

INDIA

Key economic and demographic indicators (2011 Estimates)¹

- Area: 3.29 million sq km
- Population: 1.2 billion
- Age Structure:
 - 0-14 years; 29.7%
 - 15-64 years; 64.9%
 - 65 + years; 5.5%
- Capital: New Delhi
- Population growth rate: 1.31% p. a.
- Urban Population: 30% (2010)
- Rate of Urbanisation: 2.4%
- Illiteracy rate: 35%
- Number of Languages: There are 23 recognised languages. English enjoys the status of subsidiary official language but is the most important language for national, political, and commercial communication; Hindi is the most widely spoken language and primary tongue of 41% of the people.
- GDP (Official Exchange Rate): 1.84 Trillion USD
- GDP (PPP): 4.43 Trillion USD
- GDP per capita: 1,043 USD
- GDP per capita (PPP): 3,700 USD
- Rate of inflation: approx. 6.8%
- Unemployment: 9.8 %
- Working population: 488 Million
- Labour Force by Occupation:
 - agriculture: 52%
 - industry: 14%
 - services: 34%
- Currency: Indian rupee (INR); 1 EUR = 68.76 INR (July 2012)
- Economic growth: approx. 7.8 %
- Indian exports: 298 Billion USD
- Main export partners: UAE, Singapore, China, USA, Great Britain, Hong Kong, Germany
- Indian imports: 451 Billion USD
- Main suppliers: China, Saudi Arabia, USA, UAE, Switzerland, Iran, Germany, Australia
- Mobile Phones: 752 Million Connections (2010)

¹ <https://www.cia.gov/library/publications/the-world-factbook/geos/in.html>

Information on publishing industry in India

Overview

While no one would argue that the Indian publishing industry is growing at an impressive pace, unfortunately there are few statistics that give an exact picture of the Indian market which are also estimates at best. India is one of the few (if at all any) major markets in the world which is still seeing growth in both print and digital publishing and the value of the Indian publishing industry in 2012 is estimated at USD 2 Billion² with an overall growth rate of around 15% as per conservative estimates. A nationwide survey conducted by the National Book Trust of India in 2010 revealed that one-fourth of the youth population, a staggering figure of 83 million, identify themselves as book readers. India also has about 19,000 publishers although out of those only around 12,400 have ISBN's. It is further estimated that about 90,000 titles are published in India every year which includes books across all genres³.

On the flip side, the per capita number of book titles published in India is around 8 per 100,000⁴ people which is much lower compared with countries like the United States of America, Germany and France. Print-runs for fiction rarely exceed 2,000 copies in the first instance. For well-established writers, first print runs can go up to 5,000 and a bestseller is often a book that has sold only as many as 10,000 copies. There is also severe pricing pressure on books because of which the margins for publishers in India show a bleak picture, with only 2.5 to times multipliers, as against UK or US where the publisher can afford to multiply costs by 10-12 times. Prices of books, instead of going up, have gone down further with the popular Rs. 100 (2 USD) - novel trend⁵.

Publishers: 19.000 (12.400 using ISBN)
Titles published: 90.000 per year
Title published per capita: 8 per 100.000

Breakup of Book Sales

Given that almost half of India's population is under the age of 25, it's no wonder large part of the book trade is dominated by academic and children's books which account for 40% and 30% of the market respectively. The remaining 30% constitutes trade publishing. In terms of print languages, 20% of sales volume comes from English language books which also makes India the third largest market for English

² <http://www.businessworld.in/businessworld/businessworld/content/Printing-Revolution.html>

³ http://www.buchmesse.de/bilder/buchmesse/_moving_india_by_frankfurt_academy_quarterly_.pdf

⁴ <http://www.business-standard.com/india/news/shri-nath-sahai-publishing-industry-onroll/358315/>

⁵ <http://www.entrepreneurswebsite.com/2010/11/23/an-overview-of-the-publishing-industry/>

books consumption after the US and UK markets. The largest sales volumes among Indian languages are that of Hindi books which constitute 25% of the market while the rest of the market is divided between other Indian language books⁶. Barring some run away successes, print-runs for non-academic books rarely exceed 2,000 copies in the first instance and a bestseller is often a book that has sold only as many as 10,000 copies. A handful of titles such as those by Indian commercial fiction writer, Chetan Bhagat, Gregory David Robert's Shantaram, the Harry Potter and Twilight series, and Freakonomics have sold more than 100,000 copies.

Market share:

Academic books: 40%

Children's Books: 30%

Trade publishing: 30%

Distribution and Retail

Although organised retail is growing in India at 15% per annum it still only account for 7% of book sales in India⁷. This poses a challenge to distribution and availability of titles especially in smaller towns and cities. Having said that ecommerce is fast changing the retail and distribution landscape in India. Online stores have aided book distribution and are able to reach customers in every nook and corner of the country even where there are no book stores. Furthermore due to reduced operational cost vis-à-vis brick and mortar stores, online stores are able to sell books at cheaper to consumers which have hurt sales at individual and chain bookstores forcing some of them to shut down. One major online retailer claims it sells 150,000 books every month and boasts of 6 Million titles.

Major Book Retailers - Online

- Flipkart.com
- InfiBeam
- Amazon (Planning to enter Indian market)

Major Book Retailers – Traditional

- Crossword
- Landmark
- Odyssey
- Reliance TimeOut

⁶ <http://www.business-standard.com/india/news/shri-nath-sahai-publishing-industry-onroll/358315/>

⁷ <http://publishingperspectives.com/2011/04/the-indian-invitation-publishing/>

Distribution is a major challenge for publishers, be it an indigenous company or a multinational publisher. To ensure that books are readily supplied at all possible retail outlets there are primarily two kind of distribution modules in the country. (a) Books are offered to the store on 100% return basis or (b) Books are ordered by the shops as per the demand of the same. Some publishers like Penguin India distribute its own titles and as well as that of its competitors titles. Rupa & Co and Westland too belong to this league. Publishing houses have their sales team set up in the major states of the country like Mumbai, Bangalore, Chennai, Kolkata, via which they ensure ready supply of their titles across the country. Simultaneously they also tie up with major distributors in the country for the same.

Major Distributors in India

- **International Book House** – They have 90 plus publisher as its clients and distribute books in all major and local book shops in Mumbai, Delhi, Bengaluru, Pune, Nagpur, Ahemdabad and Bhubaneshwar. They also have alliances with 10,000 international publishers in the UK, USA and other parts of the world⁸.
- **India Book House** – One of the largest distributor of books and magazines, in India. IBH is the distribution arm of Amar Chitra Katha Pvt. Ltd., the Publisher of cult brands Amar Chitra Katha & Tinkle. It also represents and distributes around 50 national/international book publishers. It has its centre in Mumbai, Delhi, Chennai, Bangalore, Hyderabad, Kolkata, Ahemdabad, Pune, Chandigarh and Trivandrum⁹.
- **India Book Distributors (IBD)** – They are spread over 7 cities, namely Mumbai, Pune, Bangalore, Hyderabad, Chennai, New Delhi and Kolkata¹⁰.

Digital Initiatives

Currently the market for ebooks in India is miniscule. A big reason for this is that currently e-readers are still very expensive for most consumers in India which impacts ebook adoption rates. On the positive side publishers feel the digital market will grow substantially in India in the next few years and Indian publishers have already started converting their current lists and back lists into ebook formats. Some publishers have already started selling their ebooks through foreign retailers such as Amazon where the pricing is in foreign currencies. Indian online retailers, not to be left behind, have also started to work with the publishers to incorporate and sell the publishers list ebooks priced in Indian Rupees although at the time of writing this report, July 2012, this service was yet to go live.

⁸ <http://www.ibhbookstore.com/>

⁹ <http://www.ibhworld.com/index.htm>

¹⁰ <http://www.ibdwebstore.com/>

Imports/Exports and Rights Sales/Purchase

Unfortunately there is not enough data or breakup available on exports/imports of Indian exports and sale/purchase of 'Rights'. In the case of global exports of printed and published products, India's share is 6.46% according to data released by the non-profit CAPEXIL (Chemical and Allied Export Promotion Council of India). The value of book and publication exports was €267 million in 2009–2010¹¹.

According to a study in "Buch und Buchhandel in Zahlen 2009", Asian partners are gaining in significance when it comes to licensing deals (this also includes India, with 78 licenses), although its 20 % market share is only half as high as that of Eastern Europe. Business is booming in the category of children's books (esp. in Asian countries), which is also evident at the NDWBF. The entire children's book segment constitutes a 25% share of the licensing trade.

Beyond Publishers – Service Providers in India

Other than book publishing India provides a thriving ground for publishing services providers such as printers and digital service providers. The Indian book print industry is pegged at USD 1.4 Billion, is estimated to be growing at 12% and caters to the printing needs of many overseas publishers. In the case of business process outsourcing (BPO) services in publishing, analysts believe globally the value of the industry will be \$1.2 billion in 2012 of which India has a huge 60% share¹². Indian BPOs offer a range of services, from data conversion, digitization and copy-editing to complete project management. Many major STM publishers, legal publishing firms, magazines, and newspapers, digitize, design, and archive content in India.

Fixed book pricing

Legally regulated price maintenance with many possible exceptions. Publishers determine book prices. The Maximum Retail Price Act stipulates that a maximum price must be printed on every book.

Value Added Tax

No VAT is charged on books and there are no customs fees for importing books.

Copyright laws

- Berne Convention
- Universal Copyright Convention

¹¹ <http://publishingperspectives.com/2011/04/the-indian-invitation-publishing/>

¹² <http://publishingperspectives.com/2011/04/the-indian-invitation-publishing/>

Associations

- National Book Trust (NBT)
- Independent Publishers Group (IPG)
- Federation of Indian Publishers (FIP)
- Federation of Booksellers and Publishers Association
- Association of Publishers in India (API)
- Federation of Educational Publishers

Book Fairs

There are numerous national book fairs in India. These are the five most important trade fairs:

New Delhi World Book Fair

The New Delhi World Book Fair (NDWBF) is India's largest international book fair and has been held at the Pragati Maidan Exhibition Centre since its inception (1972). It is the leading trade fair for exhibitors and trade visitors from India and neighbouring countries in the South Asian region and the fair usually attracts more than a million visitors from India and neighbouring countries.

The 20th New Delhi World Book Fair 2012 was held from 25 February 2012 to 4 March 2012 organised by National Book Trust, India (NBT) and hosted 1,300 exhibitors in 2,500 stalls spread over 45,000 square metres. As a new initiative, NBT collaborated with the Frankfurt Book Fair to organise the first ever Rights Table Conference at NDWBF 2012 which was very well received by Indian and International publishers.

From 2013, the fair will be held annually as opposed to biannually, and will be held from **February 4-10, 2013**.

Kolkata Book Fair

The Kolkata Book Fair is a sales fair for the general public that takes place annually at the end of January/beginning of February in Kolkata (Calcutta). It is the biggest book fair in the world in terms of retail visitors. The 36th Kolkata Book Fair was held from **25th Jan to 5th Feb, 2012**. The guest of honour was *Italy*.

Delhi Book Fair

The Delhi Book Fair is held every year in August/September. The 17th Delhi Book Fair was held over nine days from August 27 - September 4, 2011 at the Pragati Maidan exhibition grounds (open daily from 10 a.m. to 8 p.m.). This fair is particularly popular as a sales event that not only provides information, but also offers books for sale at greatly reduced prices. The general programme

accompanying the fair consists of seminars dealing mainly with topics like copyright or library management. The fair is organised by the Federation of Indian Publishers (FIP), in cooperation with the India Trade Promotion Organisation (ITPO). There is no distinction made between trade and public visitor days.

The next Delhi Book Fair will be held between **September 1-9, 2012**.

Chennai Book Fair

The Chennai Book Fair is organised by the Booksellers' and Publishers' Association of South India (BAPASI) and has taken place every year since 1977 over approx. 10 days between the end of December and middle of January. The Chennai Book Fair is a small sales event with a regional character. Exhibitors are primarily publishers, but also IT companies and newspapers. It is one of the largest cultural events in Chennai. The 35th Chennai Book Fair was held from **January 5-17, 2012**.

Mumbai International Book Fair

The ten-day Mumbai International Book Fair takes place annually in the middle/end of January. It is organised by the Good Governance India Foundation. The 6th Mumbai International Book Fair was held in January 2010 at the Bandra Kurla Complex. The Mumbai International Book Fair is still a relatively new event that focuses more on trade visitors. For this reason, fair organisers list publishing professionals, librarians, teachers, academics, students, book buyers from institutions and book lovers among their target audiences.

Guest of Honour appearance at the 2006 Frankfurt Book Fair

Under the motto "Today's India", India was featured as the Guest of Honour country at the 2006 Frankfurt Book Fair — an important step toward greater involvement of the Indian book market in an international context. In addition to the professional programme, numerous author readings and cultural events held during the Book Fair itself, networking between Indian publishers and the international book industry was promoted in the run-up as well, with professional seminars for publishers and a funding programme for the translation of Indian titles into European languages.