NETHERLANDS

Economic data

Area 41,528 sq km
Population 16.7 million (April 2011)
Gross domestic product € 602.1 billion (2011)
GDP per capita € 36,054 (2011)
Inflation rate 2.5% (2012)
Unemployment 4.4% (August 2011)

Book production data

Current situation and trends

- Strong consolidation efforts and sustained acquisitions on the part of the larger publishing groups:
  - The separate profiles of the individual publishers remain largely intact.
  - Cost-cutting measures, e.g. through the merging of offices, thematic concentration and collective use of individual departments (e.g. marketing, rights and licences)
- Despite this trend, a large number of small, independent publishers still manage to maintain a presence in the Dutch market:
  - Prometheus Bert Bakker
  - De Geus
  - Podium
  - Cossee
  - Wereldbibliotheek
  - Van Oorschot
- The economic crisis of 2008 and 2009 had little noticeable effect. Sales figures only started to decline in 2010. Current situation: -10%.
- The book market is saturated; publishers have to cope with overproduction of titles.

Publishers

- 1,480 registered publishers
- 100 publishers produce around 95% of all titles.
Largest players:
- Reed Elsevier and Wolters Kluwer (both internationally established in the knowledge and specialist information segment)
- WPG Publishing Group (Weekbladpers Groep): press, school books, fiction and non-fiction; active both in the Netherlands and in Flanders; subsidiaries include Bruna, Arbeiderspers, Balans, De Bezige Bij, Querido, Ploegsma, Zwijsen, Manteau, Standaard
- VBK: press, school books, fiction and non-fiction; active both in the Netherlands and in Flanders; subsidiaries include Luitingh-Sijthoff, Thieme Meulenhoff, Kosmos, Van Dale, Ambo/Anthos, Atlas/Contact
- Lannoo Meulenhoff Publishing Group

Bookshops
- Around 1,100 book sellers in total, three quarters of which belong to a chain or a booksellers union
- Booksellers sell around 88% of all books; 12% reach the buyers through other channels (e.g. supermarkets, department stores, toyshops, petrol stations)
- The largest retail chains:
  1.) Bruna (not related to the publisher A.W. Bruna): 375 branches
  2.) AKO: 85 branches, many of which are at airports and railway stations
  3.) Selexys: 16 shops with a high-end assortment – taken over in early 2012 by the antiquarian bookshop chain De Slegte
  4.) Boekenpartners: a central buying operation that cooperates with 110 independent booksellers
  5.) Intres: a franchiser of Blz and Libris – Libris is a union of around 100 independent booksellers.
- There are a large number of independent booksellers, most of them very small. An exception is Athenaeum, one of the largest bookshops in Amsterdam.
- Online booksellers are major competitors for the high street bookshops (2011: 27% of all book sales).
- There are 75 online booksellers
  - The largest player is Bol.com (formerly Bertelsmann on Line); independent of Bertelsmann since 2002

Turnover (2010)
- € 619 million for general literature
- € 628 million for school books and specialist books

Title production
- Peak in 2008 (14,435 new releases and reprints), followed by decline
  - 2009: 12,500 titles
  - 2010: 11,500 titles
- The average print run is between 2,000 and 3,000 copies; 10,000 is already exceptional; at 25,000 sold copies, a book counts as a bestseller
E-books
- Sluggish development prior to 2010
- In 2010 e-books made up around 1% of book sales; from 2011, the figure is increasing steadily. In 2015 an increment of 3% to 5% is expected.
- No fixed pricing system for e-books; the price is approx. 75% of the print price.
- No reduced rate of VAT on e-books (printed books are at 6% instead of 19%)
- E-books are sold at all online booksellers and on various platforms (partly the publishing groups’ own platforms, partly collective platforms)

Average book price
- Stable for several years at between € 12 and € 13

Distribution
- Centraal Boekhuis more or less has a monopoly of book distribution. 500 publishers, 1,800 booksellers and 74 online booksellers cooperate with Centraal Boekhuis
- Besides storage and deliveries, Centraal Boekhuis also offers publishers a print-on-demand service

Licensing statistics (2010)
- The share of translations in the Dutch book production is estimated at 75%.
- By far the most important language of origin is English. This is followed by Scandinavian languages, thanks to the success of their crime writers, and then to a lesser extent titles from Spain, Germany, Italy and France. Recently, more and more Chinese titles have been finding their way into the Dutch book market.
- Of all licences sold from Germany, translations into Dutch made up 5.5%, making it the 6th most important language (after Chinese, Spanish, Polish, Czech and French).
- Among the total of 451 titles translated into Dutch, the children’s and young adult book segment was particularly well represented, with 152 translated titles; otherwise, self-help books were also successful (73 titles)

Imports
- Original versions of English titles are very successful, and offer real competition to the Dutch translations. In 2010, around 10% of all sold books aimed at the general public were original versions in English.

Exports
- The primary export market is Belgium, which has a Flemish-speaking population of around 6 million.
- However, many large publishers also supply the Belgian market from their Belgian subsidiaries.

Fixed book prices
- Book prices are fixed – up to 2005 on the basis of an agreement between publishers and booksellers; since then fixed in law.
- The publisher or wholesaler determines the retail price.
- Maximum discount for the end consumer: 10%; up to 25% for public libraries
- Discount for booksellers of between 33% and 38%; discount for Centraal Boekhuis: 8%
- 6% VAT rate on books (rather than the standard rate of 19%)
**Book fairs**

Manuscripta (1 + 2 September 2012)
- Organisers: Nederlandse Vereeniging van Antiquaren, and Bond van handelaren in Oude Boeken
- www.amsterdambookfair.com

Amsterdam Antiquarian Book, Map & Print Fair (5 + 6 October 2012)
- Organiser: Stichting Collectieve Propaganda van het Nederlandse Boek
- www.manuscripta.nl

**Reading promotion**
- At the start of the 1980s, publishers and booksellers joined forces in a major reading campaign.
  - Since 1983, the CPNB (Collectieve Propaganda van het Nederlandse Boek) has managed this task, with financing provided by publishers, booksellers and libraries, as well as state grants and private sponsors.
  - A number of campaigns take place throughout the year (Book Week, Children’s Book Week, a focus on crime fiction in June).

**Associations and institutions**
- KVB – the Royal Dutch Book Trade Organization: members are mainly publishers and booksellers, but other players in the book industry are also involved.
- NUV: Dutch Publishers Association
- KBb – Royal Booksellers’ Association
- VOB – Netherlands Public Library Association
- *Nederlands Letterenfonds* – Dutch Foundation for Literature: an institution for the support of Dutch authors and Dutch literature abroad

**Sources**

*L’Edition aux Pays-Bas*, a market study by Karne Politis, Département Études du BIEF, February 2012

Germany Trade & Invest - *Wirtschaftsdaten kompakt* - Status: May 2012