

## INDIA

### Key economic and demographic indicators (2012 and 2013 estimates)<sup>1</sup>

- **Area:** 3.29 million sq km
- **Population:** 1,220,800,359
- **Capital:** New Delhi
- **Population growth rate:** 1.28%
- **National Literacy rate:** 74.04% <sup>2</sup>
- **Number of languages:** There are 24 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 is the designated national language.
- **GDP (PPP):** USD 4.761 trillion
- **GDP (official exchange rate):** USD 1.825 trillion
- **GDP (real growth rate):** 6.5%
- **Rate of inflation:** 9.3%
- **Unemployment:** 8.5%
- **Currency:** Indian rupee (INR); 1 USD= 53.437 INR
- **Indian exports:** USD 298.4 billion
- **Main export partners:** USA, UAE, China, Singapore, Hong Kong
- **Indian imports:** USD 500.4 billion
- **Main suppliers:** China, UAE, Saudi Arabia, Switzerland, USA.

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

<sup>2</sup> <http://ibnlive.in.com/news/tripura-tops-literacy-rate-with-with-9465-per-cent-leaves-behind-kerala/420560-3-224.html>

- **Mobile Phones:** 893.862 Million Connections (2013)

## **Information on the publishing industry in India**

### **The Indian book market**

The Indian publishing industry is growing at an impressive pace and 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. The value of the Indian publishing industry in 2012 is estimated at USD 2 Billion<sup>3</sup> 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 genres.<sup>4</sup> The Indian market offers great potential for the European economic market. India ranks second after China as one of the world's most attractive investment destinations. India's potential lies in its excellently trained workforce, its very young population and a relatively stable government, along with above-average profit margins for foreign firms. Given its strength in terms of its youth population, India not only has a high potential in the area of education, but also enormous purchasing power. Germany already has an excellent reputation in the fields of education, science and technology. Learning German continues to enjoy great popularity around the country. More than half of the total titles published in India are in Hindi and English, with Hindi constituting about 26%, followed by English at 24%.<sup>5</sup> India ranks third behind the USA and the UK in the publication of English-language books.

Publishers in India: 19,000 (12,400 using ISBN)

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<sup>3</sup> <http://www.businessworld.in/businessworld/businessworld/content/Printing-Revolution.html>

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[http://www.buchmesse.de/bilder/buchmesse/\\_\\_\\_moving\\_india\\_by\\_frankfurt\\_academy\\_quarterly.pdf](http://www.buchmesse.de/bilder/buchmesse/___moving_india_by_frankfurt_academy_quarterly.pdf)

<sup>5</sup> [http://www.ficci.com/sector/86/Project\\_docs/Publishing-sector-profile.pdf](http://www.ficci.com/sector/86/Project_docs/Publishing-sector-profile.pdf)

Titles published: 90,000 per year

Title published per capita: 8 per 1,00,000

### **Rights and Sales purchase**

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 in India and all over Asia. , The entire children’s book segment constitutes a 25 % share of the licensing trade.

### **Distribution and Retail**

Although organised retail is growing in India at 15% per annum it still only accounts for 7% of book sales in India.<sup>6</sup> This poses a challenge to distribution and availability of titles especially in smaller towns and cities. Having said that, e-commerce 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 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

### **Major Book retailers- Traditional**

- Crossword
- Landmark
- Odyssey

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<sup>6</sup> <http://publishingperspectives.com/2011/04/the-indian-invitation-publishing/>

- Reliance Time Out

Distribution is a major challenge for publishers, be it a small company or a multinational publisher. To ensure that books are readily supplied at all possible retail outlets there are primarily two kinds of distribution models 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 their own titles and as well as those of their competitors. 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 publishers as their clients and distribute books in all major and local book shops in Mumbai, Delhi, Bengaluru, Pune, Nagpur, Ahmedabad and Bhubaneswar. They also have alliances with international publishers in the UK, USA and other parts of the world.<sup>7</sup>

- 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, Ahmedabad, Pune, Chandigarh and Trivandrum.<sup>8</sup>

- India Book Distributors (IBD)

They are spread over 7 cities, namely Mumbai, Pune, Bangalore,

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<sup>7</sup> <http://www.ibhbookstore.com/>

<sup>8</sup> <http://www.ibhworld.com/index.htm>

Hyderabad, Chennai, New Delhi and Kolkata.<sup>9</sup>

### **Book sales**

Given that almost half of India's population is under the age of 25, it's no wonder that a 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 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 books.<sup>10</sup> 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.

### **Digital Initiatives**

Digital publishing in India is an emerging market. Currently the market for e-books is small but growing. A big reason for this is that currently e-readers are still very expensive for most consumers in India which impacts e-book adoption rates. On the positive side publishers feel the digital market will grow substantially in India given the increasing sales of devices which support e-books like smartphones and tablets. Amazon's Kindle entered the Indian market in August 2012.

In July 2012 Penguin India, the largest trade publisher in the country, launched 240-titles as e-book editions.<sup>11</sup>

Currently the biggest market for e-books in India is the higher education sector.

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<sup>9</sup> <http://www.ibdwebstore.com/>

<sup>10</sup> [http://www.business-standard.com/article/opinion/shri-nath-sahai-publishing-industry-on-a-roll-10905170025\\_1.html](http://www.business-standard.com/article/opinion/shri-nath-sahai-publishing-industry-on-a-roll-10905170025_1.html)

<sup>11</sup> <http://publishingperspectives.com/2012/07/penguin-india-launches-e-books-expects-15-digital-rev-in-3-yrs/>

### **Fixed book pricing**

Legally regulated price maintenance exists 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

### **Associations**

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

### **Book Fairs**

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

#### **New Delhi World Book Fair**

The New Delhi World Book Fair (NDWBF) is India's largest international book fair, is a major event in the publishing calendar and has been held at the Pragati Maidan Exhibition Centre since its inception in 1972. It is considered the leading trade fair for exhibitors and trade visitors from India and neighbouring countries in the South Asian region. The fair usually attracts more than a million visitors from India and its neighbouring countries. The Fair is organized by National Book Trust, India an apex body of the Government of India, under the Ministry of Human Resource Development.

India Trade Promotion Organisation (ITPO), the nodal agency of the Government of India under the Ministry of Commerce, for promoting the country's external trade is the co-organizer of the Fair. In 2013, The fair attracted more than 1,200 Indian exhibitors and 31 foreign exhibitors. For the year 2014, Poland is scheduled to be the guest of honour at the fair and the Fair will be held from **February 15–23, 2014**

### **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). The 37th International Kolkata Book Fair was held from 26 January to 10 February 2013. It was officially inaugurated on January 26 by Prof. Anisujjaman at Milon Mela Prangan.. The guest of honour was Bangladesh. The fair celebrated the 9<sup>th</sup> century renaissance of Peoples' republic of Bangladesh and the state of West Bengal.

The fair is primarily a sales event, as well as a popular cultural event. Hence it is of particular importance for the Indian book market. This year, the Fair will be held from **January 29–February 9, 2014.**

### **Delhi Book Fair**

The Delhi Book Fair is held every year in August/September. The 19<sup>th</sup> Delhi Book Fair was held over nine days from August 23–31 2013 at the Pragati Maidan exhibition grounds. 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 2013 fair had diverse seminars and interactive programmes, some centring around children's content. The fair is organised by the Federation of Indian Publishers, in co-operation with the India Trade Promotion Organisation (ITPO). The 2012 edition of the fair attracted over 3 lakh visitors from India and overseas. At this fair, there is no distinction made between trade and public visitor days.

### **Chennai Book Fair**

The Chennai Book Fair is organised by the Booksellers' and Publishers' Association of South India (BAPASI) and had its inception in 1977. It takes place over approximately 10 days between the end of December and middle of January. The 36<sup>th</sup> Chennai Book fair was held from Jan 11–23 2013. 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. 2013 Participants included Oxford University Press, Cambridge University Press, Pustak Mahal, Higginbotham's and Orient Blackswan, among others. .

### **The National Book Trust Mumbai Book Fair**

The 2013 five-day Mumbai Book Fair is scheduled to be held between **November 29 and December 3, 2013**. The National Book Trust is an apex body established by the Government of India primarily for the promotion and creation of book culture in the country. They organize several book fairs across the country.

The Mumbai International Book Fair is still a relatively new event that focuses more on trade visitors. The effort is to reach out to a diverse mix of students, institutions, NGOs and the general public under one roof.