Lebanon's book market

A strong partner for licensing to the Arab world

Lebanon is a very small country (10,452 km²) and a very small market (population 4.425 million in 2012). But the Lebanese publishing sector is very dynamic and its local sales represent only 10% of its total production. Lebanon, and Egypt, produce together around 80% of the total of Arabic books published annually in the Arab world. Unfortunately, as in all Arab countries, exact figures regarding the publishing industry are not available.

Therefore, this presentation is mainly based on interviews, conducted in August 2013 with:

- 8 Lebanese publishers – who publish about 45% of the total new trade titles annually (1260 titles), among which 35% are in translation (448 titles),
- 2 booksellers (one is the largest in the country, with 14 POS, the other is specialized in Arabic books and attuned to the intellectual trends in Beirut),
- 1 online bookseller, probably the largest in the Arab world,
- and the Office of the Book at the Lebanese Ministry of Culture.

Some further information was taken from a 2010 report made available by the Ministry of Culture.

General

Number of publishers
The Lebanese Publisher’s Association and the Ministry of Culture agree that there are around 600 registered publishers, among which 120 are active (and pay their membership fee in the LPA); these 120 are owned by around 80 publishing companies, which means that some publishers have several imprints.

New titles per annum and print-runs
According to various sources, about 3000 new trade titles are released in Lebanon every year. As a comparison, Penguin Random House is expected to publish roughly 15,000 titles. Random House Germany alone publishes roughly 2500 titles per year.

The print-runs generally vary between 1000 and 3000 copies, with rare exceptions for some children’s titles – when it is cheaper to store the print-run for many years – and some expected bestsellers, for which the print-runs can reach 5000 copies.

Number of bookshops
According to the director of a major Lebanese bookselling chain, Lebanon counts around 40 points of sales of bookshops or shops specialized in cultural goods, and around 100 general points of sales which have a book department. Another study gives the number of 321
bookshops, but includes in this figure all the shops that sell mostly parallel products like stationery, electronics, children’s educational games and even toys, lottery, etc.

**Average prices per subject categories and type of book**

Hard covers are uncommon in general literature; fiction and non-fiction books come in various paperback formats. The usual exceptions are some children’s picture books, dictionaries, celebrity chefs’ cookbooks, and (the very rare) coffee table books.

Average prices of trade books vary:

- **fiction**: $8-$15 (some Arabic original titles of less than 200pp. can be sold $5-$7)
- **non-fiction**: $12-$25
- **Cookbooks**: $4-$5 (small-size series); $10-$15 (large-size); $30-$35 (hard covers)
- **Dictionaries**: $1.5-$5 (pocket); $10-$20 (large paperbacks and hard covers)
- **Children’s books**:
  - Disney, TV tie-ins, etc.: $1-$3
  - Paperback 16.5x20 cm picture books: $3.5-$5
  - Paperback 24x24 cm or 20x28 cm picture books: $5-$10
  - Hard cover picture books: $10-$19
  - Chapter books: around $5
  - A DVD or CD accompanying a children’s book would increase the price by about $2.
- **ebooks**:
  - fiction and non-fiction: 50-70% of the price of the print edition
  - Dictionaries: more expensive than the print edition

**Copyright and intellectual property**

Lebanon has accessed the Bern Convention in 1946 and enforced it starting from September 1947. In 1999, a new law on the protection of literary and artistic property has replaced the 1924 obsolete one. In the same year, Lebanon has adhered to the ISBN system.

Despite of this judicial frame, piracy remains common, as in other major Arab countries. Piracy can take different forms:

- A local publisher translates a title without acquiring its rights.
- A local publisher acquires the rights and declares a print-run of 3000 copies while printing and selling more (without declaring the reprints for example).
- A local publisher acquires the rights and works all along legally, but once he releases the book, his edition is copied by others and pirate copies are distributed in his market
- Semi-plagiarism: a local publisher uses 30% of the contents of a foreign book to make another book and claim it has nothing to do with its model.
- Piracy of the imprint: the imprint of a local or a foreign publisher is used on books by another party.

No figures can be found on the volume of piracy, but every interviewed publisher could tell his own story of titles of his that were pirated. In this context, good publishers working legally are harmed twice: on the one hand, foreign publishers consider the region with mistrust and
subsequently try to impose very strict conditions on local publishers; on the other hand, once these publishers have done their work, their books get pirated in different markets.

Censorship and how to live with it
In Lebanon, publishers don’t submit books to the censorship before printing, but printed books can sometimes be banned if their contents seem politically sensitive or threatening to raise sectarian issues. More importantly, given that 50% to 60% of their sales are in the Gulf countries’ markets, Lebanese publishers cannot ignore the strict censorship imposed on books, especially in KSA (Saudi Arabia).

Coping with censorship can take three forms: accepting the idea of the book being banned in some countries; or trying to modify sensitive details in the book; or rejecting it completely. The attitude of the publishers usually varies depending on the type of books. With famous authors and important titles, they tend to take the risk of censorship, knowing that in these cases, the book banned in one country would sell more elsewhere. With new authors or common titles, they would advise the author about sensitive passages and suggest some modifications, but the final decision is the author’s.

The situation differs when it comes to children’s literature. Here most Lebanese publishers will try to exclude from their books any themes, images, or references that could ban their entry in KSA.

Development of digital publishing
Arabic ebooks have been available since 2011. Out of the 8 interviewed publishers, 3 have stated that all or up to 80% of their catalogue is available in digital format; 1 has tried digital publishing but kept it for one category of books (dictionaries); 2 will release their first ebooks before end of 2013; 2 are preparing the ebook phase but didn’t give an expected date of first release.

According to the main Arab online bookseller, who also offers his own Arabic e-reader app, iKitab, the platform most widely used is the iPad, followed by Android then personal computers. Currently, Kindle and Nook e-readers don’t support ePub3 for Arabic; only Arabic books in pdf format can be read on them. There is talk that this is supposed to change starting from next year, when Kindle might apply the Unicode system and be compatible with Arabic. In addition to the fact that ePub3 for Arabic is still problematic and costly, publishers who sell digital books all agree that the sales are very low. This is also confirmed by the online bookseller: the sales of the paper edition of a title exceed by 10 times the sales of its digital edition. The only exception seems to be the dictionaries: according to a specialized publisher, for some formats, digital dictionaries are starting to become more profitable than paper editions.

Book fairs and their role for the publishing industry
All publishers agree on the extreme importance of Arab book fairs for the industry: in the absence of any structured distribution channel, book fairs are the only efficient way to distribute and market books.

Book fairs give publishers the opportunity to meet the local booksellers and collect orders from them, as well as to sell their books to the schools, the libraries, and the public. The sales to individuals are also important: in many Arab countries, the bookshops’ network is highly
insufficient, especially out of the big cities, and people usually await the fair, and save money in order to buy books there for them and their children. Book fairs are also the place where publishers can directly meet their readers and get feedback from them.

The third function of the book fairs for the publishers is finding new authors. In the absence of literary agents, many authors use the opportunity of the presence of foreign Arab publishers in their country at the time of the fair to make contacts.

**Trends in publishing**

As a publisher formulates it, there are no major changes every couple of years: the trends are rather constant in the region, and some genres are known to sell better than others. The main bestsellers are Islamic books: “light” ones sell well in North Africa, deeper and more analytical ones sell well in GCC.

The second main sellers are novels. According to the bookseller specialized in Arabic books, original titles sell better than translated ones. This is probably true in all markets. The third main sellers are children’s books, and among them, educational books, leveled readers and information books are bestsellers, according to a specialized publisher. Another publisher points out that Lebanese children’s books sell very well in GCC countries, but not in North Africa, where children’s books at $4 would be too expensive to sell, the selling price there being around an average of $1. Most publishers of children’s books mention that translated children’s chapter books sell less than original Arabic ones, because the deciders in educational institutions (schools, ministries) are convinced that originals are better, and in general, the largest part of the children’s books sales are to institutions rather than individuals.

Cookbooks and original astrology books are also known to sell very well. Self-help books sales have significantly increased in the last 10 years, and in this category, translated titles sell better than original ones, according to the Arabic specialized bookseller, because foreign series are published in studied formats and prices, which the original titles still don’t have.

**On translations**

**Information on titles to translate**

There are several information channels:

- The publisher’s own Internet research, with a follow-up on new releases in the media.
- The catalogues regularly sent by foreign publishers, once they have worked on a project with a local publisher: naturally, the longer the relationship between a foreign and a local publisher, the better the foreign publisher targets his suggestions.
- Informal consultants who advise publishers on new books.
- One publisher states that he hires the services of a scout who follows up on the international market, suggests titles and facilitates the contact with the foreign...
publishers.

International book fairs are the least mentioned channel of information.

But most of the local publishers think that the foreign publishers’ efforts in circulating information are not sufficient.

**Economic success of translated titles and the importance of funding**

When a translated title sells well, this means it has sold about 1500 copies. Most translated titles do not reach this number. All publishers agree that the return on investment of translations is not often very significant. Even with subsidies, translations are costly, and the cost increases when it comes to uncommon language combinations. The subsidies cover 30% of the costs of a translated title. They make a difference, but not a huge one.

In rare cases they may allow to keep the selling price of a certain title in an affordable range, as was the case with an academic history title one of the interviewed publishers mentioned: the subsidy it received from a foreign institution allowed to keep the selling price at 16$, for a book of around 700 pages.

But funds don’t seem to be an essential factor of economic success. German and French funds have lessened these last three years, which is a problem when you invest in quality translation. And acquiring a title always means taking a risk, as no application for a subsidy can be presented before acquiring a title. Furthermore, subsidies are very rare for translations from English, which constitute about 90% of all the translated titles into Arabic.

**Factors of success of titles in translation and some examples of successful titles in recent years**

Publishers identified several factors of success of an adult’s title in translation:

- Important or famous authors: Dan Brown, Amin Maalouf, Gabriel Garcia Marquez;
- Films and TV shows: Candace Bushnell’s *Sex and the City*, Jo Frost’s *Super Nanny*; cookbooks by popular TV chefs;
- Translator’s name: Saleh Almani’s translations from Spanish, Abdallah Laroui’s translation from French;
- Efficient marketing effort and distribution network;
- Reputation of the publisher

As a publisher summarizes it: translated titles will sell relatively well if they are translated well. The level of translations is progressing in the Arab world, so the readers trust the Arabic version of a book more than before, and would read it in Arabic instead of the foreign language (in earlier years they would have preferred the foreign language even if they didn’t master it very well). The translation movement is in progress.

But one last point should be underlined: international bestsellers do not necessarily translate into Arabic bestsellers. Actually, this is rarely the case. *Harry Potter*, *the Twilight Saga*, *The Hunger Games*, *the Millennium Trilogy* and *Eat Pray Love* were not bestsellers in Arabic. But there are some exceptions: *The 7 Habits of Highly Effective People*, *The Secret*, *Men Are from Mars, Women Are from Venus* have sold very well.
Rights acquisition
All publishers acquire world Arabic rights, and for the past three years now, most of them have also acquired the digital rights, too. The royalties on translated titles are standard: between 5% and 8% of the local retail price (5-6% on children’s titles, 6-8% on adult titles). The advance is generally the total royalties on the first print-run, or on 1000 copies, to be paid in two or three payments.

E-book rights are preferably included in the licensing agreement and are usually for the standard 25% of the retail price.

There are currently no specific terms and conditions for Arabic digital rights, as it is still a nascent market.

For children’s books, the average advance paid is between $600 and $1000, and the art work will cost between $300 and $500. The average advance paid for adult’s titles varies between $1000 and $1500.

Lump sums are paid by Lebanese publishers in one case: children’s books which are difficult to produce locally and have pop-ups or other special features. If the Lebanese publisher needs to print in China for example, the foreign publisher usually refuses to let him do this directly, and delivers the print-run to him at a certain price, paid in one payment. But if the printing is possible in Lebanon, then publishers negotiate the royalty and advance system like for all other titles.

Typical communication problems with partners from non-Arab countries while negotiating rights

All publishers agree that there are no communication problems, but that the main problem consists in the expectations of foreign rights directors and agents, who see the Arab world from the outside, with a population of over 362 million people in 2012. They aren’t convinced when local publishers talk about small quantities of copies sold. But this is the fact: they should accept the idea that the Arabic version of a book will generate low sales and profits. The first year’s sales of a title are around 700-1000 copies, sometimes only 500 copies. And it is very difficult to convince foreign publishers of that.

To be more specific, as a publisher explains, earlier, the French publishers have always known that their books were being translated into Arabic without rights acquisition. With the awareness raised on copyrights issues and more and more Arab publishers acquiring rights properly, the French publishers still understand that the market is difficult, small, and that the Arab publishers cannot pay much. With them, the advance is usually calculated based on the royalties of the first print-run.

UK and US publishers and agents still don’t really understand the difficulties of the Arab market, and still negotiate the advance based on Western practices – insisting on
astronomical advances for bestselling titles and authors, expecting the Arabic editions to generate huge sales, etc. – and these practices cannot be applied in this market. So often a title cannot be acquired because the advance asked for is too high, as it is based on the fact that the author is important and bestselling in the West.

Besides, the consequence of the piracy issue is that many foreign publishers consider the region with a lot of defiance and tend to be inflexible during the negotiations, which is counterproductive and usually leads to dropping a book, or worse, an author. Piracy is a problem local publishers have to face every day. So instead of making things harder for them, foreign publishers should help them fight piracy by supporting their selected local partners among the publishers who invest in quality translation, and who respect rights and invest in the authors and the books.

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