THE NETHERLANDS

Information on the Dutch economy and society

Area: 41,528 km²
Population: 16,829 million (August 2014)
Population growth: 0.4% (2013)
Literacy rate: 99%
Gross Domestic Product: € 602.3 billion (2013)
GDP per capita: € 35,900 (2013)
Inflation rate: 2.6% (2013)
Unemployment: 6.7% (2013)
Exports: € 505.8 billion (2013)
Imports: € 444.1 billion (2013)

Sources: Germany Trade & Invest – Wirtschaftsdaten kompakt; German Federal Foreign Office country profiles

Information on the Dutch book market

The e-book business was rather slow to develop in the Netherlands up to 2010, but is now experiencing steady growth. While e-books only represented 1% of turnover in 2010, that number has since increased to 4.7%. The arrival of key players in the Dutch market in 2014 will continue to drive this development. Kobo, for example, started collaborating with the Dutch online shop bol.com in September. Tolino has also found its way into the Dutch market and is teaming up with the booksellers Libris and blz. In addition, Amazon opened an online shop in the Netherlands in November and has finalised deals with the largest publishers.
Book production data

Publishers

There are around 1,480 publishers registered in the Netherlands, though 100 publishers are responsible for producing around 95% of all titles. Like everywhere else, there is also a strong push for market concentration here, though the individual profiles of each publisher generally remain intact. Despite this trend, a variety of small, independent publishers still call the Dutch market home: Prometheus Bert Bakker, De Geus, Podium, Cossee, Wereldbibliotheek, Van Oorschot.

The largest players are:
- Reed Elsevier and Wolters Kluwer (both internationally established in the academic and specialised information segments)
- WPG Publishing Group (Weekbladpers Groep): press, textbooks, 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, textbooks, 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

Booksellers

In June 2013, the former flagship bookstore Selexyz and the modern antiquarian book chain De Slegte merged under the name “Polare”. But this new bookstore chain only survived a few months. In January 2014, it closed 20 branches and its online shop. In February, Polare filed for bankruptcy. In April, 24 of the 28 Polare branches were sold to independent booksellers. Their key advantage is their knowledge of the local market and customers; a customised product line takes the place of a central purchasing division.

The largest book retail chains:
- Bruna (no relation to the publisher A.W. Bruna): 375 branches
- AKO: 85 branches, many of which are at airports and railway stations
- Boekenpartners: A central purchasing operation that cooperates with 110 independent booksellers
- Libris is a union of around 100 independent booksellers

There are many independent bookstores in the Netherlands, most of which are very small. An exception is Athenaeum, one of Amsterdam’s largest bookstores.

Online booksellers create stiff competition for brick and mortar bookstores. The situation could be exacerbated by Amazon’s entry into the market. There are around 75 online booksellers. The largest player is Bol.com (Bertelsmann on Line until 2002), which is now teaming up with Kobo.

Turnover (general literature, excluding textbooks)

Sales in the Dutch book market have been on the decline since 2010:

2013: € 508.7 million
2012: € 544.8 million
2011: € 587.5 million
2010: € 619 million
2009: € 641.7 million
The number of copies sold has also decreased:

2013: 39.3 million
2012: 43.5 million
2011: 46.1 million
2010: 49.2 million
2009: 49.4 million

The average print run in the Netherlands is between 2,000 and 3,000 copies; selling 10,000 copies is already an exceptional accomplishment; 25,000 copies sold is bestseller material.

**Average book price**

- Stable for years between € 12 and € 13

**Distribution**

CB Logistics (formerly Centraal Boekhuis) more or less has a monopoly on book distribution: 500 publishers, 1800 booksellers and 74 online booksellers cooperate with CB Logistics. In addition to storage and delivery, CB Logistics also offers publishers a print-on-demand service.

**Licensing statistics (2013)**

Books in translation represent an estimated 75% of the books produced in the Netherlands. English is by far the most important source language. This is followed by the Scandinavian languages, thanks to the success of their crime writers, and then, to a lesser extent, titles from Spain, Germany, Italy and France. More and more Chinese titles are also finding their way into the Dutch market.

Translations into Dutch made up 4.7% of all licenses sold from Germany in 2013, making it the seventh most important language (after Chinese, Spanish, English, Italian, Czech and French). Among a total of 305 titles (2012: 293) translated into Dutch, the children’s and young adult book segment was particularly well represented with 104 translated titles, followed by the fiction segment with 74 titles and self-help with 62.

**Imports**

Original versions of English titles are very successful in the Netherlands and create stiff competition for Dutch translations. Around 10% of all books sold geared toward the general public are 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 through 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 it has been legislated
- The publisher or wholesaler determines the retail price
- Maximum discount for the end customer: 10%; up to 25% for public libraries
- Discount for booksellers between 33% and 38%
- 6% VAT for books (as opposed to the standard rate of 19%), but not for e-books

Book fairs

Manuscripta (September)
- Organiser: Stichting Collectieve Propaganda van het Nederlandse Boek
- www.manuscripta.nl

Amsterdam Antiquarian Book, Map & Print Fair (October)
- Organisers: Nederlandse Vereeniging van Antiquaren + Bond van handelaren in Oude Boeken
- www.amsterdambookfair.com

Reading promotion

At the start of the 1930s, publishers and booksellers joined forces to launch a major reading campaign. Since 1983, the CPNB (Collectieve Propaganda van het Nederlandse Boek) has managed this task with financial support from publishers, booksellers and libraries, as well as state grants and private sponsors. A number of campaigns take place throughout the year, including the Book Week, Children's Book Week and Crime Fiction Month.

Associations and institutions

- KVB: Royal Dutch Book Trade Organisation – members are primarily publishers and booksellers, but other players in the book industry are also involved
- NUV: Dutch Publishers Association
- KBB: Royal Dutch Booksellers Association
- VOB: Dutch Library Association
- Nederlands Letterenfonds: Dutch Foundation for Literature – an institution for the support of Dutch authors and Dutch literature abroad

Sources:
"L'Édition aux Pays-Bas", a market study by Karne Politis, Département Études du BIEF, February 2012; Buch und Buchhandel in Zahlen 2014; Dutch Publishers Association (NUV) - GfK/KVB-SMB