

# FRANCE

## Social and economic information

Area:	643,801 sq km
Population:	66.3 million (2014)
Population growth:	0.5% (2013)
Literacy rate:	99%
Gross domestic product:	€ 2,132.4 billion (2014) prognosis: € 2,166.0 billion (2015)
Per capita GDP:	€ 32,227 (2014)
Inflation rate:	0.6% (2014)
Unemployment rate:	10.4% (2014)
Exports:	€ 438.4 billion (2014)
Imports:	€ 51 billion (2014)
Age structure:	0-14 years: 18.7%, 15-24 years: 11.9%, 25-54 years: 38.6%, 55-64 years: 12.5%, 65 years and older: 18.3% (2014)

Sources: Germany Trade & Invest - Wirtschaftsdaten kompakt;  
website of the German Federal Foreign Office; Eurostat

## Information on the French book market

In 2014, French publishers again enjoyed an increase in the number of licences they sold abroad. The upward trend in this business area has persisted for a number of years now, resulting in growth of around 120% over the past decade. With an overall share of 28.2%, comics have proved the most popular segment, and in 2014, Spanish was the target language for the largest number of comic translations. Despite experiencing some decline, children's and young adult books remain strong (25.3%), being particularly well received in the Chinese market, although German publishers also continue to view children's and young adult titles from France, especially illustrated books, as a valuable resource. After three years of stagnation, the French market for mangas developed a new dynamic in 2014. However, the purchase of Japanese titles is steadily being supplanted by the growing trend for local production with Japanese authors.

## Publishers

- / There are approximately 10,000 publishers. Of these, 20 are large houses with a portfolio of at least 5,000 titles, while about 5,000 are small-scale publishers with fewer than 10 titles in their catalogue.
- / Some 660 publishers are members of the of the French publishers association, SNE.

### Biggest players

#### The Hachette Livre group

- / Nr 1 in France, Nr 2 in the United Kingdom, Nr 3 in Spain and Nr 4 in the USA; eighth largest overall, internationally.
- / 6,982 employees; 150 imprints; 20,359 titles (2014)
- / Direct or indirect representation in about 70 countries
- / A subsidiary of the media giant Lagardère (book publishing, magazine publishing, radio, television, event management, marketing, consulting)
- / A broad portfolio across all segments; distribution of sales:
  - o fiction: 40%
  - o education: 16%
  - o illustrated books: 15%
  - o distribution: 12%
- / Sales from e-books: 20.3%

#### The Editis group

- / Nr 2 in France
- / A subsidiary of the Spanish publishing group Planeta
- / A broad portfolio across all segments
  - o Place des Editeurs: fiction, travel guides, self-help books, illustrated books
  - o Univers Poche: paperback segment for non-fiction, fiction and young adult books
  - o Robert-Laffont: reference works
  - o Nathan: children's books, school books

#### Gallimard

- / A subsidiary, together with Flammarion, of the family-owned company Madrigall
- / Fiction, children's books, humanities, comics, travel books, art
- / Gallimard includes about 10 imprints; Flammarion owns, among others, the comics publishers Casterman and Fluide Glacial

### Other large publishing groups

- / France Loisirs: originally part of the Bertelsmann group, it now belongs to a Luxembourg fund. In 2014 France Loisirs, the largest book club in France, was hit by the bankruptcy of its 100% dependency, the bookshop chain Chapitre. It is also active in Belgium, Canada and Switzerland.
- / La Martinière: illustrated books, children's and young adult books, and fiction (Seuil); represented in the USA through Abrams, Golden Turtle and Tabori & Chang, and in Germany through Knesebeck.
- / Média-Participations: European market leader in the comics segment, with its comics publishers Dargaud, Dupuis and Le Lombard. Also children's books, religion, self-help books

and cookery books (Fleurus group). Present in France, Belgium, Switzerland and the USA; very active in the digital market.

- / Albin Michel: fiction, art, history, religion, children's and young adult books; also education, with the Magnard-Vuibert group.
- / Actes Sud: fiction, children's and young adult books.
- / Bayard: children's books.

## Booksellers

There are approximately 15,000 sales outlets for books in France. These include 1,000 fully fledged bookshops. France has one of the densest network of bookshops of any country in the world. Thanks to state subsidies, the smaller bookshops are less vulnerable to the pressure of larger chains. For example, they benefit from the LiR label (Librairies indépendantes de référence), which has applied to several hundred bookshops since August 2009. This gives them exemption from commercial tax, options for subsidies through the CNL (Centre National du Livre - a part of the Ministry of Culture and Communication), and a seal of quality related to their service and assortment. In 2013, the Ministry of Culture presented a financing package to promote bookshops. 2013 was a crisis year for the bookshop chains.

## Book sales

There is no established intermediate book trade comparable to the German book wholesalers. Distribution is the job of the *centres de distribution*, the largest of which belong to the big publishing groups, although they are also used by other publishers:

- / Sodis: Gallimard
- / Interforum: Editis
- / Hachette Distribution
- / MDS: Média Participation
- / Union Distribution: Flammarion
- / Dilisco: Albin Michel

There are also a number of small *centres de distribution*, which cater to the smaller publishers (comparable to Prolit):

- / Daudin Distribution
- / Pollen
- / De Borée

Besides these, a few wholesalers also exist, such as the Société du Livre Français (SLF), which can be compared to the German wholesalers. However, their significance is not as great, and their book deliveries are not as fast and all-encompassing.

For the e-book trade, there are three major sales platforms: Numilog (Hachette), Eden Livres (Flammarion, Gallimard and La Martinière Groupe), E-Plateforme (Editis). However, these three platforms now work together to ensure the simplicity and customer-friendliness of e-book sales. They provide booksellers and e-book websites with the titles they sell, and they also offer direct access to the end customers.

Most important sales channels 2014:

- / Bookshops: 22%
- / Media department stores: 22%
- / Department stores: 19.5%
- / Internet: 18.5%
- / Direct sales, book clubs: 14.5%

## **Turnover (2014)**

No all-embracing official statistics exist for the total turnover of the French publishing industry. The figures provided below derive from a survey of the publishers' association SNE, which only takes into consideration the sales statistics of its members. The figures therefore make no claim to completeness:

Publishers' turnover: € 2,652 million (-1.3%)

- / of which, € 2,517 million (-1.7%) from sales of books
- / of which, € 135 million (+ 5.5%) from sales of foreign rights
- / E-books: 6.4% of total sales

The largest segments:

- / fiction: 24.9%
- / children's and young adult books: 14.2%
- / self-help books: 13.2%
- / schoolbooks: 12.2%
- / humanities: 10.3%
- / comics: 9.3%

## **Book production**

In 2014 there were 80,255 new releases and reissues, representing a 7.3% increase on the previous year.

## **Digitisation**

French legislation views e-books as equivalent to printed books, and as such they are subject to a reduced rate of VAT. For this reason the EU opened legal proceedings against France, together with Luxembourg, in March 2015. A change in the VAT rate will not occur any earlier than the beginning of 2016. However, the EU itself is also preparing to reform its VAT legislation, so the case against France might be dropped.

With sales of digital titles in 2014 totalling € 161.4 million, these made up a 6.4% share of publishers' overall sales, compared to just 4.1% in 2013. Non-fiction and school books demonstrated particular dynamism in the e-book market, accounting for a 64% share. However, 2014 also saw further development in fiction and, above all, children's and young adult segments in the digital field. The latter managed a further increase of 70% following on from its 205% growth in 2013; digital products now make up 1.4% of all sales in this segment.

## Licensing statistics (2014)

### Sales

For several years, we have seen marked growth in the sale of licences abroad. In 2014, 13,046 (+6.6%) licence sales were recorded, compared to 11,892 in 2013. In 2009, only 8,607 licences were sold.

Within the last 10 years, this business area has grown by around 120%. French follows English, albeit at a considerable distance, as the second most commonly translated language in the world.

In 2014, the most successful segments for the sale of licences were comics, which accounted for 28.2% of all sold titles, followed by children's and young adult books (25.3%), although the latter figure represented a drastic decline of about 22%. In third place, with a 15.9% share, came fiction.

Of the target languages for the licensing of French titles, the most important was Chinese, with 1,639 translations (of which, 209 were in Taiwan). This represented an 8% increase on the previous year and constitutes a 14.2% share of all translations from French. The number of translations into Spanish demonstrated spectacular growth of 19% (1,152 titles). It is likely that Argentina's Guest of Honour appearance at the 2014 Paris Book Fair had something to do with this. The same is true of Romanian, which, with 236 translated titles, achieved a 42% increase. Growth was also seen in the number of translations into Japanese (428 titles, +65%), Polish (474 titles, +11%), Arabic (255 titles, +43%) and Estonian (192 titles, +336%).

By contrast, there was a strong decline in translations into Italian: after achieving 1,385 translations in 2013, in 2014 there were only 835 (-40%). Also in decline in 2014 were translations into English (721 titles, -9%), German (791 titles, -16%) and Dutch (508 titles, -24%).

As a share of the overall turnover of the publishing industry, the sale of licences abroad amounts to between 5% and 7%.

### Purchases

Over the five years from 2008 to 2013, the proportion of the French book production consisting of translations increased steadily from 14% to 17.5%. In 2014, the figure remained more or less constant, with a 17.4% share and 12,527 titles.

The ranking of the most commonly translated languages of origin in 2014 were as follows:

- / English: 62% (7,744 titles)
- / Japanese: 12% (1,542 titles)
- / German: 6% (710 titles)
- / Italian: 538 titles
- / Spanish: 486 titles
- / Swedish: 153 titles
- / Arabic: 151 titles
- / Russian: 114 titles
- / Dutch: 103 titles
- / Korean: 101 titles

In general it can be seen that, while English continues to top the list, an ever wider palette of different languages is experiencing a rapid growth in numbers.

With 4,400 titles and a 35% share, fiction is the largest segment among the purchased licences. This is followed by comics (2,112 titles, 17%) and children's and young adult books (1,619 titles, 13%).

## Exports (2014)

In 2014, the volume of book exports amounted to € 692.1 million (2013: € 688.7 million). The most important export markets are Belgium (25.6%), Switzerland (15.1%) and Canada (10.8%). Of the non-Francophone countries, Germany leads the way with 5%, followed by the United Kingdom (4%), Spain (2.9%), Morocco (2.8%), Algeria (2.7%) and Italy (2.5%).

## Regulation of prices

- / Book prices have been fixed since the “Lang Law” was passed in 1981.
- / The publisher or wholesaler sets the shop price.
- / The maximum discount for end customers is 5%.
- / Fixed book prices also apply e-books

## Copyright laws

- / Code de la Propriété Intellectuelle (1992)
- / Berne Convention (since 1994)

## Book fairs

The most important French book fair is the Salon du Livre de Paris, which will be known by its new name “Livre Paris” from 2016. Organised by: Reed Expositions France, on behalf of the Syndicat National de l’Edition.

## Associations

Syndicat National de l’Edition Française (SNE) - The French Publishers Association, active since 1874, currently 660 members

Bureau International de l’Edition Française (BIEF) - Active since 1873, its tasks are to promote French literature abroad, and support publishers with exports, the rights trade and partnerships abroad.

Syndicat de la Librairie Française (SLF) - Active since 1959, with approximately 600 members.

Sources: L’Edition en perspective 2014/2015 (SNE); Economie du Livre - Le secteur du livre - chiffres-clés 2013-2014 (Service du Livre et de la Lecture); Les Repères statistiques du Syndicat National de L’Edition à l’international 14/15 ; Börsenblatt Spezial Kinder & Jugendbuch (38/2015)