Spain

Information about Spain’s economic situation in numbers

Area: 504,750 km²
Population: 46.7 million (as of Jan. 2009)
Illiteracy rate: 2.2% (as of 2008)
Gross Domestic Product: 1,051 billion euros (2009)
Inflation rate: 0.8% (2009)
Unemployment rate: 18.01% (2009)

(Sources: Bundesagentur für Außenwirtschaft; Instituto Nacional de Estadística: www.ine.es; Illiteracy rate: Ministerio de Administraciones Públicas)

Information about book production in Spain

The data featured in the study "Comercio Interior del Libro en España 2009" incorporates figures from all private Spanish publishers that are members of a trade association. In 2009, 889 Spanish publishers met these criteria. That’s around 53% of the 1,677 publishers that have registered an ISBN. But the full number of ISBN registrants includes any private company that has published at least one book. Thus it is safe to assume that the associations represent a majority of publishers that publish actively and continuously.

Sales and copies sold

In 2009, the book industry was impacted by fallout from the severe financial crisis in Spain. Total domestic turnover from book sales totalled 3,109.58 million euros. After the industry experienced a steady increase in sales over the last few years (2008: 3,185.5 million euros; 2007: 3,123.17; 2006: 3,014 million euros), it reported a 2.4% decline in sales for the first time in 2009. However, one positive development is evident in the rights and licensing business. From 2008 to 2009, sales in this segment of the business increased by 0.9%. Profits from the sale of copyrights more than quadrupled in one year (139 million euros 2009 compared to 33.6 million euros in 2008).

Only 4% of all publishers were responsible for almost two-thirds (65.7%) of the Spanish book industry’s total sales. In addition, over 90% of total sales can be attributed to members of the publishers associations in Catalonia (51.1%) and Madrid (41.9%).
More than two-thirds of total sales (72.4%) in 2009 were attributed to the following segments:
- Schoolbooks with 27.2% (2008: 28.2%; 2007: 25.7%)
- Fiction with 22.9% (2008: 21.7%; 2007: 21.2%)
- Children’s and young adult books with 11.3% (2008: 10.3%; 2007: 10.6%)
- Humanities and social sciences with 11.0% (2008: 11.9%; 2007: 11.4%).

Sales for the following segments were up in 2009:
- Children’s and young adult books: +7.2%
- General non-fiction: +5.4%
- Fiction: +3.2%

However, the following segments witnessed a decline in sales:
- Reference books (dictionaries and encyclopaedias): -20.8%
- Humanities and social sciences: -10.6%
- Non-academic textbooks: -6%

Around 236.2 million books were sold in Spain in 2009 – nearly 2% fewer than in the previous year

(Source: Comercio interior del libro 2009, Federación de Gremios de Editores de España)

Title production / New releases per year

In 2009, 76,213 titles were published in Spain (55.7% of which were new releases and 44.3% reprints). That is an increase of 4.4% over the previous year (2008: 72,982; 2007: 70,520; 2006: 68,930). The number of titles available (415,208 titles) increased by 5.6%.

Total number of copies published in 2009: 329.83 million copies. While the number of copies increased by 2.8% from 2007 to 2008, it declined for the first time in 2009 by 10.2% (2008: 367.46 million). Only 71.6% of all copies (236.19 million copies) were sold domestically. The remaining copies were exported or remaindered.

The average print run decreased by 14% to 4,328 copies in 2009 compared to the previous year (2008: 5,035, 2007: 5,070). Thus, an average of 707 fewer copies were printed per title in 2009 compared to 2008.

Paperbacks

Paperbacks accounted for 8.4% (or 6,245 titles) of all titles (2008: 9.1% or 6,608 titles; 2007: 9% or 6,392 titles). They represented a 5.8% share of total industry sales in 2009 (or 180.46 million euros). The paperback also accounted for 10.8% of all copies published and 11% of all copies sold.
The following segments were responsible for 72.8% of all titles and 71% of all copies in 2009:
- Children’s and young adult books: 12,112 titles (2008: 11,701; 2007: 10,524; 2006: 12,178)

Title production and changes in circulation figures by segment

Steep decline in number of titles in the following categories:
- Comic: -17%
- Dictionaries and encyclopaedias: -16.6%

Decrease in the number of copies in nearly all segments:
- Reference books: -54.4%
- Fiction: -17.2%
- Academic, technical and scientific books: -16.2%
- Advice/how-to: -14%
- Comics: -11.7%
- Children’s and young adult: -5.9%
- Non-academic textbooks: -3.6%

The only exceptions were:
- General non-fiction: +3.3%
- Humanities and social sciences: +6.4%

78.1% of all titles were published in Spanish in 2009 (2008: 77.8%; 2007: 77.8%); 13.4% in Catalan (2008: 13.9%; 2007: 14.8%); 2.1% in Galician (2008: 2.3%; 2007: 2.3%); 1.8% in Basque (2008: 1.9%; 2007: 1.9%). The remaining 4.6% were foreign language titles (2008: 4.2%; 2007: 3.1%).

(Source: Comercio interior del libro 2009, Federación de Gremios de Editores de España)

Average book price

Average paperback price in 2009: 6.97 euros.

(Source: Comercio interior del libro 2009, Federación de Gremios de Editores de España)

Fixed book price:

Yes Fixed book pricing is legally regulated in Spain. Booksellers are only permitted to sell books at the prices set by the publishers. The one exception is schoolbooks, which have not been subject to fixed book prices since 2007.

Digital Publishing

Seventy per cent of publishers only published printed books in 2009; the remaining 30% also worked with other media and formats.

Number of titles published digitally in 2009: 5,960
Digitised titles from the publishing programme: 17,293
Number of digital titles marketed: 10,590
Sales generated by digital titles: 51,259 million euros (1.64% of total sales)

A look at the segments in which digital books were published reveals that scientific books, the humanities and social sciences, law and economics textbooks achieved the highest sales. These segments account for almost 70% of total sales of electronic books.

Digital reading devices:

Computer: 67.7%
Dedicated e-readers: 12.6%
Mobile devices/PDA: 0.6%
Other: 19.1%

Publication formats:

LPDF: 48.4%
EPUB: 3.7%
MobiPocket generic: 1.7%
MobiPocket Kindle: 0.2%
Other: 46.1%

Distribution channels:

Sales via digital distribution channels: 66.8%
Sales through the publisher’s website: 15.8%
Sales via bookstores: 0.7%
Other channels: 16.8%

(Source: Comercio interior del libro 2009, Federación de Gremios de Editores de España)

Copyright law

Universal Copyright Convention UCC (since 1955)
Berne Convention (since 1887)

(Source: Recht im Verlag)
Law in Spain

Real Decreto Legislativo 1/1996

In January 2011, the Ley de Economía Sostenible, also known by the name Ley Sinde, was passed. It regulates copyright protection and the legal conditions for downloading copyrighted content from websites.

(Source: Website of the Spanish Ministry of Culture)

Licensing statistics

The Spanish language

Spanish is one of the 10 most important languages for German publishers in terms of licenses sold abroad. In 2009, 5.6% of all licenses (353) were granted for translations into the Spanish language. This leaves Spanish in 5th place (behind Polish, Chinese, Czech and Korean). Until 2007, the number of licenses sold for translations into Spanish had been increasing steadily. Since then, they have decreased significantly (2009: 353, 2008: 464, 2007: 655) . However, 2007 was generally a record year for German books. A total of 9,225 German licenses were sold abroad. Since then, the German licensing business has lost significant ground. In 2008 and 2009, the number of foreign rights deals decreased by 17.5% each year, not least as a result of the financial crisis. This explains why Spain, despite its decline in acquisitions, managed to advance one spot in the ranking.


But the Spanish language remains the frontrunner in terms of sales of literary licenses. In 2009, it shared this position with Italy (27 contracts each, compared to 31 licenses in 2008 and 64 licenses in 2007 – in general, literary licenses are particularly affected by sharp overall declines in licensing deals).

(Source: Buch und Buchhandel in Zahlen 2010, p. 80-88)

Spain as a country

Even taking into account the licensing statistics for 2009 by country, Spain is among the most important licensees for German publishers with 357 licenses purchased: 5.7% of all German deals were made with Spain. Thus the country is Germany’s third most important European licensing partner, after Poland and the Czech Republic, and just ahead of Italy. Looking beyond Europe, it still holds the 5th position (China and the Republic of Korea shift ahead of Spain). 2009: 357, 5.7%; 2008: 406, 5.3%; 2007: 589, 6.4%; 2006: 572, 6.5%; 2005: 529, 7.1%.

(Source: Buch und Buchhandel in Zahlen 2010, p. 80-88)
Translations from Spanish into German

In 2008, Spanish was 4th (after English, French and Italian) on the list of the 10 languages most translated into German. Buch und Buchhandel in Zahlen optimistically reported that the language had followed a slightly zigzagged upward course since 2003 and stood a chance of surpassing Italian in 2009: 193 translations (2.6% of all translations into German in 2008) originated from the Spanish-speaking world. In 2009, however, only 182 translations from Spanish were registered (1.7% of all translations into German), sending the language to 8th place behind Japanese, Dutch, Swedish and Russian.

(Source: Buch und Buchhandel in Zahlen 2010, p. 75-78; Buch und Buchhandel in Zahlen 2009, p. 80-81)

Export/Import


There was also a slight decline in imports in 2009:

As a result, the net trade balance for the Spanish book market in 2009 was very low compared to previous years: 206.876 million euros (2008: 298.001; 2007: 311.151; 2006: 316.818 million euros).

(Source: Comercio Exterior del Libro 2009, Federación Española de Cámaras del Libro, Gobierno de España)

Number of publishers

2009: 1,677 publishers (private companies that have registered at least one ISBN and thus published at least one book)
53% of all publishers (889) are members of trade associations, 3.6% more than in 2008 (2008: 1,546 publishers, 858 of which were members of trade associations; 2007: 1,487 publishers, 800 of which were members; and 2006: 1,426 publishers, 776 of which were trade association members).

Breakdown of trade association members:
Large publishers: 34 (more than 18 million euros in sales/year)
Mid-sized publishers: 119 (between 2.4 and 18 million euros in sales/year)
Small publishers: 736 (up to 2.4 million euros in sales/year)
In 2009, 26.8% of Spanish publishers belonged to a publishing group (in 2008, that number was 27.7%; 2007, 28.4%; 2006, 29.1%).

(Source: Federación de Gremios de Editores de España, Comercio interior del libro en España 2009)

Sales/distribution channels

Retail sales (via bookstores, book chains and supermarkets) increased by 1.5% in 2009 (total growth of 6.3% over the last 5 years). Bookstores and book chains continue to be the primary distribution channels for books in Spain. Together they account for a market share of 48.5% (2008: 47.5%). While sales declined slightly for bookstores and book chains in 2009 (by 0.2% and 0.3% respectively), supermarkets reported a 10.2% increase in sales. Kiosk sales (traditionally a strong distribution channel in Spain), which had increased by 54.4% over the last 5 years, suffered a slight decline in 2009 (-0.5%).

Publishers experienced their largest increase in sales in 2009 through special sales to companies and institutions, including schools (+29.9%) and libraries (+39%). Direct to consumer sales, on the other hand, (through credit card purchases, telephone and mail orders, book clubs, the Internet or subscriptions), declined sharply by 25.1% compared to the previous year, and by 31.9% over the last 5 years.

(Source: Comercio interior del libro 2009, Federación de Gremios de Editores de España)

Copyright

In 2009, Spanish publishers spent 213.8 million euros 2009 on rights acquisitions (2008: 208.4 million euros; 2007: 185.2 million euros): 202 million euros for author contracts, 7.4 million euros for purchasing other rights and 4.4 million euros for translation rights. Rights for Spanish authors accounted for 60.5% of spending and 39.5% was spent acquiring rights to foreign authors. The proportion of expenditure for author contracts, which has increased steadily in recent years (2008: 39.8%; 2007: 36.1%; 2006: 34.4%; 2005: 31.7%), remained more or less on par with the previous year.

Copyright sales, on the other hand, have been a positive source of income for Spanish publishers. In 2008, rights sales brought in 33.6 million euros. Sales more than quadrupled in 2009 to 139 million euros.

(Source: Comercio interior del libro 2009, Federación de Gremios de Editores de España)

Book Fairs

The Feria Internacional del Libro (Liber) takes place annually, alternating between Barcelona and Madrid. This annual cycle is sometimes interrupted. In both 2007 and 2008, for example, it was held in Barcelona. In 2011, the fair will take place in Madrid, with Romania as the guest of honour. Liber is purely for the trade and does not incorporate book sales to the public.
In 2010, more than 700 exhibitors from 15 countries presented their books in Barcelona. More than 15,000 trade visitors from 60 countries were in attendance. Librarians (from the USA and other countries) are among those invited to Liber to place their orders. Liber also features a trade programme with more than 50 events.

In contrast, the Feria del Libro del Madrid, which takes place annually in May/June in Madrid’s municipal park, the “Parque del Retiro”, is a fair purely for the general public. Germany will be the Guest of Honour of the Feria del Retiro in 2011.

(Source: Website of the Feria Internacional del Libro; Website of the Feria del Libro de Madrid)