Chinese Publishing Industry-
An Overview

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M.S. in Publishing Program
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Data Sources

• Press, Publication, Radio, Film and Television Journal
• China Publishing and Media Journal
• Publishers Magazine
• OpenBook
  • collecting data from over 2000 physical bookstores
  • and over 20 online bookstores
• CNIT Research
• BigData Research
• Enfodesk.com
Major Publishing Groups
Market Share of Top 10 Publishing Groups (January-October 2015)

- China Publishing Group (40 imprints) 6.80%
- Century Publishing Group (20 imprints) 4%
- Phoenix Publishing & Media Group (12 imprints) 3.17%
- China South Publishing & Media Group (10 imprints) 2.85%
- Changjiang Publishing & Media Group 2.82%
- Zhejiang Publishing United Group 2.81%
- Jilin Publishing Group 2.73%
- China International Publishing Group 2.70%
- Beijing Publishing Group 2.10%
- Shaanxi Xinhua Publishing & Media Group 1.94%
# January-October 2015 Market Segment Share

<table>
<thead>
<tr>
<th>Market Segment</th>
<th>Publisher</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>China Publishing Group</td>
<td>9.84%</td>
</tr>
<tr>
<td>Literature Top 3</td>
<td>China South Publishing &amp; Media Group</td>
<td>9.35%</td>
</tr>
<tr>
<td></td>
<td>Phoenix Publishing &amp; Media Group</td>
<td>9.02%</td>
</tr>
<tr>
<td></td>
<td>China International Publishing Group</td>
<td>5.43%</td>
</tr>
<tr>
<td>Social Science Top 3</td>
<td>China Publishing Group</td>
<td>4.94%</td>
</tr>
<tr>
<td></td>
<td>China South Publishing &amp; Media Group</td>
<td>1.91%</td>
</tr>
<tr>
<td></td>
<td>Zhejiang Publishing United Group</td>
<td>11.10%</td>
</tr>
<tr>
<td>Children’s Book Top 3</td>
<td>Shandong Publishing Group</td>
<td>6.62%</td>
</tr>
<tr>
<td></td>
<td>Jilin Publishing Group</td>
<td>5.98%</td>
</tr>
<tr>
<td></td>
<td>People’s Literature Publishing House</td>
<td>0.95%</td>
</tr>
<tr>
<td>Top 3 Translation Houses</td>
<td>Yilin Press</td>
<td>0.67%</td>
</tr>
<tr>
<td></td>
<td>Shanghai Translation Publishing House</td>
<td>0.4%</td>
</tr>
</tbody>
</table>
Title Output
Including 32,712 children’s books, 7.29% of total title output.
Revenue by Segment (Jan.-Oct. 2015)

- Education: 27.91%
- Social Science: 22.52%
- Children's Books: 16.90%
- Fiction: 13.55%
- STM: 8.96%
- Self-help: 5.25%
- Art: 4.70%
The Translation Market
# of Translation Titles from Different Countries - 2014

- USA: 4840
- UK: 3333
- Japan: 160
- Korea: 754
- Germany: 1160
- France: 807
- Canada: 1736
- Russia: 2655
- Other: 97
Translation Market, January – June, 2015

Revenue
- Children's: 34.31
- Literature: 21.95
- Culture: 7.31
- Language: 6.68
- Business: 6.21
- Self-Help: 5.75
- Study guide: 3.62
- Biography: 3.22
- Art: 2.55
- Other: 5.48

Title
- Children's: 31.88
- Literature: 14.6
- Culture: 9.29
- Language: 6.46
- Business: 6.43
- Self-Help: 4.46
- Study guide: 3.76
- Biography: 14.81
- Art: 6.46
- Other: 9.29
# of Translation Works in Top 100 Bestsellers (January – June, 2015)
Half of the Titles are from US and UK

- Literature: 23 (B&M), 12 (Online)
- Children's: 8 (B&M), 2 (Online)
- Biographies: 2 (B&M), 2 (Online)
- Business: 2 (B&M), 2 (Online)
- Culture: 1 (B&M), 0 (Online)
- Education: 0 (B&M), 1 (Online)
- Psychology: 0 (B&M), 6 (Online)
- Style: 0 (B&M), 1 (Online)

Half of the Translation Works are from US and UK.
Book Retailing
China Book Retail Revenue (B&M Stores) (in USD Billions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue (USD Billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>$8.0</td>
</tr>
<tr>
<td>2006</td>
<td>$8.1</td>
</tr>
<tr>
<td>2007</td>
<td>$8.3</td>
</tr>
<tr>
<td>2008</td>
<td>$8.7</td>
</tr>
<tr>
<td>2009</td>
<td>$9.4</td>
</tr>
<tr>
<td>2010</td>
<td>$9.7</td>
</tr>
<tr>
<td>2011</td>
<td>$10.5</td>
</tr>
<tr>
<td>2012</td>
<td>$11.5</td>
</tr>
<tr>
<td>2013</td>
<td>$11.9</td>
</tr>
<tr>
<td>2014</td>
<td>$12.5</td>
</tr>
</tbody>
</table>
China Book Retail Revenue (Online Stores)

2010: 40~50
2011: 80~90
2012: 120~130
2013: 160~170
2014: 200~210 ($3.2 billion)
3 Major Online Stores: January – June, 2015

- 当当网 (dangdang.com): 44.2%
- JD.COM 京东: 18.7%
- 亚马逊 (amazon.cn): 15.9%
## What Sell and Where (January - June 2015)

<table>
<thead>
<tr>
<th>Category</th>
<th>Physical Bookstores</th>
<th>Online Bookstores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sales (%)</td>
<td>Sales (%)</td>
</tr>
<tr>
<td><strong>Textbook &amp; Supplementary</strong></td>
<td>23.37</td>
<td>8.25</td>
</tr>
<tr>
<td><strong>Social Science</strong></td>
<td>21.72</td>
<td>27.99</td>
</tr>
<tr>
<td><strong>Children’s Books</strong></td>
<td>18.66</td>
<td>22.85</td>
</tr>
<tr>
<td><strong>Literature</strong></td>
<td>12.18</td>
<td>13.24</td>
</tr>
<tr>
<td><strong>Science &amp; Technology</strong></td>
<td>7.33</td>
<td>11.09</td>
</tr>
<tr>
<td><strong>Language</strong></td>
<td>5.51</td>
<td>6.06</td>
</tr>
<tr>
<td><strong>Life Style</strong></td>
<td>5.27</td>
<td>4.71</td>
</tr>
<tr>
<td><strong>Art</strong></td>
<td>4.16</td>
<td>4.3</td>
</tr>
<tr>
<td><strong>Biography</strong></td>
<td>1.71</td>
<td>1.26</td>
</tr>
<tr>
<td><strong>General</strong></td>
<td>0.08</td>
<td>0.23</td>
</tr>
</tbody>
</table>
Revenue Contribution of Bestsellers
E-Book
E-book Reading Is Rising

2012-2015年中国年度人均阅读量

Print Book 纸质书籍 E-book 电子书

<table>
<thead>
<tr>
<th>Year</th>
<th>Print Book</th>
<th>E-book</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>4.39</td>
<td>2.35</td>
</tr>
<tr>
<td>2013</td>
<td>4.77</td>
<td>2.48</td>
</tr>
<tr>
<td>2014</td>
<td>4.80</td>
<td>3.21</td>
</tr>
<tr>
<td>2015e</td>
<td>6.12</td>
<td>2.84</td>
</tr>
</tbody>
</table>
Two E-book Markets

1. E-books from Traditional Publishers
2. Online Literature

In 2014, e-book sales in China was $726 million, including online literature
E-Books from Traditional Publishers

• In 2014, Amazon China listed 240,000 new print titles, of which only 8,013 titles had e-book versions.
Three Major E-book Reading Platforms

- Kindle
- iReader
- WeChat
E-versions of Top 10 Titles in 15 Bestseller Lists

Social Science: Kindle 50%, iReader 30%, WeChat 50%
Business: Kindle 90%, iReader 60%, WeChat 50%
Self-help: Kindle 70%, iReader 20%, WeChat 50%
Fiction: Kindle 60%, iReader 50%, WeChat 50%
Children's: Kindle 10%, iReader 20%, WeChat 10%
STM: Kindle 30%, iReader 10%, WeChat 20%
E-book Price: % of Print Version

- Kindle: 35.70%
- iReader: 42.90%
- WeChat: 38%
Another Market: Online Literature

• 2011: 1.76 million titles
• 2012: 2.14 million titles
• 2013: 1.76 million titles
• 2014: 2 million titles
### Trend: BAT Enter E-book Market

<table>
<thead>
<tr>
<th>自有渠道资源</th>
<th>联盟渠道资源</th>
<th>渠道说明</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://www.aliexpress.com">AliExpress</a></td>
<td><a href="https://www.bookchannel.com">Book Channel</a></td>
<td>自有书旗小说和淘宝阅读，并与新浪阅读、塔读文学和长江传媒签约，达成深度战略合作，同时也在微博自媒体平台的作品互动传播</td>
</tr>
<tr>
<td>阅文集团</td>
<td><a href="https://www.qidian.com">起点中文网</a></td>
<td>自有QQ阅读，并与起点中文网、创世中文网、红袖添香、潇湘书院、小说阅读网等签约，但整体更多的资源是PC端</td>
</tr>
<tr>
<td><a href="https://www.baidu.com">Baidu</a></td>
<td><a href="https://book.baidu.com">Baidu E-Book</a></td>
<td>自有91熊猫看书和百度阅读，并收购了纵横中文网，同时和苏宁阅读进行战略合作</td>
</tr>
</tbody>
</table>
Thank You!