



THE EUROPEAN BOOK MARKET 2024/25

Frankfurt Book Fair
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About FEP

Who we are

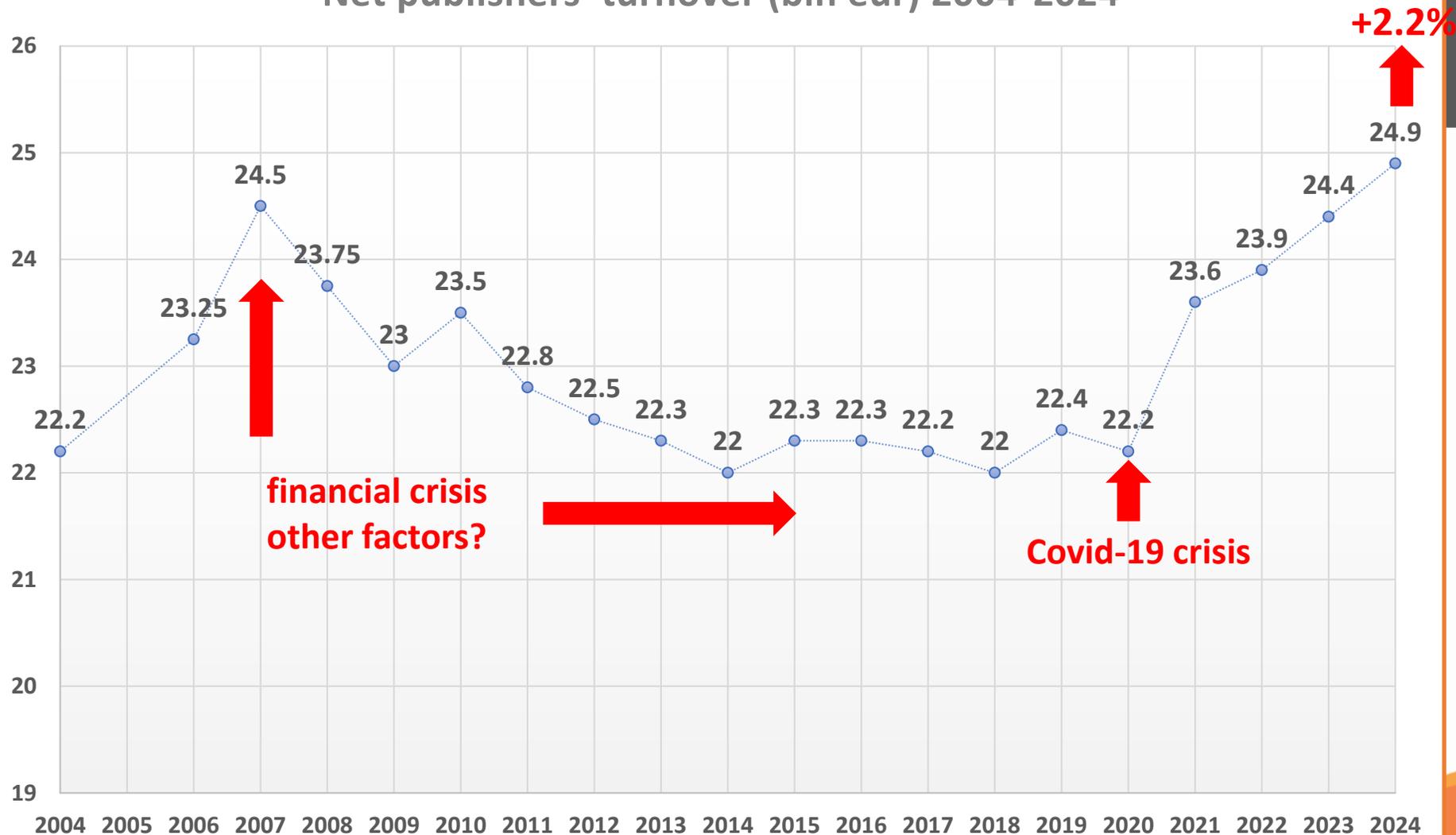
- FEP is an independent, non-commercial umbrella association representing 31 national associations of publishers of books, learned journals and educational materials from all over Europe
- Founded in 1967, FEP deals with European legislation and advises publishers associations on copyright and other legislative issues
- 6,000+ individual publishers represented (>80% of the book market in Europe)
- Based in Brussels, Belgium





The core data

Net publishers' turnover (bln eur) 2004-2024



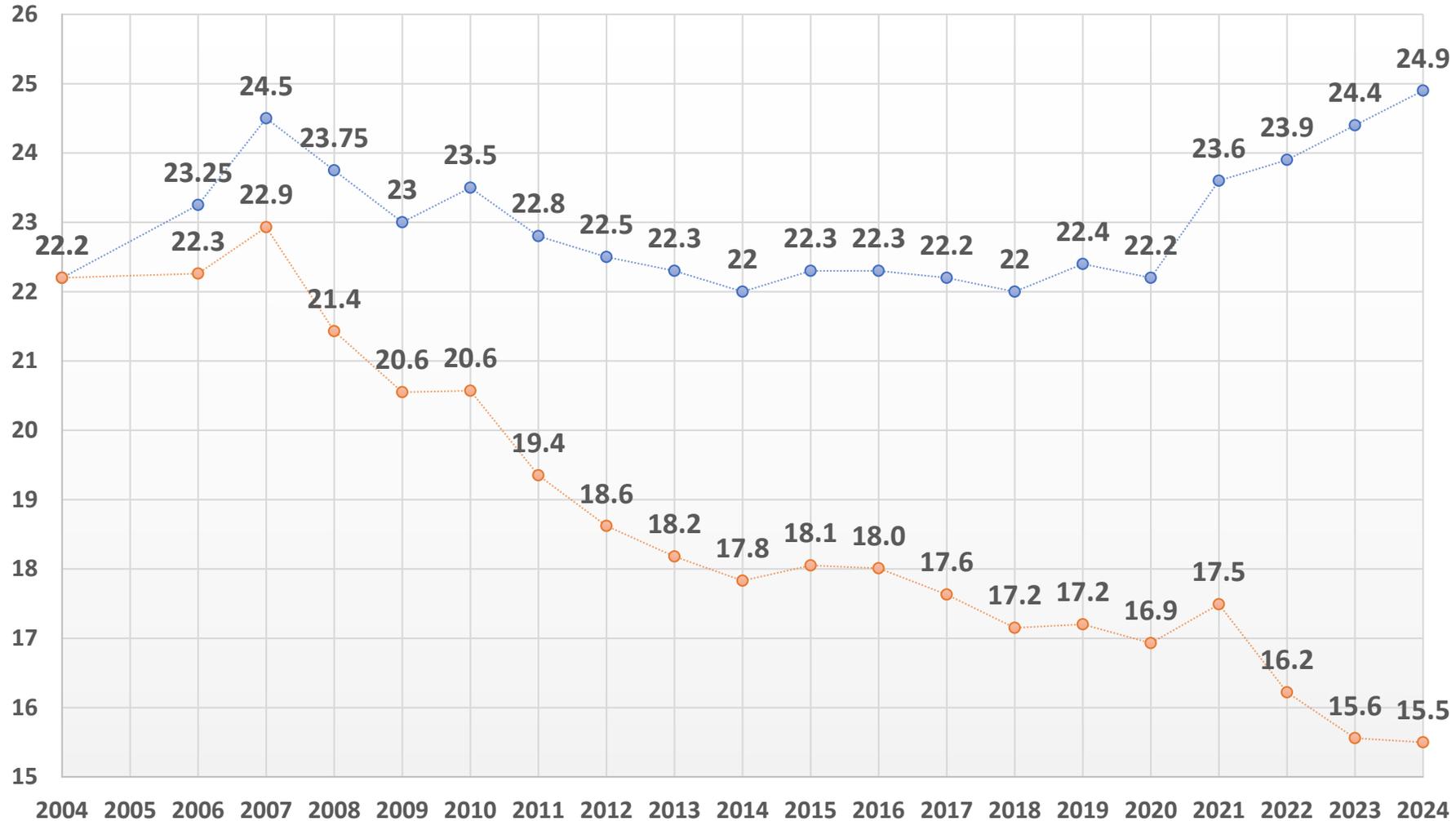
Largest cultural industry in Europe

Highest turnover ever (**not in real terms**)

Past 3 years: **value up, volume down, price as driver**

Not pictured: **inflation**

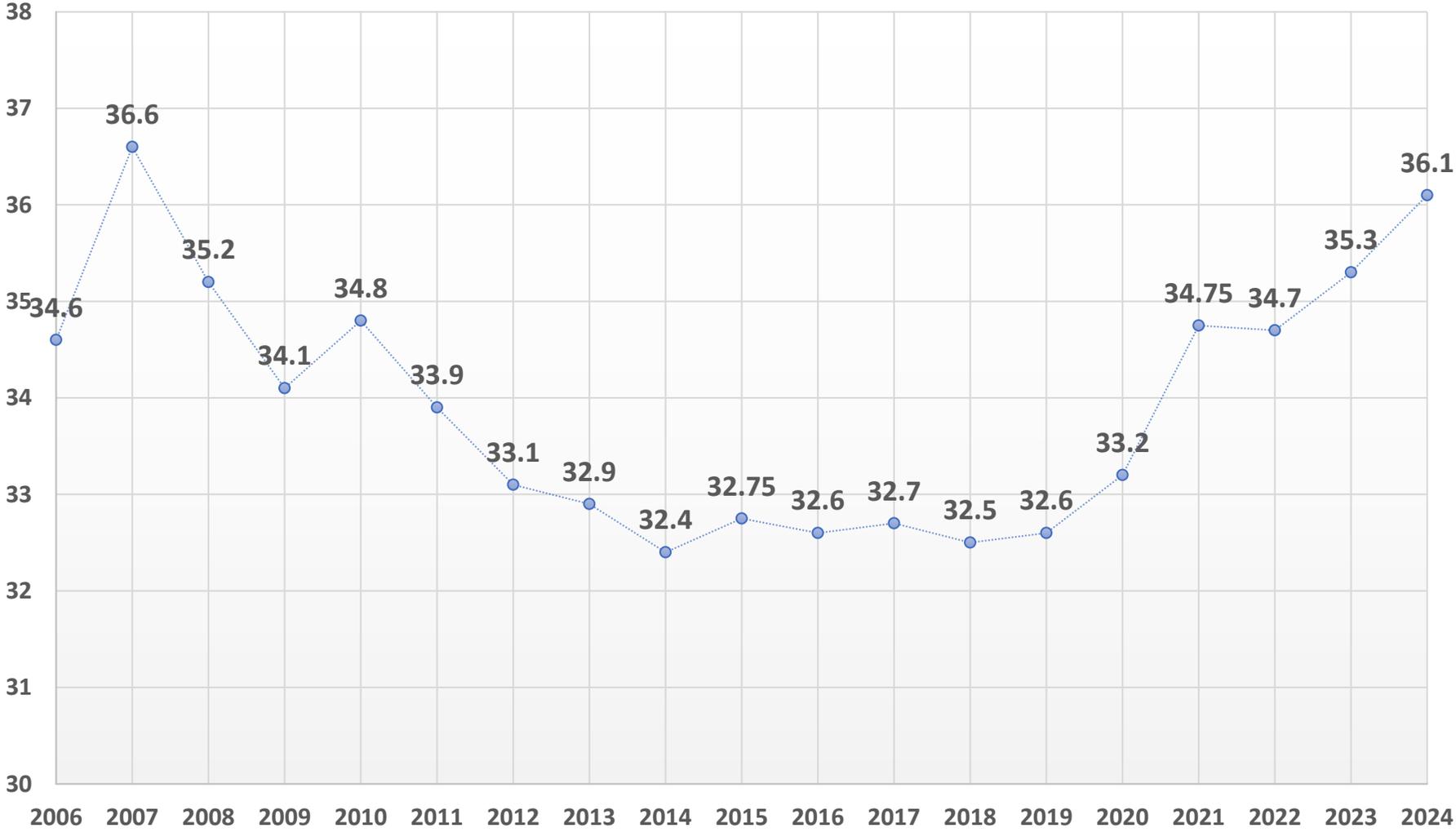
Net publishers' turnover (bln eur) 2004-2024 - Nominal vs real



Looking at **real terms** paints a very different picture

Maybe we have a problem

Market value (bln eur) 2004-2024



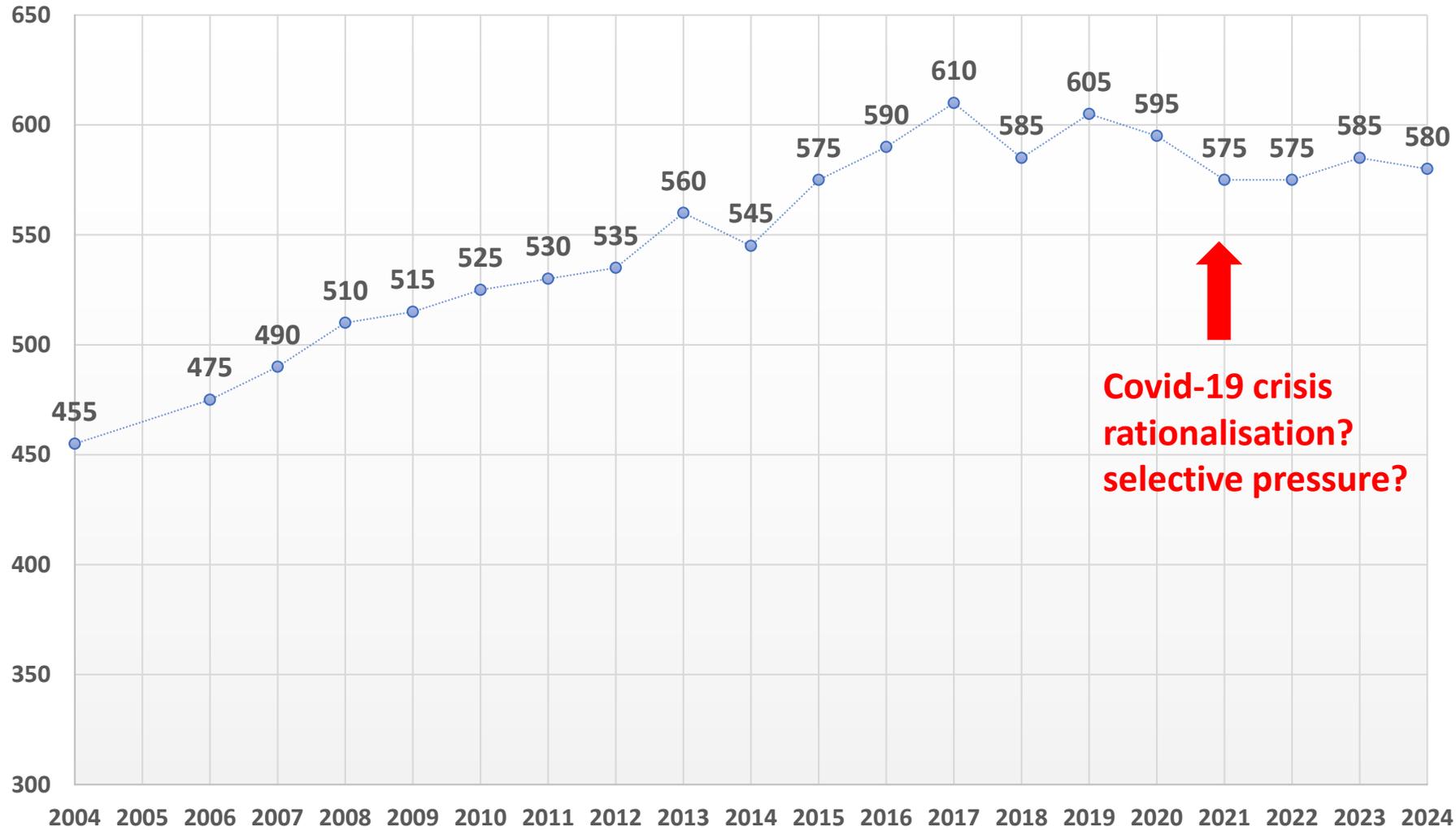
Sales at cover price follow similar trend as net turnover

Between 32 and 37 billion € per year

Not pictured: exports by European publishers and sales of imported books, self-publishing

Total market value likely **36-39 billion**

New titles ('000) 2004-2024

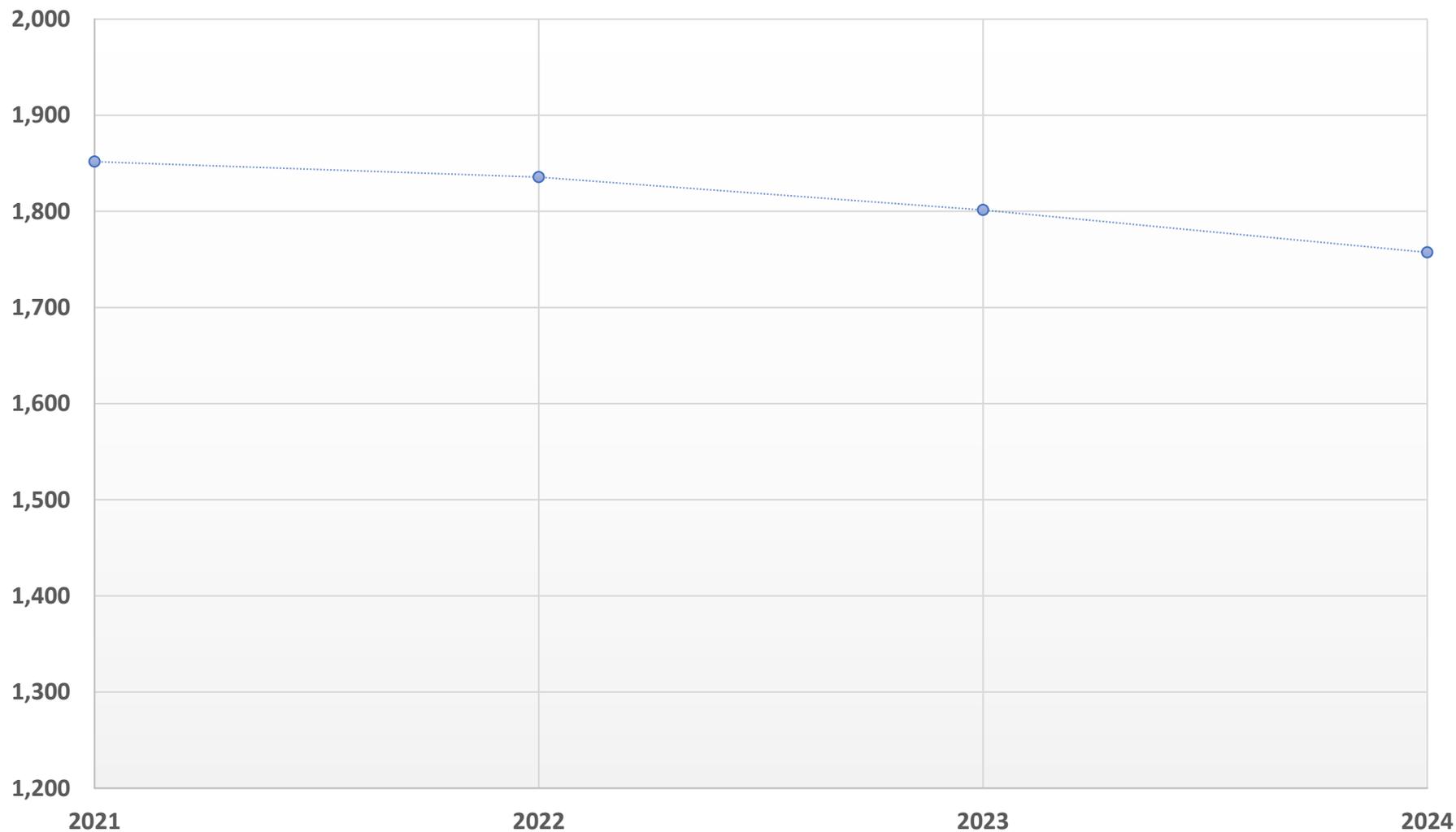


First editions in print, all categories

Mixed picture in major markets

**Covid-19 crisis
rationalisation?
selective pressure?**

Print book sales in million units (selected countries) 2004-2024



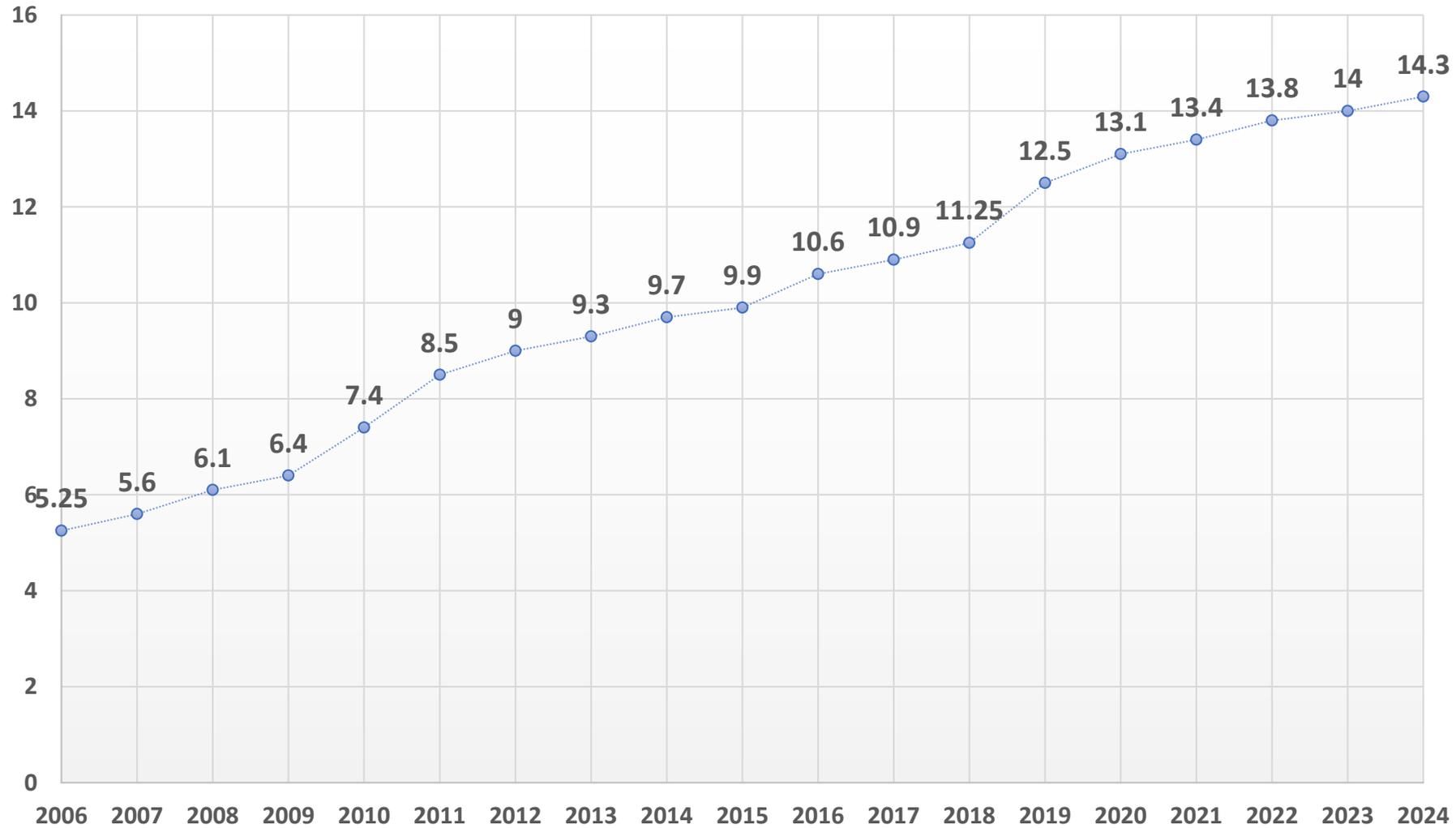
Total copies sold in 2024 (all formats) **> 2.5 billion**

Our sample (75% of turnover):

-5.1% in 4 years after 2020

About **95 million fewer** books sold

Active catalogue (mio) 2006-2024



Of which some
3.4 million in
digital/audio format

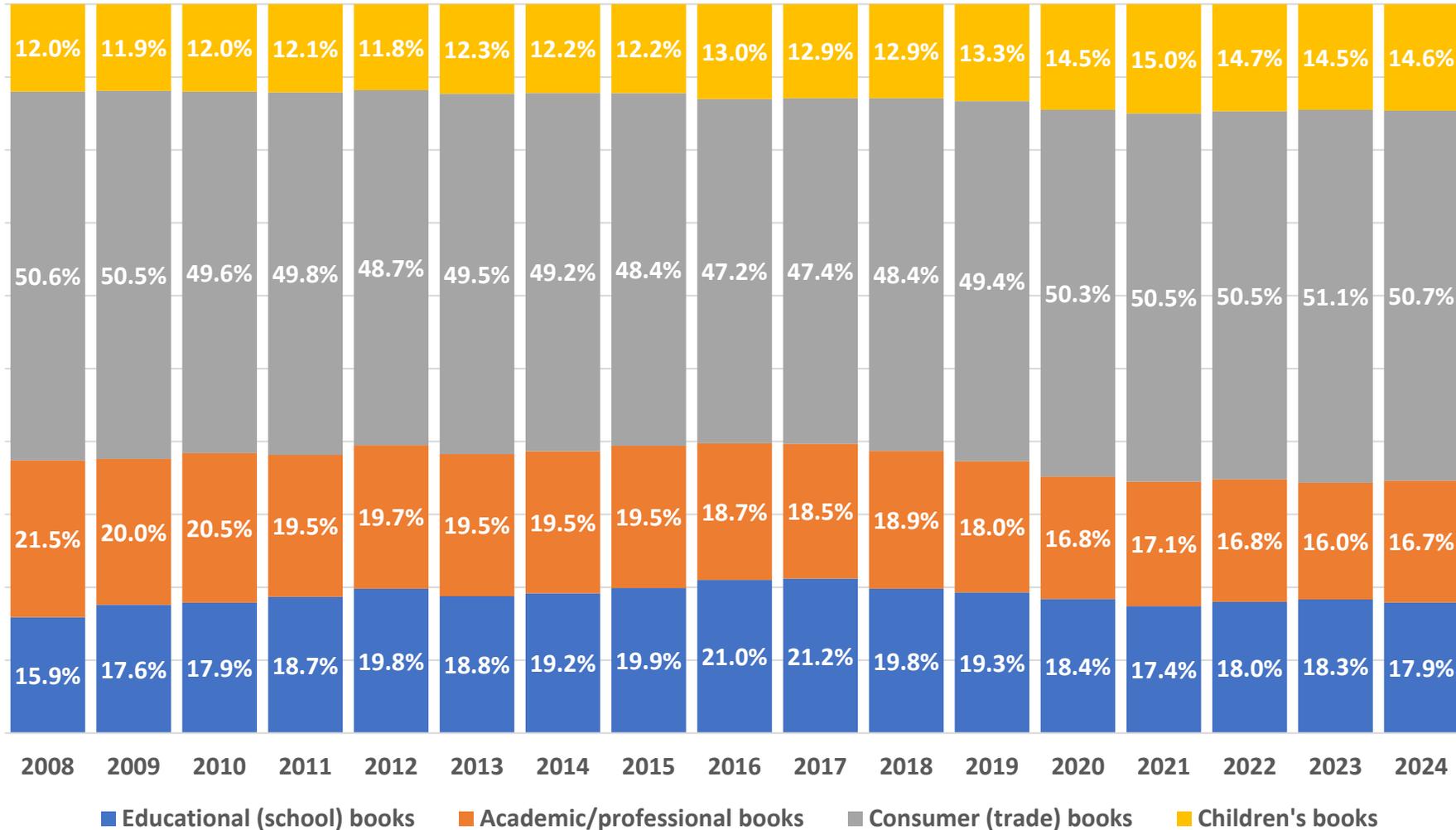
Turnover

1. Germany
2. UK
3. France
4. Spain
5. Italy
6. Netherlands

New titles

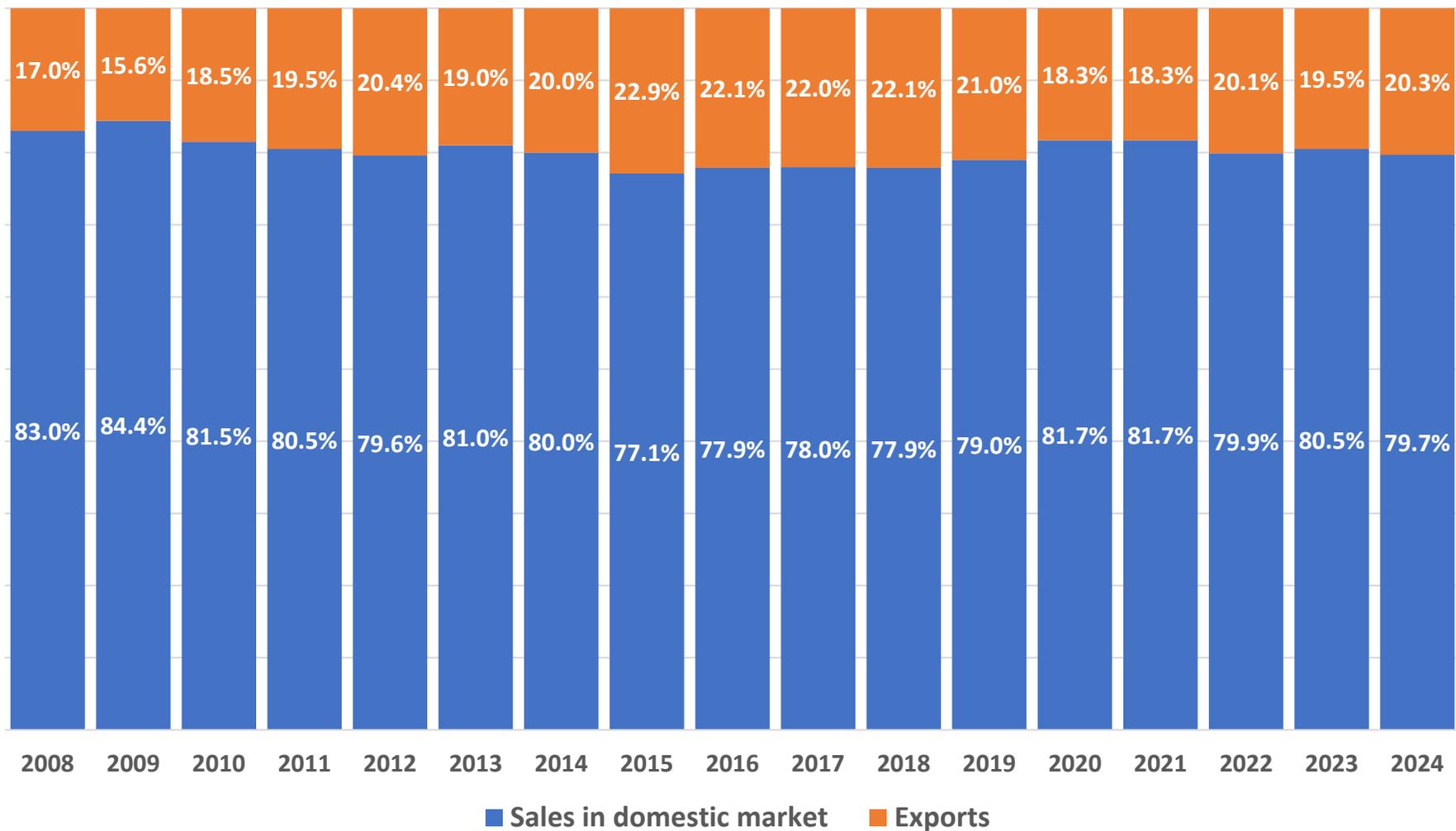
1. UK
2. Germany
3. Spain
4. Italy
5. France
6. Poland

Turnover by category (%) 2008-2024



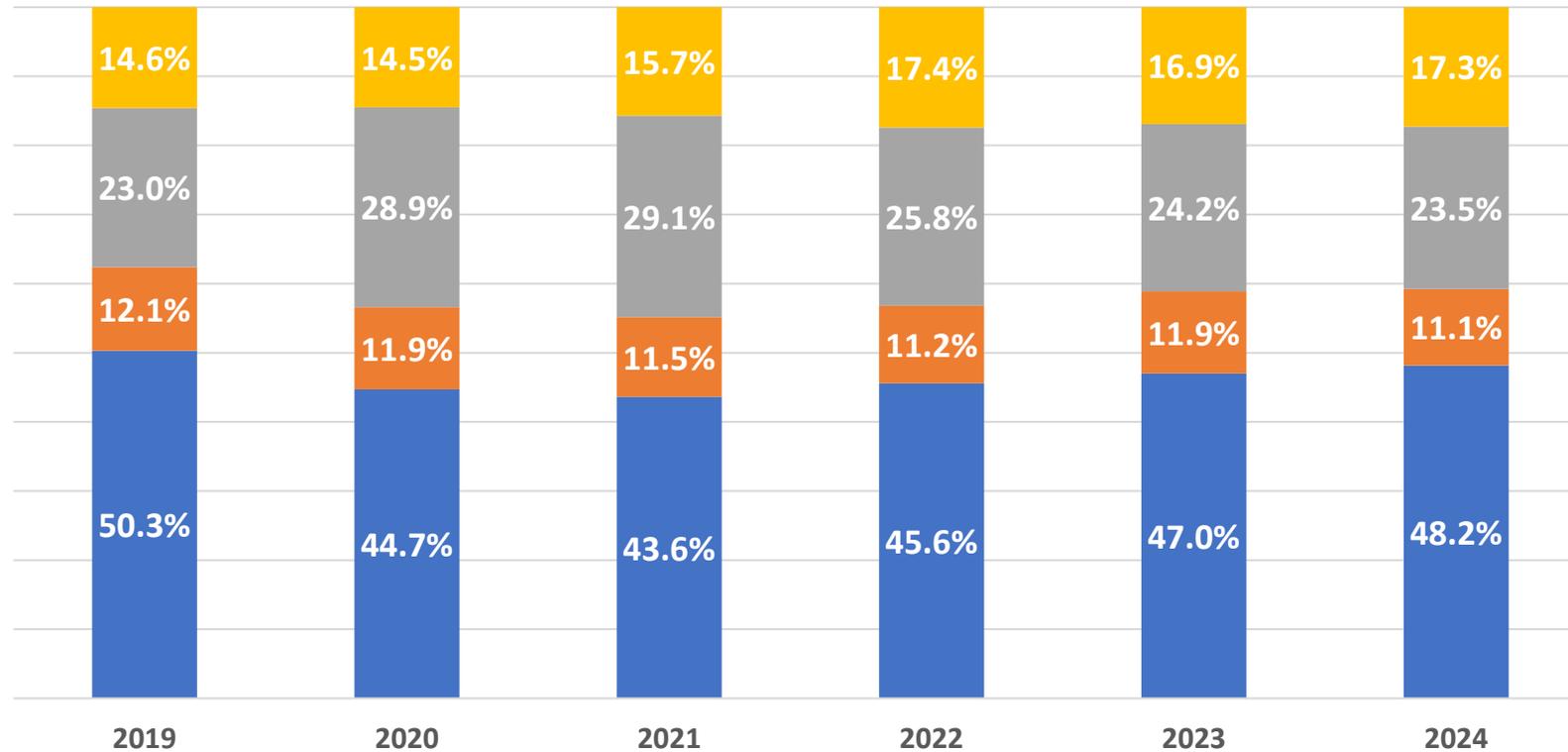
Children's books
still strong (but
slowing)

Turnover by destination (%) 2008-2024



Exports recovered after Covid, remain around one fifth of turnover

Turnover by distribution channel (%) 2019-2024

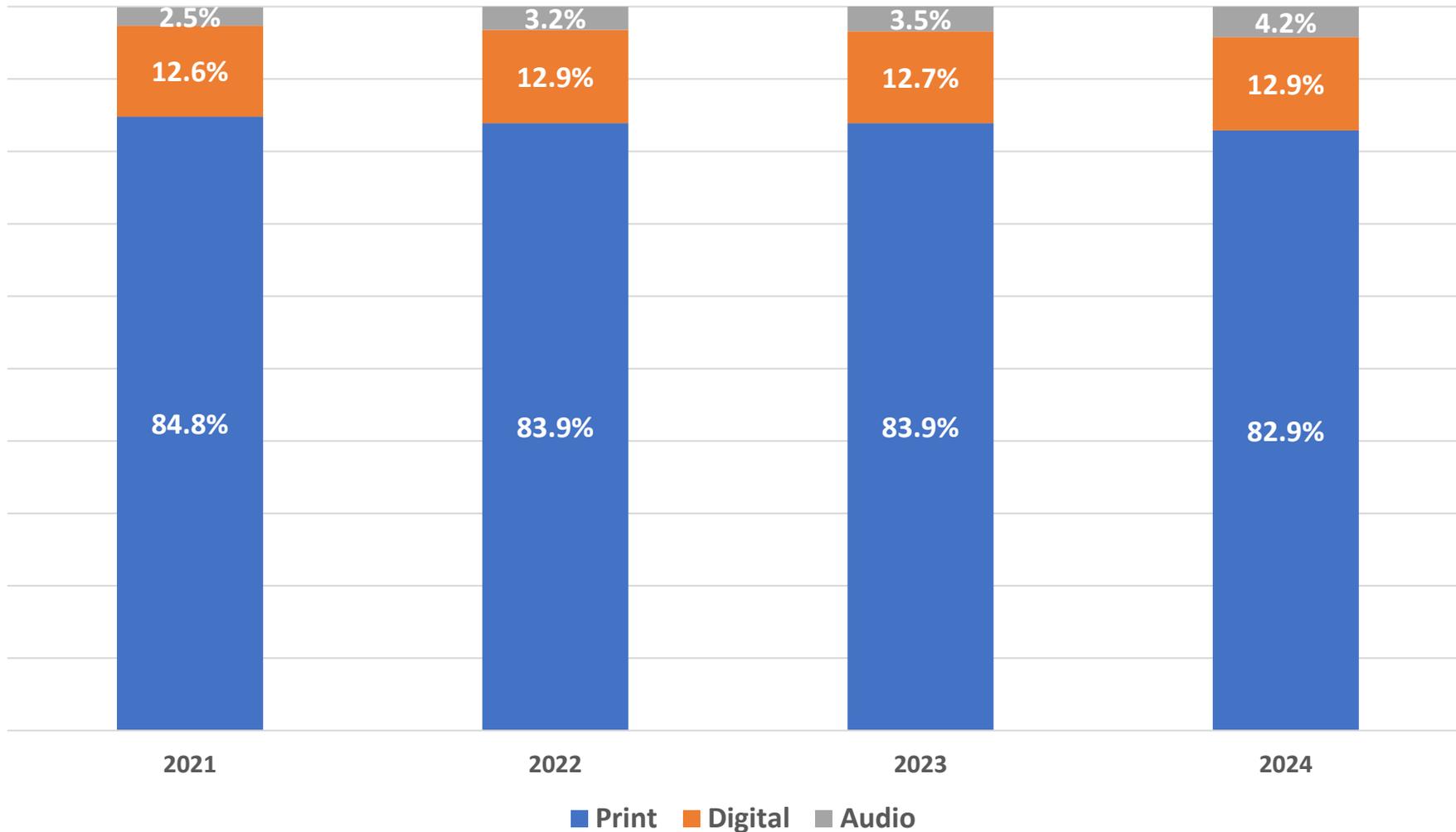


■ Sales in bookstores and specialised stores
■ Online sales

■ Sales in supermarkets and other stores
■ Direct sales (incl. libraries, book clubs)

Gradual return to **bookstores** seems to continue, but slower

Turnover by format (%) 2021-2024

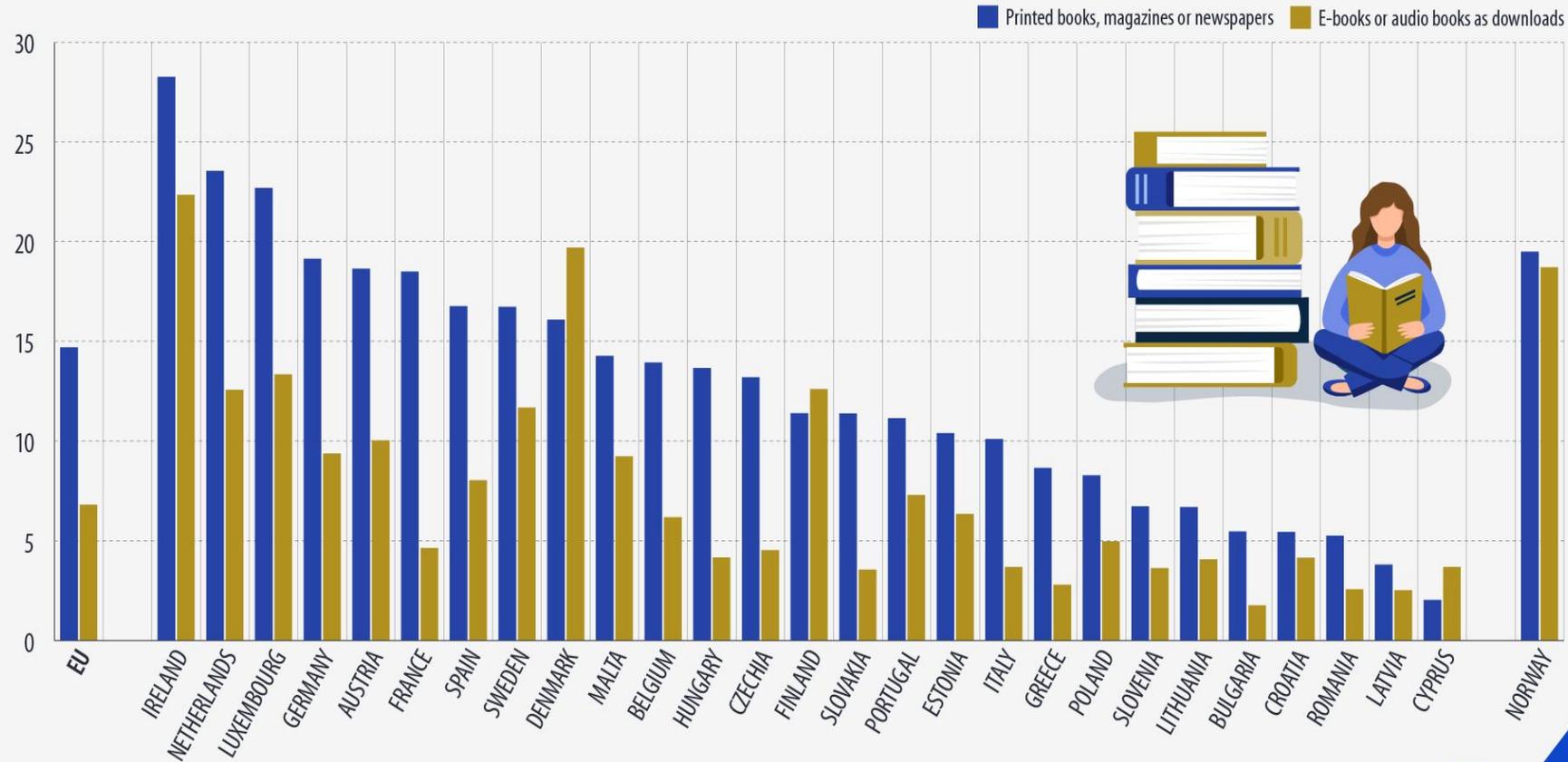


Print books by far largest share

The rise of **audiobooks** (but we are already **losing track**)

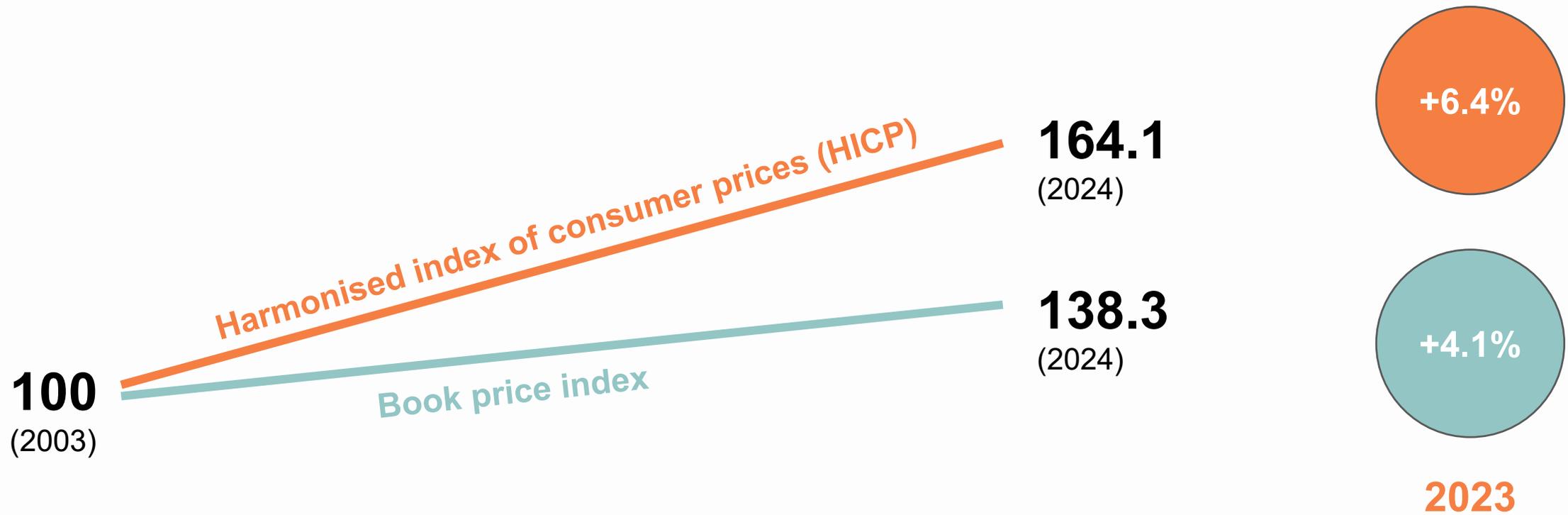
Online purchases of books and publications, 2024

(% of the population, in 3 months before the survey)



Country ranking based on printed books, magazines or newspapers data in descending order.

Book prices grow below inflation

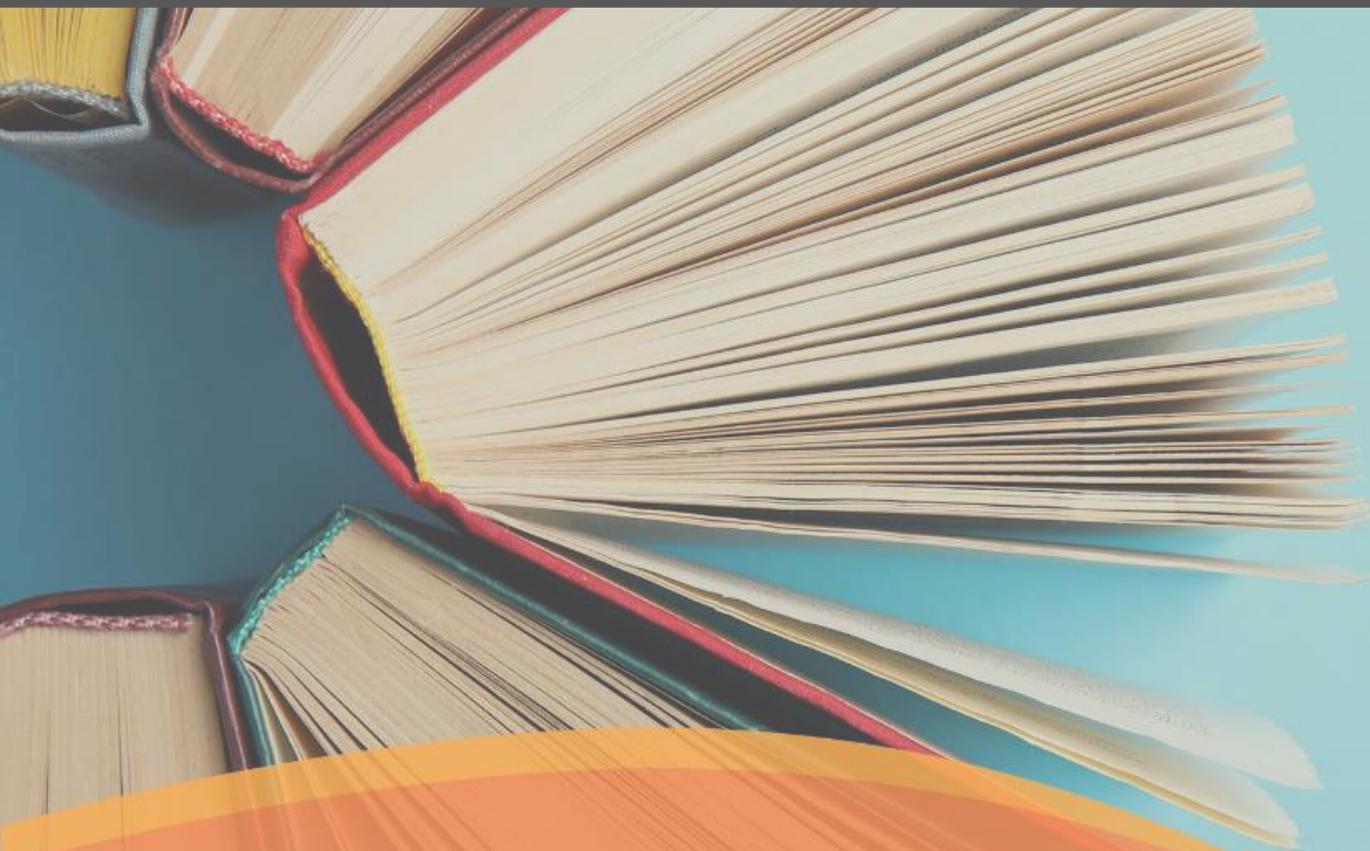


Source: EUROSTAT

- For many years titles up, revenue stagnant
- Prices not keeping up with inflation
- Shift to digital, audio, subscriptions
- The rise of the second-hand market
- The rise of reading in original language (mainly English)



Reading



American students' reading skills drop to record lows

Axios, 29/01/25

Les Français lisent de moins en moins, selon le baromètre 2025 « Les Français et la lecture »

Livres Hebdo, 08/04/25

Calano i lettori e il tempo per la lettura, al Sud il 30% in meno di librerie rispetto alla media

Il Sole 24 Ore, 05/12/25

Report finds 'shocking and dispiriting' fall in children reading for pleasure

The Guardian, 05/11/24

Books sales rise in Germany, but trade frets over declining readers

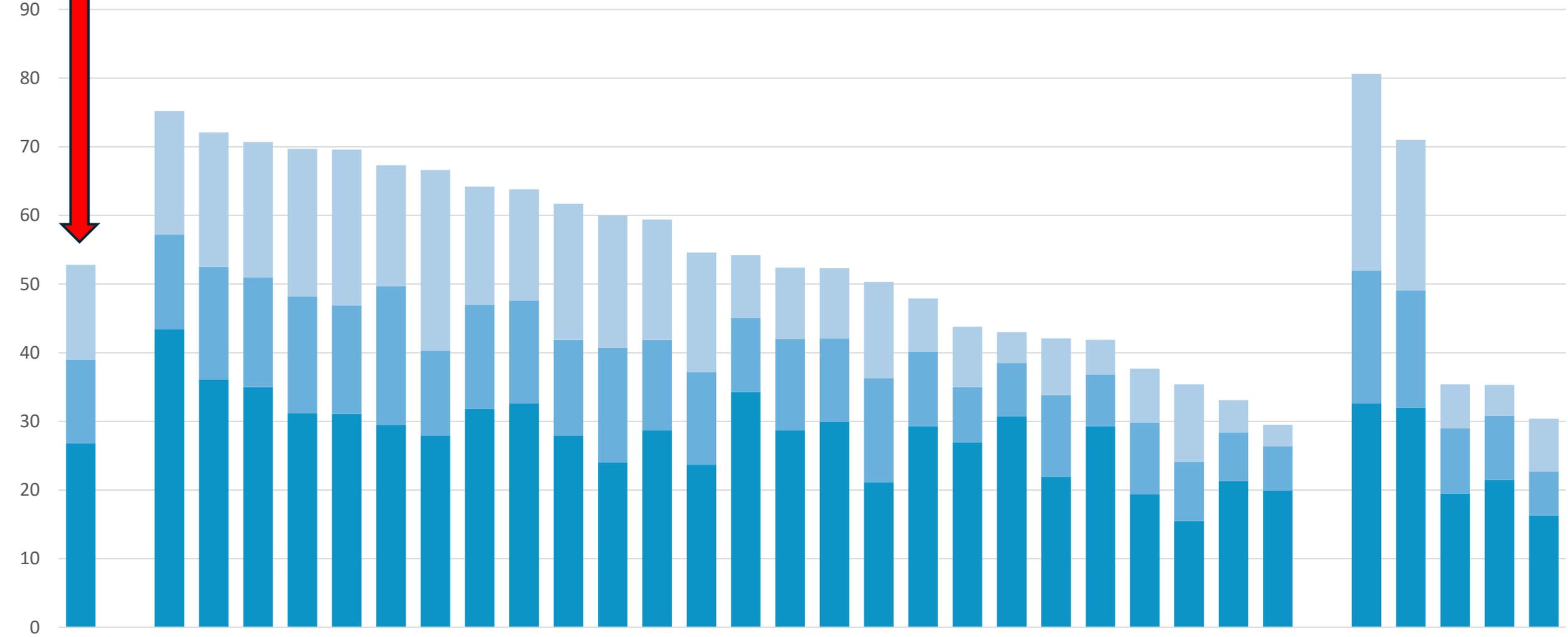
The Bookseller, 08/07/24

A major problem: measuring

Persons reading books in the last 12 months, 2022

(% of people aged 16 and over, by country)

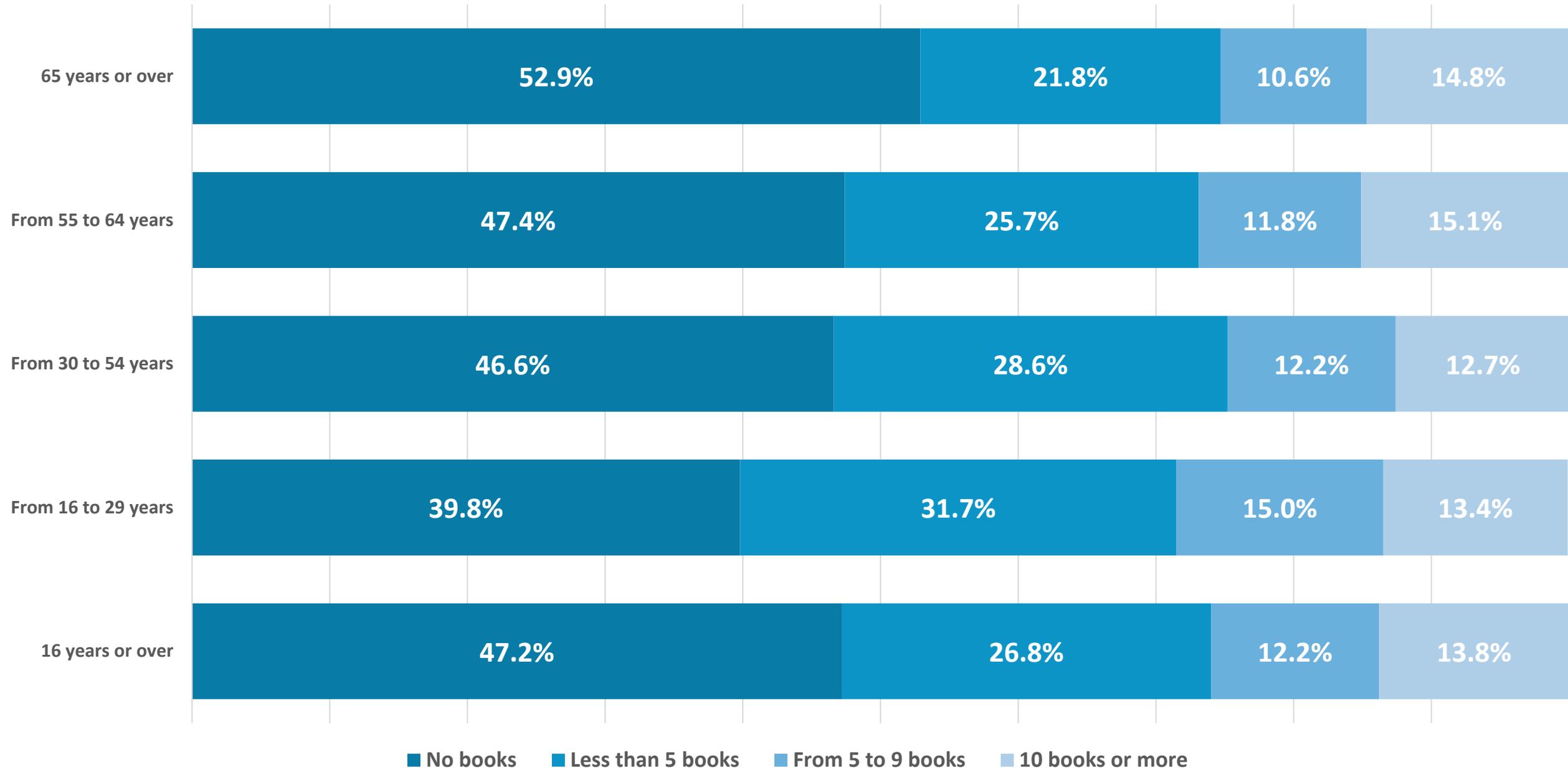
47.2% non-readers

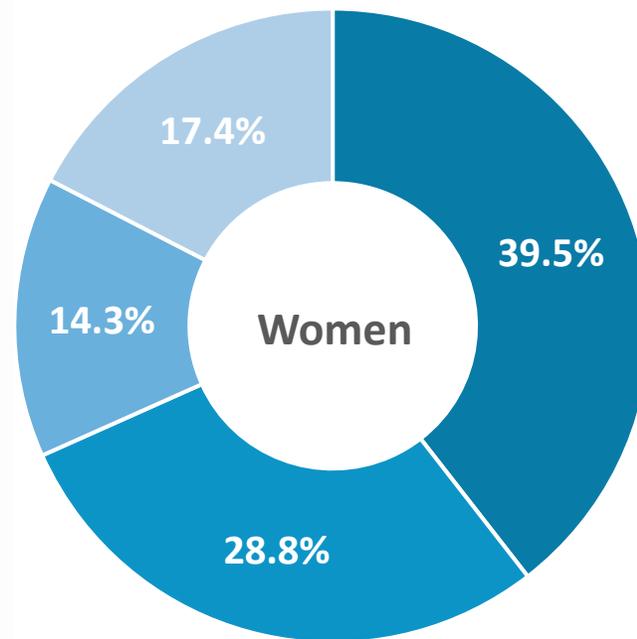
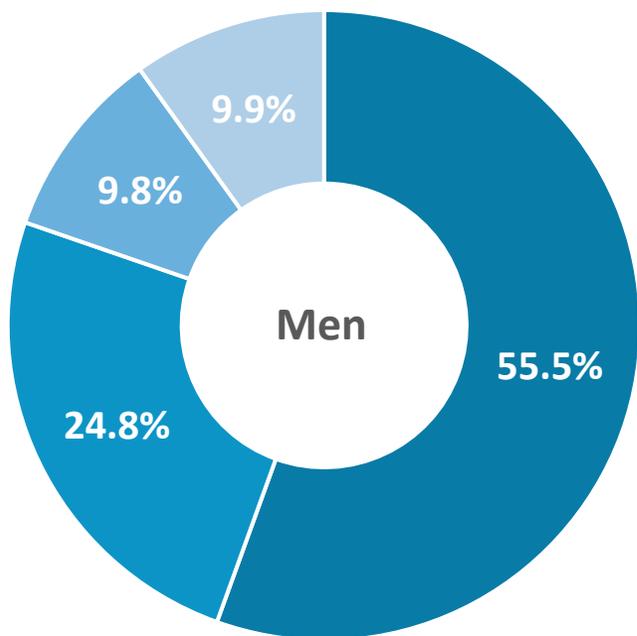


Source: EUROSTAT

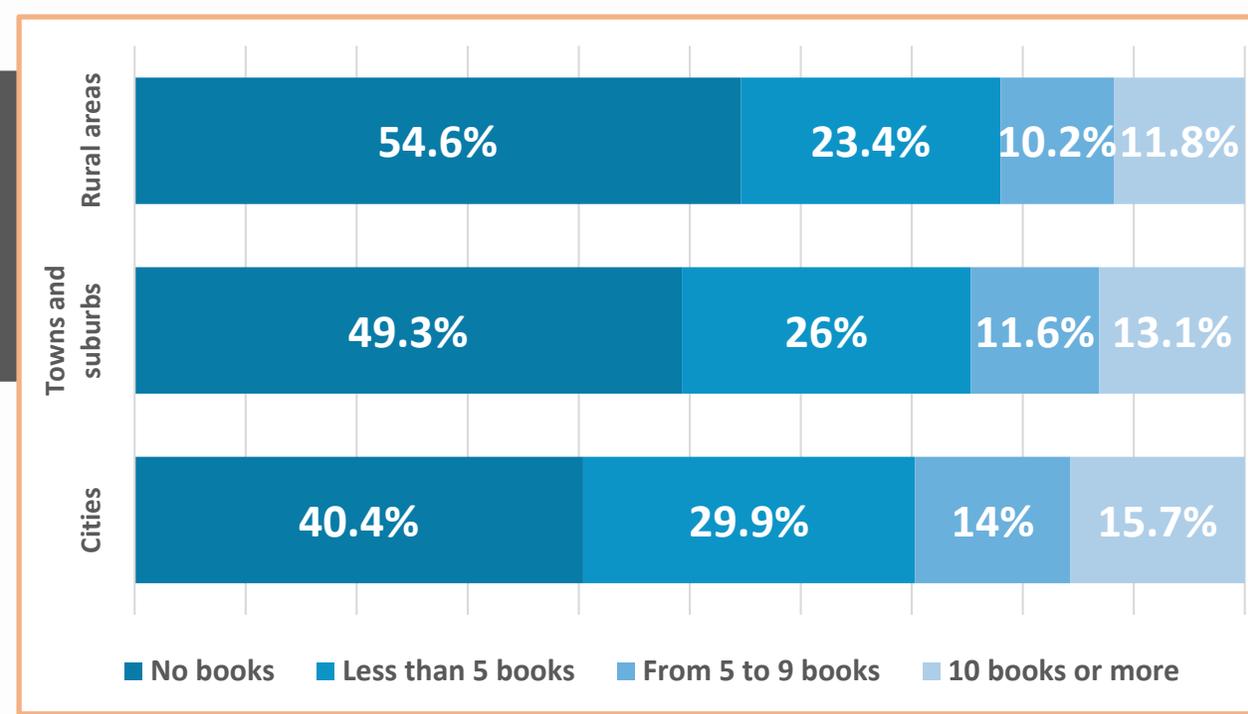
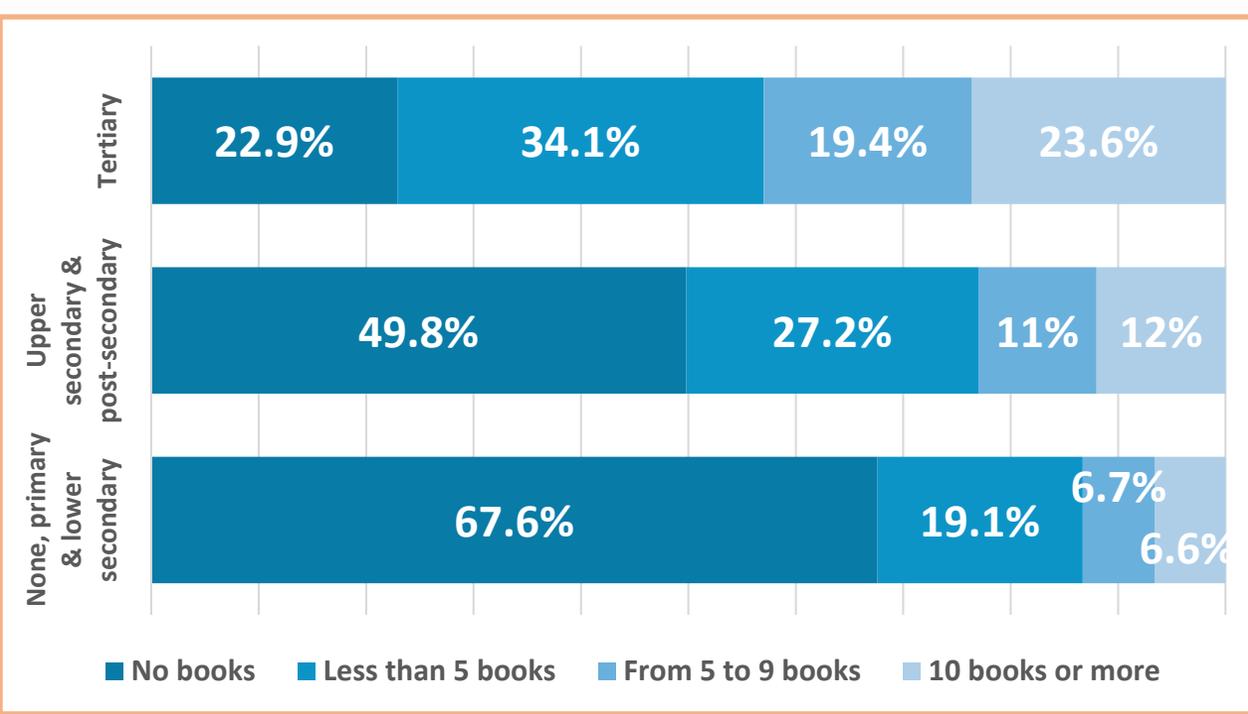
■ Less than 5 books ■ From 5 to 9 books ■ 10 books or more

Persons reading books in the last 12 months, 2022
(% of people aged 16 and over, by age)





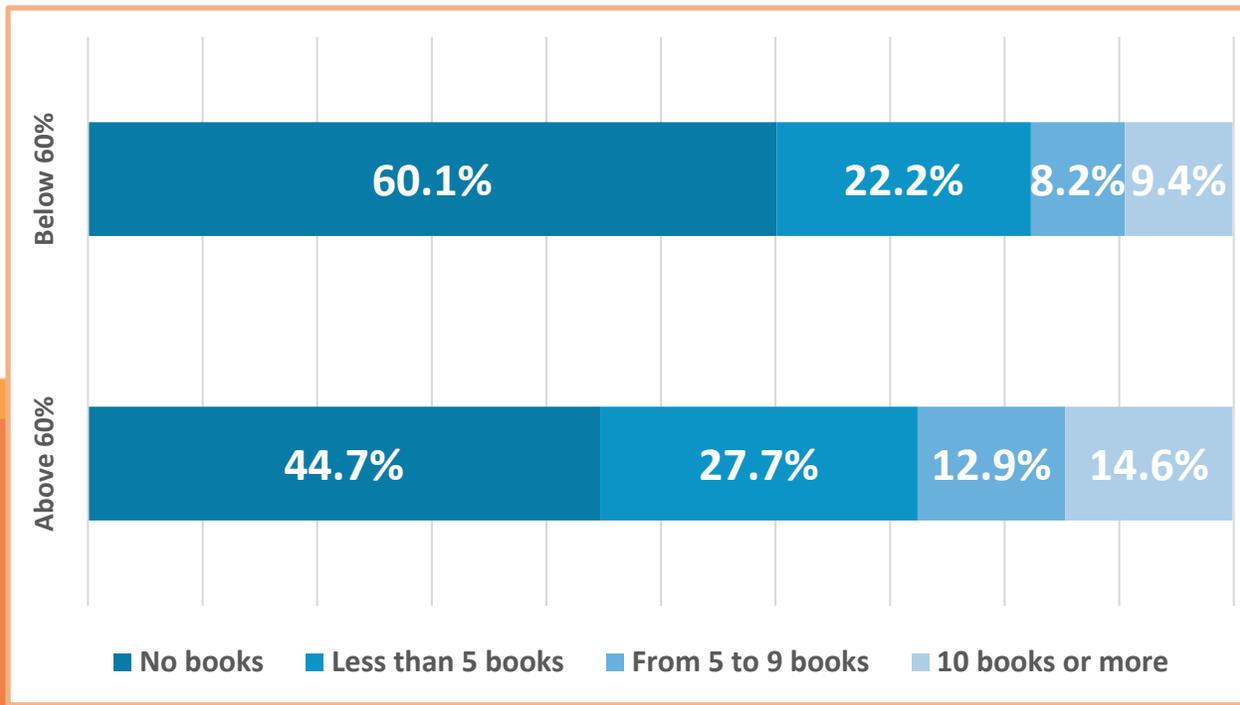
- No books
- Less than 5 books
- From 5 to 9 books
- 10 books or more



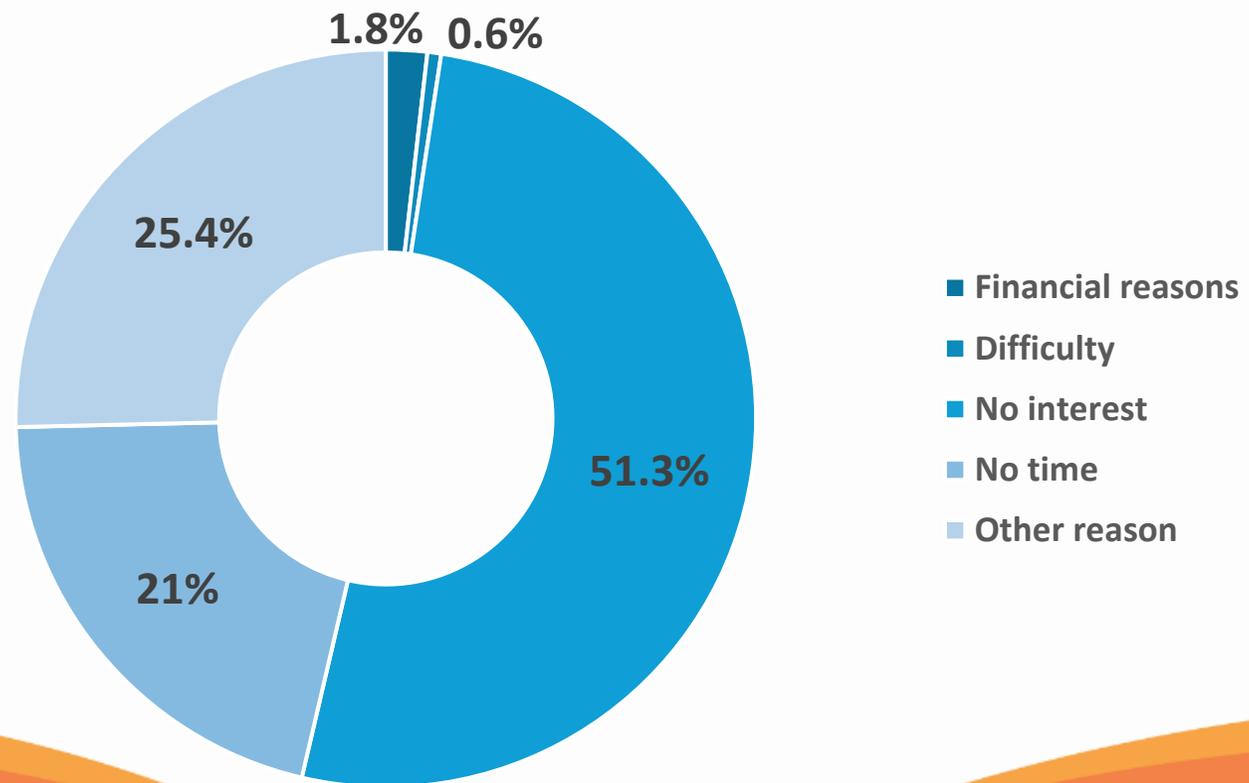
education

urbanisation

risk of poverty



People not reading books: reasons (%)

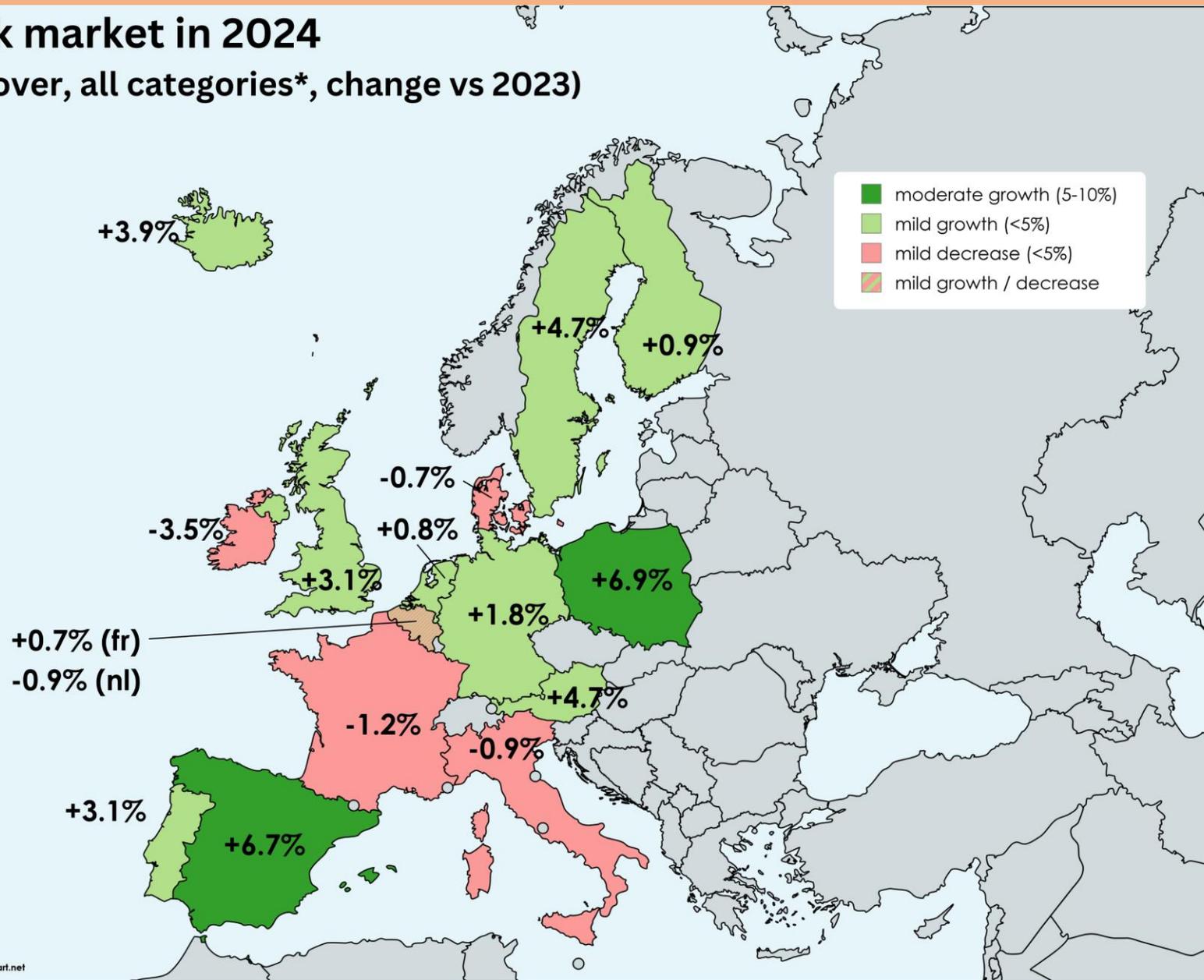




The markets in 2024

The book market in 2024

(total turnover, all categories*, change vs 2023)



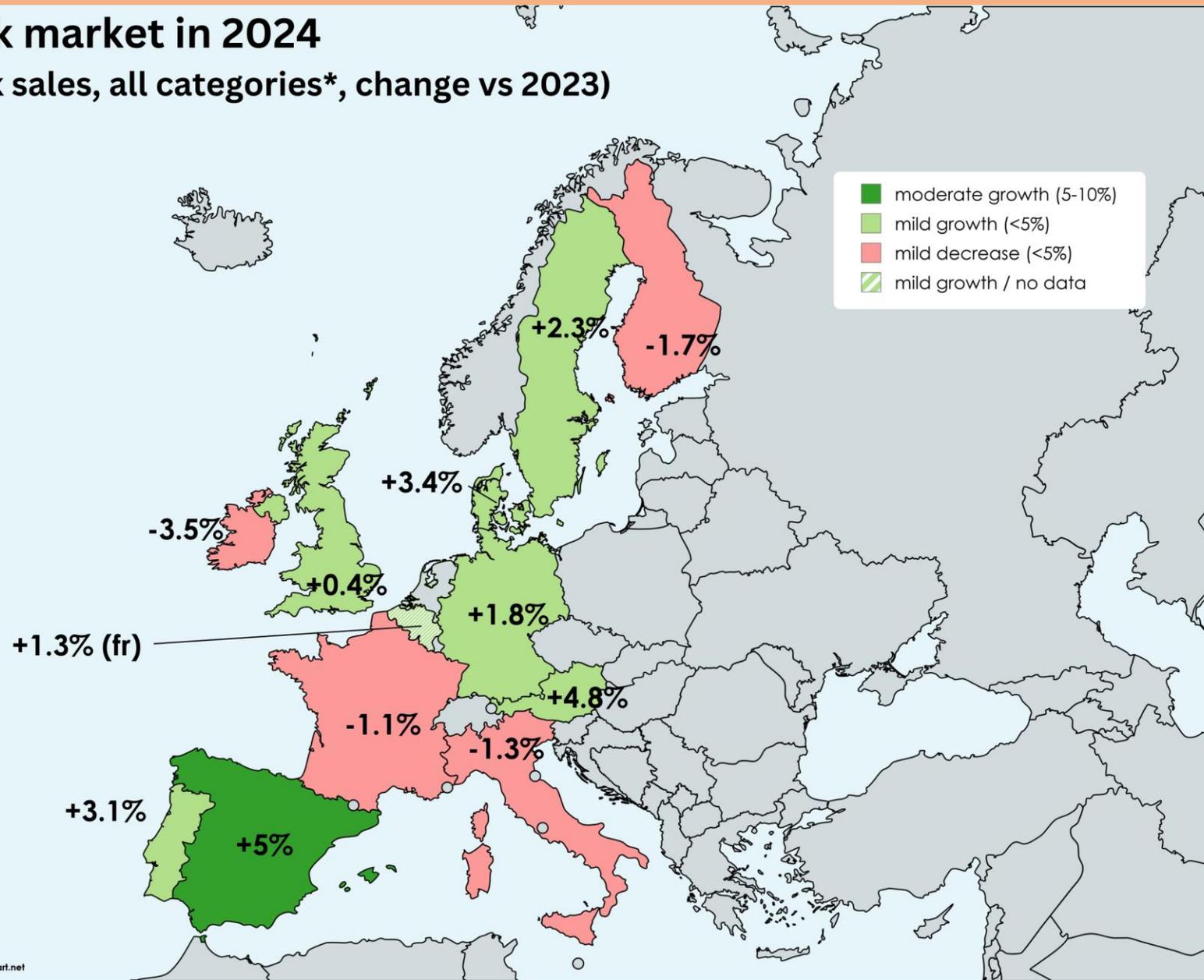
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Total +2.2%

In most cases,
value marginally up, volume down, prices up (increase of costs, inflation)

The book market in 2024

(print book sales, all categories*, change vs 2023)



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Ebooks

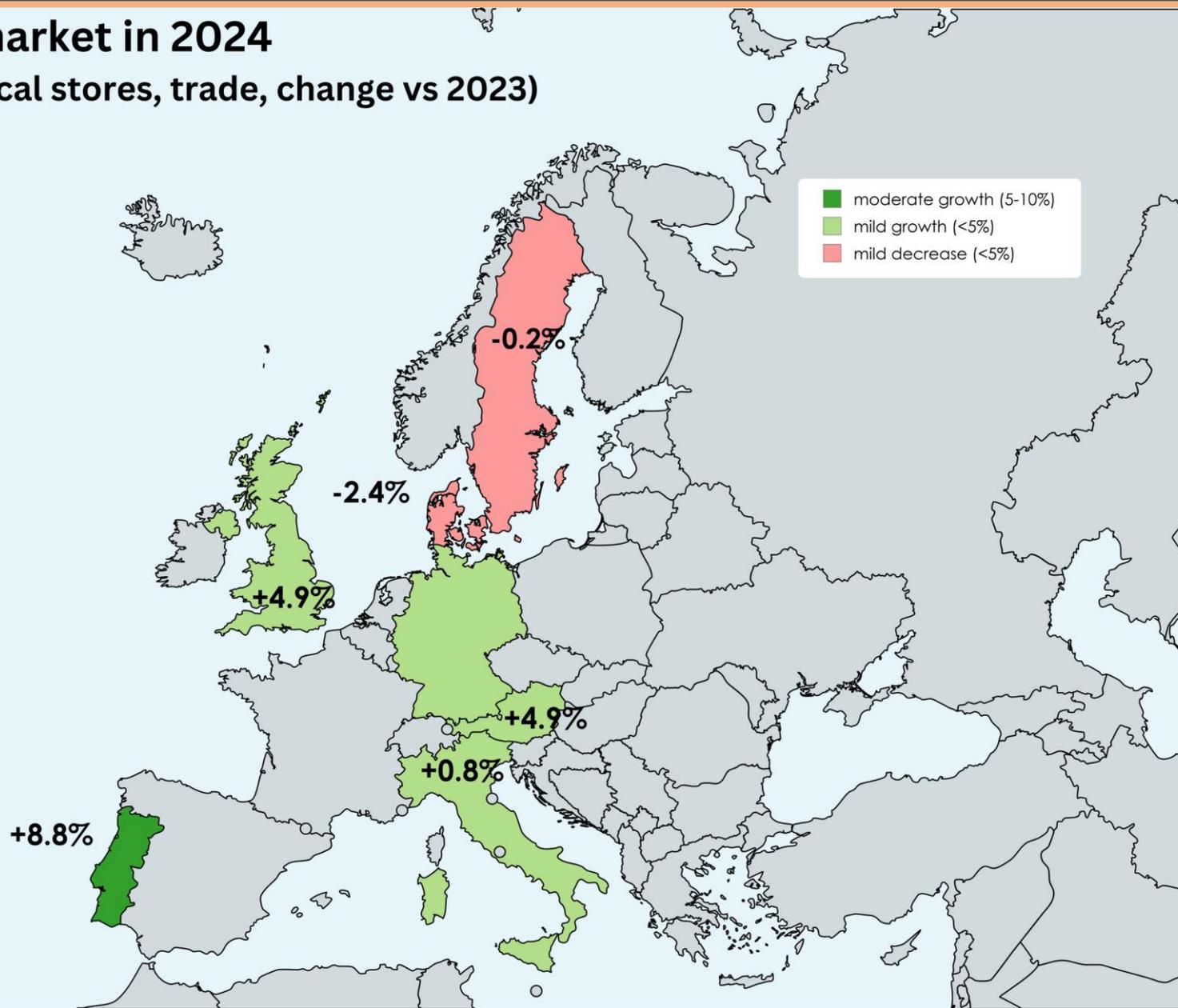
- Denmark -8.8%
- Finland +0.7%
- Germany +2.2%
- Italy +4%
- France +4%
- Sweden +10.4%
- UK +13.3%

Audiobooks

- Denmark -6.3%
- Finland -0.4%
- Germany +7.3%
- Italy +7.1%
- Sweden +8.2%
- UK +16.2%

The book market in 2024

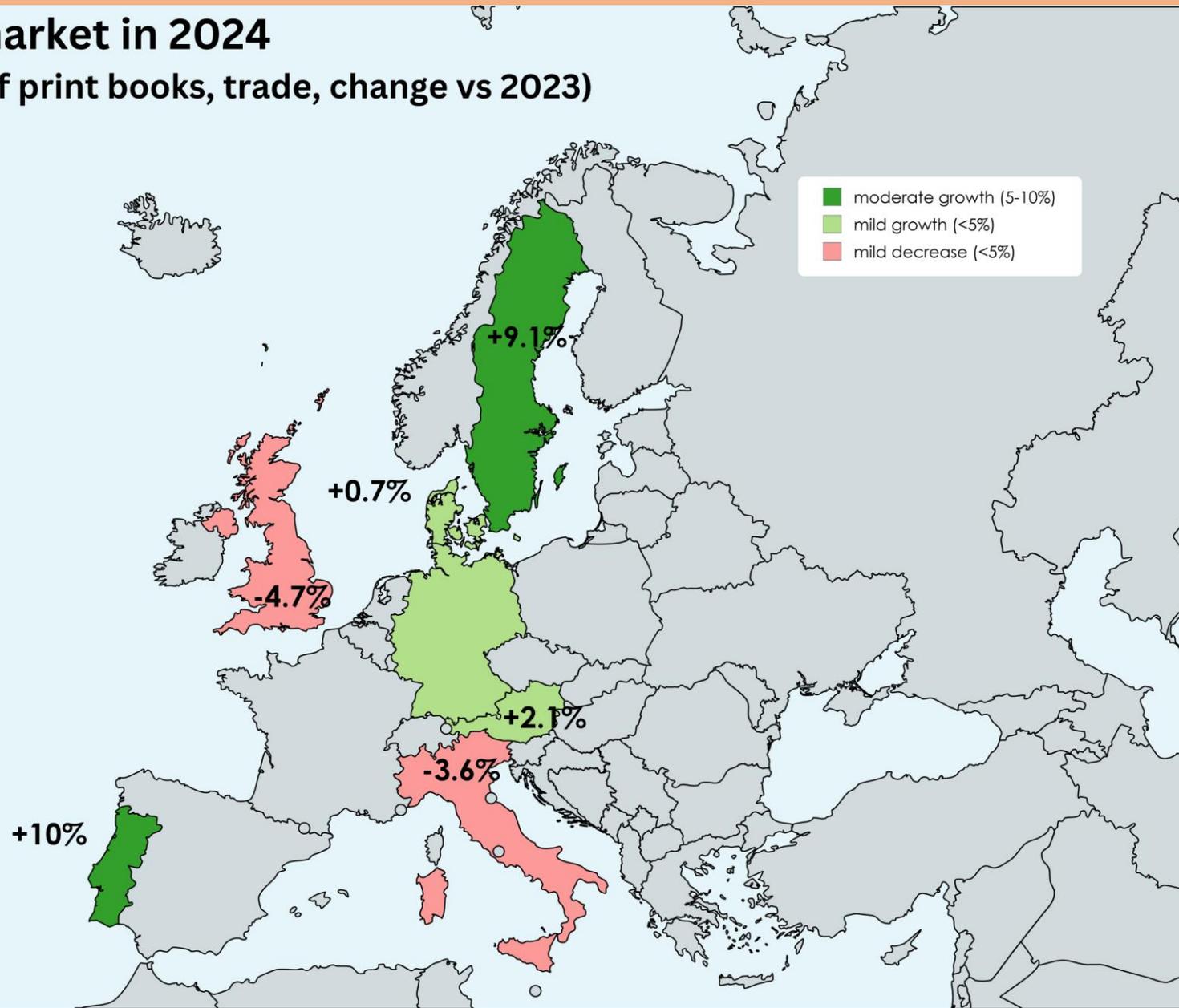
(sales in physical stores, trade, change vs 2023)



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The book market in 2024

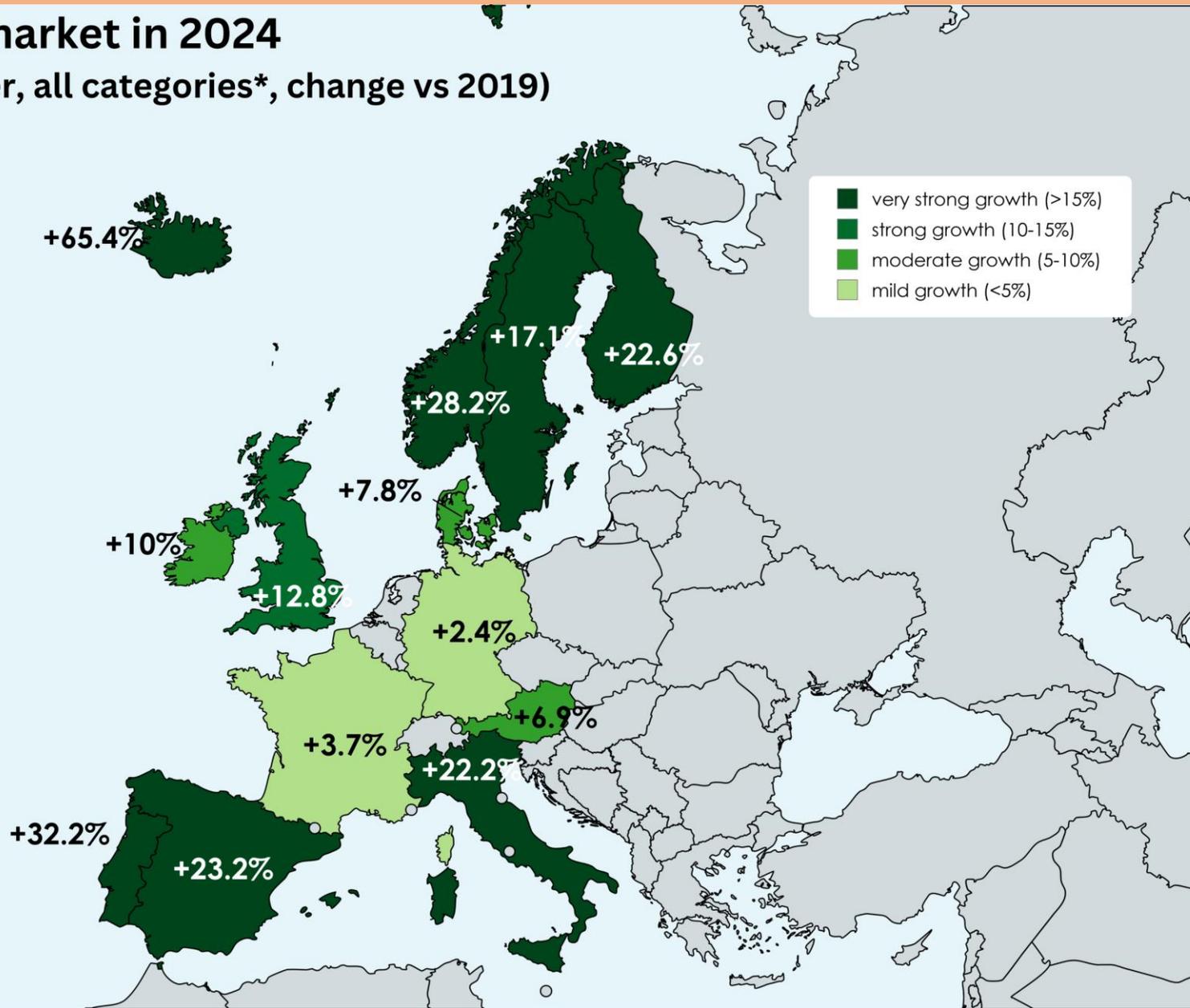
(online sales of print books, trade, change vs 2023)



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The book market in 2024

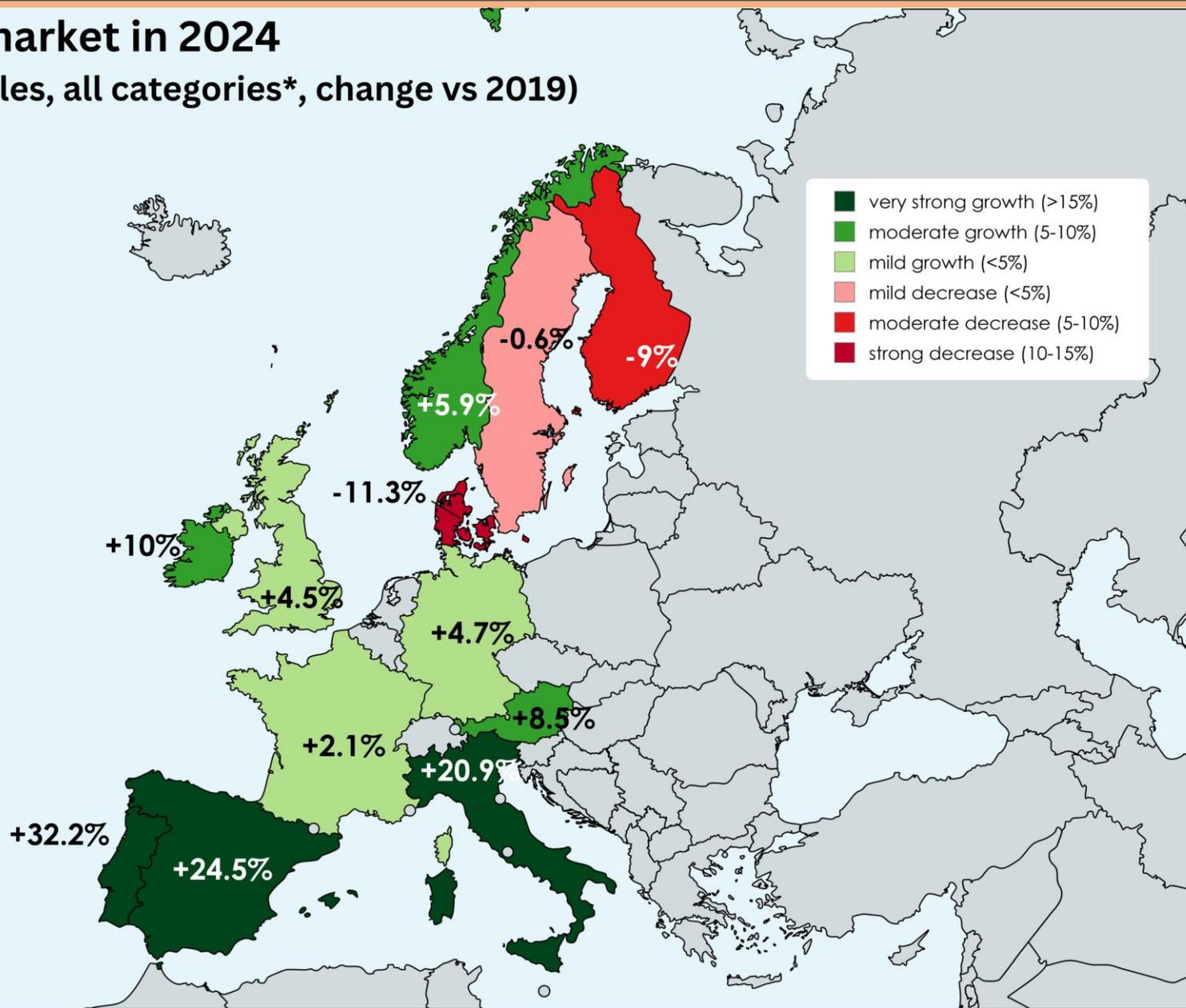
(total turnover, all categories*, change vs 2019)



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The book market in 2024

(print book sales, all categories*, change vs 2019)



Created with mapchart.net

Ebooks

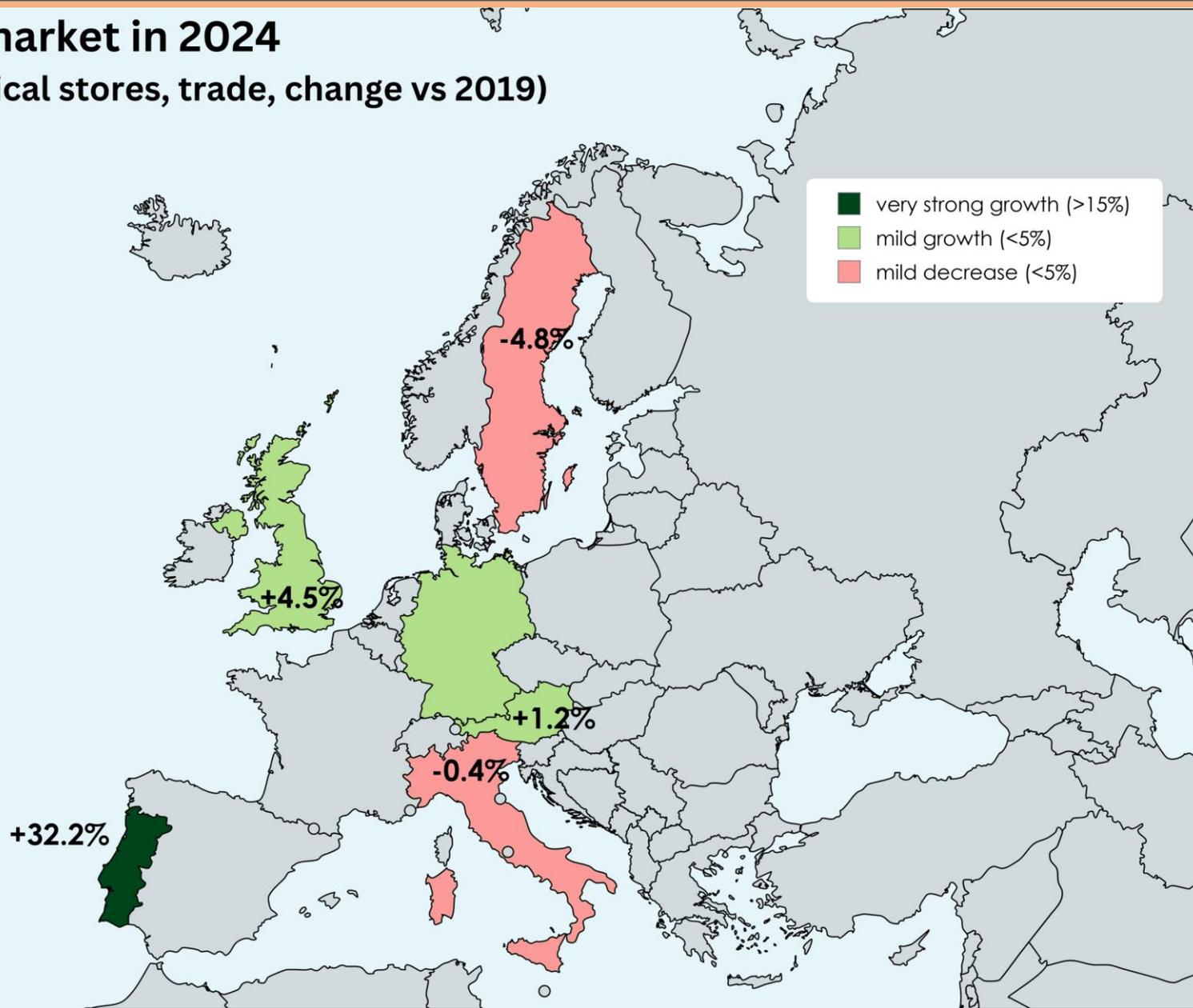
- Finland +100%
- Italy +18.6%
- Sweden +54.1%
- UK +23.7%
- Germany +10.6%

Audiobooks

- Finland +243.8%
- Italy +233.3%
- Sweden +61.9%
- UK +68.9%
- Germany +50%

The book market in 2024

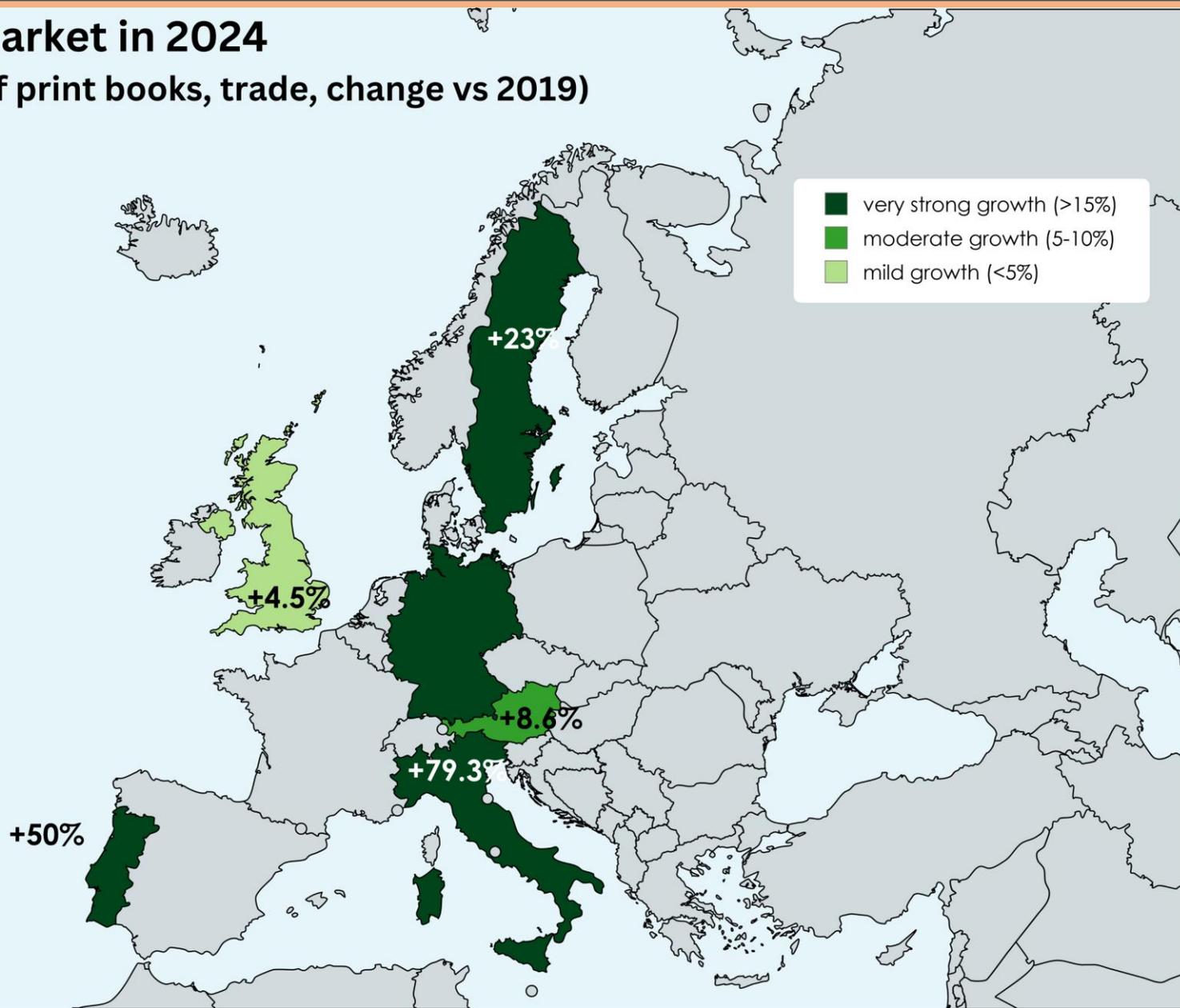
(sales in physical stores, trade, change vs 2019)



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The book market in 2024

(online sales of print books, trade, change vs 2019)



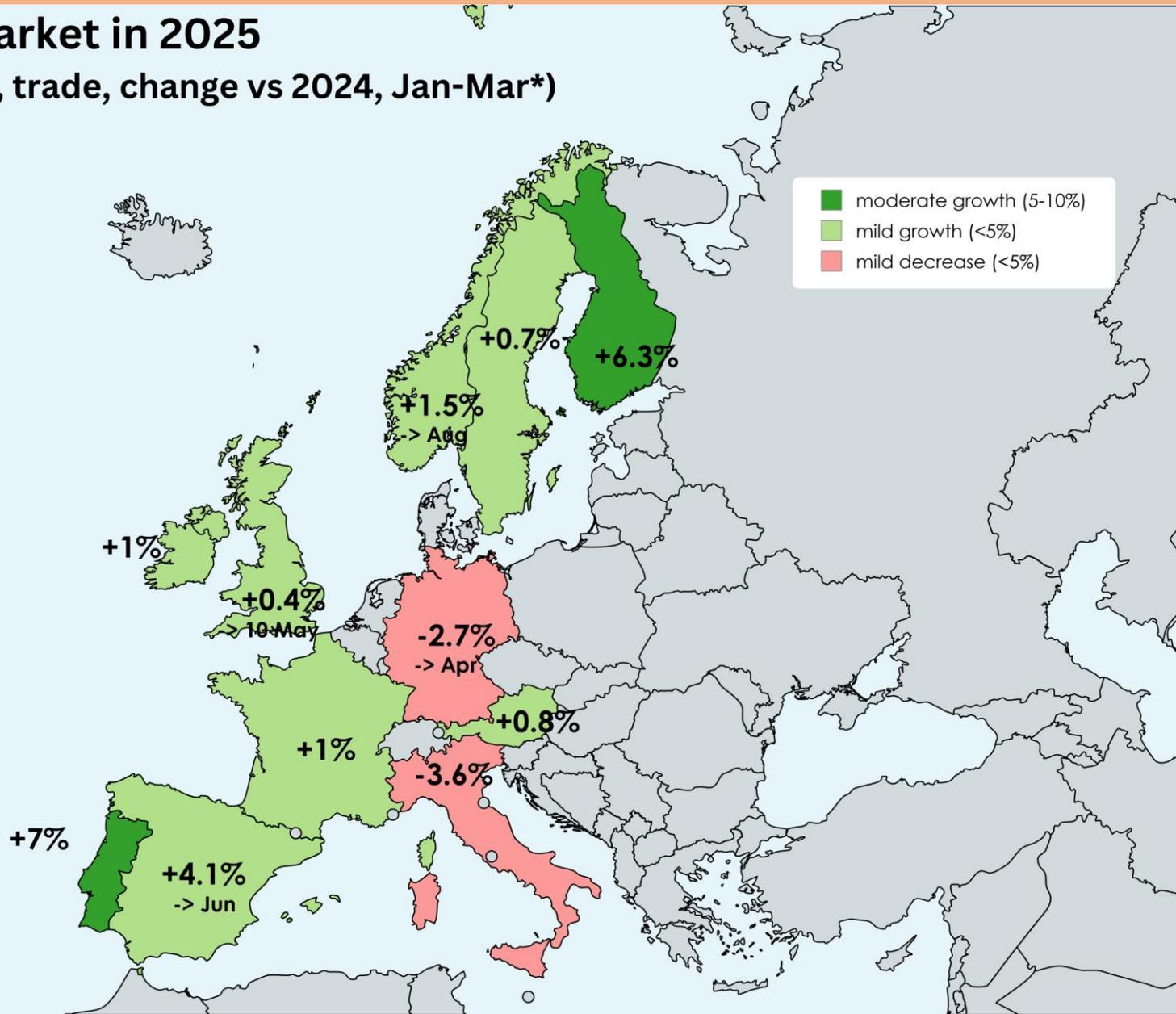
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The markets in 2025

The book market in 2025

(total turnover, trade, change vs 2024, Jan-Mar*)

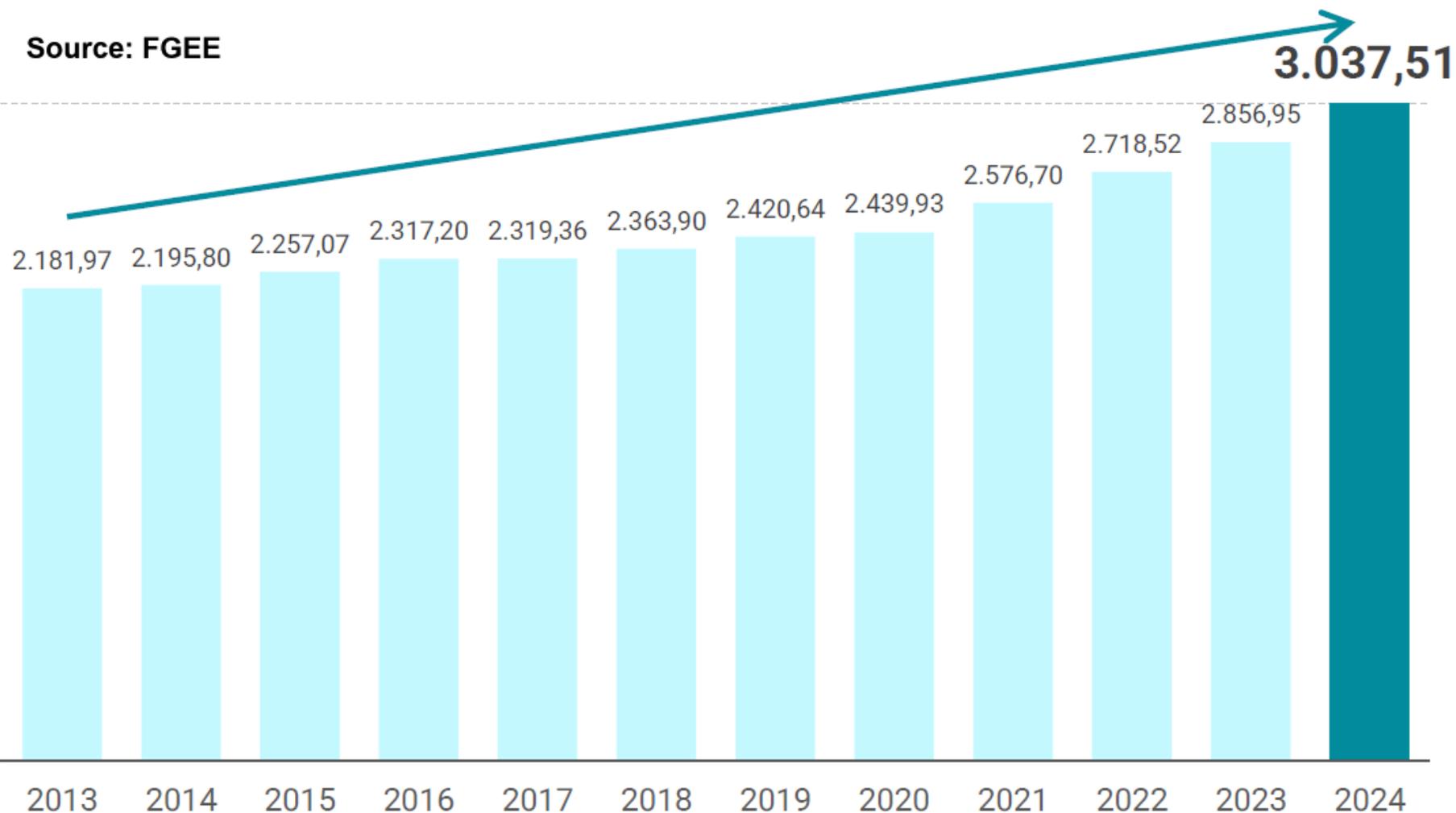


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Same trend as previous few years: **value marginally up, volume down, prices up** (with few exceptions)

Publishers' domestic turnover (million €, mkt value) - Spain, 2013-24

Source: FGEE



S1 2025: +4.1%

The only European market on a 12-year **growth stretch**

The **Spanish phenomenon?**



THANK YOU! ANY QUESTIONS?
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