

PPRODUCTION AND SALES OF THE BRAZILIAN PUBLISHING SECTOR



BASE YEAR
2020



CBL
Câmara
Brasileira
do Livro



nielsen
.....

PRODUCTION AND SALES OF THE BRAZILIAN EDITORIAL SECTOR

REPORT DEVELOPED BY:



Industry Portrait



Longest-lasting
research in the country
and in Latin America



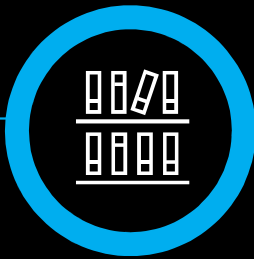
Its characteristic is
greater coverage in
terms of **channel
coverage** and the **entire
market**.



It is an **annual photograph**
of the **book market** that,
added to previous years,
allows us to analyze the
evolution and changes in
the industry.

HIGHLIGHTS

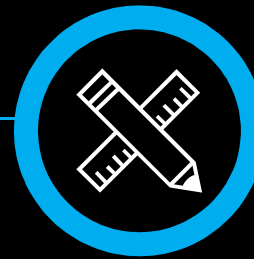
2020



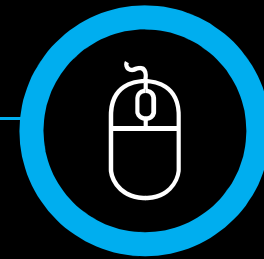
The sector presents a **6% drop** in sales to the market, which means a **10% drop**, considering the **4.52% IPCA** variation in the period.



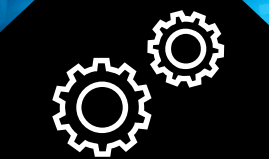
General Works is the only subsector that presents **nominal growth** in sales to the market, recording an increase of **3.8%**.



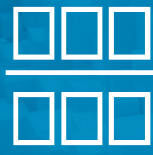
Didactics showed a drop of **11%** in sales to the market, in real terms this reduction is **15%**.



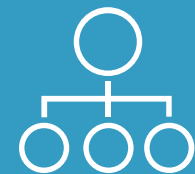
The share of **Exclusively Virtual Bookstores** in publishers' turnover **grew** by **84%**.



PRODUCTION



SALES



CHANNELS



SUBSECTORS



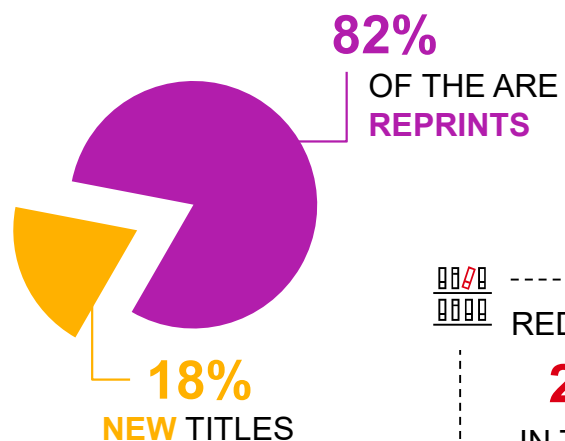
APPENDIX

SECTOR PRODUCTION

IN 2020 THE EDITORIAL SECTOR PRODUCED:



314 MILLION COPIES



REDUCTION OF
20.5%
IN THE PRINT RUN

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

n



46 MIL
TITLES
EDITED



76%
OF THE ARE
REPRINTS



24% NEW
TITLES

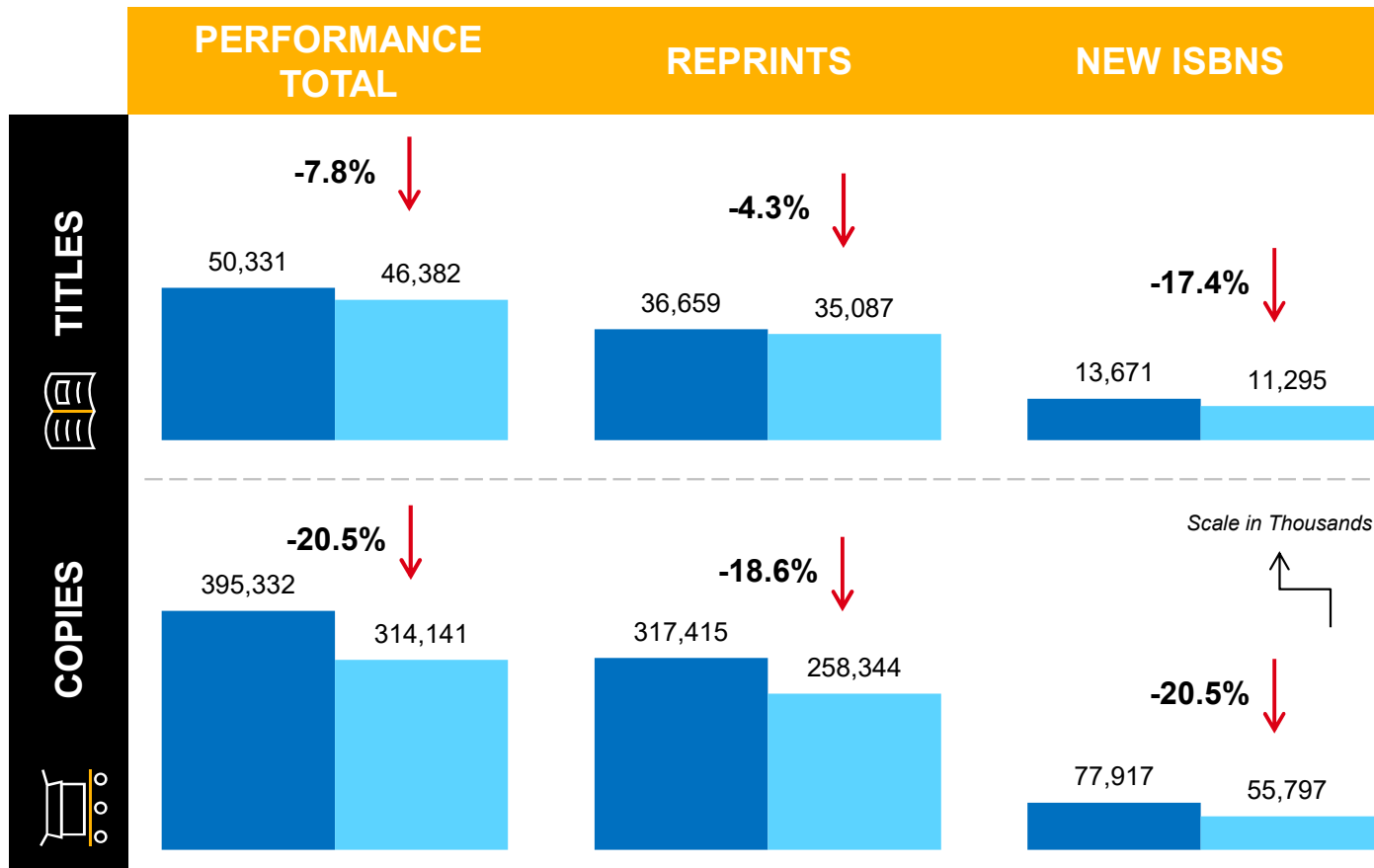


-17.4% NEW TITLES RELEASES

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

SECTOR PRODUCTION

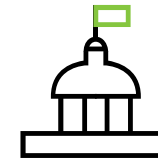
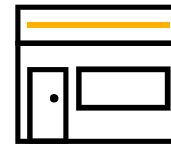
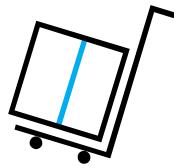
■ 2019 ■ 2020



WHEN WE
COMPARE WITH
THE
PERFORMANCE
OF 2019, WE SEE
THAT 2020
PRESENTS A
REDUCTION OF
THE **TOTAL**
PRODUCTION



SECTOR SALES

**TOTAL****MARKET****GOVERNMENT**

COPIES

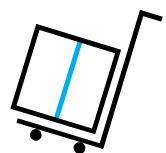
354 MILLIONS**193** MILLIONS**161** MILLIONS

TURNOVER

BRL 5,2 BILLIONS **BRL 3,7** BILLIONS **BRL 1,4** BILLIONS

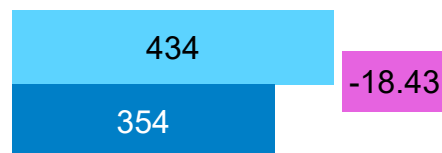
SECTOR SALES

>> COPIES SOLD

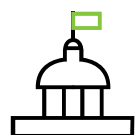
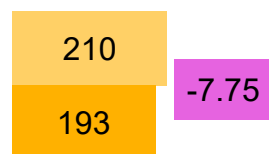


354
MILLIONS

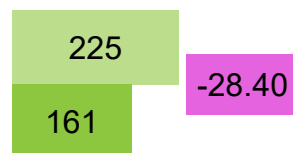
20 x 19 Comparative



193
MILLIONS



161
MILLIONS



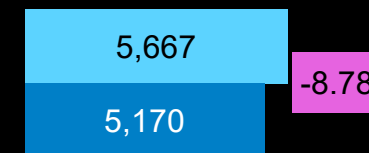
Escala em Milhões

>> TURNOVER

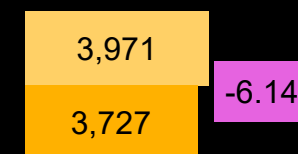
2019 2020 Variation %

20 x 19 Comparative

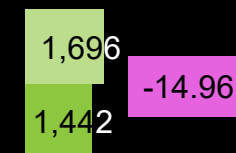
BRL 5,17
BILLIONS



BRL 3,73
BILLIONS



BRL 1,44
BILLIONS

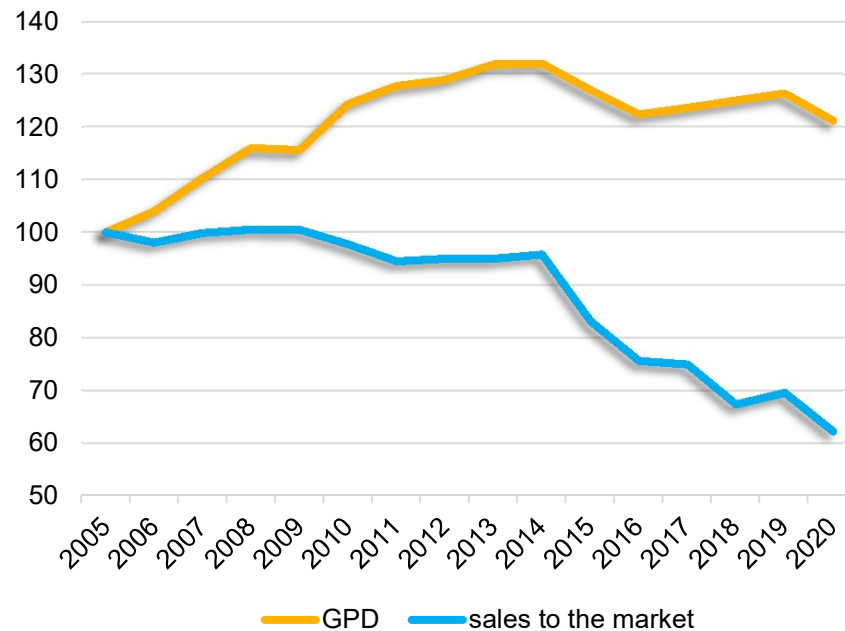


SALES TO THE MARKET



GDP AND SALES TO THE MARKET

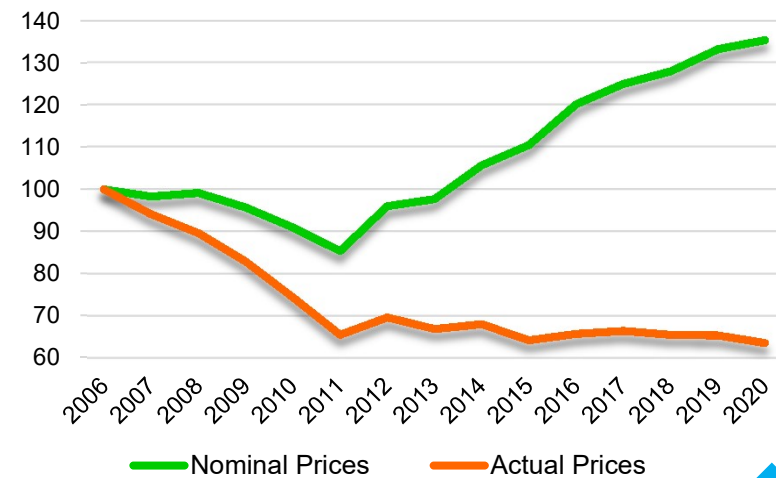
REAL GROWTH
INDEX NUMBER



Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

AVERAGE MARKET PRICES

CURRENT VALUES AND CONSTANT VALUES
INDEX NUMBER



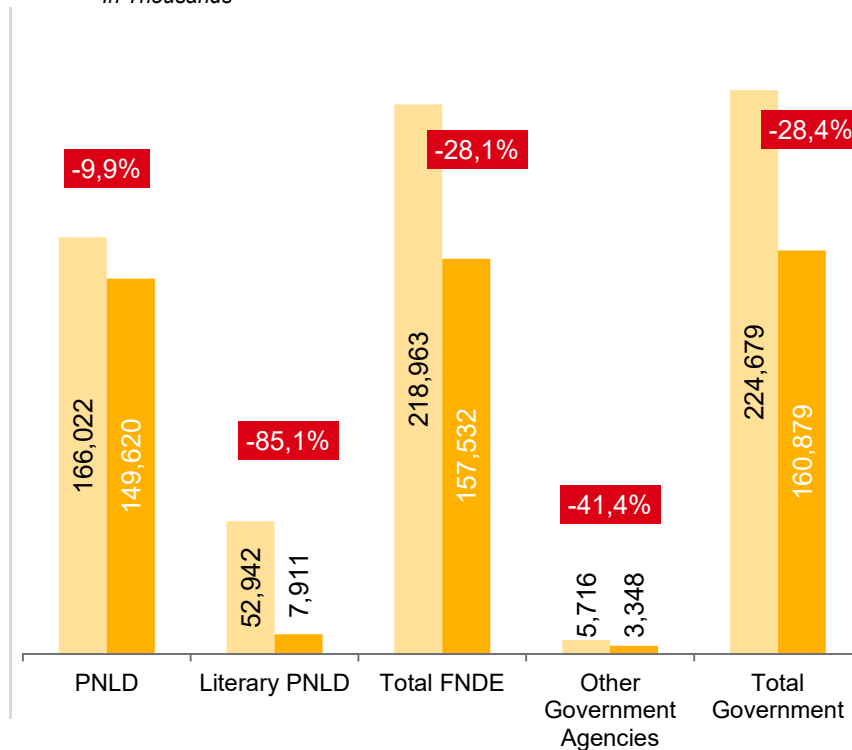
AVERAGE MARKET PRICE

2019	2020	VAR. %
BRL 18,95	BRL 19,28	1.75

SALES TO THE GOVERNMENT

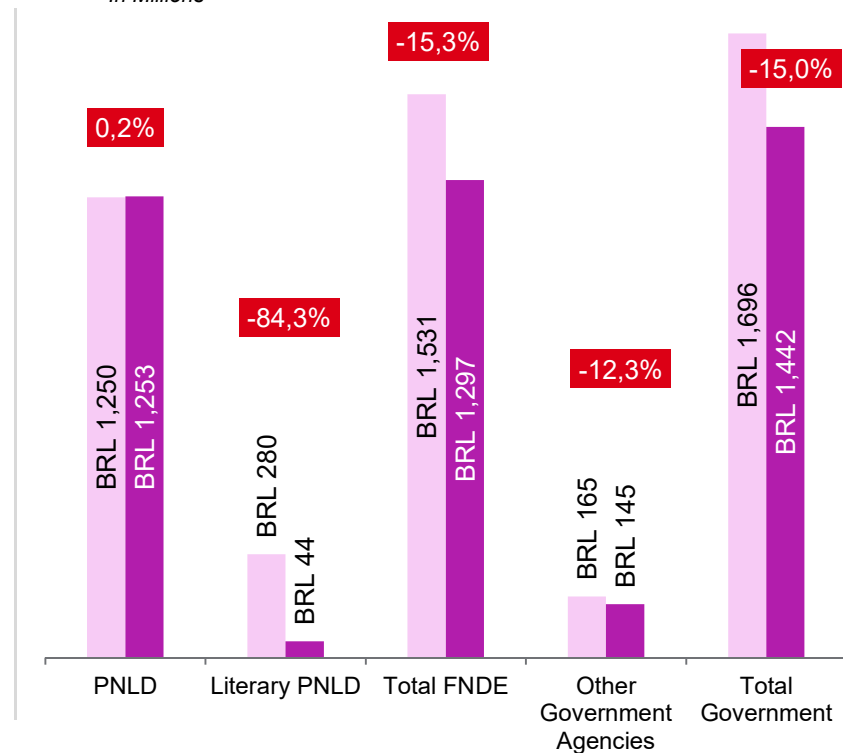
COPIES SOLD

In Thousands



TURNOVER

In Millions



2019 2020 Variation (%)



SECTOR SUMMARY

SECTOR SUMMARY



PRODUCTION

	2019	2020	VAR. %
TITLES	50,331	46,382	-7.85
PRODUCED COPIES	395 Million	314 Million	-20.54



SALES IN COPY

	2019	2020	VAR. %
TOTAL	434 Millions	354 Millions	-18.43
MARKET	209 Millions	193 Millions	-7.75
GOVERNMENT	224 Millions	161 Millions	-28.40



REVENUE (BRL)

	2019	2020	VAR. %
TOTAL	5,67 Billions	5,17 Billions	-8.78
MARKET	3,97 Billions	3,73 Billions	-6.14
GOVERNMENT	1,70 Billion	1,44 Billion	-14.96

-10%

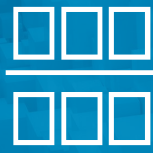
DROP of the market
turnover in **REAL TERMS**

-13%

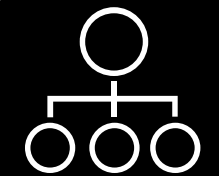
DROP of total turnover
(*MARKET + GOVERNMENT*)
in **REAL TERMS**



PRODUCTION



SALES



CHANNELS



SUBSECTORS



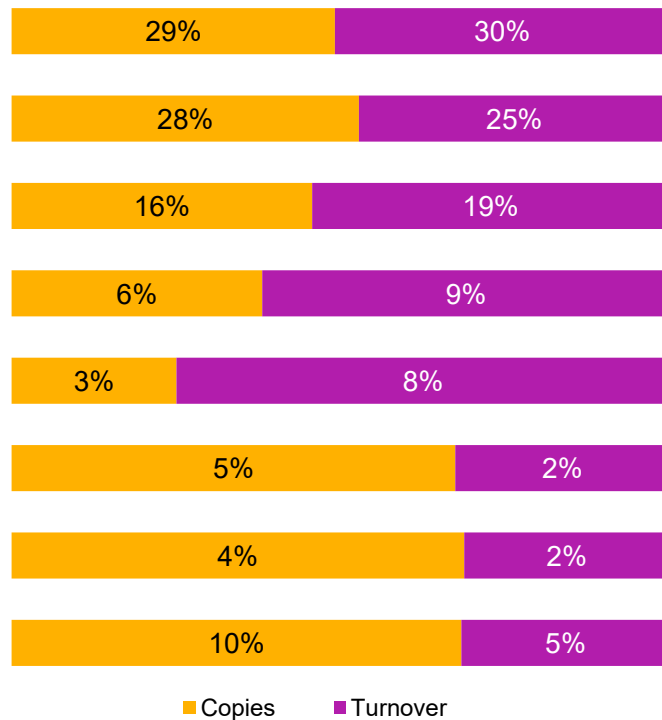
APPENDIX

DISTRIBUTION CHANNELS



SALES BY CHANNEL

Importance

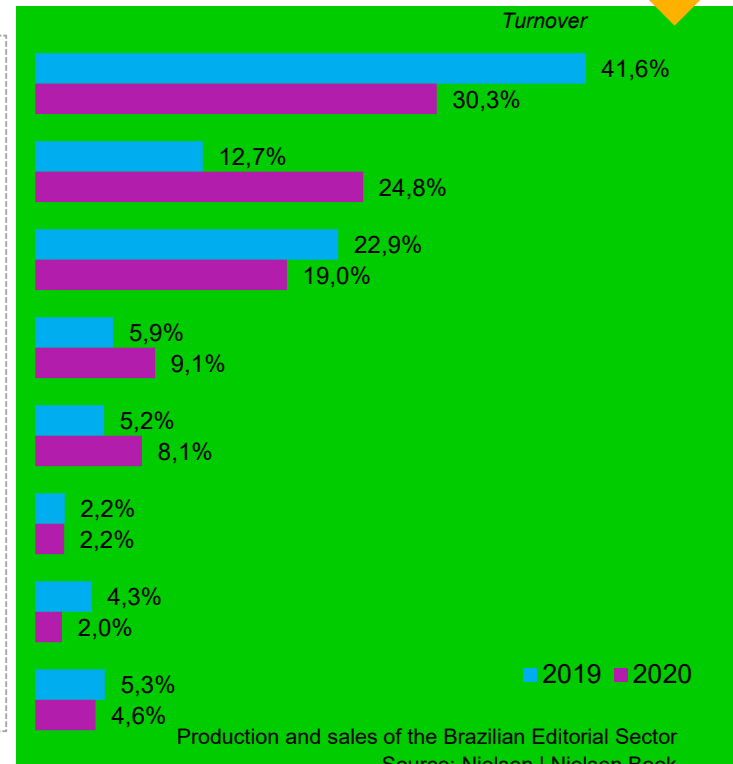


COMPARATIVE PERFORMANCE



Turnover

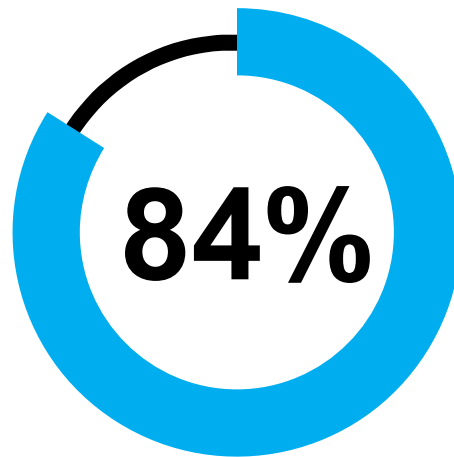
Bookstores
Exclusively Virtual Bookstores
Distributors
Schools and Colleges
Internet – Marketplace
Churches and Temples
Door-to-door and Catalog
Others



Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

DISTRIBUTION CHANNEL

BEST PERFORMANCES

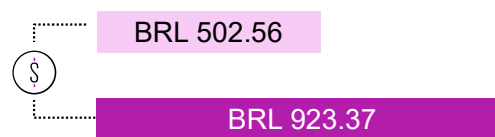


It is the growth in the participation of **EXCLUSIVELY VIRTUAL** bookstores in PUBLISHERS' REVENUE

COPIES SOLD



TURNOVER In Millions



Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

2019 2020

2019 2020 Variation (%)

PARTICIPATION IN REVENUE

In Millions

SCHOOLS AND COLLEGES

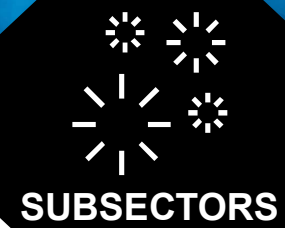
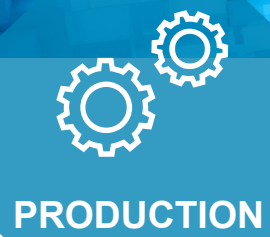


INTERNET – MARKETPLACE



CLUBE DO LIVRO [Book Club]



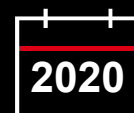


SUBSECTORS – DIDACTICS



AVERAGE MARKET PRICE

2019	2020	VAR. %
BRL 33,6	BRL 34,4	2.4



VAR. %

PRODUCTION



TITLES

12,369

12,273

-0.8

COPIES PRODUCED

202,039

172,715

-14.5

In Thousands

TURNOVER



In Millions

TOTAL

2,857

2,646

-7.4

MARKET

1,422

1,267

-10.9

GOVERNMENT

1,435

1,379

-3.9

COPIES SOLD



In Thousands

TOTAL

221,882

190,008

-14.4

MARKET

42,324

36,847

-12.9

GOVERNMENT

179,558

153,161

-14.7

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



REAL BEHAVIOR



-15%

SALES TO
THE
MARKET



-11%

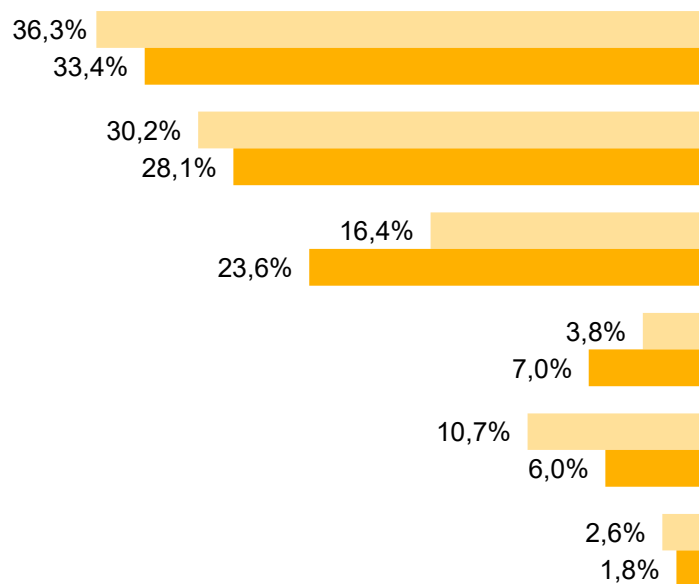
TOTAL **SALES**
(MARKET +
GOVERNMENT)

DISTRIBUTION CHANNELS DIDACTICS



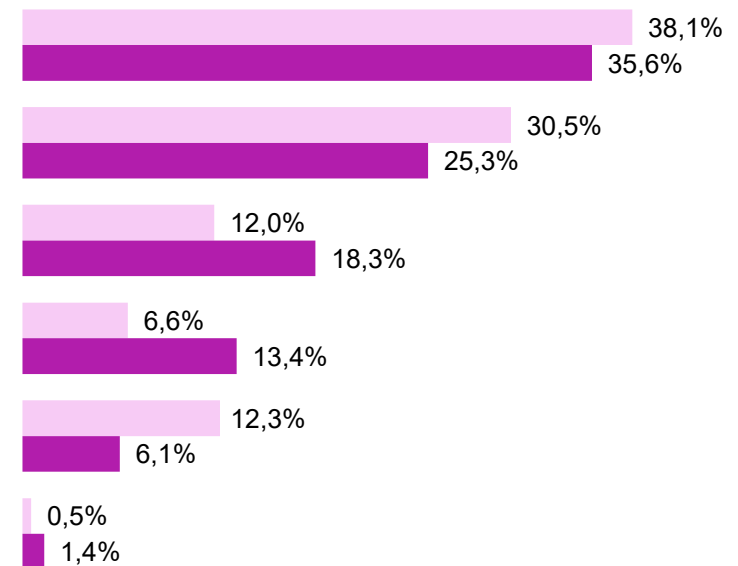
COPIES SOLD

Importance



TURNOVER

Importance



2019 2020

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

SUBSECTORS – OBRAS GERAIS



AVERAGE MARKET PRICE

2019	2020	VAR. %
BRL 13.7	BRL 14.4	4.9

2019

2020

VAR. %

PRODUCTION



TITLES

21,300

21,599

1.4

COPIES
PRODUCED

110,228

80,581

-26.9

In Thousands

TURNOVER



In Millions

TOTAL

1,443

1,323

-8.3

MARKET

1,222

1,269

3.8

GOVERNMENT

220

54

-75.6

COPIES
SOLD

In Thousands



TOTAL

126,863

94,718

-25.3

MARKET

89,045

88,081

-1.1

GOVERNMENT

37,818

6,637

-82.5

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



REAL BEHAVIOR



-1%

SALES TO
THE
MARKET

-12%

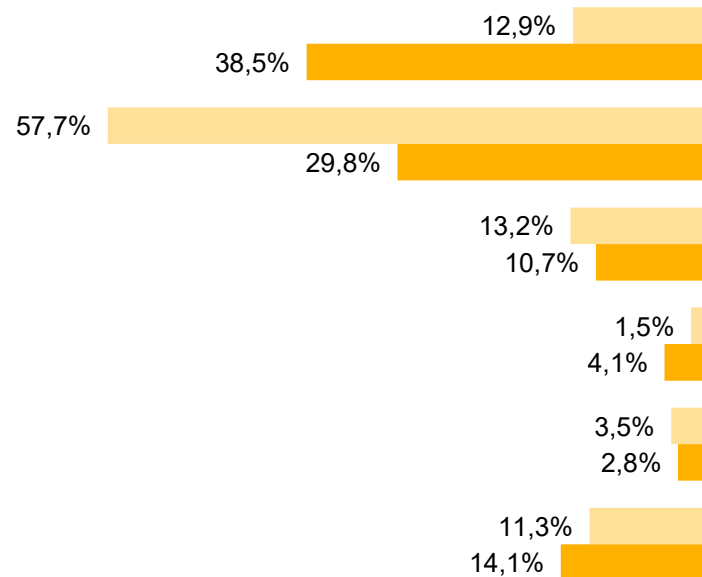
TOTAL **SALES**
(MARKET +
GOVERNMENT)

DISTRIBUTION CHANNELS GENERAL WORKS



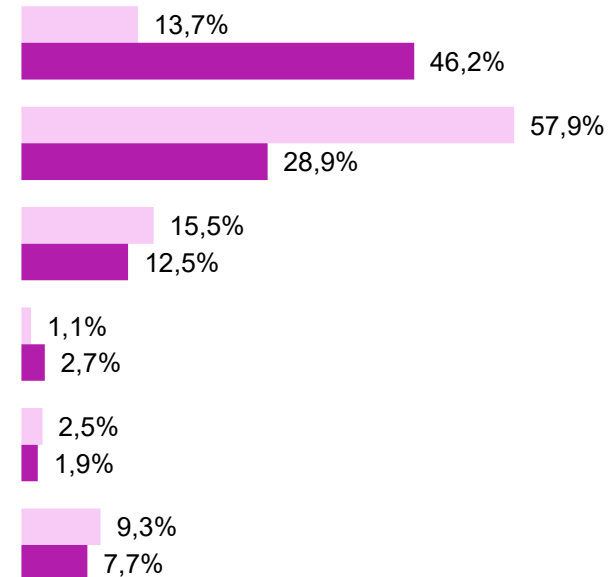
COPIES SOLD

Importance



TURNOVER

Importance



2019 2020

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

SUBSECTORS – RELIGIOUS



AVERAGE MARKET PRICE

2019	2020	VAR. %
BRL 9.8	BRL 9.9	0.5

2019

2020

VAR. %

PRODUCTION



TITLES

6,309

4,976

-21.1

COPIES PRODUCED

62,282

44,963

-27.8

In Thousands

TURNOVER



In Millions

TOTAL

632

542

-14.2

MARKET

624

535

-14.2

GOVERNMENT

7.83

6.97

-

COPIES SOLD



In Thousands

TOTAL

64,901

54,800

-15.6

MARKET

63,410

54,144

-14.6

GOVERNMENT

1,491

656

-

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



REAL BEHAVIOR



-18%

SALES TO
THE
MARKET



-18%

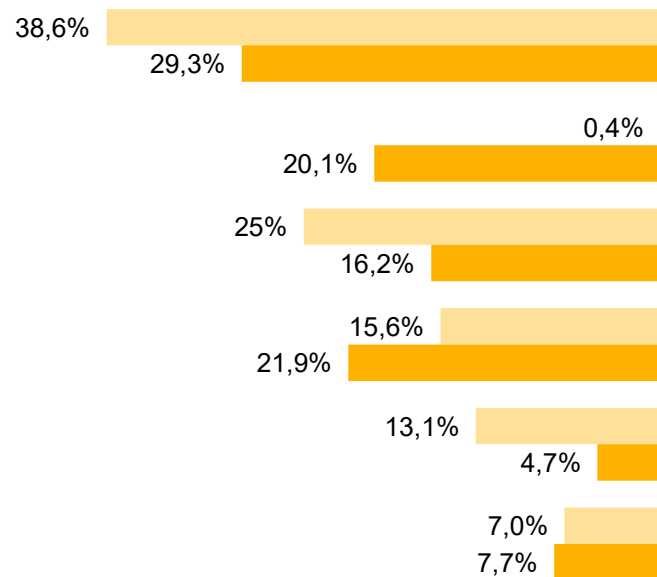
TOTAL **SALES**
(MARKET +
GOVERNMENT)

RELIGIOUS DISTRIBUTION CHANNELS



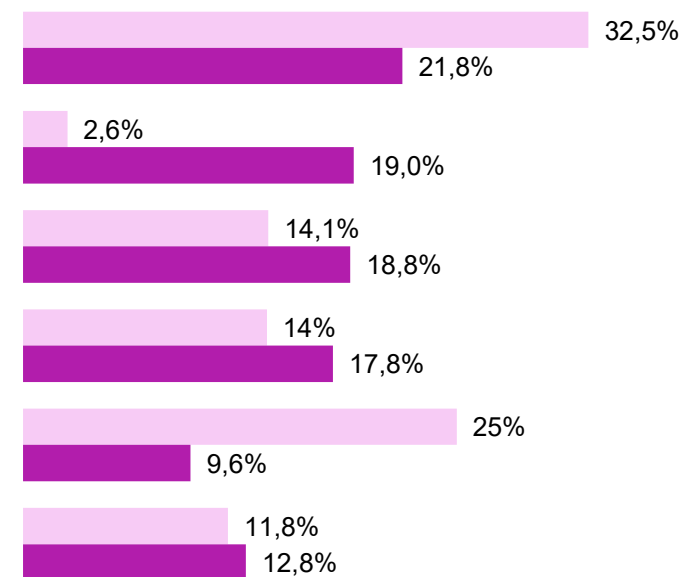
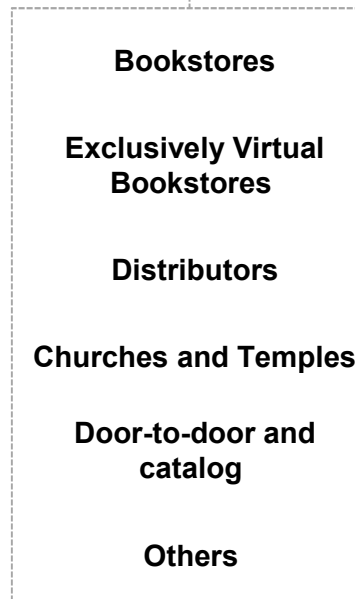
COPIES SOLD

Importance



TURNOVER

Importance



2019 2020

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

SUBSECTORS – CTP



AVERAGE MARKET PRICE

2019	2020	VAR. %
BRL 47.6	BRL 46.1	-3.2

2019

2020

VAR. %

PRODUCTION

TITLES

10,353

7,534

-27.2

COPIES
PRODUCED

20,783

15,882

-23.6

In Thousands

TURNOVER

In Millions

TOTAL

735

658

-10.5

MARKET

702

656

-6.7

GOVERNMENT

33

3

-

COPIES SOLD

In Thousands

TOTAL

20,564

14,643

-28.8

MARKET

14,752

14,218

-3.6

GOVERNMENT

5,812

425

-

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book

n

REAL

BEHAVIOR



-11%

SALES TO
THE
MARKET

-14%

TOTAL **SALES**
(MARKET +
GOVERNMENT)

DISTRIBUTION CHANNELS

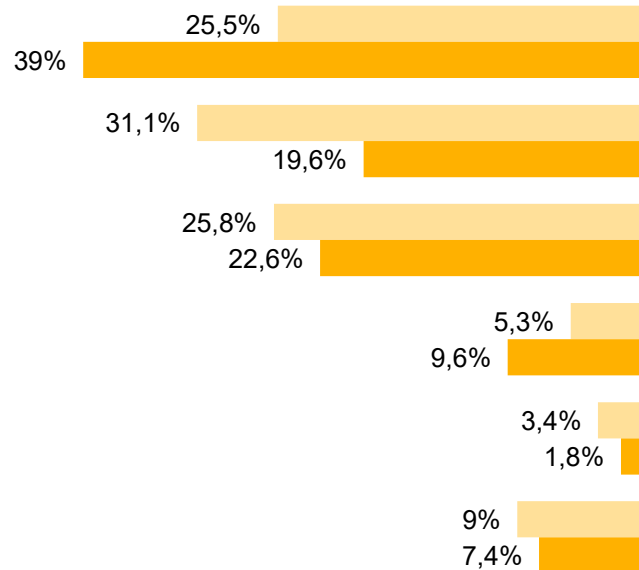


CTP



COPIES SOLD

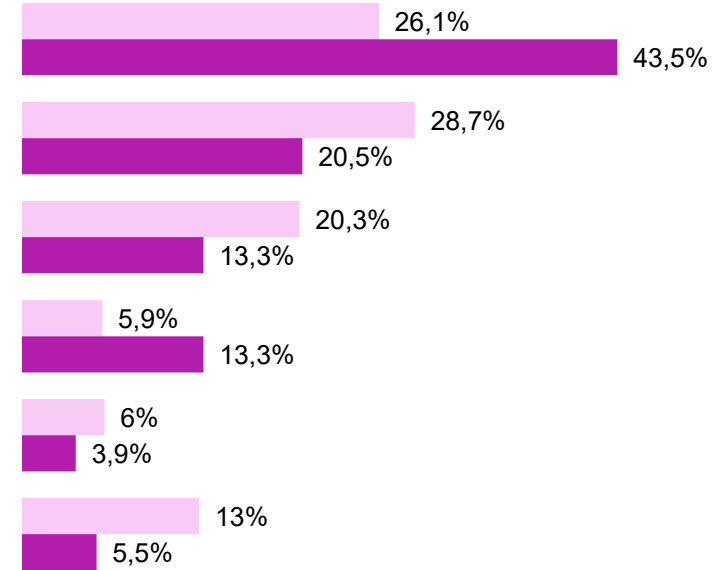
Importance



TURNOVER



Importance



2019 2020

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



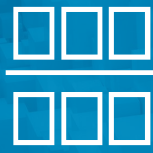
THANK YOU!

n

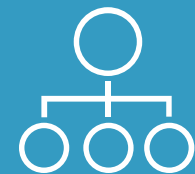




PRODUCTION



SALES



CHANNELS



SUBSECTORS



APPENDIX

METHODOLOGY

ABOUT THE STUDY

Research carried out by Nielsen Book and coordinated by the National Union of Book Publishers (SNEL) and the Brazilian Book Chamber (CBL).

COLLECT

The information collection process is carried out by completing an online questionnaire, sent by Nielsen to publishers in the country.

QUESTIONNAIRE

The questions in the questionnaire refer to the production and sales made by publishers, both to the market and to the government and all their divisions: edited titles, produced copies, production by subject area, sold copies, sales, distribution channels etc. It is also through the questionnaire that the publisher's subsector is defined, which is determined by the company's turnover. For example, a publisher that earns most of its turnover from the sale of textbooks declares itself a textbook publisher.

The study divides the publishing industry into four subsectors:

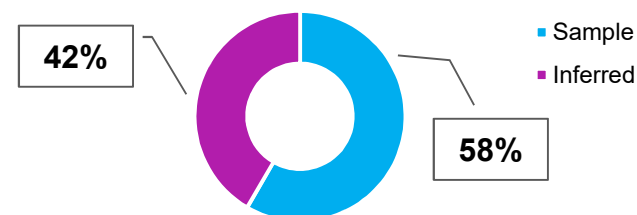
- Didactics
- General Works
- Religious
- CTP – Scientific, Technical and Professional.

GOVERNMENT

Data referring to sales to the government are taken from the publishers and also from FNDE, the federal government agency responsible for carrying out these purchases.

SAMPLE

The sample is formed by paired publishers, that is, publishers who answered the questionnaire in the current year and who also did so in the previous year. In 2020, the Sample was 58% in turnover terms.



INFERENCE

Based on the data collected and the variations observed in the previous year, the statistical inference process is applied to reach the values referring to the entire market.

REAL DATA

All data in real terms are calculated according to IBGE's IPCA. In 2020, the IPCA registered a variation of 4.52%.

PRODUCTION

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



EDITED TITLES AND PRODUCED COPIES

	TITLES			COPIES		
	2019	2020	VAR. %	2019	2020	VAR. %
NEW ISBN NUMBERS	13,671	11,295	-17.38	77,916,547	55,797,154	-28.39
REPRINT	36,659	35,087	-4.29	317,415,435	258,343,870	-18.61
TOTAL	50,331	46,382	-7.85	395,331,981	314,141,024	-20.54

EDITED TITLES AND PRODUCED COPIES BY SUBSECTOR

(NEW ISBNs + REPRINT)

	TITLES			COPIES		
	2019	2020	VAR. %	2019	2020	VAR. %
DIDACTICS	12,369	12,273	-0.78	202,038,735	172,715,475	-14.51
GENERAL WORKS	21,300	21,599	1.41	110,228,141	80,581,301	-26.90
RELIGIOUS	6,309	4,976	-21.13	62,282,344	44,962,633	-27.81
CTP	10,353	7,534	-27.23	20,782,761	15,881,614	-23.58
TOTAL	50,331	46,382	-7.85	395,331,981	314,141,024	-20.54

PRODUCTION

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



▶ EDITED TITLES AND PRODUCED COPIES BY SUBSECTOR

(NEW ISBNs)

	TITLES			COPIES		
	2019	2020	VAR. %	2019	2020	VAR. %
DIDACTICS	734	663	-9.67	5,847,456	4,560,276	-22.01
GENERAL WORKS	6,692	6,646	-0.69	53,640,882	38,410,695	-28.39
RELIGIOUS	1,783	1,156	-35.18	14,197,111	9,919,337	-30.13
CTP	4,462	2,831	-36.56	4,231,097	2,906,846	-31.30
TOTAL	13,671	11,295	-17.38	77,916,547	55,797,154	-28.39

THEMATIC

PRODUCTION

2019

	Total Copies	Participation %
Didactics	187,929,771	47.54
Religion	74,109,905	18.75
Adult Literature	22,491,447	9.20
Children's Literature	36,383,887	5.69
Self Help	12,285,719	3.22
Young Literature	12,717,715	3.11
Economy, Administration, Business and Public Administration	7,018,257	1.78
Human and Social Sciences	6,189,362	1.57
Law	5,101,570	1.29
Young Adult Literature	3,791,904	0.96
Psychology and Philosophy	4,028,141	1.02
Biographies	2,970,727	0.75
Medicine, Pharmacy, Public Health and Hygiene	2,302,334	0.58
Education and Pedagogy	1,909,711	0.48
HQs	1,864,636	0.47
Languages and Linguistics	2,145,480	0.54
Arts	1,447,601	0.37
Mathematics, Statistics, Logic and Natural Sciences	1,293,068	0.33
Engineering and Technology	1,050,063	0.27
School Dictionaries and Atlas	984,634	0.18
IT, Computing and Programming	711,078	0.25
Gastronomy and Cooking	919,525	0.23
Architecture and Urbanism	556,546	0.14
Agriculture, Veterinary and Pets	575,978	0.15
PE and Sports	447,192	0.11
Tourism and Pleasure	524,516	0.13
Others	3,581,215	0.91
Total	395,331,981	100

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



2020

	Total Copies	Participation %
Didactics	166,311,749	52.94
Religion	57,899,815	18.43
Adult Literature	18,001,312	5.73
Children's Literature	16,180,434	5.15
Self Help	10,564,227	3.36
Young Literature	9,858,619	3.14
Economy, Administration, Business and Public Administration	5,407,619	1.72
Human and Social Sciences	4,413,209	1.40
Law	3,856,005	1.23
Young Adult Literature	3,677,295	1.17
Psychology and Philosophy	3,205,545	1.02
Biographies	2,093,547	0.67
Medicine, Pharmacy, Public Health and Hygiene	1,611,797	0.51
Education and Pedagogy	1,491,986	0.47
HQs	1,307,475	0.42
Languages and Linguistics	1,163,549	0.37
Arts	938,741	0.30
Mathematics, Statistics, Logic and Natural Sciences	875,118	0.28
Engineering and Technology	836,820	0.27
School Dictionaries and Atlas	470,068	0.15
IT, Computing and Programming	462,151	0.15
Gastronomy and Cooking	395,506	0.13
Architecture and Urbanism	336,464	0.11
Agriculture, Veterinary and Pets	289,901	0.09
PE and Sports	169,244	0.05
Tourism and Pleasure	81,218	0.03
Others	2,241,637	0.71
Total	314,141,024	100

SALES

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



▶ TURNOVER AND COPIES SOLD

(MARKET + GOVERNMENT)

	COPIES SOLD		
	2019	2020	VAR. %
TOTAL	434,210,276	354,168,960	-18.43

	TURNOVER BRL		
	2019	2020	VAR. %
	5,667,135,287	5,169,513,034	-8.78

▶ TURNOVER AND COPIES SOLD - TOTAL PER SUBSECTOR

(MARKET + GOVERNMENT)

	COPIES SOLD		
	2019	2020	VAR. %
DIDACTICS	221,881,978	190,008,115	-14.37
GENERAL WORKS	126,863,081	94,718,302	-25.34
RELIGIOUS	64,901,291	54,799,902	-15.56
CTP	20,563,926	14,642,640	-28.79
TOTAL	434,210,276	354,168,960	-18.43

	TURNOVER BRL		
	2019	2020	VAR. %
	2,856,993,030	2,646,272,837	-7.38
	1,442,677,221	1,322,688,109	-8.32
	631,977,938	542,313,525	-14.19
	735,487,098	658,238,564	-10.50
	5,667,135,287	5,169,513,034	-8.78

SALES

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



▶ TURNOVER AND COPIES SOLD - TOTAL FOR MARKET

	COPIES SOLD		
	2019	2020	VAR. %
DIDACTICS	42,324,416	36,846,860	-12.9
GENERAL WORKS	89,044,974	88,081,345	-1.1
RELIGIOUS	63,409,904	54,143,865	-14.6
CTP	14,751,817	14,217,644	-3.6
TOTAL	209,531,110	193,289,715	-7.75

	TURNOVER BRL		
	2019	2020	VAR. %
DIDACTICS	1,421,969,832	1,267,073,535	-10.9
GENERAL WORKS	1,222,391,591	1,269,011,829	3.81
RELIGIOUS	624,146,970	535,343,533	-14.2
CTP	702,435,564	655,665,258	-6.7
TOTAL	3,970,943,957	3,727,094,155	-6.14

▶ AVERAGE MARKET PRICE (BRL)

	2019	2020	VAR. %
DIDACTICS	33.6	34.4	2.4
GENERAL WORKS	13.7	14.4	4.9
RELIGIOUS	9.8	9.9	0.5
CTP	47.6	46.1	-3.2
TOTAL	19.0	19.3	1.7

CHANNELS

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



SALES CHANNELS 2020

	Copies Sold	Participation %	Turnover	Participation %
Bookstores	56,627,538	29.30	1,130,433,911	30.33
Exclusively virtual bookstores	53,520,361	27.69	923,369,748	24.77
Distributors	30,847,938	15.96	708,636,993	19.01
Schools and Colleges	10,758,572	5.57	337,340,629	9.05
Internet – Marketplace	5,212,159	2.70	300,811,797	8.07
Churches and Temples	8,698,156	4.50	81,065,436	2.18
Door-to-door and catalog	8,597,102	4.45	75,373,850	2.02
Clube do Livro	4,667,749	2.41	36,155,523	0.97
Companies	5,382,205	2.78	29,493,451	0.79
Supermarket	3,288,746	1.70	25,145,590	0.67
Private Libraries	220,495	0.11	16,794,554	0.45
Export	359,214	0.19	11,430,383	0.31
Newsstands	1,020,010	0.53	5,907,698	0.16
Direct Marketing (Direct Mail, Mail)	216,166	0.11	5,616,993	0.15
Book Fairs/Exhibition	132,103	0.07	1,609,451	0.04
Others	3,741,199	1.94	37,908,149	1.02
TOTAL	193,289,715	100	3,727,094,155	100

CHANNELS

SALES CHANNELS TURNOVER

Production and sales of the Brazilian Editorial Sector
Source: Nielsen | Nielsen Book



	2019	Participation %	2020	Participation %
Bookstores	1,652,071,027	41.60	1,130,433,911	30.33
Exclusively virtual bookstores	502,555,010	12.66	923,369,748	24.77
Distributors	908,996,097	22.89	708,636,993	19.01
Schools and Colleges	233,938,193	5.89	337,340,629	9.05
Internet – Marketplace	206,680,436	5.20	300,811,797	8.07
Churches and Temples	88,635,204	2.23	81,065,436	2.18
Door-to-door and catalog	169,269,277	4.26	75,373,850	2.02
Clube do Livro	13,174,209	0.33	36,155,523	0.97
Companies	39,125,896	0.99	29,493,451	0.79
Supermarket	26,628,691	0.67	25,145,590	0.67
Private Libraries	23,726,430	0.60	16,794,554	0.45
Export	10,448,080	0.26	11,430,383	0.31
Newsstands	4,176,588	0.11	5,907,698	0.16
Direct Marketing (Direct Mail, Mail)	26,728,363	0.72	5,616,993	0.15
Book Fairs/Exhibition	28,550,869	0.67	1,609,451	0.04
Others	36,239,585	0.91	37,908,149	1.02
TOTAL	3,970,943,957	100	3,727,094,155	100.00