Book market in Brazil

Frankfurt, 18.10.2016
Brazilian Book Market in Numbers

2015

Revenue

R$ 5.231 Mio.
YoY: -3.27%

Active ISBN

258,672

New Titles

17,282

700 Publishers

3,000 Booksellers

Source: Nielsen BookScan Brasil, CBL, SNEL, Fipe
Market Development

Source: CBL, SNEL, Fipe
Market Structure

- 700 Publishers
- 6 major Distributors
- 6 large Bookstore chains / Online stores
- 95 Million readers
Concentration of Publishers

Source: Nielsen BookScan Brasil
Concentration of Booksellers

### Biggest Booksellers in Brazil

<table>
<thead>
<tr>
<th></th>
<th>Number of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saraiva</td>
<td>105</td>
</tr>
<tr>
<td>Leitura</td>
<td>44</td>
</tr>
<tr>
<td>Livrarias Curitiba</td>
<td>22</td>
</tr>
<tr>
<td>Livraria Cultura</td>
<td>17</td>
</tr>
<tr>
<td>Livraria da Vila</td>
<td>10</td>
</tr>
<tr>
<td>Livraria da Travessa</td>
<td>8</td>
</tr>
</tbody>
</table>

Source:
Associação Nacional de Livrarias (ANL)
Anuário de Livrarias 2011
Brazilian booksore association
### Brazil and Germany in Comparison

<table>
<thead>
<tr>
<th></th>
<th>Brazil</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenue</td>
<td>1.481 mio. €</td>
<td>9.322 mio. €</td>
</tr>
<tr>
<td>Total active Titles</td>
<td>250.000</td>
<td>&gt;2 mio.</td>
</tr>
<tr>
<td>New Title / Year</td>
<td>17.000</td>
<td>87.000</td>
</tr>
<tr>
<td># of Publishers</td>
<td>700</td>
<td>21.000</td>
</tr>
<tr>
<td># of Booksellers</td>
<td>3.000</td>
<td>6.000</td>
</tr>
<tr>
<td>has Books in Print?</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Publisher Pain Points

Data Exchange in XLS

Maintaining different formats

Time to market

From days to several weeks
Bookseller Pain Points

- Resources requirement
- Data consistency
- Product categorisation
„ISBN-Paradox“

Paradox I

ISBN: 978 85 15 02826 9

Paradox II

ISBN: 978 85 15 01925 4

ISBN: 978 85 15 02826 9

A

B
Metadata Exchange in Brazil

Peer-to-Peer Communication

Publishers

Booksellers
Major issue in the P2P Communication

Peer-to-Peer Communication

No data Validation

Publishers

Booksellers
Addressing Customer Pain Points

Publishers

Centralized Data Hub

Booksellers
Introducing ONIX to Brazilian Market
Standardized classification

- Mandatory
  - BISAC

- Optional
  - Thema

Automated mapping
Thank you for your attention!

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