Nielsen BookData

DIGITAL
BRAZILIAN PUBLISHING SECTOR
Base Year - 2022   *Ebook & Audiobook*

CBL Câmara Brasileira do Livro

SNEL Sindicato Nacional dos Editores de Livros

April, 2023

DIGITAL
BRAZILIAN PUBLISHING SECTOR

This is the only study on the subject in Brazil

Industry analysis - ebook & audiobook

Conducting the study periodically makes it possible to analyze the performance of the publishing digital market over the years

Nielsen BookData

CBL Câmara Brasileira do Livro SNEL Sindicato Nacional dos Editores de Livros

Report Developed By:

Nielsen BookData

HIGHLIGHTS

Base Year - 2022

In 2022, publishers' revenue grew by 35% (nominal) from ebooks and audiobooks sales. In real terms this growth was 28% (inflation variation - IPCA - was 5.79%)

This growth was driven by the "Other Categories" revenue segment, with a nominal growth of 104%. In this segment, Online Libraries were the highlight, with a nominal growth of 69%.

The Educational category started to be considered in the study "base year 2022" through the educational publishers' revenue with Educational Platform. In 2022 this revenue was R$27 million.

Publishers' revenue from the ebooks and audiobooks sales has increased by 95% in real terms over the past 4 years.

Access historical data at: http://snel.org.br/pesquisas or http://cbl.org.br/servicos/pesquisas-de-mercado

Nielsen BookData

PRODUCTION

April, 2023

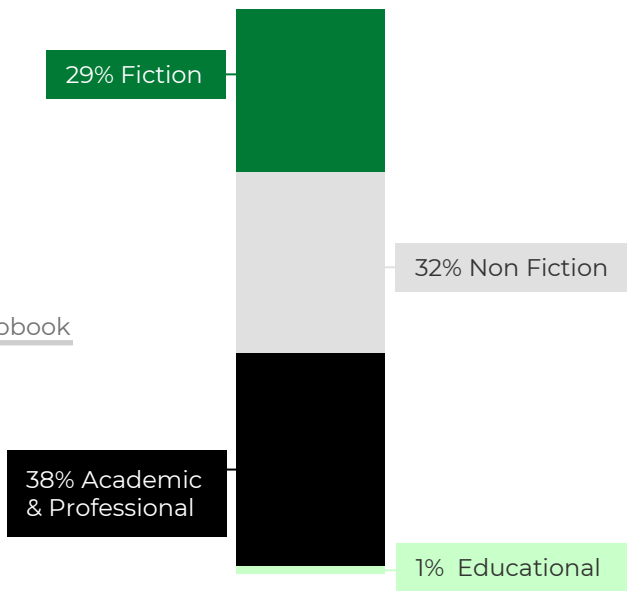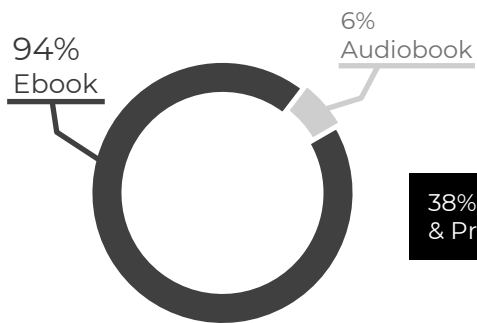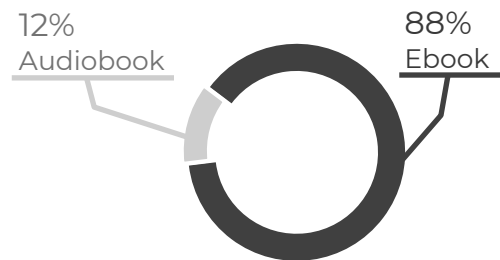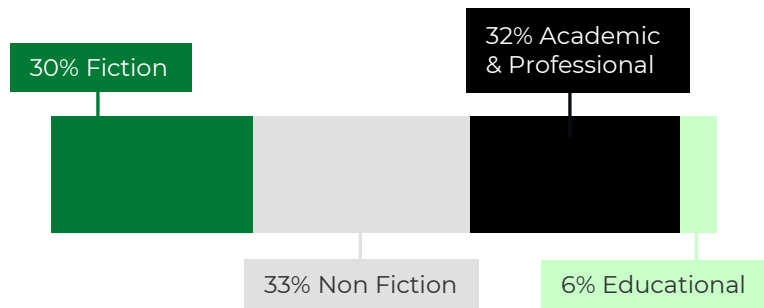Nielsen BookData | Digital - BR Publishing Sector | Base Year 2022

Publishers' Digital Production

1st year with Educational category

There are **106.000** Digital Titles in Brazil

13.000 New Digital Titles in 2022

15% ↑ compared to 2021
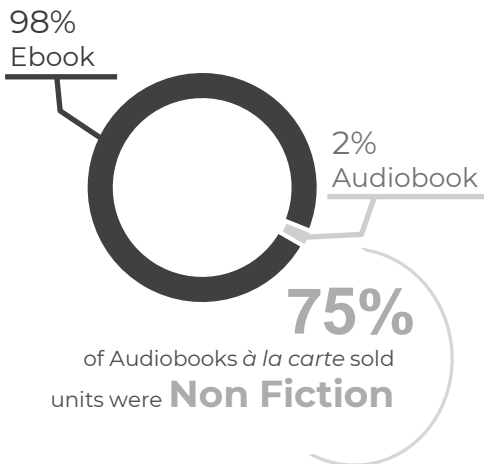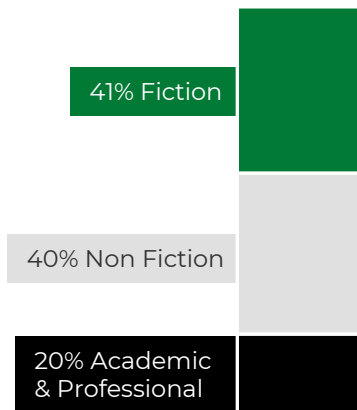
29% Fiction

32% Non Fiction

38% Academic & Professional

1% Educational

94% Ebook

6% Audiobook

30% Fiction

32% Academic & Professional

33% Non Fiction

6% Educational

12% Audiobook

88% Ebook

SALES

Publishers Sales

Sold Units - *à la carte*

À la carte → sale of an entire unit

10 Millions of Sold Units

41% Fiction

40% Non Fiction

20% Academic & Professional

98% Ebook

2% Audiobook

75%

of Audiobooks *à la carte* sold units were **Non Fiction**

Sold Units Total (E-book + Áudio)

In Thousands

	2021	2022	VAR.%
Ficton	3.887	4.152	7%
Non Fiction	3.618	4.021	11%
Academic & Professional	1.877	1.993	6%
Total	9.382	10.165	8%

Sold Units E-book

In Thousands

	2021	2022	VAR.%
Ficton	3.833	4.097	7%
Non Fiction	3.474	3.848	11%
Academic & Professional	1.874	1.990	6%
Total	9.182	9.935	8%

2021   2022   VAR.%

Educational Publishers do not sell à la carte

Publishers Sales

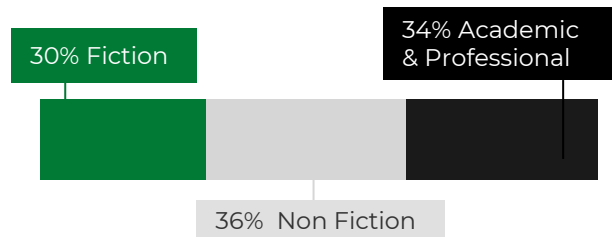Revenue - *à la carte*

À la carte → sale of an entire unit

R$ 131 million was the publishers revenue with sales *of à la carte* units

30% Fiction

34% Academic & Professional

36% Non Fiction

99% Ebook

1% Audiobook

68% of publishers' revenues is due to sales of **Non Fiction** *à la carte* audiobook

Revenue - R$ EBook – *à la carte*

In Thousands

	2021	2022	VAR.%
Ficton	38.793	38.817	0,1%
Non Fiction	43.143	46.293	7%
Academic & Professional	41.970	44.745	7%
Total	123.906	129.855	5%

In Real Terms

↓ **-0,9%**

2021 x 2022
Total Revenue – R$ (Ebook + Áudio)

	Fiction	Non Fiction	Academic & Professional	Total
2021	38.983	43.850	42.136	124.969
2022	39.007	47.093	44.927	131.027
VAR.%	0,1%	7%	7%	5%
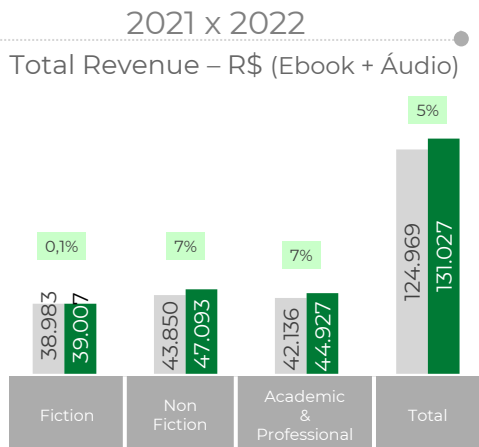
2021   2022   VAR.%

In Thousands
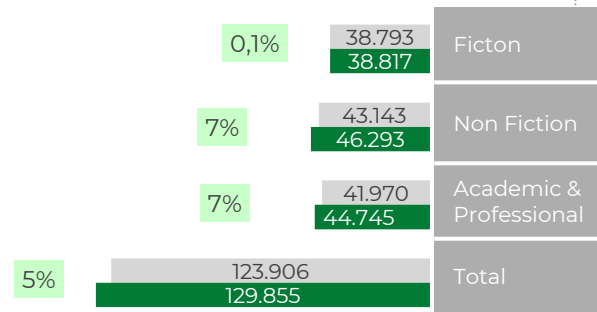
In Real Terms

↓ **-0,9%**

Average Price – R$
Ebook - Total

2021	2022	Var.%
13,32	12,89	-3%

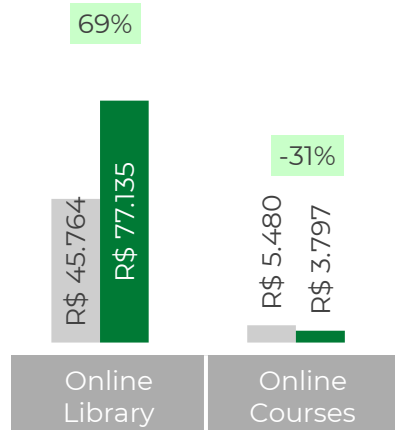Educational Publishers do not sell à la carte

Publishers Sales
Other Revenue Categories

1st year with Educational Platforms *

R$113 million was the publishers revenue with sales *of Other Revenue Categories*

Revenue Subscriptions

In Thousands

2021 R$ 4.397

23%

2022 R$ 5.400

VAR.%

69%

-31%

R$ 45.764 | R$ 77.135

R$ 5.480 | R$ 3.797

Online Library	Online Courses

In Thousands

2021   2022   VAR.%

Educational Platforms

R$27 million was the publishers revenue from educational platforms
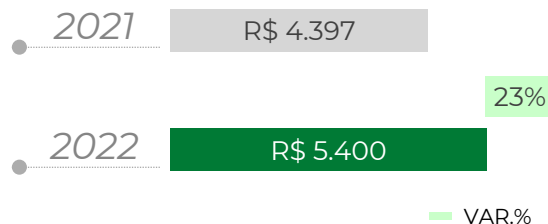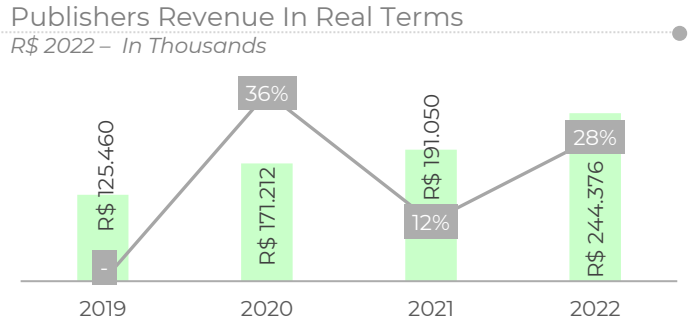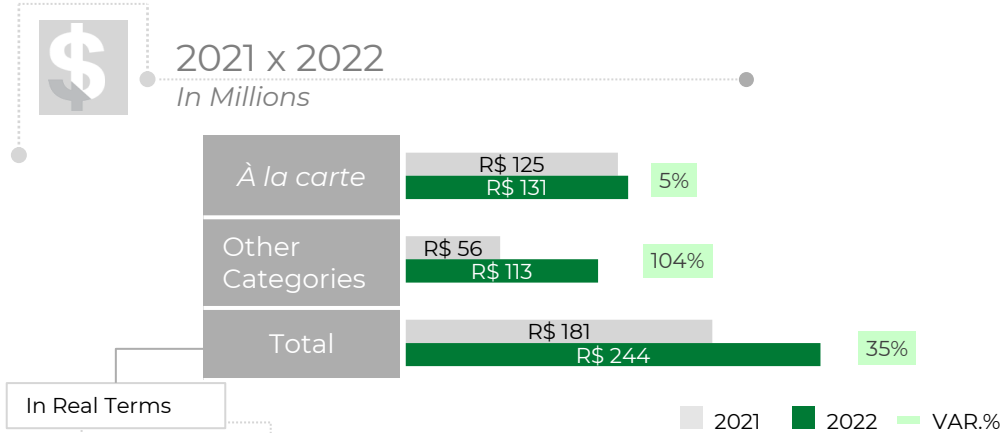
79% Ebook

21% Audiobook

80% of publishers' revenues is due to sales of **Non Fiction** audiobook subscription

*Platforms used in kindergarten, primary school and secondary school

Publishers Sales

Total Revenue (à la carte + Other Categories)

2021 x 2022
In Millions

	2021	2022	VAR.%
À la carte	R$ 125	R$ 131	5%
Other Categories	R$ 56	R$ 113	104%
Total	R$ 181	R$ 244	35%

2021 2022 VAR.%

In Real Terms

⬆ **28%**

Publishers Revenue In Real Terms
R$ 2022 – In Thousands

- Revenue in Real Terms
- % growth in Real Terms

	2019	2020	2021	2022
Revenue	R$ 125.460	R$ 171.212	R$ 191.050	R$ 244.376
% growth	-	36%	12%	28%

Publishers Revenue – Printed x Digital
R$ - In Thousands

	2021	2022	VAR%
PRINTED*	3.952.176	4.072.702	3%
DIGITAL	180.611	244.376	35%
TOTAL	4.132.787	4.317.079	4%

In Real Terms ⬇ **-1%**

*Printed books → publishers sales to the government are disregarded

Printed x Digital → Educational Category considered for the first time.

94% Print

6% Digital

METHODOLOGY

DIGITAL BRAZILIAN PUBLISHING SECTOR
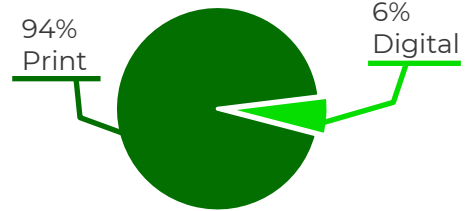
Methodology

Study

The Study is sponsored by the Brazilian Association of Book Publishers (SNEL) and the Brazilian Book Chamber (CBL) and developed by Nielsen BookData.

Data Collection Process

The gathering information process is executed through an online form, provided by Nielsen BookData Systems to Brazilian publishers.

Survey

The survey questions are about Publishers' production and Publishers' sales – Ebboks and Audiobooks, considering published titles, New digital ISBNs, Sold Units, and the different types of publishers revenue in due the different types of ebooks and audiobooks sales.
The survey 2023, base year of 2022, started to consider the Educational Category through of Educational Platforms.

Printed x Digital

Comparisons between the printed book publishing market and the digital publishing market use data from publishers' sales to the market. Therefore, sales to the government were excluded.
The data were extracted from: Production and sales - Brazilian Publishing Sector – Base Year 2022

Sample

Sample: publishers who aswered the survey two years in a row. The sample coverage is 76% of the revenue for the survey base year 2022.

Sample   inference

24%

76%
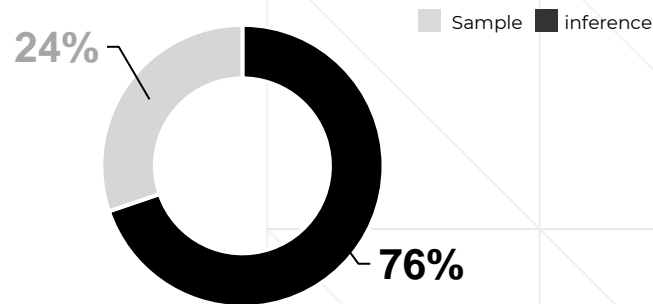
Inference

Based on the variations measured in relation to the previous year, the statistical inference process is applied to reach the total market values.

Real Terms

Data in real terms are calculated according to the IPCA (Cosumer Prices Index Broad, in Portuguese) by IBGE (Brazilian Institute of Geography and Statistics, in portuguese). In 2022 the IPCA registered a variation of 5.79%.

Access historical data at: http://snel.org.br/pesquisas or http://cbl.org.br/servicos/pesquisas-de-mercado