

Nielsen BookData

PRODUCTION AND SALES BRAZILIAN PUBLISHING SECTOR

Base Year – 2022

Printed Book



April 2023

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PRODUCTION AND SALES - BRAZILIAN PUBLISHING SECTOR

Industry Analysis - Printed Book

Longest-lasting research in the country
and in Latin America

By conducting this analysis on an
annual basis, we can effectively
evaluate the Brazilian market
throughout the years.

This study covers every possible
Sales channel in the publishing industry

Report Developed By:



**Nielsen
BookData**

Publishers achieved a **nominal growth** of **3%** in sales to the market (excluding sales to the government). As the variation of **inflation** (IPCA) was **5.79%** in 2022, the result in **real terms** was a **drop** of **2.6%**.

Educational publishers, **Trade** publishers and **Religious** book publishers recorded a **nominal growth** of **6%**. In **real terms**, the variation of these **3** publishing categories is almost **zero**.

Academic & Professional Publishers recorded a **nominal decline** of **10%** in sales to the market. In **real terms**, this **drop** was **15%**.

For the first time, **Exclusively Online Bookshops** was the channel with the **biggest value share** in, **about 35%**. Also for the first time, **Book Fair/SP Bienal** was among the **5 main channels** of the **Trade publishers**.

HIGHLIGHTS

Base Year - 2022

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

Nielsen
BookData

PRODUCTION



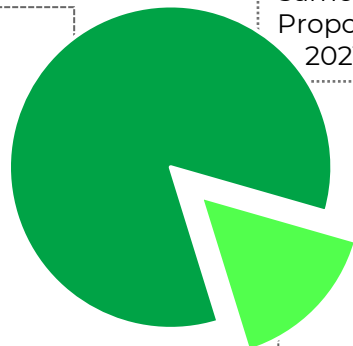
May, 2023

Publishers Production

In 2022 the publishers produced:

▶ 324 Millions of Copies

Reprint
84%

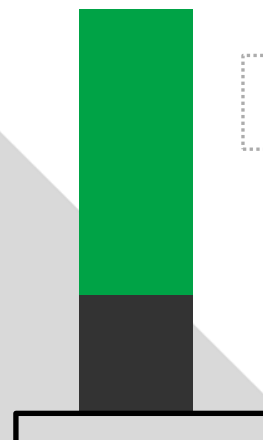


Same
Proportion % of
2021



16%
New Titles

■ ■ ■ ■ 46 MIL Edited Titles



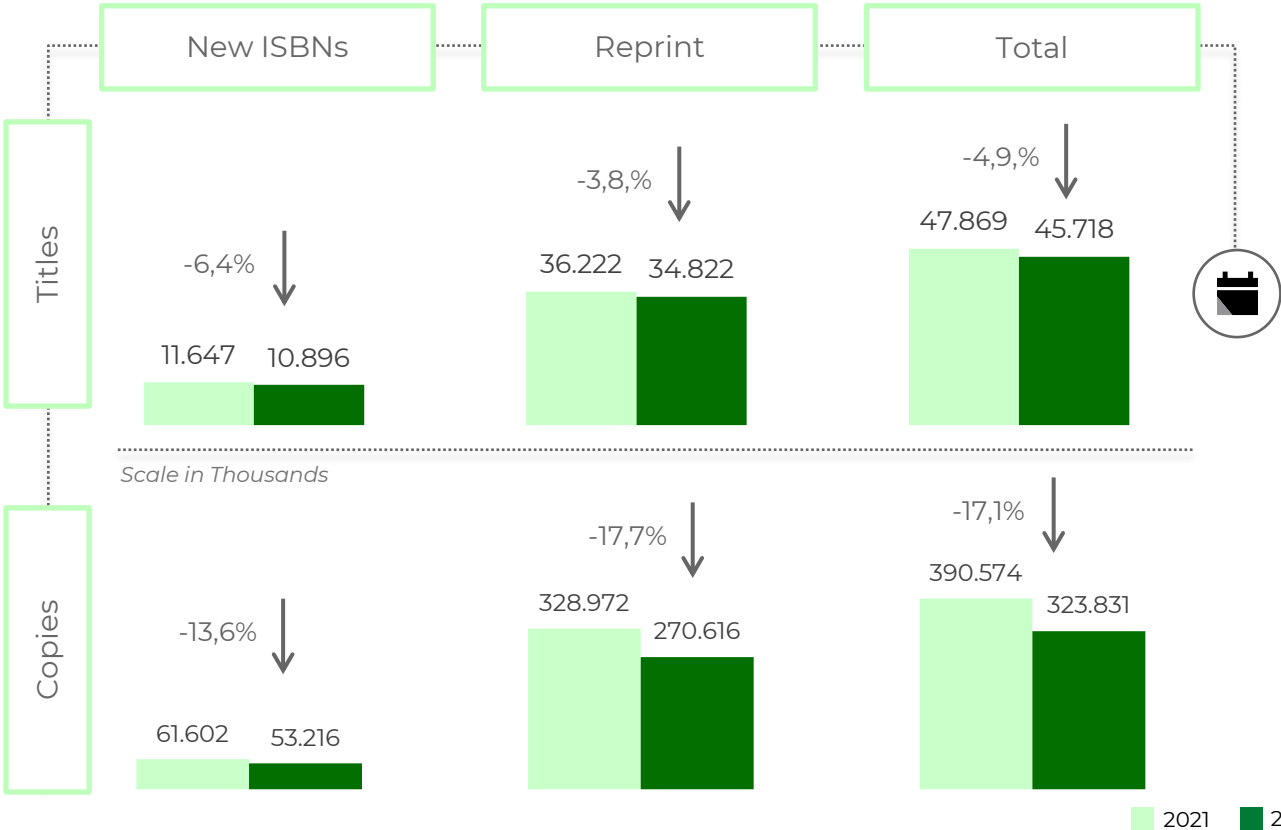
76% Reprint

24% New
Titles

Same
Proportion % of 2021



Publishers Production



SALES



Publishers Sales

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Sold Copies



314 Millions

188 Millions

126 Millions

Revenue



R\$5,5 Billions

R\$4,1 Billions

R\$1,4 Billions

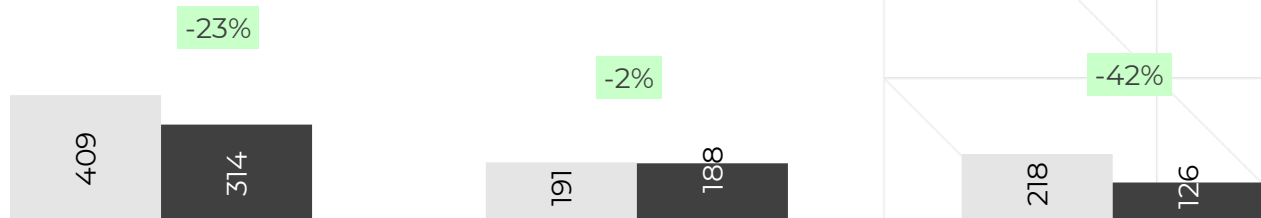
Publishers Sales



Sold Copies



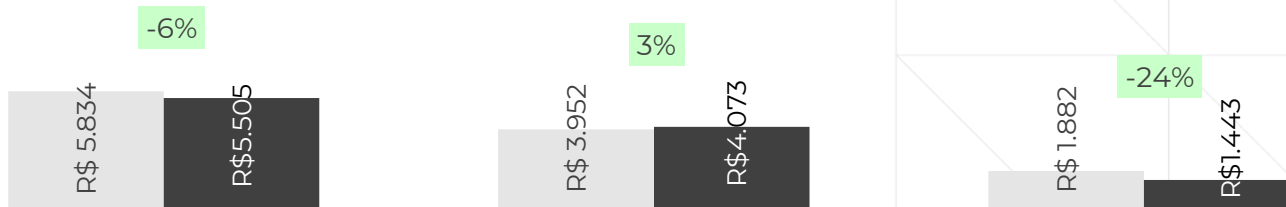
Scale in Millions



Revenue



Scale in Millions

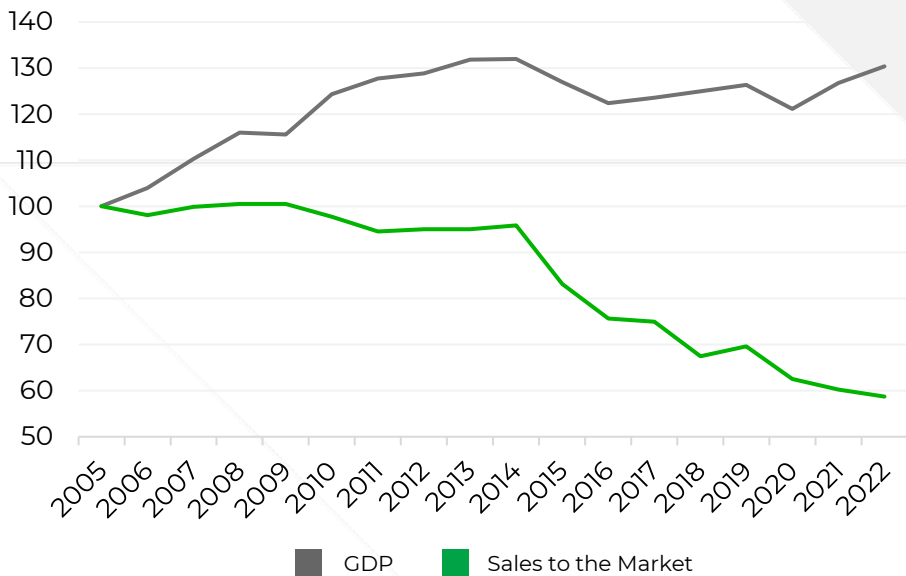


■ 2021 ■ 2022 ■ VAR. %

Sales to the Market

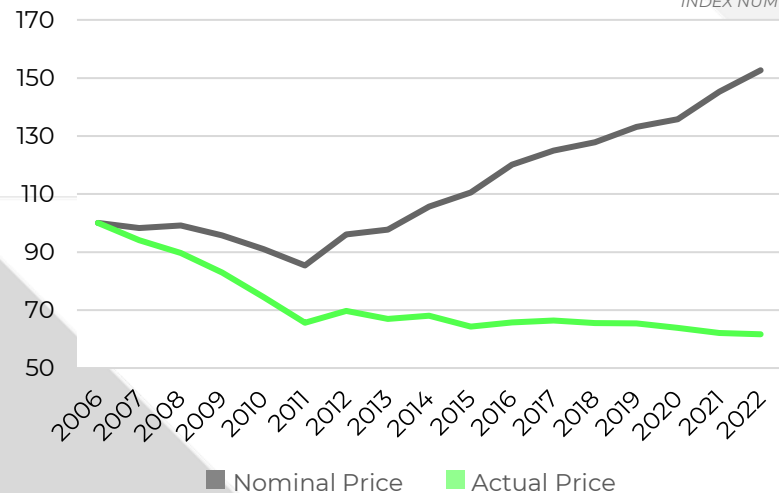
GDP and Sales to the Market

REAL GROWTH - INDEX NUMBER



Average Market Prices \$

CURRENT VALUES AND CONSTANT VALUES INDEX NUMBER



Average Price - Market Nominal

2021	2022	VAR. %
R\$ 20,67	R\$ 21,71	5,1%

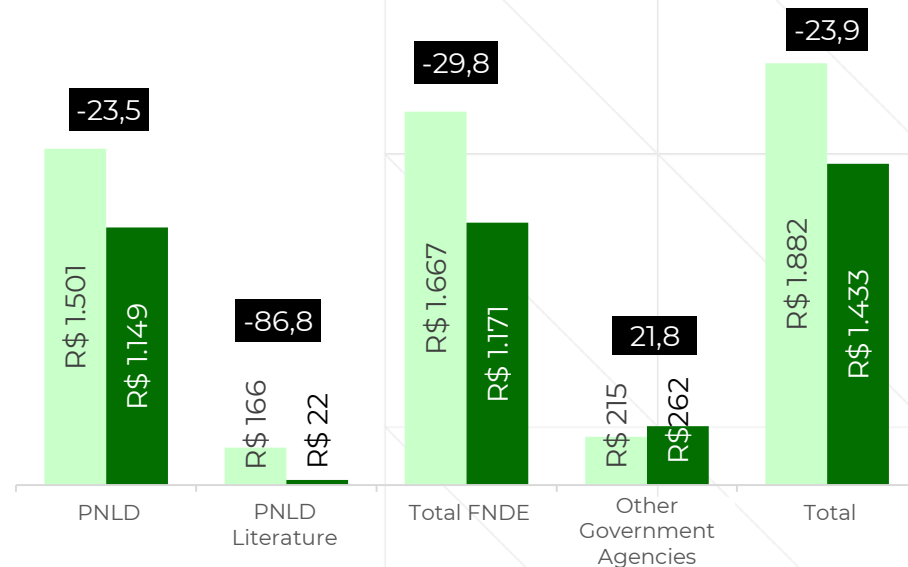
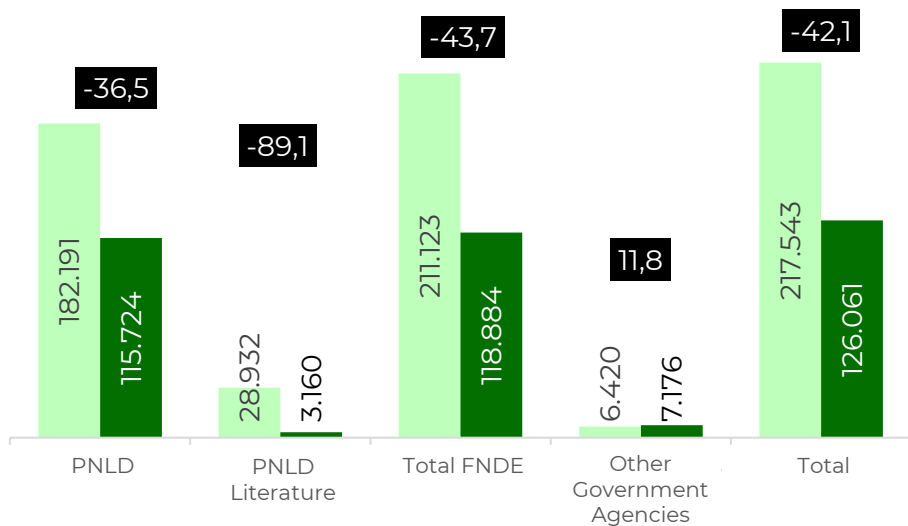
Sales to the Government

▶▶ Copies Sold

Scale in Thousands

▶▶ Revenue

Scale in Millions



■ 2021 ■ 2022 ▬ VAR. %

Industry Summary

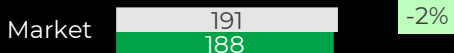
Production

2021 2022 VAR.%



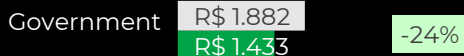
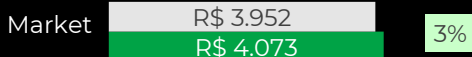
Sold Copies

Scale in Millions



Revenue

Scale in Millions



Average Price - Market



2021	2022	VAR. %
R\$20,67	R\$21,71	5,1

Nominal

Revenue In Real Terms

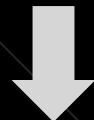
Sales to the Market



-3%

Total Sales

Market + Government



-11%

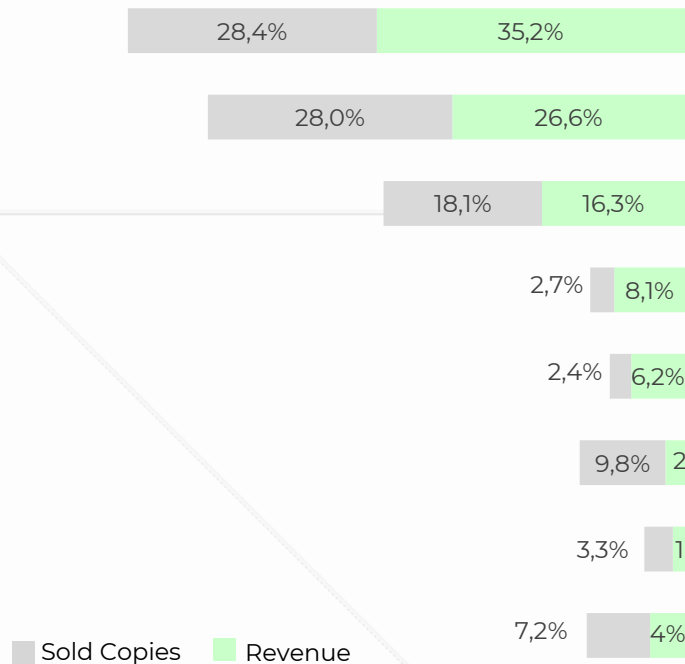
CHANNELS



Channels

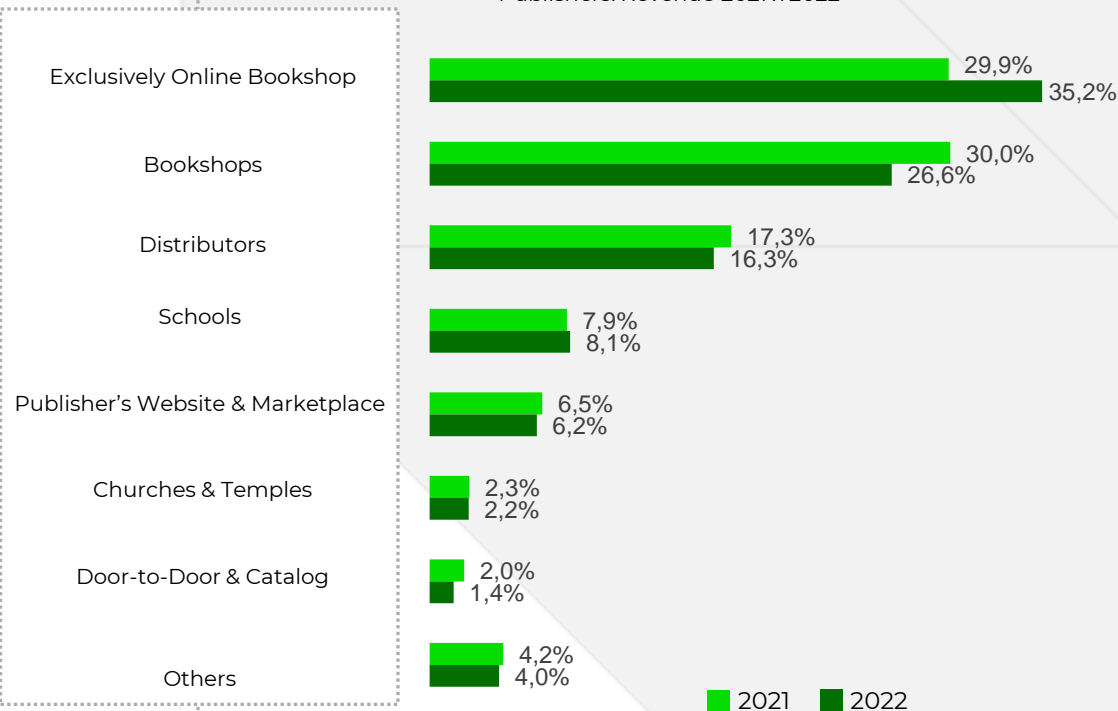
Sales by Channel

Publishers: Sold Copies & Revenue - 2022



Comparative Performance

Publishers: Revenue 2021 x 2022



PERFORMANCE BY PUBLISHER CATEGORY

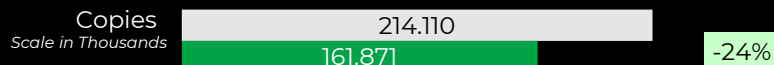
Educational Publishers

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Production

2021 2022 VAR.%



Sold Copies

Scale in Thousands



Revenue

Scale in Millions



Average Price - Market



2021	2022	VAR. %
R\$35,91	R\$39,64	10,4

Nominal

Revenue In Real Terms

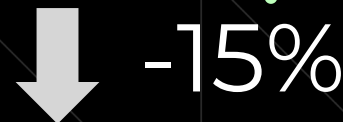
Sales to the Market



Regulates with inflation

Total Sales

Market + Government



Channels

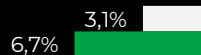
Educational Publishers

Sold Copies

% Importance

Revenue \$

% Importance



BookShops

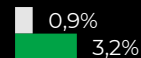
Distributors

Schools

Exclusively Online Bookshops

Publisher's Website & Marketplace

Others

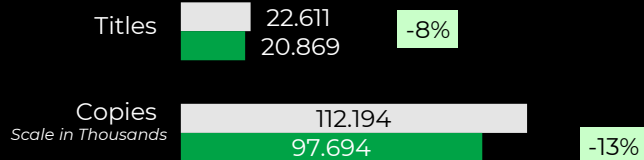


2021 2022

Trade Publishers

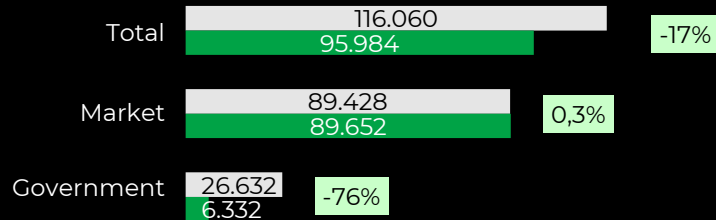
Production

2021 2022 VAR.%



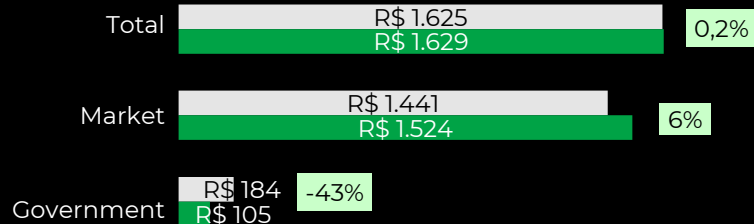
Sold Copies

Scale in Thousands



Revenue

Scale in Millions



Average Price - Market



2021	2022	VAR. %
R\$16,11	R\$17,00	5,5

Nominal

Revenue In Real Terms

Sales to the Market



0,1

Regulates with inflation

Total Sales

Market + Government



-5,2%



Channels

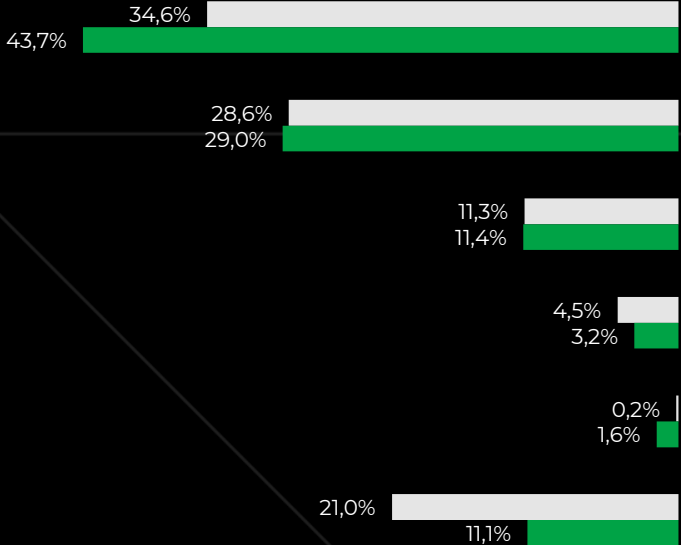
Trade Publishers

Sold Copies

% Importance

Revenue \$

% Importance



Exclusively Online Bookshops

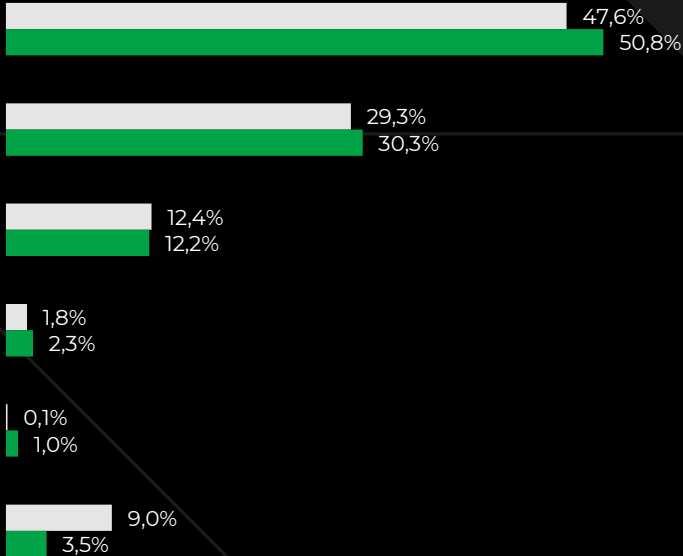
Bookshops

Distributors

Supermarket

Book Fair/SP Bienal

Others



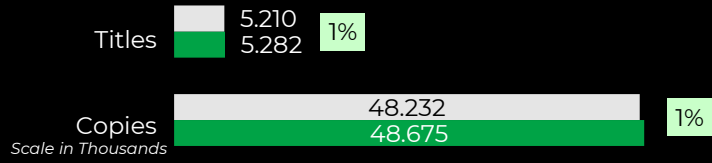
2021 2022

Religious Publishers



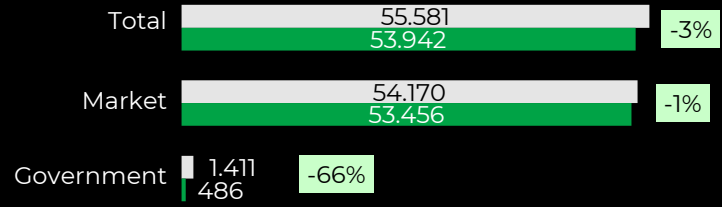
Production

2021 2022 VAR.%



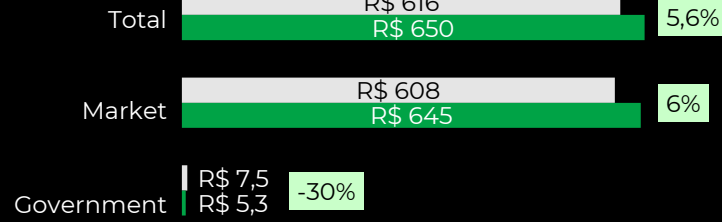
Sold Copies

Scale in Thousands



Revenue

Scale in Millions



Revenue In Real Terms

Sales to the Market



0,2

Regulates with inflation

Total Sales

Market + Government



-0,02%

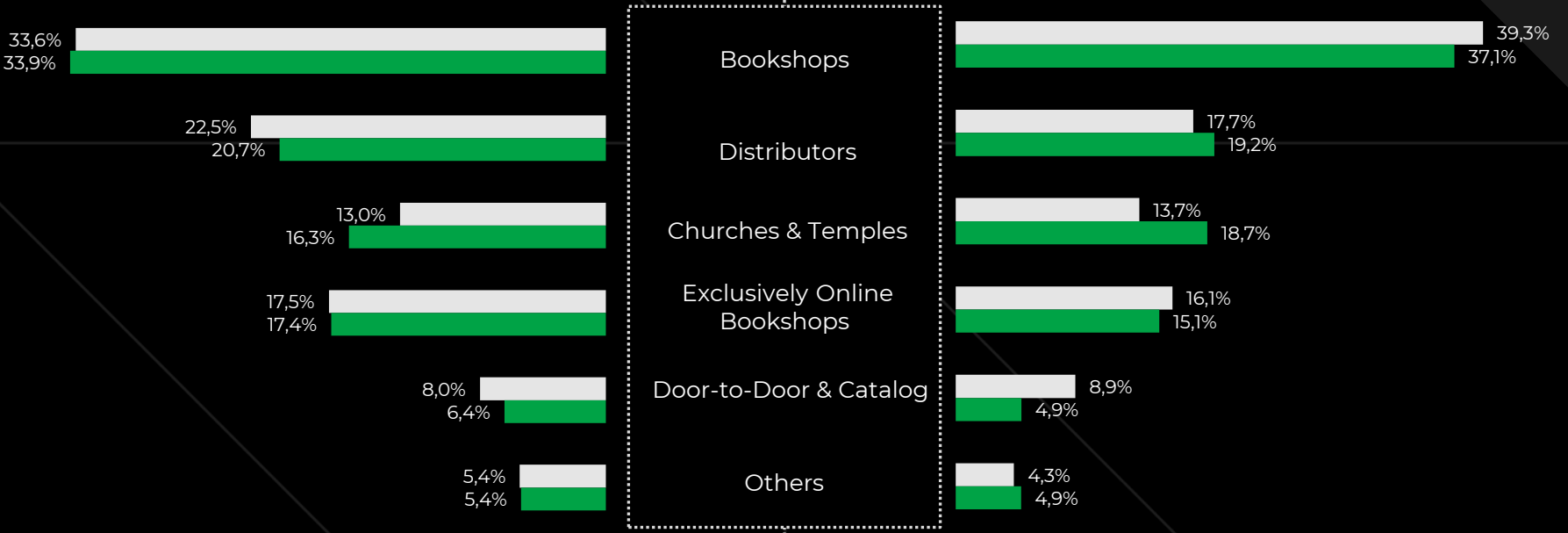


Channels

Religious Publishers

Sold Copies
% Importance

Revenue \$
% Importance

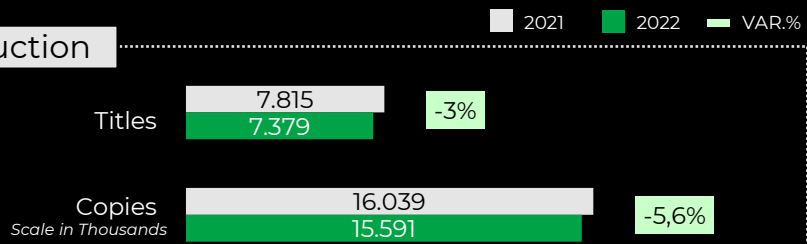


Academic & Professional Publishers

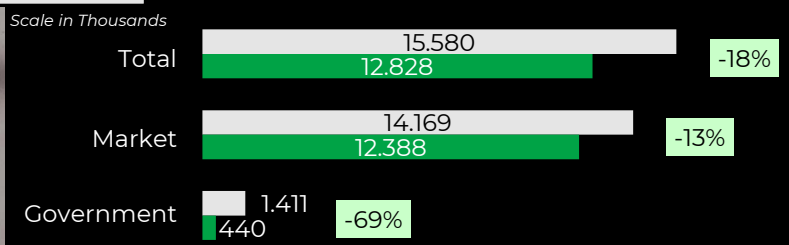
Nielsen BookData



Production

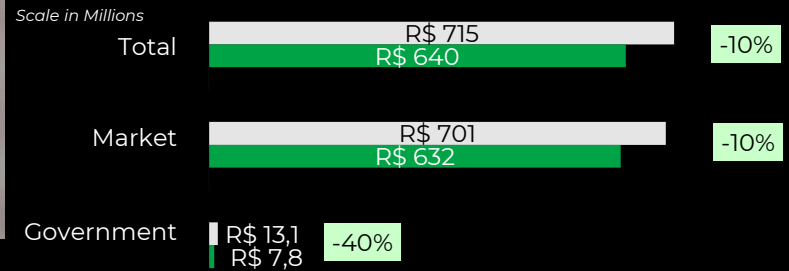


Sold Copies



Revenue In Real Terms

Revenue



Sales to the Market



Total Sales *Market + Government*



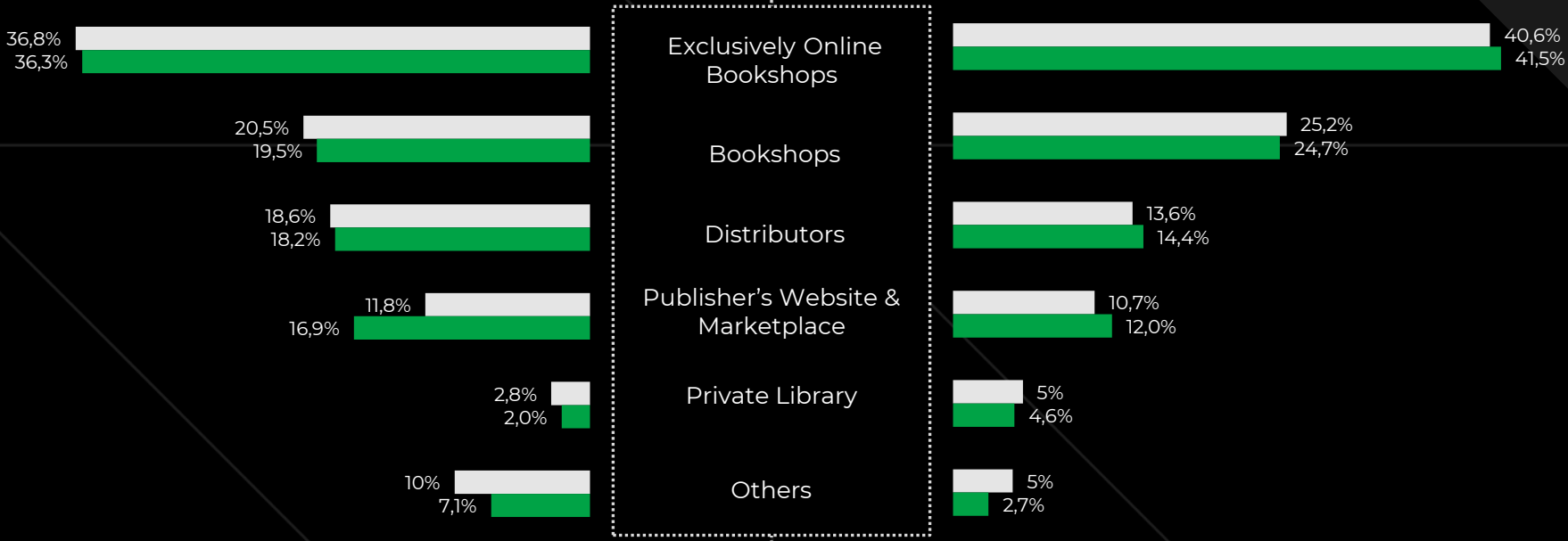


Channels

Academic & Professional Publishers

Sold Copies
% Importance

Revenue \$
% Importance



2021 2022

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APPENDIX & METHODOLOGY



Publishers Production

► Titles and Published Copies

► Titles

► Copies

	2021	2022	VAR.%%	2021	2022	VAR.%%
New ISBNs	11.647	10.896	-6,44	61.602.013	53.215.860	-13,61
Reprint	36.222	34.822	-3,87	328.972.476	270.615.502	-17,74
Total	47.869	45.718	-4,49	390.574.490	323.831.361	-17,09

► Titles and Published Copies by Publisher Category

► Titles

► Copies

	2021	2022	VAR.%%	2021	2022	VAR.%%
Educational	12.234	12.189	-0,37	214.109.733	161.870.944	-24,40
Trade	22.611	20.869	-7,70	112.193.541	97.693.623	-12,92
Religious	5.210	5.282	1,38	48.232.326	48.675.460	0,92
Academic & Professional	7.815	7.379	-5,58	16.038.890	15.591.334	-2,79
Total	47.869	45.718	-4,49	390.574.490	323.831.361	-17,09

Publishers Production

▶ Titles and Published Copies by Publisher Category – New ISBNs

▶ Titles

▶ Copies

	2021	2022	VAR.%%	2021	2022	VAR.%%
Educational	566	530	-6,46	4.349.092	3.748.023	-13,82
Trade	7.220	6.680	-7,49	43.904.204	36.303.152	-17,31
Religious	1.168	1.115	-4,52	10.220.442	10.098.530	-1,19
Academic & Professional	2.692	2.572	-4,47	3.128.276	3.066.154	-1,99
Total	11.647	10.896	-6,44	61.602.013	53.215.860	-13,61

Publishers Production



Books	Copies	Share %	Copies	Share %	2021 x 2022
Educational	212.413.225	54,38	184.010.675	56,82	-13%
Religious	60.852.342	15,58	53.025.483	16,37	-13%
Adult Literature	22.774.417	5,83	20.004.113	6,18	-12%
Children's	26.092.329	6,68	15.699.225	4,85	-40%
Youth Literature	24.420.154	6,25	14.055.538	4,34	-42%
Self Help	10.111.425	2,59	8.469.198	2,62	-16%
Economy & Business	5.031.926	1,29	4.196.037	1,30	-17%
Y&A	3.060.191	0,78	3.470.495	1,07	13%
Social Sciences and Humanities	3.547.777	0,91	3.341.809	1,03	-6%
Psychology and Philosophy	3.679.321	0,94	3.260.964	1,01	-11%
Law	3.480.455	0,89	3.123.978	0,96	-10%
Biographies	2.800.682	0,72	1.787.178	0,55	-36%
Medicine & Health	1.633.382	0,42	1.431.083	0,44	-12%
Education and Pedagogy	1.680.930	0,43	1.128.155	0,35	-33%
Languages and Linguistics	1.044.691	0,27	930.799	0,29	-11%
Comics & Graphic Novels	1.070.849	0,27	911.885	0,28	-15%
Arts	857.663	0,22	890.495	0,27	4%
Engineering and Technology	691.126	0,18	392.334	0,12	-43%
Mathematics, Statistics, Logic and Natural Sciences	632.835	0,16	373.434	0,12	-41%
Dictionaries and School Atlas	323.594	0,08	303.245	0,09	-6%
Food & Drink	279.889	0,07	192.056	0,06	-31%
IT	243.453	0,06	137.041	0,04	-44%
Sports	173.412	0,04	128.304	0,04	-26%
Architecture	292.190	0,07	117.445	0,04	-60%
Agriculture & Veterinary & Pets	162.003	0,04	69.774	0,02	-57%
Travel & Holiday & Guide	111.231	0,03	35.764	0,01	-68%
Outsiders	3.113.000	0,80	2.344.852	0,72	-25%
Total	390.574.490	100	323.831.361	100,00	-17%

Publishers Sales

Sales to the Market

Sold Copies

	2021	2022	VAR.%%
Educational	33.468.168	32.081.167	-4,1
Trade	89.428.027	89.651.981	0,3
Religious	54.170.482	53.456.165	-1,3
Academic & Professional	14.169.033	12.387.755	-12,6
Total	191.235.710	187.577.067	-1,9

Revenue (R\$)

	2021	2022	VAR.%%
Educational	1.201.777.371	1.271.567.989	5,8
Trade	1.440.824.338	1.524.150.793	5,8
Religious	608.191.730	644.686.684	6,0
Academic & Professional	701.383.224	632.296.794	-9,9
Total	3.952.176.663	4.072.702.259	3,0

Average Price

	2021	2022	VAR.%%
Educational	35,91	39,64	10,4
Trade	16,11	17,00	5,5
Religious	11,23	12,06	7,4
Academic & Professional	49,50	51,04	3,1
Total	20,67	21,71	5,1

Publishers Sales

Channels 2022

	Sold Copies	Share %	Revenue (R\$)	Shares %
Exclusively Online Bookshops	53.349.085	28,44	1.435.145.245	35,24
Bookshops	52.463.621	27,97	1.082.305.641	26,57
Distributors	33.976.211	18,11	665.775.803	16,35
Schools	5.109.660	2,72	329.148.769	8,08
Publisher's Website & Marketplace	4.594.721	2,45	250.713.576	6,16
Churches & Temples	18.353.941	9,78	91.090.281	2,24
Door-to-Door & Catalog	6.144.054	3,28	56.140.961	1,38
Companies	2.642.483	1,41	27.893.668	0,68
Export	2.280.461	1,22	24.757.890	0,61
Book Fair/SP Bial	1.335.687	0,71	24.555.322	0,60
Book Club	1.336.856	0,71	20.946.657	0,51
Supermarket	1.878.019	1,00	20.494.989	0,50
Private Library	289.785	0,15	19.990.958	0,49
Newsstand	2.027.156	1,08	8.074.725	0,20
Direct Marketing (Direct Mail, Mail)	77.142	0,04	803.461	0,02
Other	1.718.186	0,92	14.864.314	0,37
Total	187.577.067	100	4.072.702.259	100

Publishers Sales

Channels	2021		2022		2021 x 2022 %
	Revenue (R\$)	Share %	Revenue (R\$)	Share %	
Exclusively Online Bookshops	1.179.956.817	29,86	1.435.145.245	35,24	22%
Bookshops	1.183.692.783	29,95	1.082.305.641	26,57	-9%
Distributors	685.458.926	17,34	665.775.803	16,35	-3%
Schools	311.964.781	7,89	329.148.769	8,08	6%
Publisher's Website & Marketplace	256.068.731	6,48	250.713.576	6,16	-2%
Churches & Temples	89.775.605	2,27	91.090.281	2,24	1%
Door-to-Door & Catalog	78.264.421	1,98	56.140.961	1,38	-28%
Companies	29.100.443	0,74	27.893.668	0,68	-4%
Export	17.204.244	0,44	24.757.890	0,61	44%
Book Fair/SP Bial	4.155.148	0,11	24.555.322	0,60	491%
Book Club	32.227.460	0,82	20.946.657	0,51	-35%
Supermarket	26.208.068	0,66	20.494.989	0,50	-22%
Private Library	20.602.349	0,52	19.990.958	0,49	-3%
Newsstand	6.988.410	0,18	8.074.725	0,20	16%
Direct Marketing (Direct Mail, Mail)	1.042.104	0,03	803.461	0,02	-23%
Other	29.466.373	0,75	14.864.314	0,37	-50%
Total	3.952.176.663	100	4.072.702.259	100	3%

Publishers Sales

▶ Sales to the Government

▶ Sold Copies

▶ Revenue (R\$)

	2021	2022	VAR.%%	2021	2022	VAR.%%
PNLD	182.191.359	115.724.160	-36,48	1.500.825.310	1.148.828.263	-23,45
PNLD Literature	28.931.527	3.160.078	-89,08	165.781.494	21.817.522	-86,84
Total FNDE	211.122.886	118.884.238	-43,69	1.666.606.803	1.170.645.785	-29,76
Other Government Agencies	6.420.119	7.176.491	11,78	215.145.554	262.065.558	21,81
Total	217.543.005	126.060.729	-42,05	1.881.752.357	1.432.711.343	-23,86

Publishers Sales

▶ Total Sales (Market+Government)

▶ Sold Copies

▶ Revenue (R\$)

	2021	2022	VAR.%%	2021	2022	VAR.%%
TOTAL	408.778.715	313.637.796	-23,3	5.833.929.020	5.505.413.602	-5,63

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 data collection 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 to the market and to the government, considering published titles, produced copies, sold copies, Revenue, channels, etc. the publisher's category is defined by the largest share of its revenue (e.g. a publisher that earns most of its revenue from selling educational books, declares itself an educational publisher.)

The publishing industry is divided in four categories:

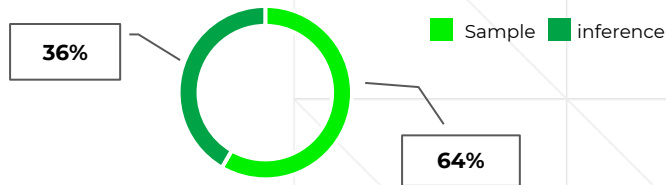
- Educational
- Trade
- Religious
- Academic and Professional.

Government Data

The publishers' sales to the government data is gathered from survey provided to the publishers and sent by FNDE (National Fund for Educational Development, in portuguese) directly to Nielsen BookData

Sample

Sample: publishers who aswered the survey two years in a row. The sample coverage is 64% of the revenue for the survey base year 2022.



Inference

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

Data in 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%.

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