

ROOTS IN THE FUTURE



ITALY

GUEST OF HONOUR 2024
FRANKFURTER BUCHMESSE

16-20 OCTOBER 2024

A PUBLISHING INDUSTRY LOOKING TO THE FUTURE AND INTERNATIONAL MARKETS DATA BY ITALIAN PUBLISHER ASSOCIATION RESEARCH OFFICE

Italian publishing, with an annual sales value of €3.338 billion, is the fourth largest in Europe, employing more than 70,000 people ranging from publishing houses to authors, translators and illustrators, literary agents, booksellers, libraries, organisers of fairs and festivals and much more. It is the country's first cultural industry for consumer purchases, ahead of pay TV and generalist television, video games, daily and periodical press, music and cinema. This data demonstrates a centrality that goes beyond numbers. The book is at the heart of narrative universes that become films, video games and TV series. It is at the centre of public debate stemming from non-fiction production, as well as at the centre of young people's training through textbooks, of university research and teaching, of professional development.

Since Italy's first appearance as the Buchmesse's Guest of Honour in 1988, the domestic market has doubled in value, net of inflation (see table on the third page). In 1988, around 50 million books were sold in bookstores and supermarkets every year, in 2023 (online bookstores have been added in the meanwhile) 112 million copies were sold, net of textbooks, academic and professional publishing, digital books. The leap from the pre-pandemic period to today has also been significant: 12.5 million more copies were sold in 2023 than in 2019, which is a jump of nearly 13%, with new young, media-savvy audiences driving the growth of genres such as comics and romance.

The Italian publishing industry has accompanied and stimulated the country's modernisation while increasing its visibility beyond national borders: in 2022 (latest data available), 7,889 translation rights were sold abroad, more than four times the 1,800 that were sold in 2001, when the surveys started. The national industry has translation support from the Ministry of Foreign Affairs and International Cooperation and the Centro per il Libro e la Lettura of around one million euros annually. Visibility abroad is supported through an annual plan developed by ICE – Italian Trade and Investment Agency, in collaboration with AIE, which includes participation in foreign trade fairs and incoming actions at the main Italian trade fair events. Other promotional opportunities include attending international trade fairs as Guest of Honour. Latest in chronological order before Frankfurt: Paris, Bucharest, Tunis and

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Warsaw. Finally, tools such as Newitalianbooks increase the visibility of Italian books and authors abroad.

At the heart of the book industry's growth, both domestically and internationally, is a pluralistic system powered by over 750 publishing house brands with annual cover-price sales of over €100,000 in trade channels. Counting companies below this threshold indicates a realm of over 5,000 publishers. Around 84,000 new print titles are published every year, feeding and enriching a commercially live catalogue of 1.4 million items. Sales in the trade market are divided in half between on one hand four large Italian-owned groups – Gruppo Mondadori, Gruppo Editoriale Mauri Spagnol, Gruppo Feltrinelli, and Gruppo Giunti – and medium and small publishers on the other. Italian pluralism is also ensured by a system of sales channels that balances online sales (41%), supermarkets (4%), and over 3,000 bookstores throughout the country, accounting for 55% of purchases.

FROM 1988 UNTIL NOW: THE ITALIAN BOOK RETURNS AS GUEST OF HONOUR IN FRANKFURT TRANSFORMED

	1988	2023
OVERALL MARKET (EUR cover price values)	652 M	3.338 B +412% +103% at constant value
CATALOGUE OF PRINT BOOKS ON THE MARKET	250,000	1.4 M +460%
TRANSLATION RIGHTS SOLD ABROAD	1,800 2001, first year of compilation	7,889 2022, latest data available
ADULT AND CHILDREN'S TRADE MARKET (values in euros at cover price)	361 M	1.806 B +400% +98% at constant value
ADULT AND CHILDREN'S TRADE MARKET (number of titles published)	23,750	68,791 +190%
CHILDREN'S TRADE MARKET (values in euros at cover price)	43 M	283 M +558% +160% at constant value
CHILDREN'S TRADE MARKET (number of titles published)	1,891	8,962 +374%
TRADE MARKET: PRINT COPIES SOLD	50 M	112 M +124%
PUBLISHERS	2,315	5,184 +124%
SUPPLY CHAIN EMPLOYEES, INCLUDING ALLIED INDUSTRIES	ND	over 70,000
BOOKSHOPS	ND	over 3,000
READERS (at least one book in previous 12 months)	18.2 M Istat, population 11+	31.5 M AIE Observatory, population 15-74 years
EDUCATION RATE (upper secondary)	64%	94%
UNIVERSITY ENROLMENT	1.1 M	1.909 M +74%