Books and the book trade in 2018 (2017 figures)

The importance of books

In 2017, books came 13th in a list of 51 of the Germans' most popular leisure activities. 18.2 per cent of German citizens over the age of 14 "often" read books after work (2016: 18.8 per cent), and another 27.3 per cent do so "occasionally" (2016: 27.5 per cent). 29.2 per cent "seldom" spend their time with a book (2016: 28.5 per cent), and 25.3 per cent "never" read (2016: 25.2 per cent). The figures show a further shift toward infrequent readers and non-readers, whose share rose from 51.1 to 54.5 per cent over the five year period from 2013 to 2017. Nevertheless, for almost half of all Germans books still play a more significant part in their leisure activities.

The media commonly accessed also include newspapers, albeit with a slight downward trend: 51.1 per cent "often" pick up a paper (ranked fifth; 2016: 52 per cent). On the other hand, the leisure time appreciation of magazines and periodicals showed a distinct improvement for the second year in a row (ranked ninth, with 36.2 per cent; 2016: 33.1 per cent).

Still topping the list of hobbies – and still growing in popularity – was watching television: 83.5 per cent of respondents stated that they "often" turn on the television (2016: 82.2 per cent). 55.1 per cent use the Internet intensively (fourth place), which is also another increase on the year before (2016: 54.2 per cent). Meanwhile, a very old pastime is back in fashion, as 60.2 per cent of those questioned said they "often" listen to the radio (2016: 57.6 per cent). As such, radio takes second place in the list, immediately behind TV viewing. Both these categories fit well with the fact that Germans like to "relax comfortably at home" (ranked third, 58.1 per cent; 2016: 56.8 per cent).

In June 2018, an extensive study of media behaviour was also published by the German Publishers & Booksellers Association in collaboration with the market research company GfK, under the title "Book buyer – quo vadis?" This study examines a phenomenon that publishers have been observing for some time now: that the number of book buyers is falling in Germany. Over the last five years, the customer reach of titles in the general trade book segment (which excludes school books and specialist books) has fallen from around 53 per cent to approximately 44 per cent. In 2013 there were still around 36 million people buying books, but in 2017 only 29.6 million people aged 10 years or above bought at least one book.

All told, between 2013 and 2017 the book market lost around 6.4 million buyers, especially those in the 20 to 49-year-old age group, who instead spend a lot more time on their laptops, or with a smartphone or tablet. Books also have to compete with a growing number of digital activities, for instance on Netflix, YouTube and Instagram. One conclusion of the study – which also identified opportunities for the industry – is that due to the daily sensory overload and the changing patterns of media usage, reading a book is no longer an option in a lot of leisure-time situations, or it is just one option amongst many. This is because digital media consumption and constant multitasking leave many people feeling stressed and under pressure, whereas reading a book is something they associate with calm and relaxation. In the coming months the industry wants to pursue a number of ideas and projects to tackle this problem, among others.

The economic development of the German book market

Today, books have to compete with many other media – and the industry can feel the pressure of that competition ever more sharply. This is evident in the development of consumer numbers and, to a lesser extent, in the economic figures from last year. In 2017, book industry sales amounted to 9.13 billion euros – a decline of 1.6 per cent on the previous year.

2014 and 2015 saw appreciable declines in total annual revenue of 2.2 per cent and 1.4 per cent respectively, but in 2016 the industry recuperated with a growth in sales of one per cent. Altogether, in the last five years the book market declined by 405 million euros, a 4.2 per cent fall in its sales volume. However, looking still further back to 2002 for a long-term comparison it is clear that the industry's sales have only fallen by one percent over the last fifteen years. In view of the radical digital transformation, this is a sign of the industry's adaptability and innovative strength.

High-street booksellers in Germany achieved sales of 4.3 billion euros in 2017. As such they remain by far the most important sales channel for books, despite surrendering two per cent of their sales of the previous year. The segment is therefore currently responsible for 47.1 per cent of the industry's overall sales (2016: 47.3 per cent; 2013: 48.6 per cent).

Compensating for this, the online book trade continued to catch up. Sales through e-commerce rose by 1.5 per cent in 2017, with the online trade securing an 18.8 per cent share of the industry's total sales (2013: 16.3 per cent). That is equivalent to 1.71 billion euros. Undoubtedly, much of this can be attributed to earnings by the market leader Amazon – but by no means all. The figures also include online revenues earned by the high-street booksellers, two thirds of which now have their own online shop.

This time around, publishers' direct business has maintained the same level as in the previous year, accounting for a volume of 1.94 billion euros. Their market share rose slightly, however, from 20.9 per cent to 21.3 per cent (2013: 19.7 per cent). Publishers' direct sales are primarily sales to companies and institutions. As such, this is above all a business channel for scientific and specialist books, although general trade publishers (especially self-help books) now also achieve appreciable sales in this way, although at a comparatively low level.

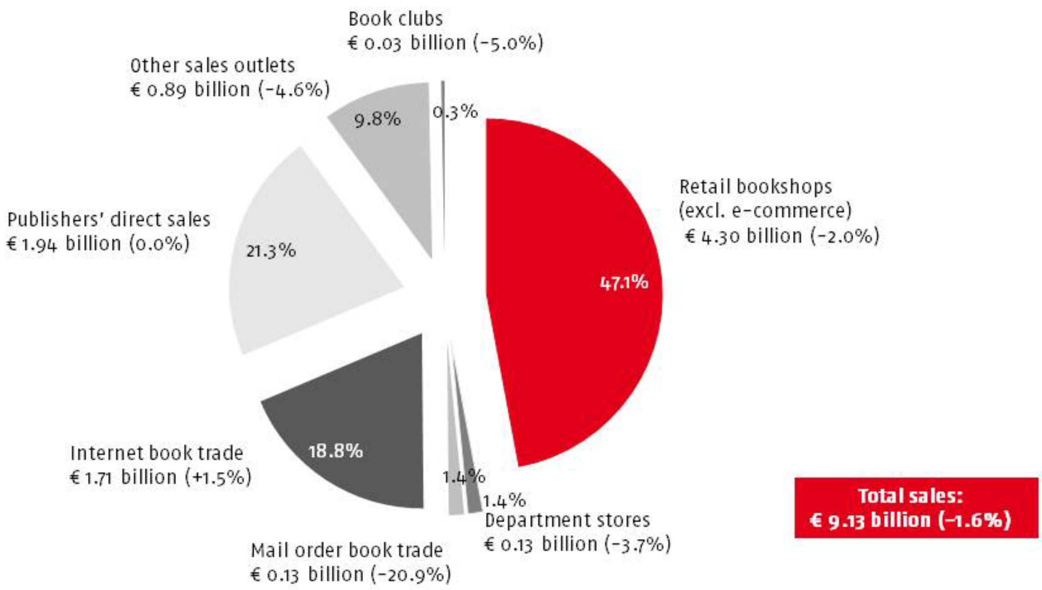
Apart from the online book trade and direct sales, all other channels experienced a decline last year. The traditional mail-order book trade saw the steepest decline. Following a collapse in sales in 2015 and 2014 (falls of 26.4 per cent and 26 per cent respectively), 2016 saw a distinct recovery in the revenues obtained through this channel (up by 37.5 per cent). Following this peak, 2017 witnessed a renewed slump, with sales falling by 20.9 per cent. As such, the traditional mail-order business through catalogues, mailings or by telephone now accounts for only 1.4 per cent of all the industry's sales, with a volume of 128 million euros (2013: 218 million euros; market share: 2.3 per cent).

Likewise, the book sections of department stores (Karstadt, Kaufhof etc.) also registered a return to negative figures (a fall of 3.7 per cent) following a good 2016 (up 16.3 per cent; total sales: 131 million euros). At present, 1.4 per cent of the industry's total sales pass through department stores (2013: 1.5 per cent). Book clubs no longer play any significant role in the book market. In 2017 they were responsible for just 0.3 per cent of all sales, the same as the year before (2013: 1.6 per cent). Bertelsmann closed its book-club business at the end of 2015, thereby driving down the figures.

The book business was also significantly slower last year in the other sales outlets, including discounters, supermarkets, filling stations and specialist electronics dealers. Taken together, these sales channels lost 4.6 per cent of the previous year's revenue, earning 892 million euros. As a result, the market share of these ancillary markets once again slipped into single figures (9.8 per cent; 2016: 10.1 per cent; 2013: 9.9 per cent).

Estimated sales of bookselling enterprises

Distribution channels 2017



Market structures

Throughout Germany a good 20,000 enterprises are, in the broadest sense, involved in the production or sale of books. They are listed in the "Address Book of the German Book Trade", which is available in digital form at www.adb-online.de. Around 14,200 of these companies – almost three quarters – are publishing houses or institutions involved in publishing. The term "bookselling enterprise" is defined very broadly. The Address Book includes, for instance, municipalities, university faculties, societies and institutions that only sporadically issue publications.

The number of companies that produce and distribute books or specialist and scientific magazines on a professional basis is much smaller than the Address Book suggests. Most of them are members of the German Publishers & Booksellers Association (Börsenverein des Deutschen Buchhandels), which represents the interests of the book industry across its different sectors. At the close of 2017, the association's exact membership stood at 4,657 (2016: 4,816). This included 1,644 publishers, 67 book wholesalers and 17 publishers' representatives. Booksellers, which counted 2,844 enterprises, made up the majority of the membership. This figure also differs significantly from the Address Book, which lists as many as 5,600 booksellers. Unlike the membership statistics of the German Publishers & Booksellers Association, the Address Book includes individual entries for branch outlets. Added to this are the so-called book sales points, such as stationery shops, which focus on other segments, and where books make up just a small part of their complete range.

Information on the number of bookselling enterprises in Germany and on their sales figures can also be derived from the VAT statistics of the Federal Statistical Office, although these are currently only available for the years up to 2016. This source records all companies with an annual turnover greater than 17,500 euros, but it also makes different distinctions between the businesses included than do the statistics of the German Publishers & Booksellers Association or the Address Book of the German Book Trade. According to these sales statistics, in Germany in 2016 there were 2,034 publishers (41 fewer than in the year before) and 3,682 booksellers (34 fewer). A comparison of these figures over several years also confirms the decline in the number of companies involved in either publishing or bookselling. Between 2012 and 2016, the number of companies operating as publishers declined by 175 in all, while the number involved in selling books fell by almost 360.

However, the VAT statistics only list companies and corporations, and do not record booksellers' branch outlets or publishers' imprints. The German Publishers & Booksellers Association attests to the existence of about 3,000 publishers and 6,000 bookshops (including branch offices and book sales points in which books form a small part of a wider range).

Sales breakdown by category and form of publication

Hardbacks are the most important source of turnover for the German book trade. Together with the softcover books, which also command a higher price, they continue to claim an increasingly large share of the sales cake. In 2017, they accounted for 75.1 per cent of the sales of printed books. (As the figures for e-books are only available for the general trade market – without schoolbooks and specialist publications – they have a different basis and will therefore be addressed on their own. See below.)

As such, hardback and softcover books increased their share of the printed book market again. In 2016 they were responsible for 74.8 per cent of sales, up from 73 per cent in 2015. In the space of two years, therefore, the market share of hardback and softcover books rose by 2.1 percentage points. However, this did not translate into higher sales, as in this respect they actually saw a negative development last year. Across all sales channels turnover derived from hardback and softcover books fell by 1.5 per cent. In the retail book trade, the decline even amounted to 2.7 per cent. In contrast, sales of such books had risen in 2016 – by 2.9 per cent (or by 0.4 per cent in the retail bookstores).

Paperbacks, meanwhile, experienced only a very slight decline and now have a market share of 21.8 per cent (2016: 21.9 per cent). In 2017, paperbacks generated 2.7 per cent less turnover than in 2016, with retail book sales falling by 3.3 per cent.

Audio books lost some of their market share in 2017, when they accounted for 3.1 per cent of overall (physical) sales in the book market (2016: 3.3 per cent). These revenues also constitute a decline – by 8.4 per cent across all sales channels, and by 9.4 per cent in retail bookshops. However these figures only account for sales of physical products. If digital sales are included, as listed in market reports such as the "Audible Hörkompass 2017", then last year saw 16 million Germans using audio books – approximately 1.6 million more than in 2016.

In terms of the different categories (across all sales channels and book formats), fiction was by far the most important for the German market. With a 31.9 per cent share of overall sales, it remained at around the same level as the year before (2016: 31.5 per cent). Actual turnover derived from fiction sales nevertheless fell by one per cent on 2016.

The second most important source of sales was still children's and young adult books, which maintained a high market share of 16.3 per cent last year (2016: 16.5 per cent). After this segment's sales grew by a healthy nine per cent in 2016 – partly because of the "Harry Potter effect" – in 2017 it incurred a small downturn of 2.3 per cent.

In third place came self-help books, which were also unable to sustain their sales in 2017. Across all channels they lost 2.5 per cent of their sales value compared to the year before. Their market share also fell a little, from 14.5 per cent in 2016 to 14.3 per cent in 2017.

In the non-fiction category, sales across all channels fell by 2.3 per cent in 2017, with a market share of 9.9 per cent (2016: 9.8 per cent). As such, non-fiction books occupied fifth place, behind schools and learning which, as in the year before, accounted for 10.9 per cent of all sales and stayed in fourth place. This was the only category which achieved growth in its turnover in 2017 (up by 0.9 per cent).

The respective market shares of the remaining segments in 2017 were as follows: scientific books (all categories) achieved a combined share of 10.9 per cent (3.5 per cent decline in sales); travel books achieved 5.9 per cent (2 per cent decline in sales).

Sales indices for e-books in Germany

The business with digital books in 2017 can be summarised thus: the numbers of units sold continued to increase, whereas turnover fell. Sky-rocketing growth for e-books is a thing of the past. Sales revenues declined for the first time last year, when the turnover in the digital market for trade books for private use (excluding school textbooks and specialist books) showed a year-on-year decline of 1.4 per cent. Already in 2016, the dynamism of this market had slowed down, producing only modest growth of 2.6 per cent (2015: 4.7 per cent; 2014: 7.6 per cent).

Despite this moderate downturn, in 2017 e-books still maintained the same share of the overall trade book market, accounting for 4.6 per cent as in the previous year (2015: 4.5 per cent; 2014: 4.3 per cent; 2013: 3.9 per cent; 2012: 2.4 per cent; 2011: 0.8 per cent). Even if the development of digital sales remains slower than originally expected or predicted, looking at the absolute numbers sold, it is clear that the demand for digital books is indeed still growing. The number of copies sold in the marketplace for e-books climbed by 3.9 per cent (following a rise of 4.1 per cent in 2016). All told, in 2017 the industry sold 29.1 million e-books to private users, compared to 28.1 million in the previous year.

That fact that sales turnover still cannot keep pace with the numbers sold is due, as in previous years, to the downward trend in the average prices of e-books. In 2017 customers paid an average of 6.38 euros for an e-book, a full 34 cents less than in 2016. In 2010, users still paid 10.71 euros for each e-book, 4.33 euros more than they do today. The price pressure on e-books derives, not least, from the large number of low-budget self-published titles. For the purposes of the GfK Consumer Panel, all purchases of e-books costing 50 cents or more in the trade book market are recorded. This means the focus is on sales. However, free e-books with classics in the public domain and flat rate models are also likely to have an effect on the market.

The German market for general trade e-books is clearly dominated by fiction, which accounted for around 82 per cent of turnover in this area. Children's and young adult books, which in 2016 enjoyed a roughly eight per cent share thanks to bestsellers like "Harry Potter and the Cursed Child" (J.K. Rowling/John Tiffany/Jack Thorne) and "Seven Wonders – The Legend of the Rift" (Peter Lerangis), fell back to approximately five per cent in 2017. Self-help books were thus able to increase their share (from around six per cent to seven per cent). Travel and non-fiction books maintained their approximate market shares of one and five per cent respectively.

Book production in Germany

In 2017, the total number of titles produced by German book publishers (first editions and reissued titles) fell to its lowest point in 10 years. If we combine first editions and reissued titles, then 2017 saw the publication of exactly 82,636 books – 2,850 fewer than in the previous year (a decline of 3.3 per cent). As such the current production figures are lagging ever further behind the record levels of 2010 and 2011, when the industry seemed on course to reach the 100,000 mark.

However, if we exclude reissued titles and only count the real first editions for 2017, it becomes clear that publishers have sustained the number of (printed) new releases at almost the same level as the previous year. Precisely 72,499 first editions were published last year – just 0.4 per cent fewer than in 2016. As such, 87.7 per cent of all new releases in 2017 were genuinely new titles (2016: 85.2 per cent). Therefore, the current brake on production applies above all to the backlists, which are no longer being published. Over time, the ratio between first editions and reissued titles has been shifting generally towards the former. In the mid-1990s, production of the two was still divided roughly 70 per cent to 30 per cent respectively.

The largest number of these new titles – 14,273 – appeared in the fiction category, which contributed a 19.7 per cent share of all first editions (2016: 19.1 per cent) – a modest upturn compared to 2016, when 13,891 first editions were issued (a rise of 2.7 per cent). In second place, as usual, came German literature. This is listed separately (even if this causes some overlapping) and unlike the pure fiction category, it includes works of literary criticism. This accounted for 14.9 per cent of the first editions (2016: 14.1 per cent), with precisely 10,824 books being newly issued in this segment last year. Amounting to a 5.1 per cent increase (2016: 10,297 titles), this means growth in the category was more pronounced than for fiction pure. As in the previous years, third place was again taken by children's and young adult books, which enjoyed a generous 11.5 per cent expansion in the number of titles in 2015. In 2017 they experienced a modest fall for the second year in a row (8,752 titles; down by 2.3 per cent). A bigger decline was seen last year in the category "general interest, computer science, information science" (down 12.2 per cent). Likewise producing fewer new titles in 2017 were the categories "social sciences" (down six per cent) and "technology, medicine, applied sciences" (down 1.2 per cent).

Taking paperback production as a separate category, their share of first editions climbed in comparison to the year before, rising to 13 per cent from 12.5 per cent. In all, 9,451 new paperback titles were published last year – 4.1 per cent more than in 2016 (9,077 new editions). This means the paperback lists expanded somewhat, following three rather thin years in succession. In the overarching category of literature – the most important paperback category with a share of 64.7 per cent – it is clear that here in particular publishers allowed themselves more leeway. In this segment in 2017, approximately 300 more new paperback books came onto the market (6,116 titles, an increase of 5.2 per cent; 2016: 5,812 titles). In terms of fiction books, publishers even raised their paperback production by 7.3 per cent, issuing 5,128 titles (2016: 4,781). Altogether in 2017, 54.3 per cent of all new paperback editions appeared in the fiction category (2016: 52.7 per cent). A comparison of these figures over several years reveals a clear shift towards fiction in paperback books.

On the other hand, a downward trend is evident for paperback production in children's and young adult literature. Publishers have been cutting down on the quantity of titles in this area for a number of years. In 2017, 785 children's and young adult books came freshly onto the market as paperbacks, compared to 840 in 2016 (down by 6.5 per cent).

Business with other countries

Translations

A steady number of titles and a tried-and-tested portfolio of languages: that is what distinguishes the German book market when it comes to translation. In all, some 10,358 works were translated into German or were published as new editions last year – almost 140 fewer than in the year before. That represents a small decline of 1.3 per cent (2016: 10,496). Between 2008 and 2013 the number of translations ranged consistently between 11,400 and 11,900, but since 2014 publishers have been surrendering ever more of this volume. However, this is probably connected to the fact that fewer new editions overall are coming onto the market. In a 10-year comparison, little has changed in the traditional ratio between German-language books and translated titles. In 2017, 12.5 per cent of all first editions and reissued titles derived from other languages. In 2008, when the number of translations was almost 1,550 higher, that figure was 12.6 per cent.

If we ignore reissued titles and take only the first editions into account, then in 2017 9,890 "genuinely new" books came onto the German market as translations – just eight more than in the previous year (2016: 9,882). As such, translations accounted for 13.6 per cent of all first editions in 2017. This is a similar share to the year before, but viewed in a 10-year comparison is clearly at the upper end of the scale.

English is uncontested as the most important language of origin for translations for the German book market. Books from English-speaking countries accounted for 64.2 per cent of all translations (first editions) in 2017. In all, some 6,347 new titles were translated from English into German, a modest decline of around 30 (down by 0.5 per cent; 2016: 6,380 titles). Of these, 2,522 fell into the fiction category (2016: 2,587). Set against the total 3,720 translated works of fiction published in 2017, English therefore held a 67.8 per cent share (2016: 70.3 per cent). This means more than two thirds of all fiction translations still come from English.

Alongside English, French also carries a certain weight in the translation rankings, and 2017 saw an increase in interest in the language of Germany's European neighbour. In 2017, some 1,136 first editions – 11.5 per cent of all translations – were translations from French to German, over 70 more than in the year before (2016: 1,064 titles, 10.8 per cent share). The upturn for French is especially evident in the fiction segment: The literary traffic arriving in Germany from across its western border accounted for 341 first editions – almost 100 more than the previous year. As such, at 9.2 per cent, French secured its highest ever share of all fiction translations (2016: 6.7 per cent). There was a good reason for this because, in the autumn of 2017, France presented itself as Guest of Honour at the Frankfurter Buchmesse. Guest of Honour appearances usually have an impact on the output of translations from German publishers.

In the top-10 list of most important languages of origin for translations into German, Japanese has held on to third place since 2009. In 2017, 612 new titles were translated from Japanese into German – somewhat fewer than in the previous year (623 titles). While this means that 6.2 per cent of all translations (first editions) came from Japanese (2016: 6.3 per cent), Japanese books only accounted for 0.7 per cent of translated fiction titles (25 works; 2016: 22). The largest number of translated Japanese books were probably in the comics genre – above all manga titles.

The overall share of translations among all new releases (first editions) was 13.6 per cent. Where individual categories are seen to enjoy a higher value in this respect, translations play a prominent role for that genre. A good example of this is fiction, where 26.1 per cent of all first editions were translations. As such its share was only slightly lower than in the previous year (26.5 per cent), although viewed over a longer period it has declined significantly: in 2010 it still held a 30.3 per cent share. In total, last year saw the release of 3,720 translated fiction titles (first editions) – almost 40 more than in the year before. Fiction therefore accounts for 37.6 per cent of all translations (first editions).

The second most important segment for the overall German translation market is children's and young adult books (with a 18.3 per cent share of all translations). Another significant force in the market are comics, which achieved a 15.2 per cent share of all translations.

Licensing

German publishing houses reported an extremely buoyant licensing trade in 2017 – after having experienced a small slump in their rights business the previous year. In all, some 7,856 works "made in Germany" crossed the German language border in 2017. With a 7.5 per cent increase, the licensing business enjoyed a significant improvement on the previous year (2016: 7,310 licences sold, down 2.8 per cent on 2015). However, the year against which all others have to be measured is 2007, when the industry almost broke the 10,000 mark, selling 9,225 licences.

For some years the leading licensing partner for German publishers has been China. The total number of contracts signed with Chinese partners was 1,150, more than twice as many as with second-placed Turkey. All the same, the rights trade with China showed a strong decline for the second year in a row. China now only accounts for 14.6 per cent of all completed deals (2016: 18.6 per cent; 2015: 20.1 per cent). While China managed to retain its position at the top of the ranking, there was considerable movement among the rest of the top-10 buyers of German licences. Turkey, already the climber of the year in 2016 when it rose from 10th to 5th place, made a great leap forward in 2017, occupying second placed directly behind China, with 522 completed deals (2016: 308). In November 2016, Germany was Guest of Honour at the International Istanbul Book Fair, and it is quite likely that Turkey's high position in the ranking reflects that appearance. Following the boom in demand from Turkey, Spain had to make do with third place. Nevertheless business is blooming here too. Some 444 licences were sold in Spain, accounting for 5.7 per cent of the total licensing volume (2016: 384 contracts).

Chinese also tops the list of target languages, though here too it had to surrender some of its share (share of all licences in 2017: 16.1 per cent; 2016: 19.5 per cent). The Chinese-speaking partners are still particularly keen on children's and young adult books. However, with 514 contracts signed, their interest has cooled significantly compared to 2016, when 782 deals were done. On the other hand, outside the children's and young adult segment the number of licensing deals increased. For instance, German non-fiction books were considerably better received by Chinese-speaking partners, with the number of deals for such books more than doubling to 165 (2016: 80 contracts). Also growing in popularity are titles in the schools and learning category, for which 58 licences were purchased last year (2016: 10).

All told, last year German publishers completed 25.9 per cent of their licensing deals with publishing houses in Asia (2016: 29.7 per cent). For sheer quantity, however, the most important licensees for German books are still those based in Europe. Last year, German publishers signed 68.2 per cent of all their licensing deals with European partners (2016: 63.5 per cent). The sale of 5,358 licences in total was even an improvement on the good results of the previous year (4,644 deals). Leading the European neighbours was Turkey, where German rights managers completed 522 contracts in 2017

(2016: 308). This huge leap of 69.5 per cent is above all thanks to children's and young adult books (325 contracts; 2016: 147 in terms of language). Turkish buyers were particularly keen on picture books (128 licences; 2016: 38).

The most important category for the whole licensing trade, regardless of country, were children's and young adult books, with 3,037 contracts signed (2016: 2,883). Within this segment, the largest number of contracts (1,236) were for picture books. The second-placed category was fiction, which accounted for 16.5 per cent of all contracts last year (2016: 15.8 per cent). Here, the total number of contracts signed was 1,294 (2016: 1,157) – the largest number for Italian (119; 2016: 80), English (104; 2016: 130) and Czech (94; 2016: 72).

Foreign trade

Import and export data for the book industry are currently only available up to 2016. The figures encompass books, magazines, newspapers, cartographic products and musical notes.

Looking at all the products of the book trade together, the last five years have seen strong growth, especially in import values, which rose by an impressive 48.6 per cent. Developments were much more modest with respect to exports, which grew by 1.6 per cent between 2012 and 2016. For many years, the value of exports was approximately twice that of imports, which is mainly due to the German-speaking neighbours Austria and Switzerland. Since 2015, however, this relationship has been shifting increasingly in favour of imports, which now account for 42.9 per cent of the total foreign trade volume for book-related items (2012: 34 per cent).

Above all in the product category "books", imports grew by a seemingly record amount, accounting for a 74 per cent share in the total import volume of book-related items (including picture books: 76.9 per cent). Five years ago, around 580 million euros worth of books were imported to Germany (including picture books: 622 million euros). By 2016, this number had almost doubled to 1.16 billion euros (including picture books: 1.2 billion euros).

But books are also by far the most important of all the book industry's export items. In 2012, books valued at 1.18 billion euros were exported from Germany (including picture books: 1.21 billion euros); in 2016, this figure climbed to 1.37 billion euros (including picture books: 1.41 billion euros). Thus the growth rate since 2012 amounts to 16.3 per cent – or 16.8 per cent including picture books. This means that books currently account for 66 per cent of all exports of book trade items (including picture books: 67.9 per cent).

When it comes to the countries that play a leading role in imports, the ranking has long been headed by the UK. Imports from there have served the growing interest in Germany for books in English. In 2015, the British were overtaken by Poland, which in 2016 further expanded its position as the most important partner for German imports (volume: approximately 486 million euros, up by eight per cent on the previous year). Some 40.4 per cent of all imported books and picture books now come to Germany across the Polish border. The reason for this rapid growth is called Amazon. In 2014, the online retailer opened two new warehouses in Poznan and Wroclaw which also deliver to eastern areas of Germany. Since then it has added further logistical centres in Poland, and in 2015 it also opened a major distribution centre near to Prague, which likewise delivers to Germany. This explains why, in 2016, the Czech Republic rose from fourth to second in the ranking of the most important import countries – causing the UK to slide down to third place.

In 2016 Amazon's distribution strategy influenced not only the import statistics, but also the export figures. This is because, for the books to be delivered to German customers from Poland and the Czech Republic, they first have to be sent there by the German publishers (or directly from the printers). That is also why the Polish neighbours have occupied first place on the list of Germany's most important export countries since 2015, currently with a volume of about 292 million euros (up by 2.8 per cent on the previous year). To illustrate this foreign trade upheaval, in 2012 exports to Poland amounted to just about 22 million euros. In 2015, therefore, it shunted Switzerland and Austria – until then the biggest importers of German print products – down to second and third place respectively. On this ranking list, the climber of the year in 2016 was the Czech Republic, which jumped from eighth place to fifth. Books with a value of almost 88 million euros passed into the Czech Republic in 2016 – in 2015, this figure had still been around 48 million euros (an increase of 80.7 per cent!).

Source: German Publishers & Booksellers Association, 2018
from: Buch und Buchhandel in Zahlen 2018