

BRAZILIAN PUBLISHING MARKET - PERFORMANCE IN REAL TERMS

Historical Series of the Production And Sales - Brazilian
Publishing Sector
Printed Book

May 2024



Production And Sales - Brazilian Publishing Sector Printed Book

Industry Analysis

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



Developed by:



Nielsen
BookData

TARGET

Analyze the **PERFORMANCE** of the publishing market in **REAL TERMS**. The **NOMINAL** data from the annual survey “Production And Sales Brazilian Publishing Sector” were deflated and adjusted to 2023 values using the accumulated variation of the IPCA (Consumer Prices Index Broad, in Portuguese) by IBGE (Brazilian Institute of Geography and Statistics, in Portuguese). In 2023 the IPCA registered a variation of 4.62%.

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

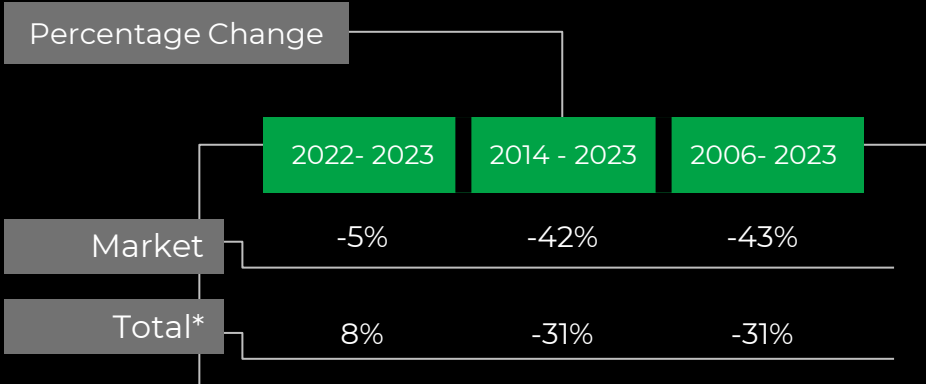
PUBLISHERS' PERFORMANCE ADJUSTED FOR INFLATION

Printed Book



PUBLISHING SECTOR

Analysis of Revenue Adjusted for Inflation - In constant 2023 Prices

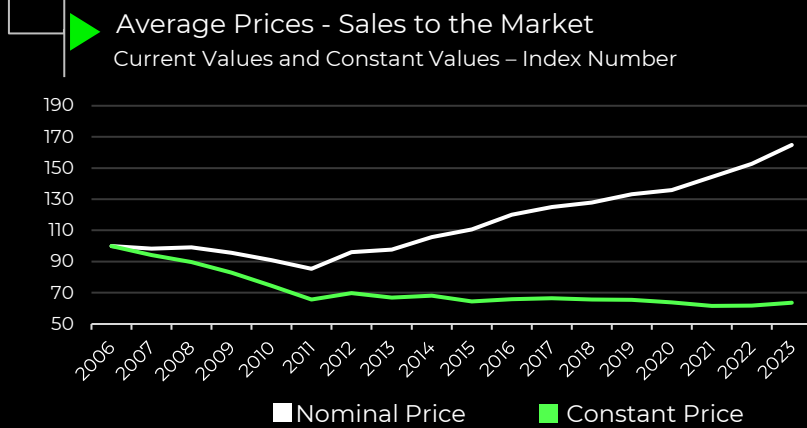
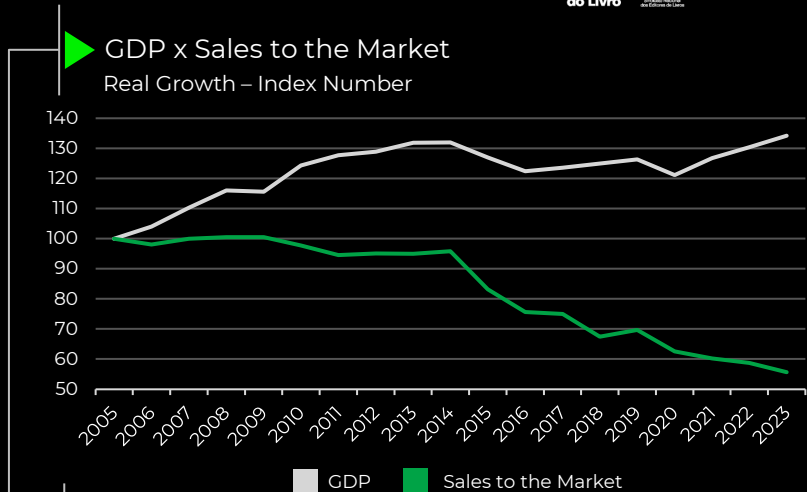


*Total: Sales to the market+Sales to the government

SALES TO THE MARKET - 2023

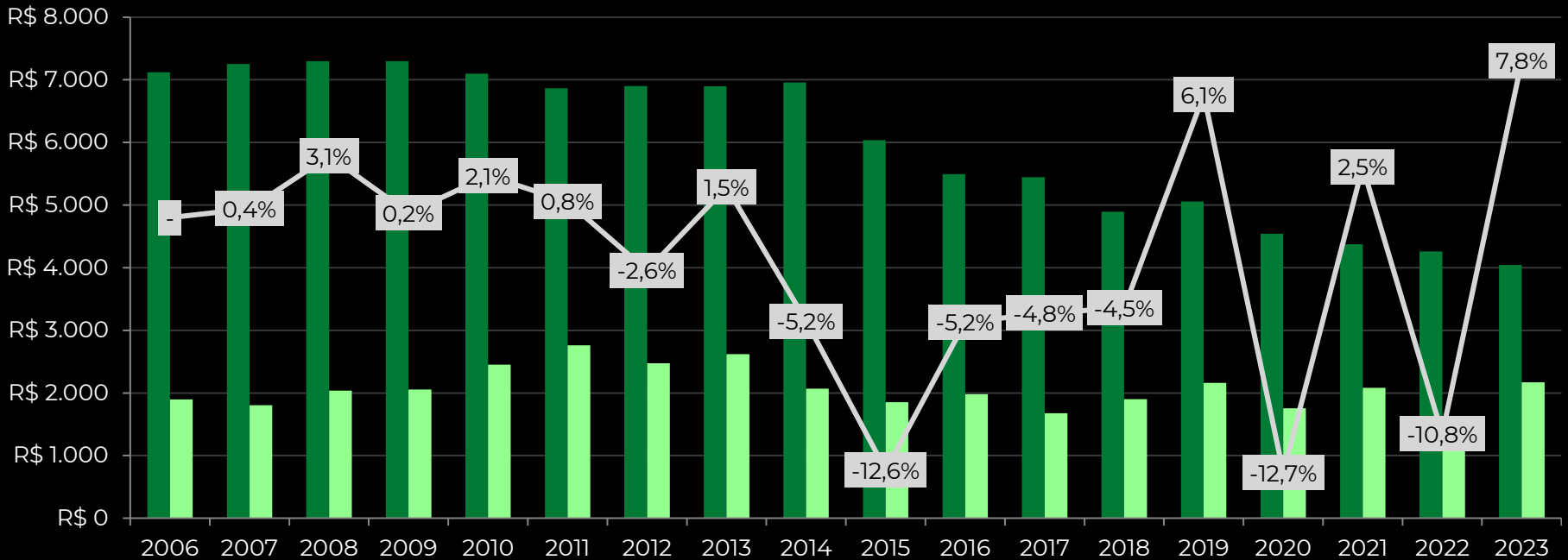


Once again, **PUBLISHERS'** have recorded a **DECLINE IN REAL TERMS**. Since **2019**, the **LAST YEAR** with **GROWTH ABOVE INFLATION**, the cumulative **DECLINE** is **20%**.



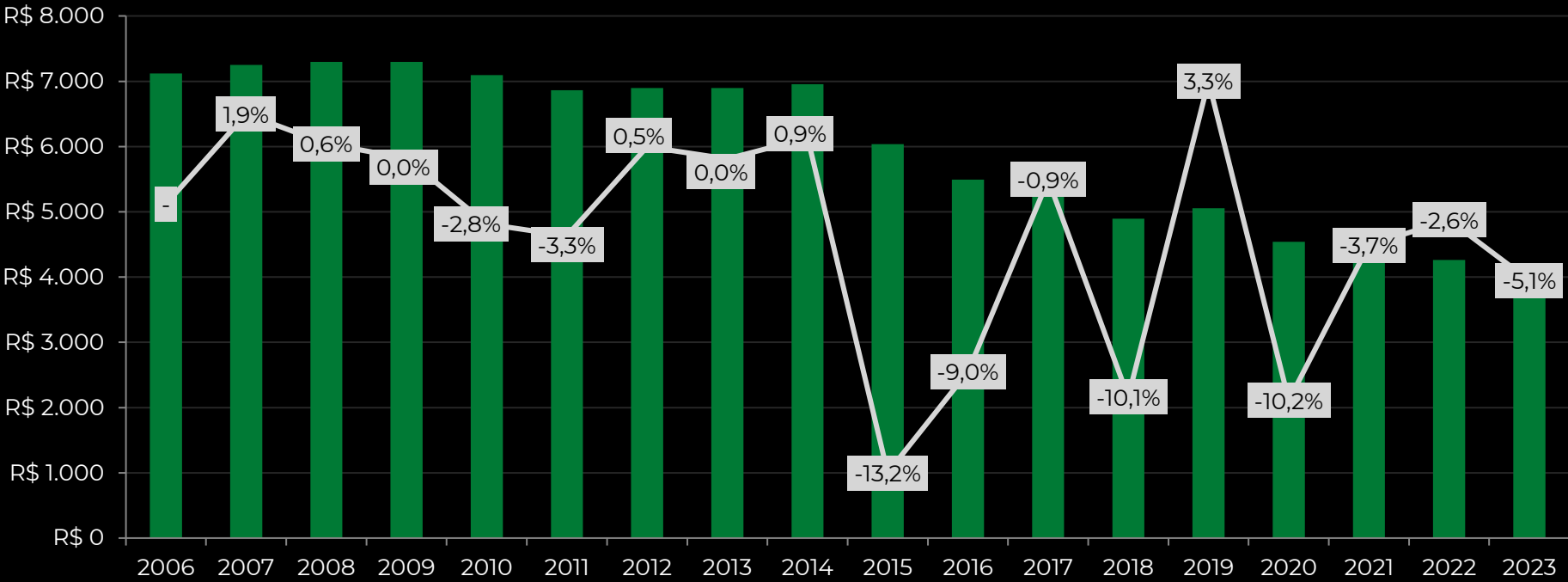
PUBLISHING SECTOR

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market & Sales to Government
 In Constant 2023 Prices | *In millions*



PUBLISHING SECTOR

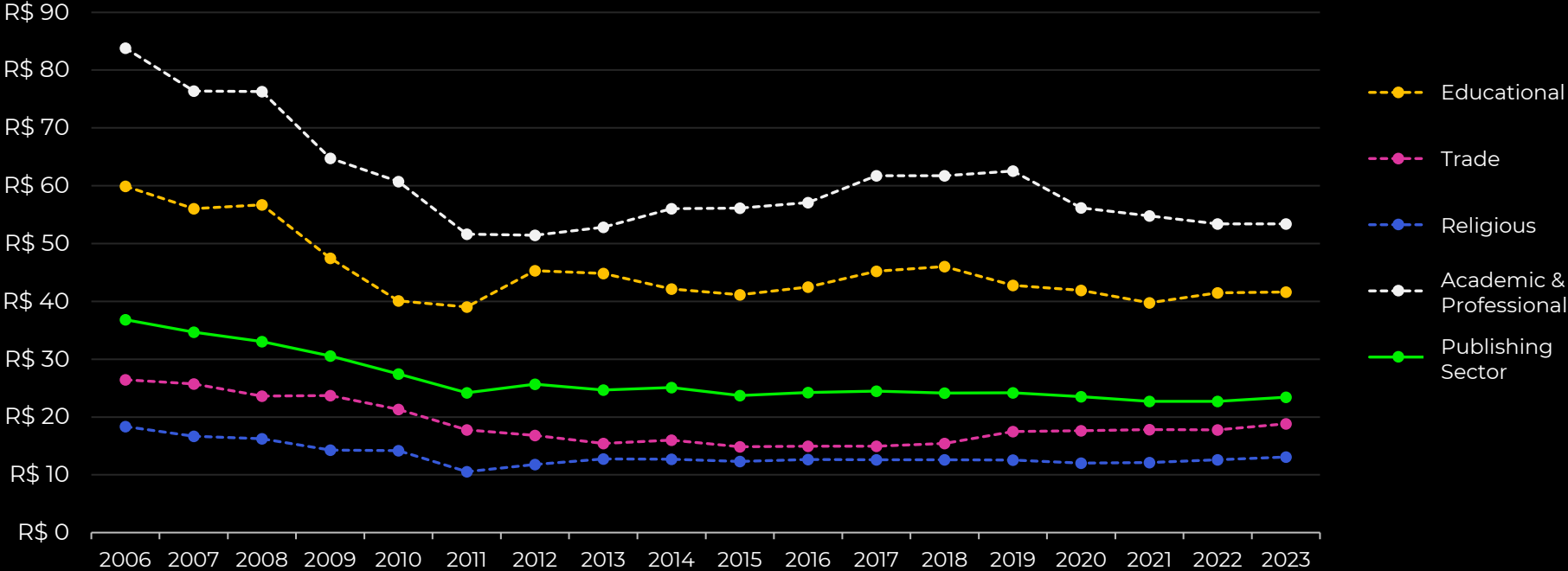
► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market preços constantes de In Constant 2023 Prices | *In millions*





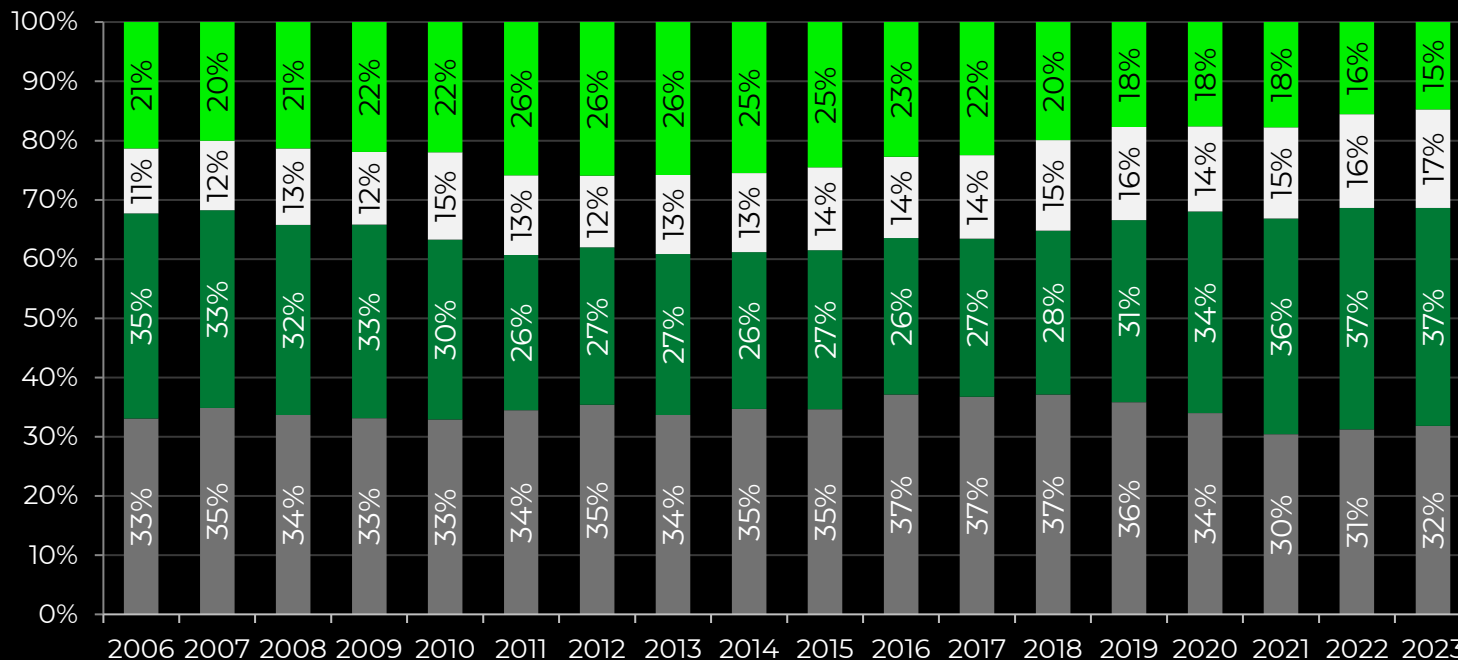
PUBLISHING SECTOR

► Average price adjusted for inflation - sales to the market
In Constant 2023 Prices



PUBLISHING SECTOR

► Publishers' Share by Category - Sales to the Market
In Constant 2023 Prices



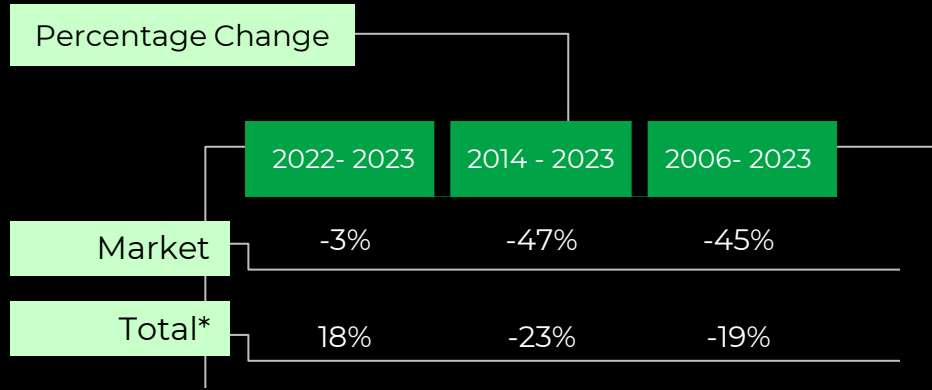
In 2023, religious publishers overtook academic and professional publishers in market share for the first time.

EDUCATIONAL PUBLISHERS' PERFORMANCE ADJUSTED FOR INFLATION

Printed Book

EDUCATIONAL PUBLISHERS'

Analysis of Revenue Adjusted for Inflation - In constant 2023 Prices



*Total: Sales to the market+Sales to the government

SALES TO THE MARKET

- The average book price has seen a slight 0.4% increase in real terms.
- This price increase mitigated a steeper decline, as the number of copies sold hitting its lowest point in 18 years.

SALES TO THE MARKET - 2023



With a **DECLINE** of **3%** in **REAL TERMS**, publishers' were **UNABLE** to **RECOVER** the **LOSSES** accumulated since the start of the **ECONOMIC CRISIS** and reached their **LOWEST LEVEL** in **18 YEARS**.

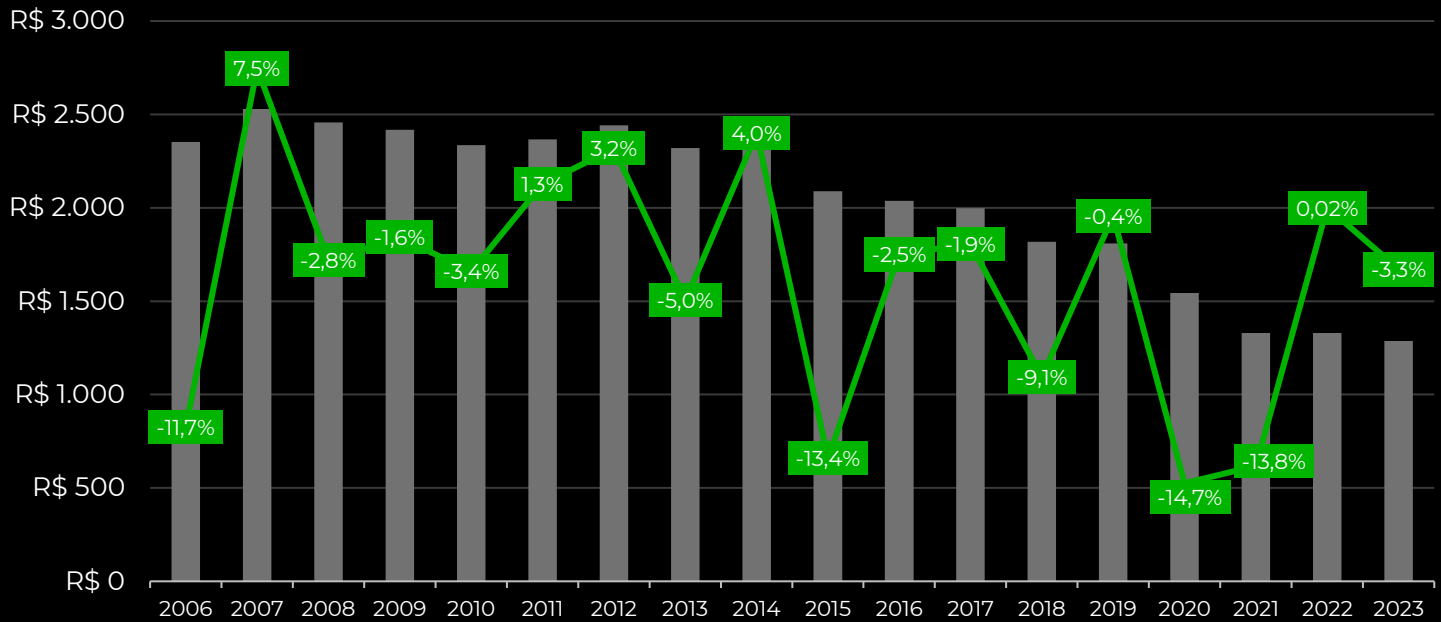


Since **2020**, the **YEAR** of the **COVID-19 PANDEMIC**, **PUBLISHERS'** have recorded a **17% DECLINE**.



EDUCATIONAL PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market
In Constant 2023 Prices | *In millions*



Even with the return to "normalcy" after the pandemic, publishers' have struggled to recover their losses.



EDUCATIONAL PUBLISHERS'

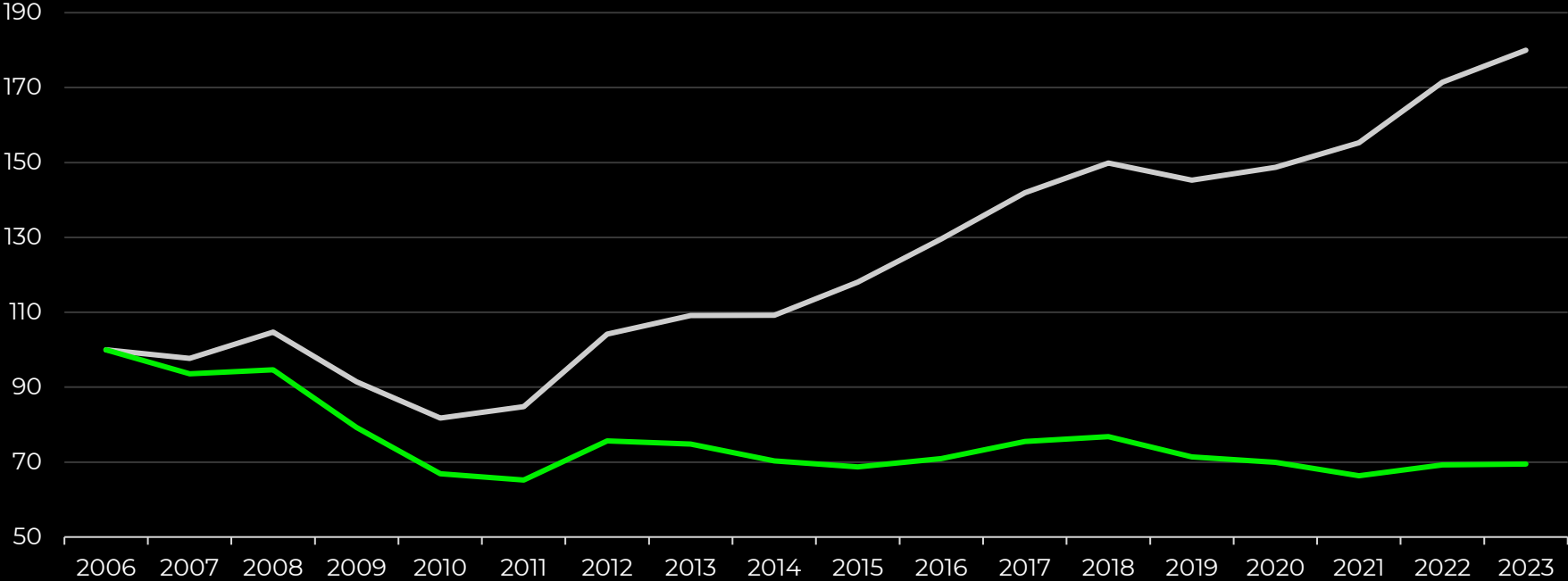
▶ GDP x Sales to the Market
Index Number





EDUCATIONAL PUBLISHERS'

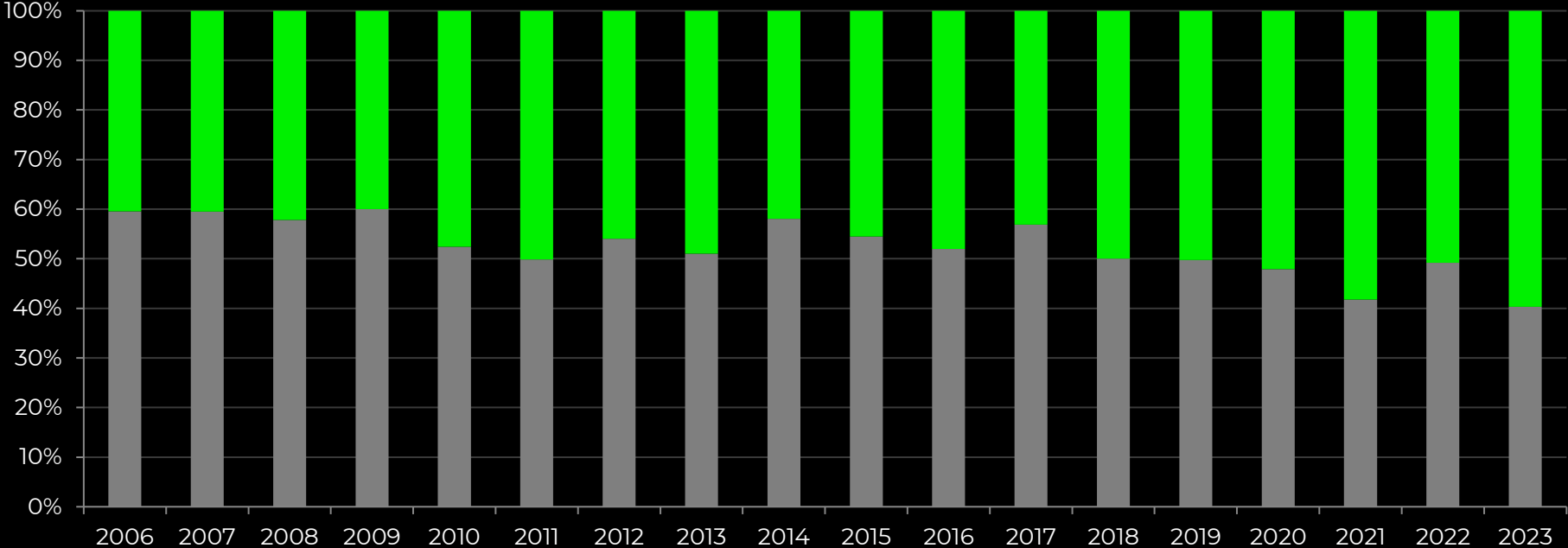
► Average Prices - Sales to the Market
Current Values and Constant Values – Index Number





EDUCATIONAL PUBLISHERS'

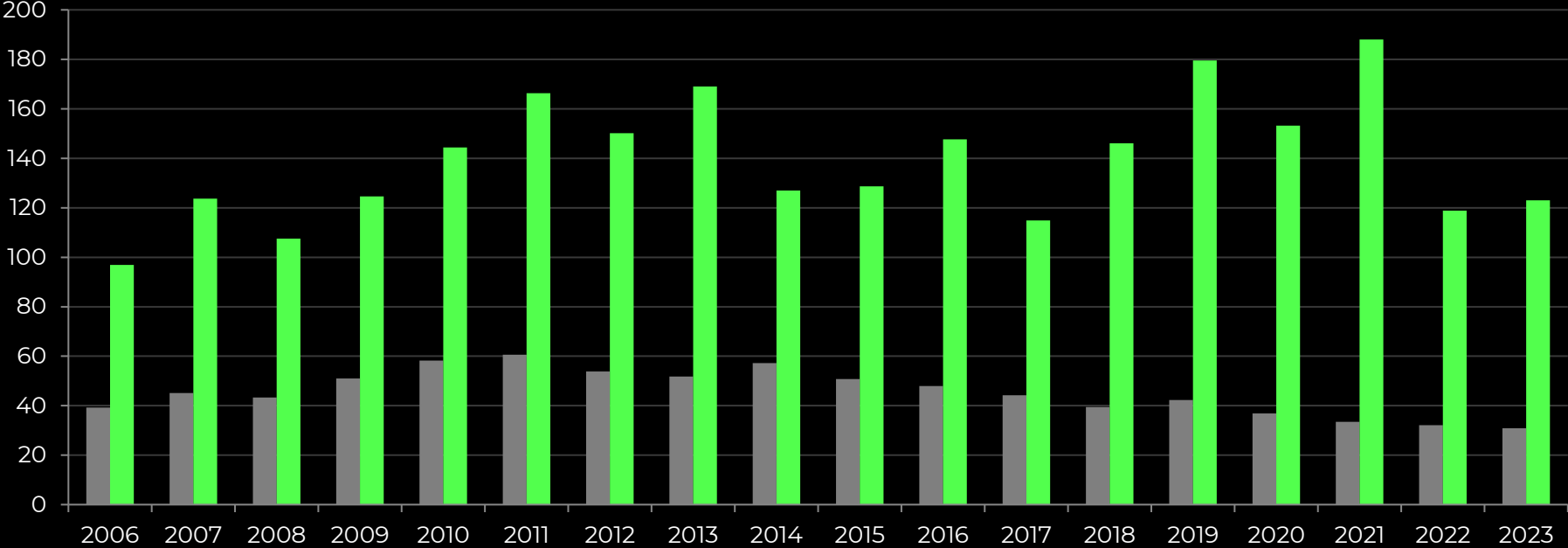
► Sales share to the Market and Government Revenue





EDUCATIONAL PUBLISHERS'

► Copies sold - Market and Government
In Millions

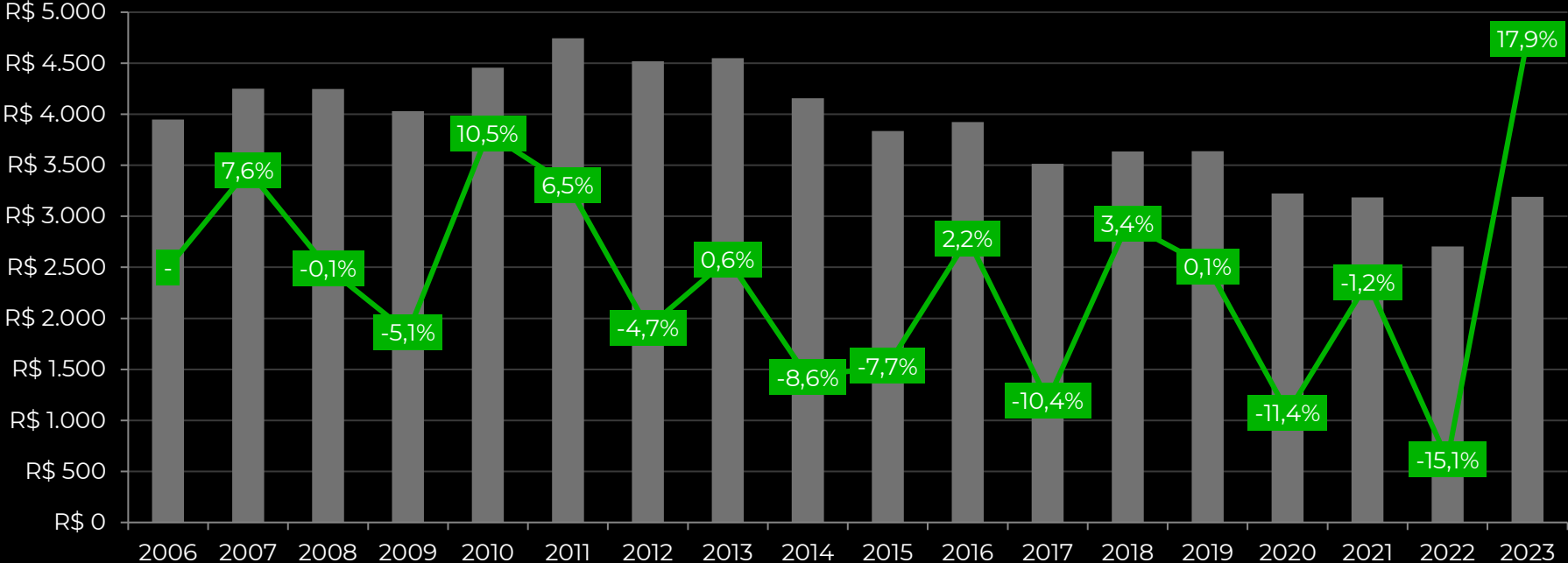


■ Market ■ Government



EDUCATIONAL PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market+Sales to the Government
In Constant 2023 Prices | *In millions*



■ Revenue (Market+Government) — Real Growth Rate

Nielsen
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TRADE PUBLISHERS' PERFORMANCE ADJUSTED FOR INFLATION

Printed Book

MaY 2024

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TRADE PUBLISHERS'

Analysis of Revenue Adjusted for Inflation - In constant 2023 Prices



*Total: Sales to the market+Sales to the government

SALES TO THE MARKET

- Over the past 18 years, the number of copies sold has fallen by 15%.
- The strategy adopted to sustain publishers' performance was to increase the average price. In 2023, prices increased by 5.8% in real terms; however, they remain significantly lower than those in 2006.

SALES TO THE MARKET - 2023



For **TRADE PUBLISHERS**, the **DECLINE** was the **SHARPEST DROP** since **2018**, with **REVENUES FALLING** by **7% IN REAL TERMS**.

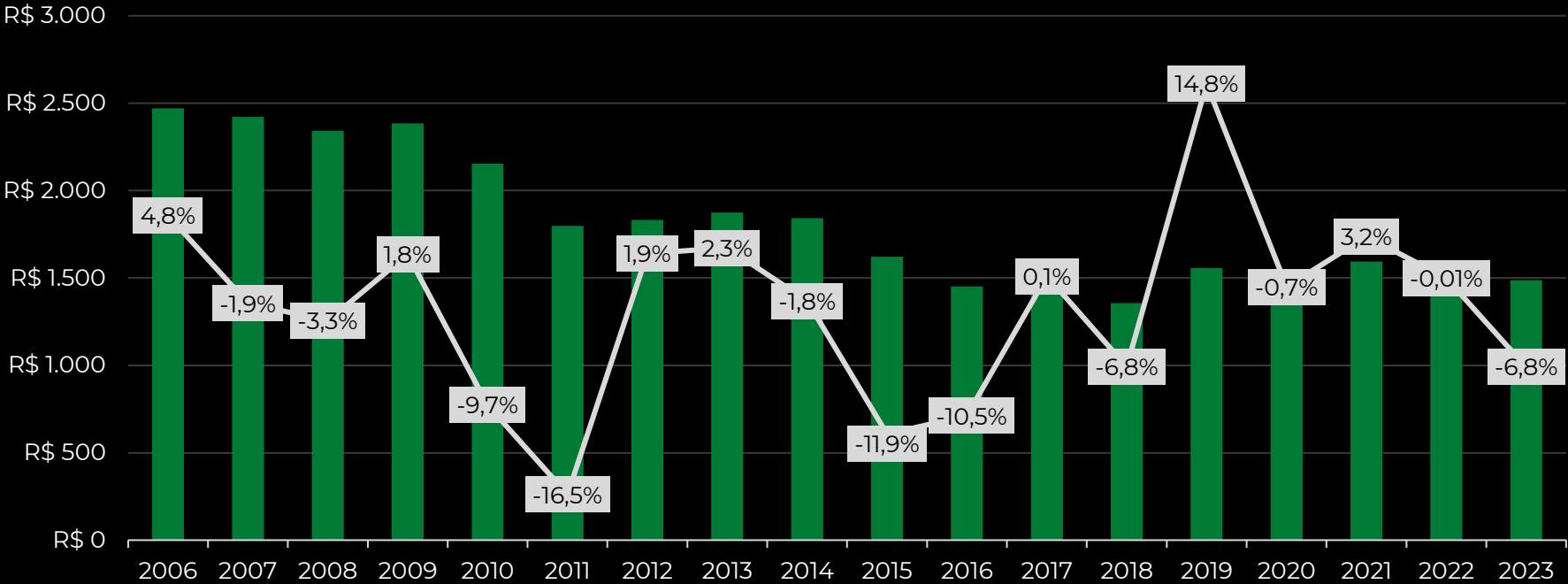


Since **2006**, the **AVERAGE PRICE DROPPED** by **29%** in **REAL TERMS**.



TRADE PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market
In Constant 2023 Prices | *In millions*



TRADE PUBLISHERS'



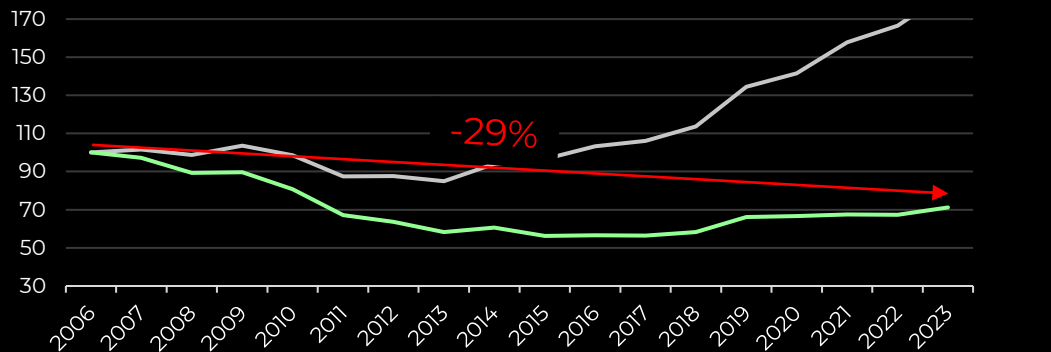
Despite recent adjustments for inflation, it is important to note that the average price is still significantly lower than the initial values recorded in the series. Publishers' have turned to price increases as a strategy to ensure the sustainability of their operations, particularly in light of the significant reduction in the number of copies sold. Yet, reflecting a cumulative loss of 40% over the past 18 years, publishers' revenues from sales to the market are still significantly lower than in 2006.

GDP x Sales to the Market
Real Growth – Index Number



Average Prices - Sales to the Market

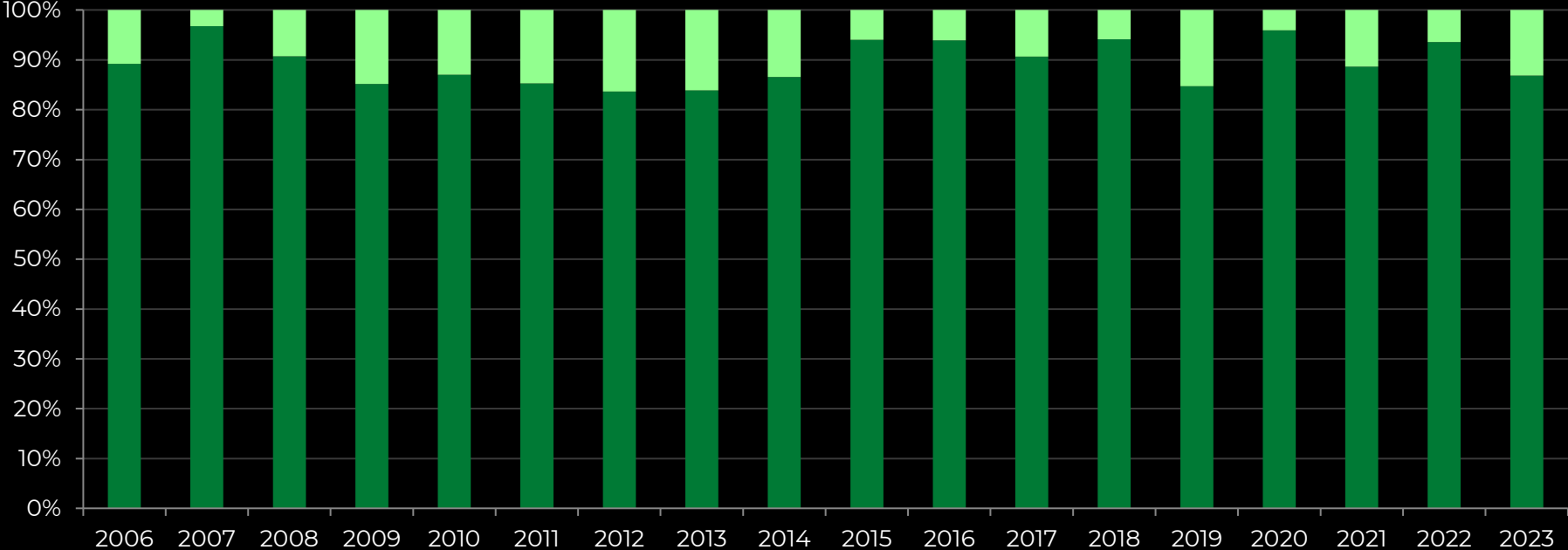
Current Values and Constant Values – Index Number





TRADE PUBLISHERS'

▶ Sales share to the Market and Government Revenue

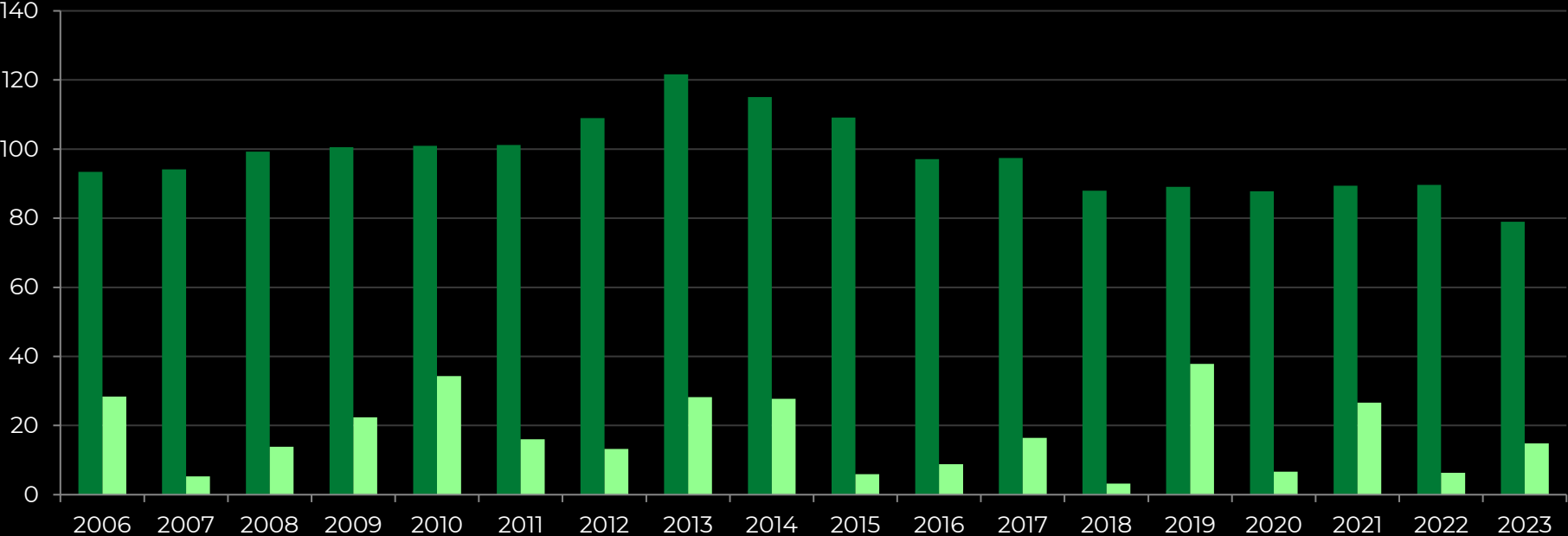


■ Market ■ Government



TRADE PUBLISHERS'

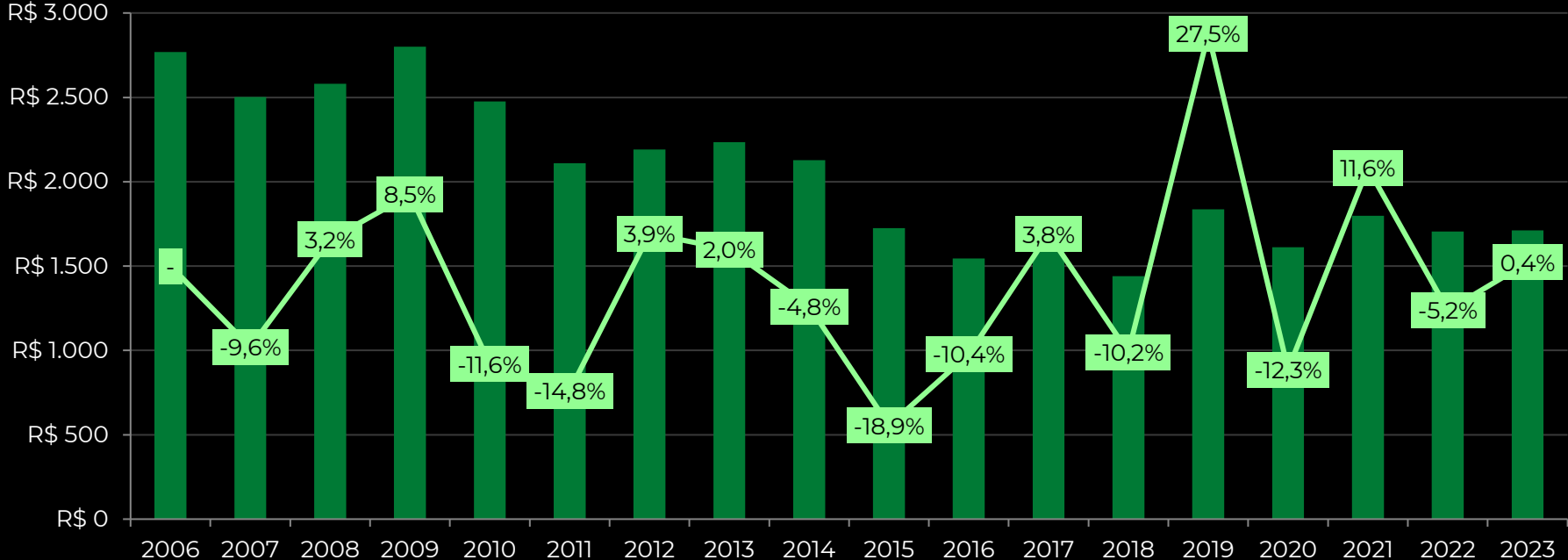
▶ Copies sold - Market and Government
In Millions



■ Market ■ Government

TRADE PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market+Sales to the Government
 In Constant 2023 Prices | *In millions*



■ Revenue (Market+Government) — Real Growth Rate

Nielsen
BookData

RELIGIOUS PUBLISHERS' PERFORMANCE ADJUSTED FOR INFLATION

Printed Book

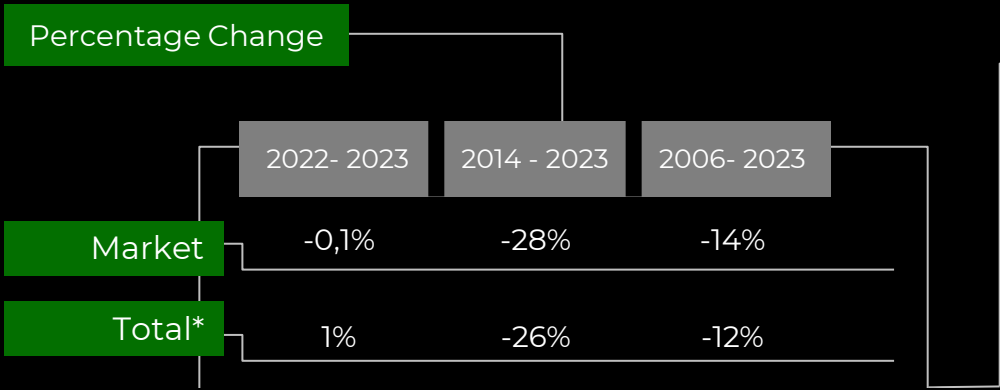
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RELIGIOUS PUBLISHERS'

Analysis of Revenue Adjusted for Inflation - In constant 2023 Prices



*Total: Sales to the market+Sales to the government

SALES TO THE MARKET

- With a 14% decline in revenue in real terms, these publishers experienced the smallest decrease in 18
- From 2006 to 2023, the average price of religious books has fallen by 29% in real terms.

SALES TO THE MARKET - 2023

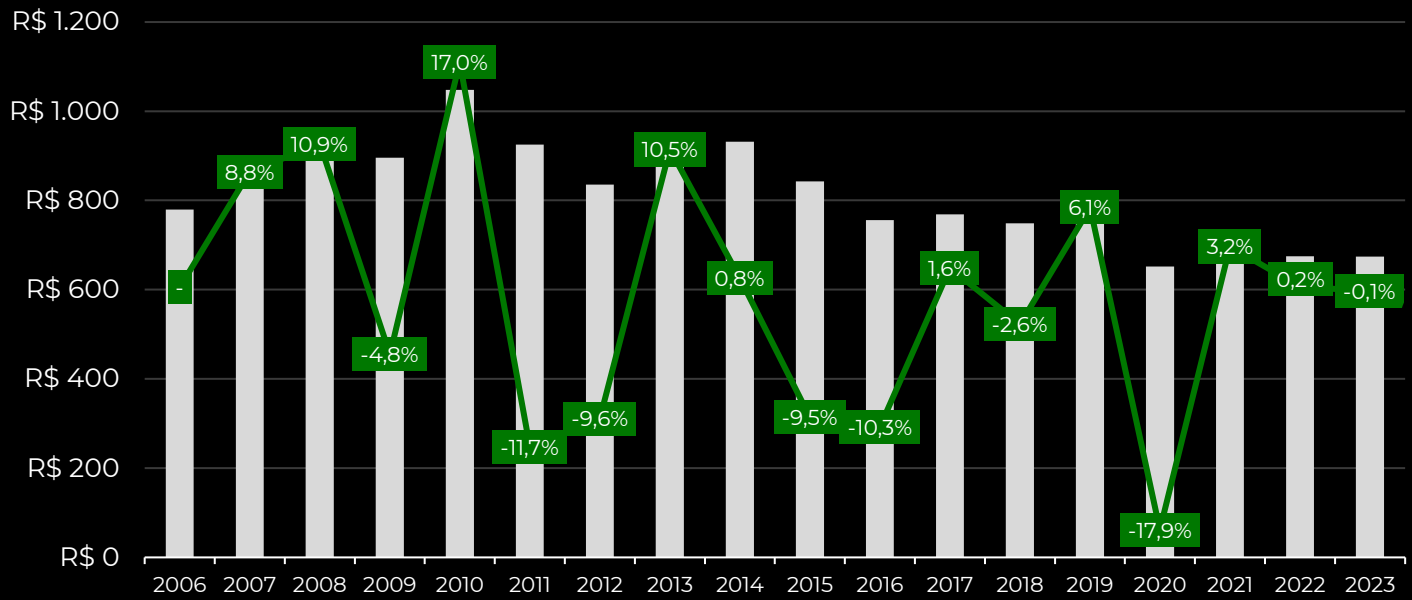
In **REAL TERMS**, REVENUES have **REMAINED STABLE** as **PUBLISHERS'** performance has **KEPT PACE** with **INFLATION**, resulting in **MINIMAL DECLINE**.

Since the **ONSET** of the **ECONOMIC CRISIS** in **2014**, the **NUMBER** of **COPIES SOLD** has **DECREASED** by **30%**.



RELIGIOUS PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market
In Constant 2023 Prices | *In millions*



For the second year in a row, religious publishers have seen near-zero growth in real terms. Revenues have been flat for the past three years.

■ Market - Constant Price ■ Real Growth Rate



RELIGIOUS PUBLISHERS'

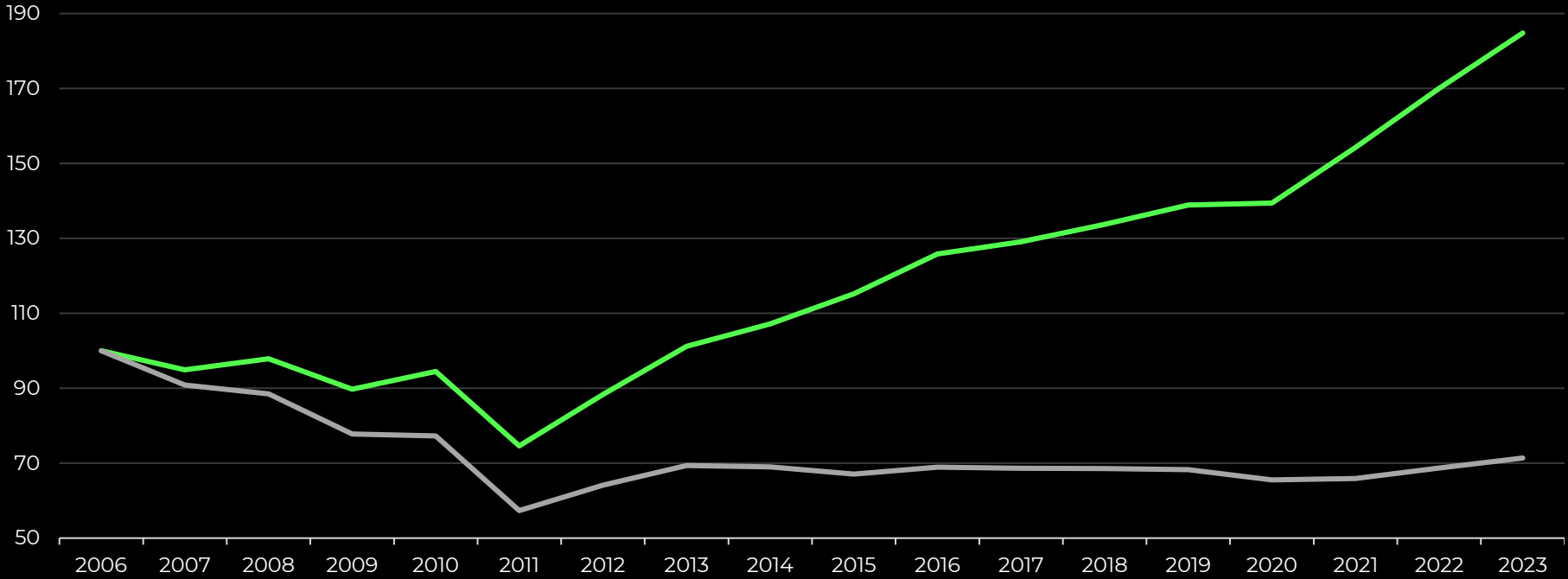
▶ GDP x Sales to the Market
Index Number





RELIGIOUS PUBLISHERS'

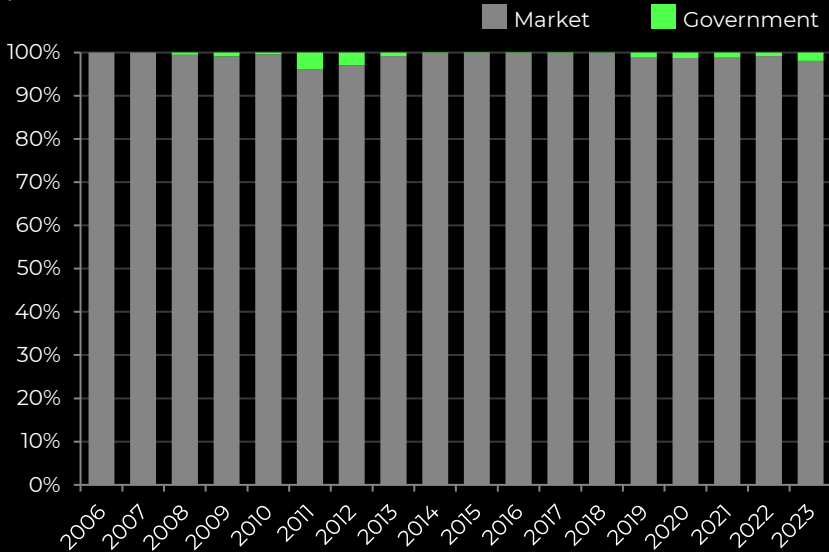
► Average Prices - Sales to the Market
Current Values and Constant Values – Index Number



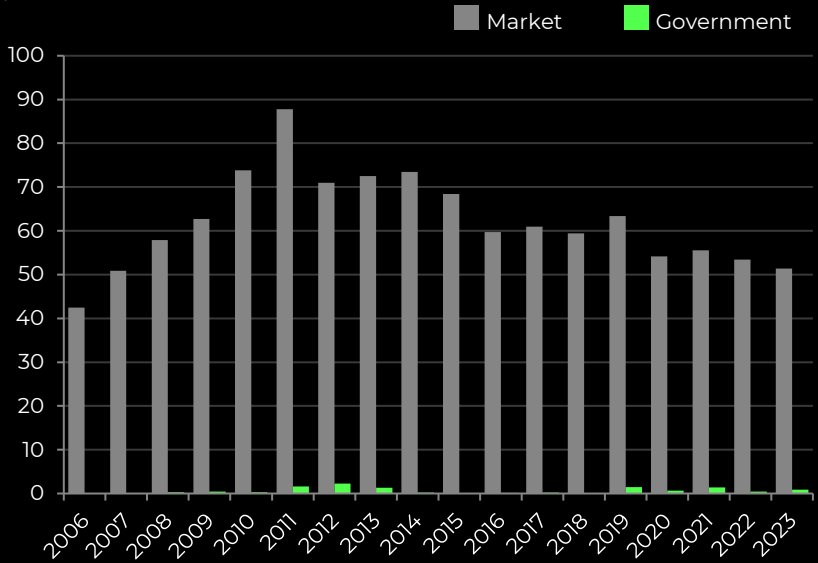


RELIGIOUS PUBLISHERS'

▶ Sales share to the Market and Government Revenue



▶ Copies sold - Market and Government In Millions

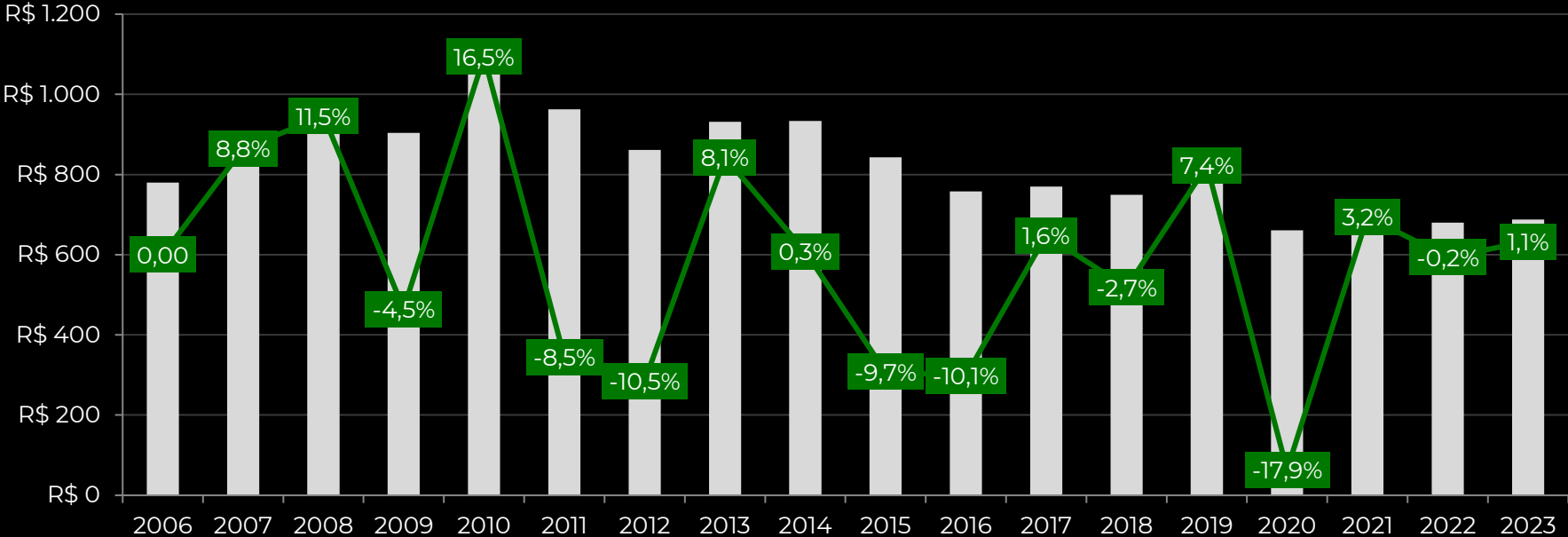


For religious publishers, sales to the government account for a small portion of their revenue



RELIGIOUS PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market+Sales to the Government
In Constant 2023 Prices | *In millions*



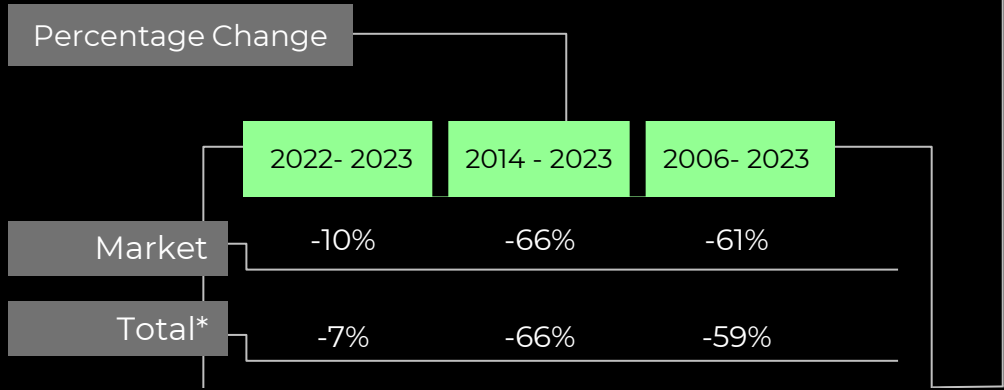
ACADEMIC & PROFESSIONAL PUBLISHERS' PERFORMANCE ADJUSTED FOR INFLATION

Printed Book



ACADEMIC & PROFESSIONAL PUBLISHERS'

Analysis of Revenue Adjusted for Inflation - In constant 2023 Prices



*Total: Sales to the market+Sales to the government

SALES TO THE MARKET

- With a 61% decline in revenue in real terms, these publishers' have recorded the largest drop in 18 years.
- For the last 10 years, academic and professional publishers' have not reported a positive result in real terms. There were only 4 years during this period with negative results below double digits.

SALES TO THE MARKET - 2023



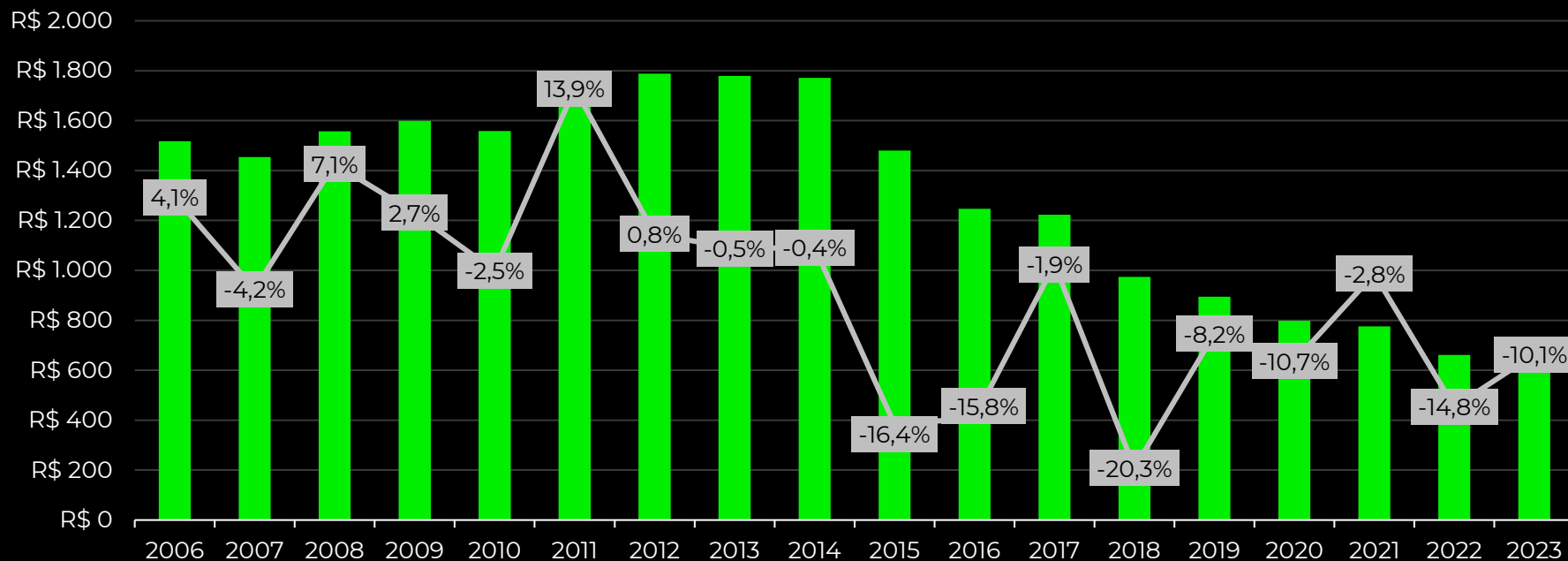
Academic & Professional publishers again **EXPERIENCED** a **SHARP DECLINE** in **REAL TERMS**.



These publishers have recorded the **LARGEST DECLINE** in the **AVERAGE BOOK PRICE**, **DROPPING** by **36%** over **18 YEARS**.

ACADEMIC & PROFESSIONAL PUBLISHERS'

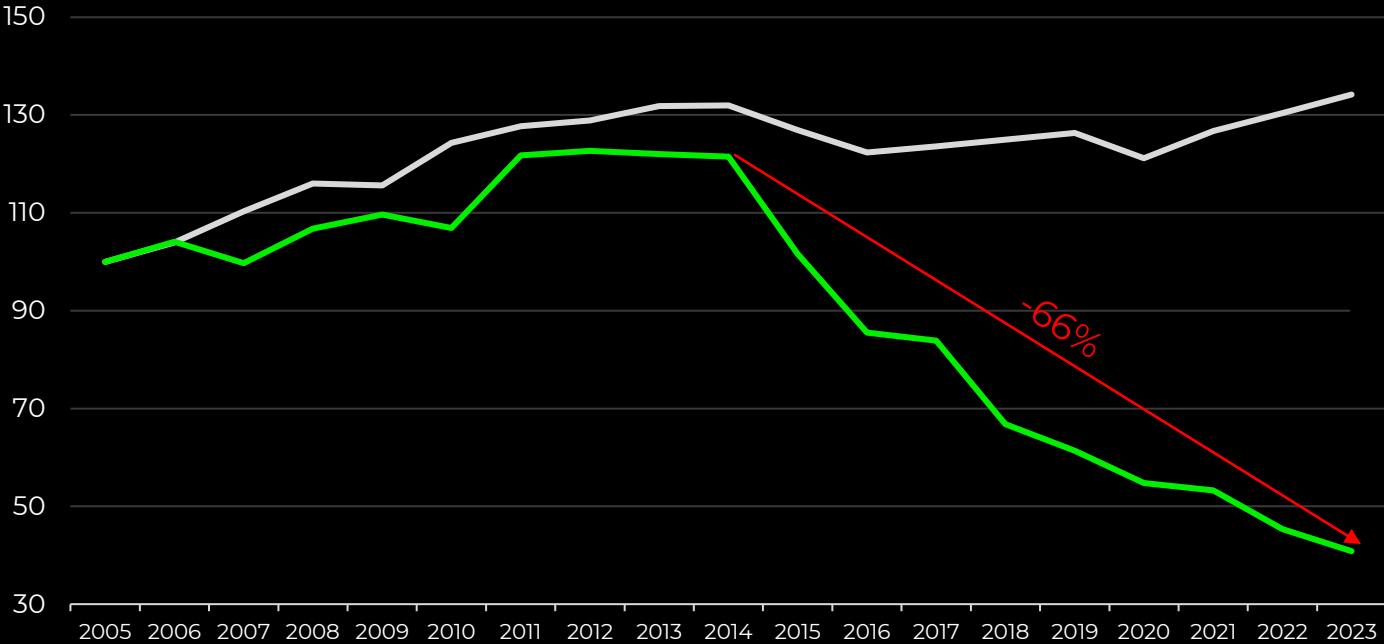
► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market
In Constant 2023 Prices | *In millions*





ACADEMIC & PROFESSIONAL PUBLISHERS'

▶ GDP x Sales to the Market
Index Number

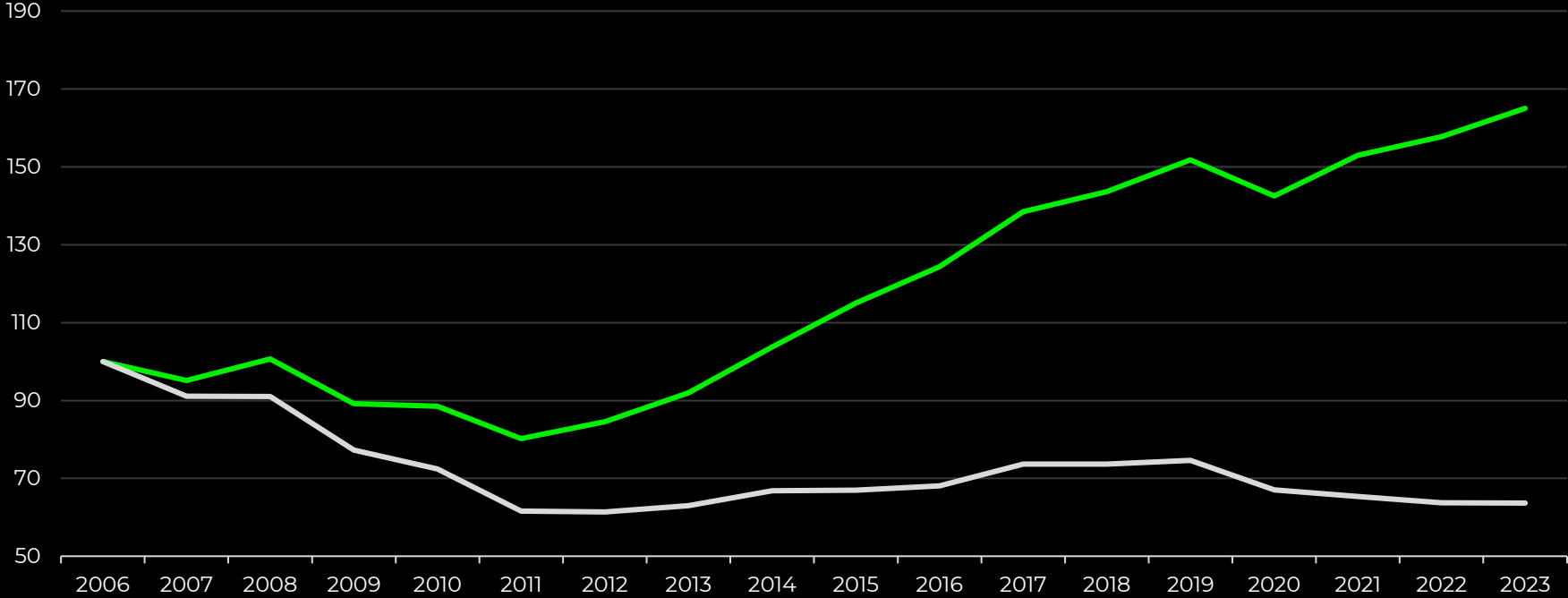


Since the onset of the economic crisis in 2014, revenue for academic and professional publishers has declined by 66% in real terms.



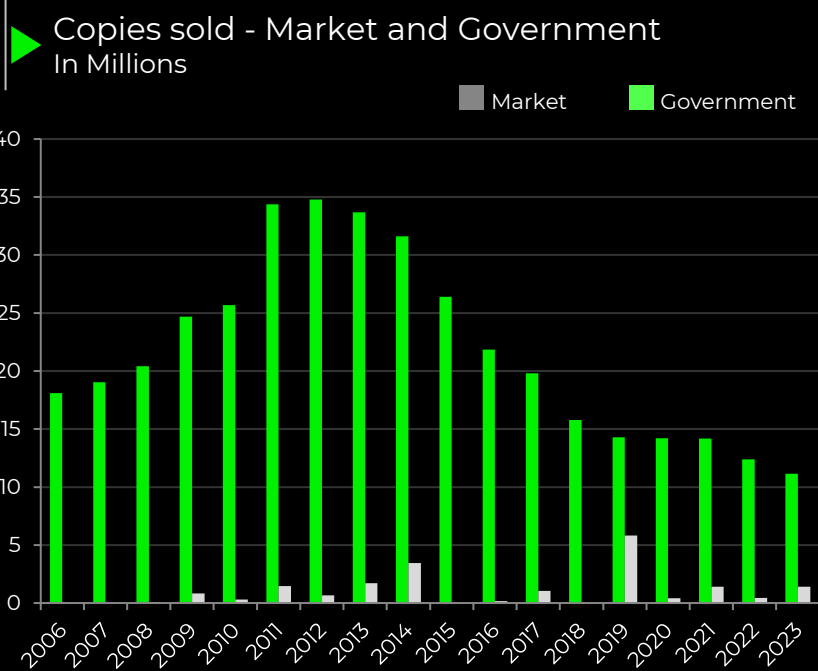
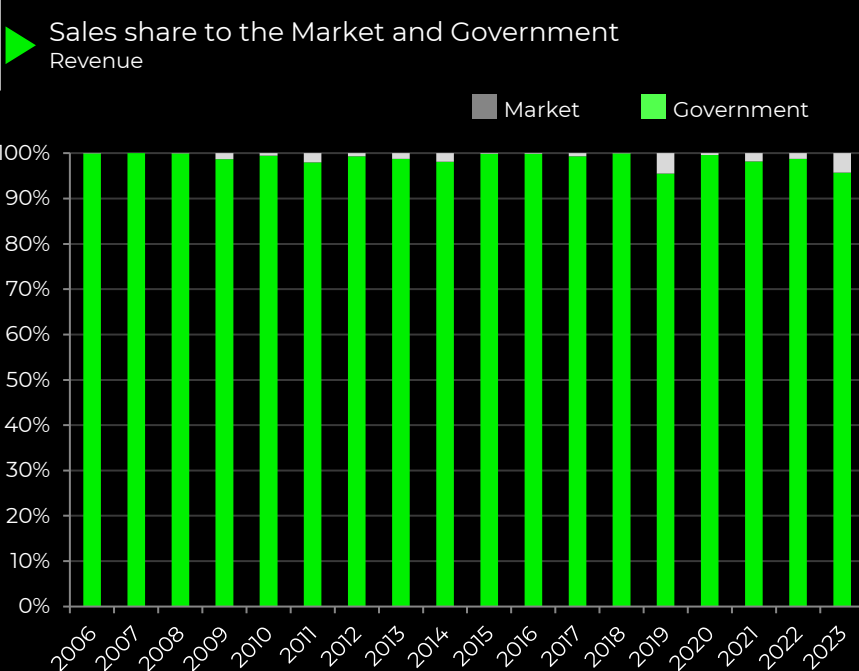
ACADEMIC & PROFESSIONAL PUBLISHERS'

► Average Prices - Sales to the Market
Current Values and Constant Values – Index Number





ACADEMIC & PROFESSIONAL PUBLISHERS'

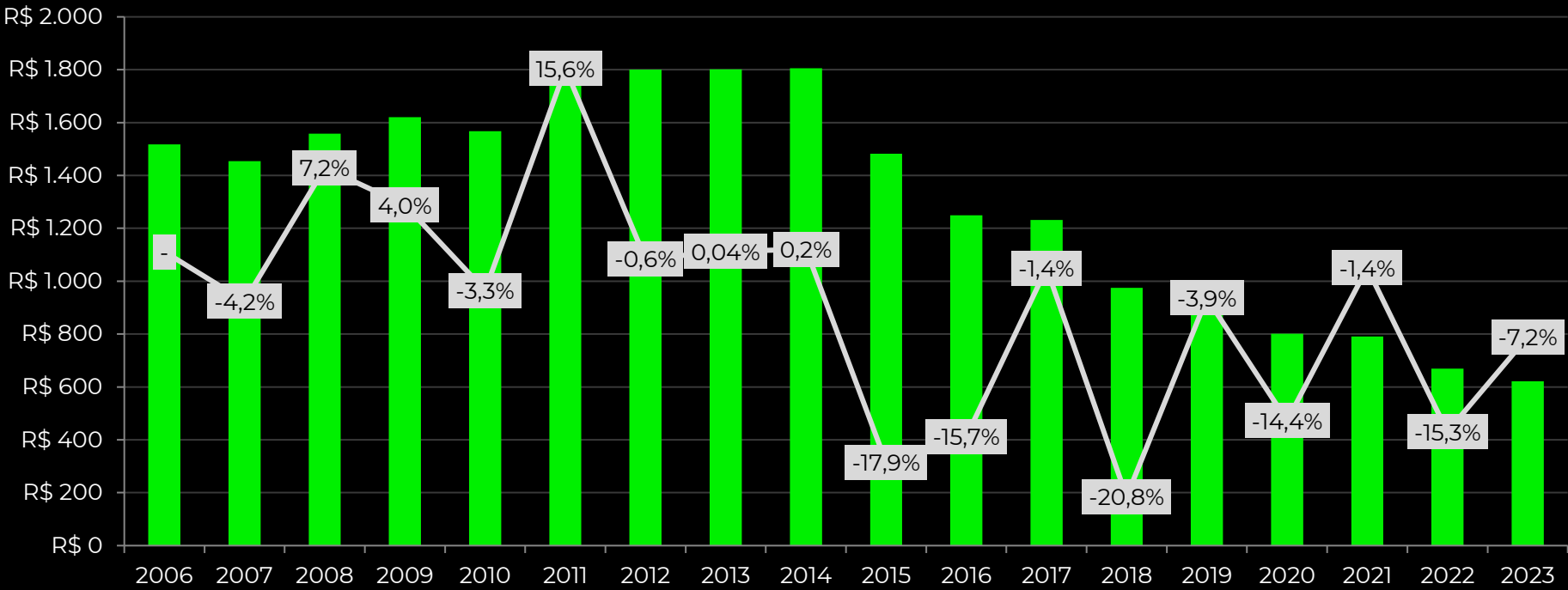


For academic & professional publishers, sales to the government account for a small portion of their revenue



ACADEMIC & PROFESSIONAL PUBLISHERS'

► Performance of Publishers' Revenue Adjusted for Inflation – Sales to Market+Sales to the Government
In Constant 2023 Prices | *In millions*



■ Revenue (Market+Government) — Real Growth Rate

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