

# Chinese Publishing Industry- An Overview

Xiao Chuan Lian

Director, Sino-American Publishing Research Center

M.S. in Publishing Program

Pace University

December 3, 2015

# Data Sources

- *Press, Publication, Radio, Film and Television Journal*
- *China Publishing and Media Journal*
- *Publishers Magazine*
- OpenBook
  - collecting data from over 2000 physical bookstores
  - and over 20 online bookstores
- CNIT Research
- BigData Research
- Enfodesk.com



**中华人民共和国国家新闻出版广电总局**

State Administration of Press, Publication, Radio, Film and Television of The People's Republic of China

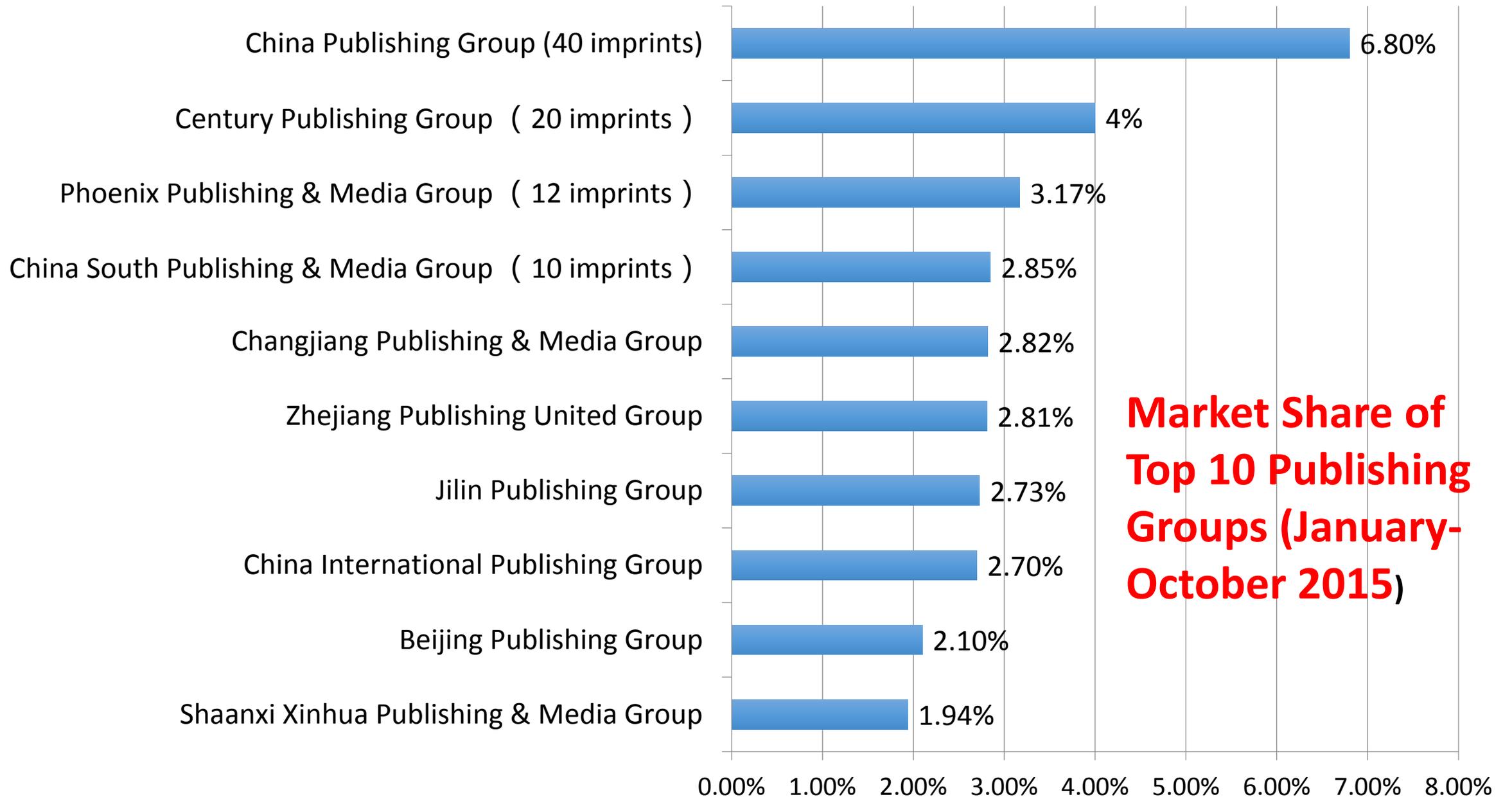


**ISBN**



**583 Publishing Companies**

# Major Publishing Groups



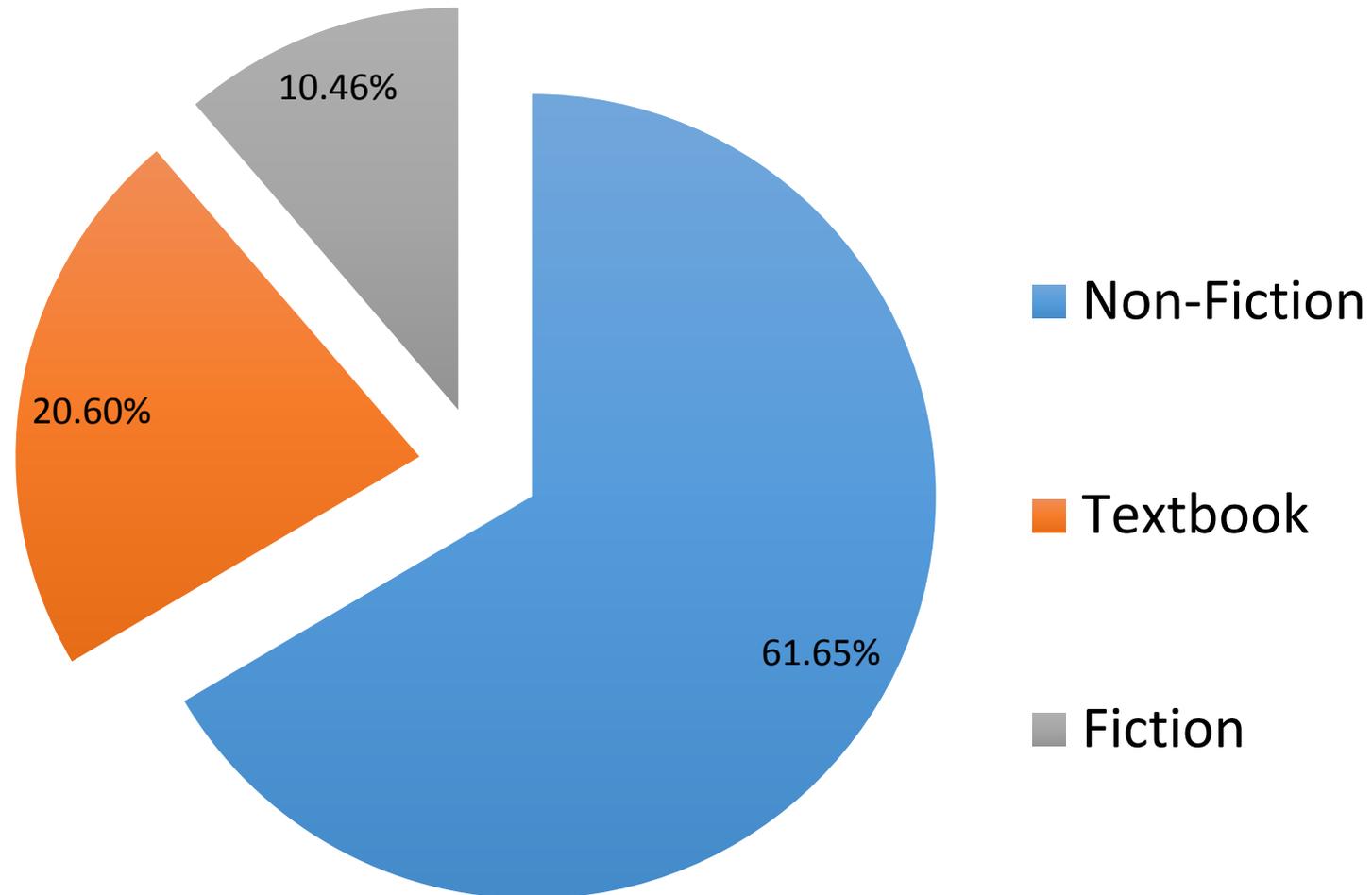
**Market Share of  
Top 10 Publishing  
Groups (January-  
October 2015)**

# January-October 2015 Market Segment Share

Market Segment	Publisher	Market Share
	China Publishing Group	9.84%
Literature Top 3	China South Publishing & Media Group	9.35%
	Phoenix Publishing & Media Group	9.02%
	China International Publishing Group	5.43%
Social Science Top 3	China Publishing Group	4.94%
	China South Publishing & Media Group	1.91%
	Zhejiang Publishing United Group	11.10%
Children's Book Top 3	Shandong Publishing Group	6.62%
	Jilin Publishing Group	5.98%
	People's Literature Publishing House	0.95%
Top 3 Translation Houses	Yilin Press	0.67%
	Shanghai Translation Publishing House	0.4%

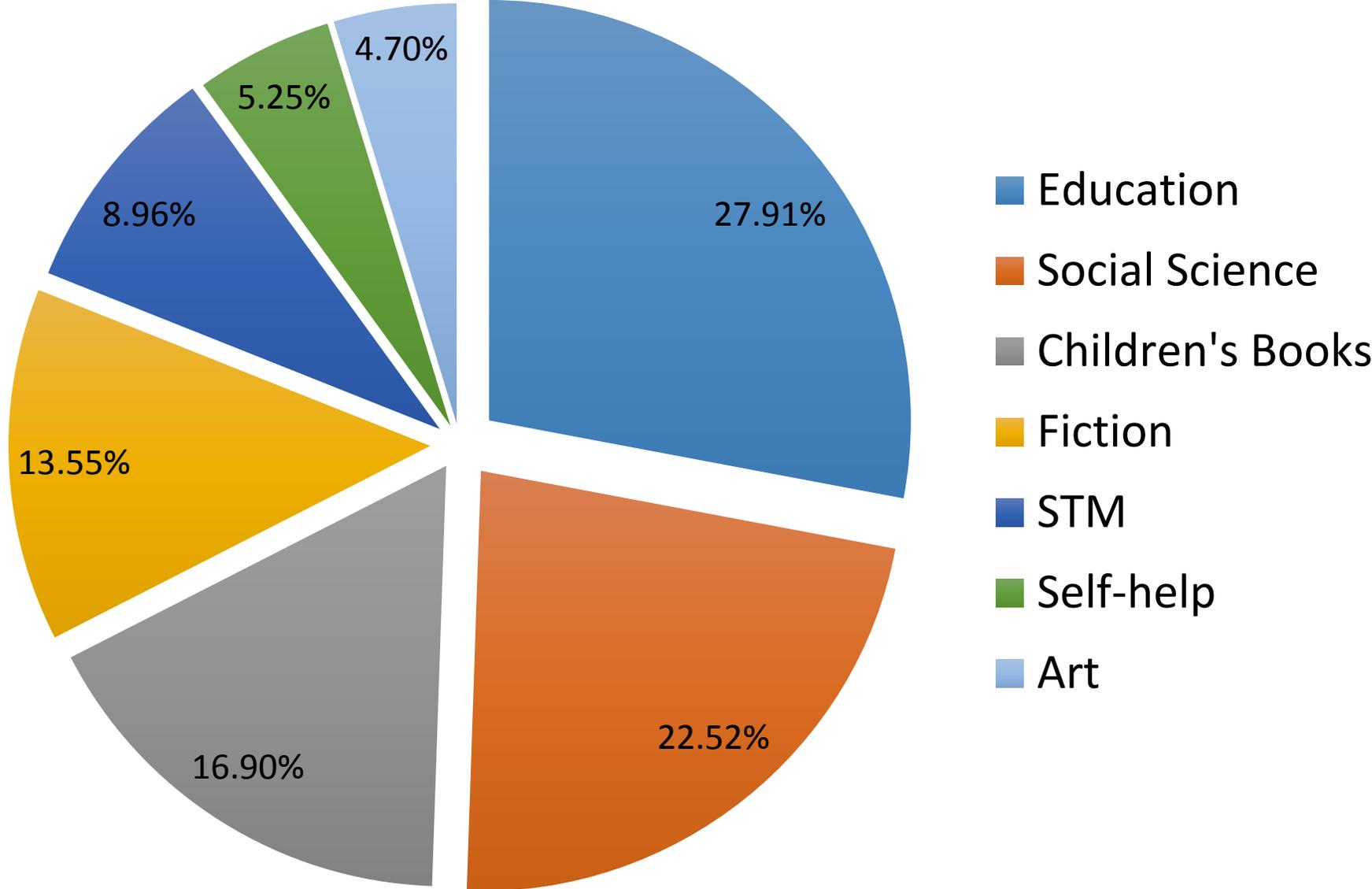
Title Output

# 2014 Output – 448,431 Titles



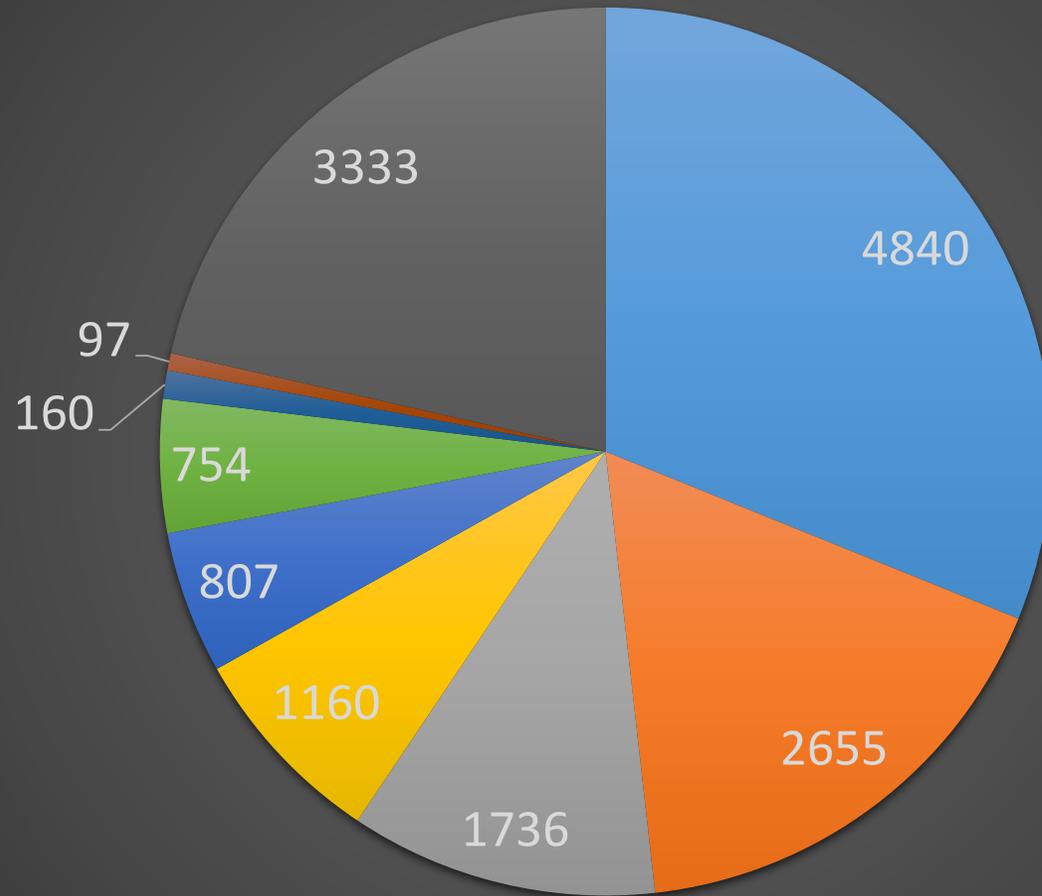
Including 32,712 children's books, 7.29% of total title output.

# Revenue by Segment (Jan.-Oct. 2015)



# The Translation Market

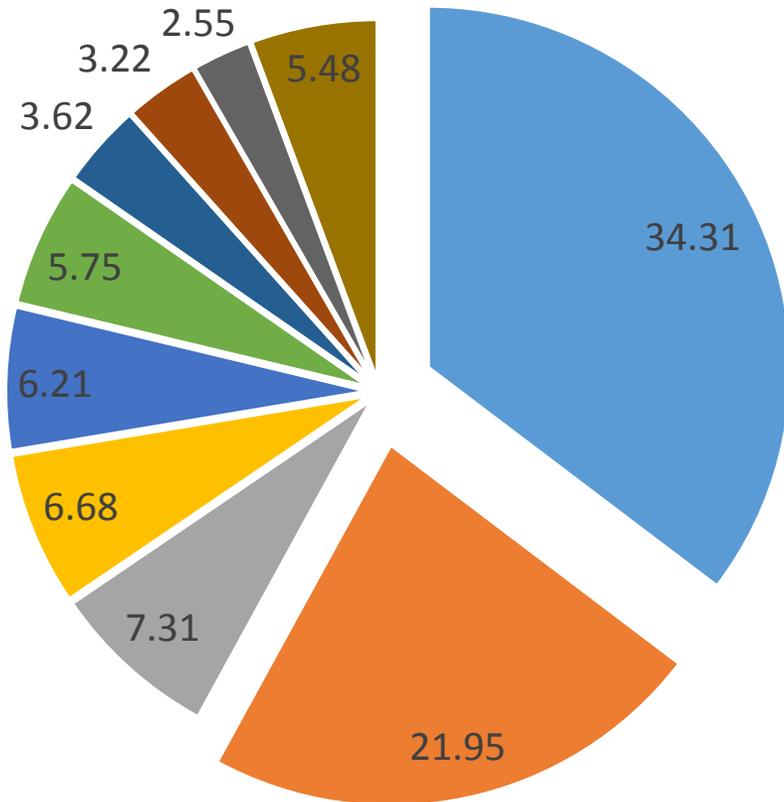
# # of Translation Titles from Different Countries - 2014



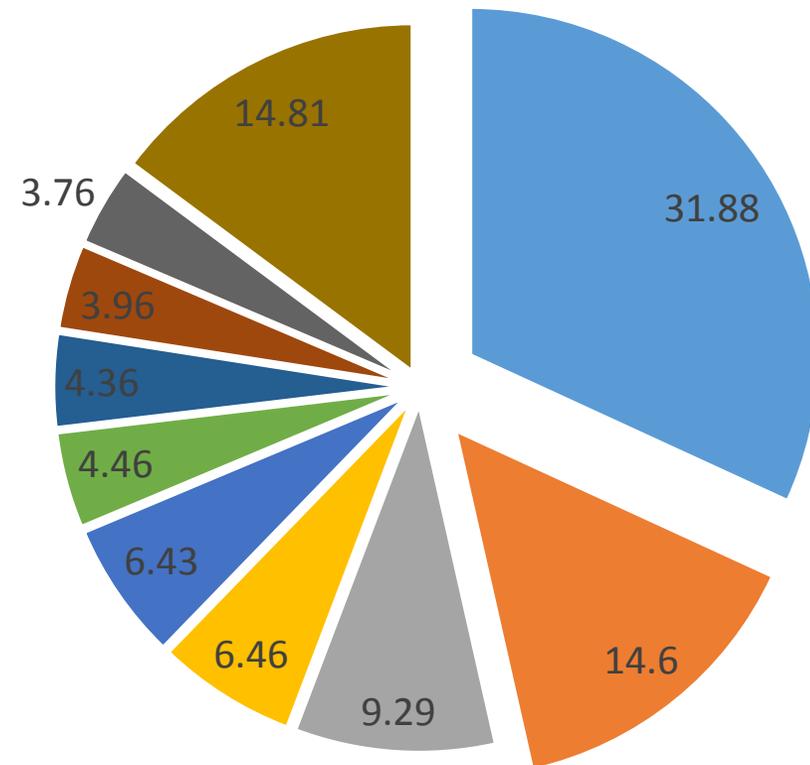
■ USA ■ UK ■ Japan ■ Korea ■ Germany ■ France ■ Canada ■ Russia ■ Other

# Translation Market , January – June, 2015

Revenue



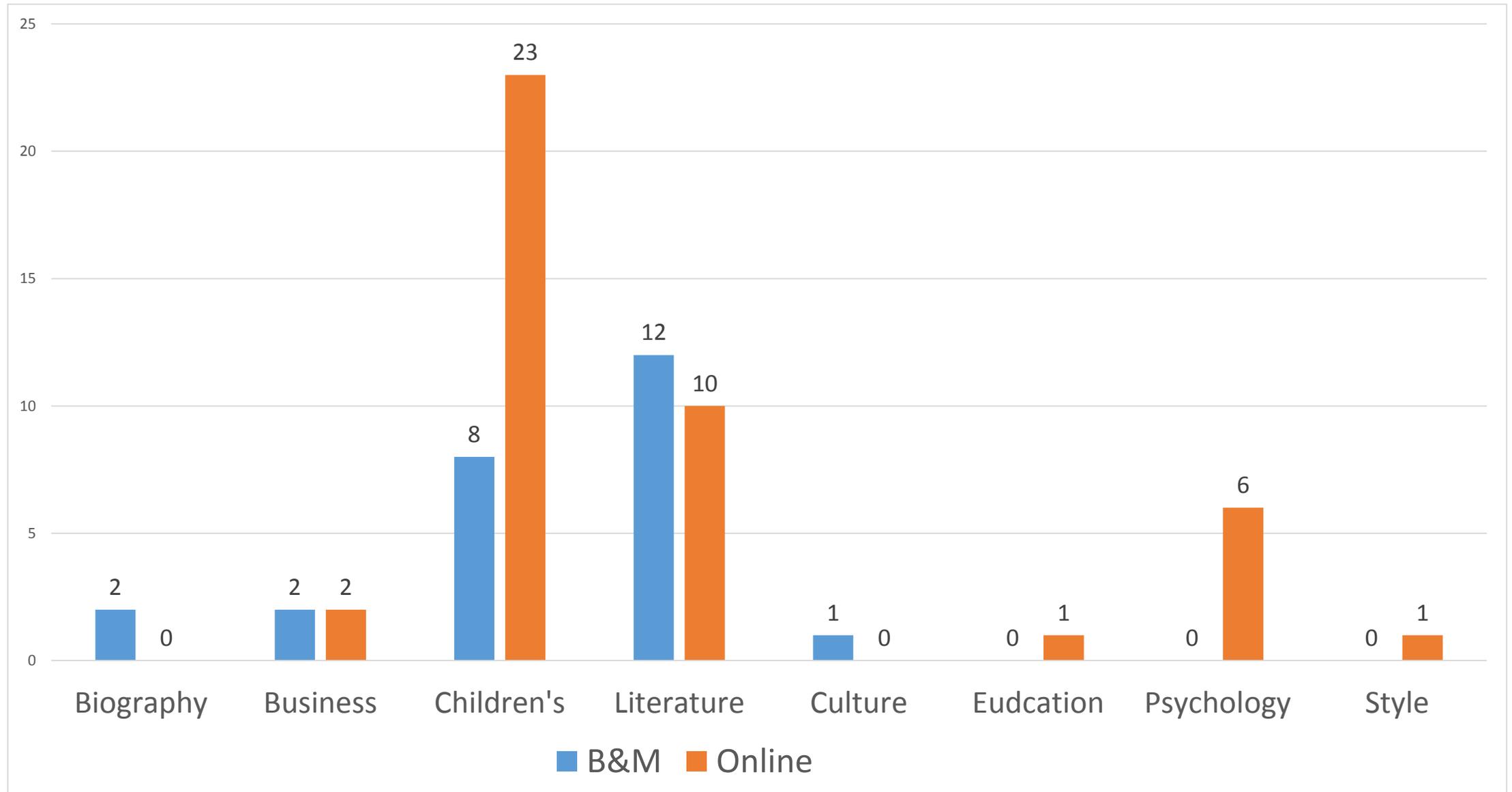
Title



- Children's
- Literature
- Culture
- Language
- Business
- Self-Help
- Study guide
- Biography
- Art
- Other

# # of Translation Works in Top 100 Bestsellers (January – June, 2015)

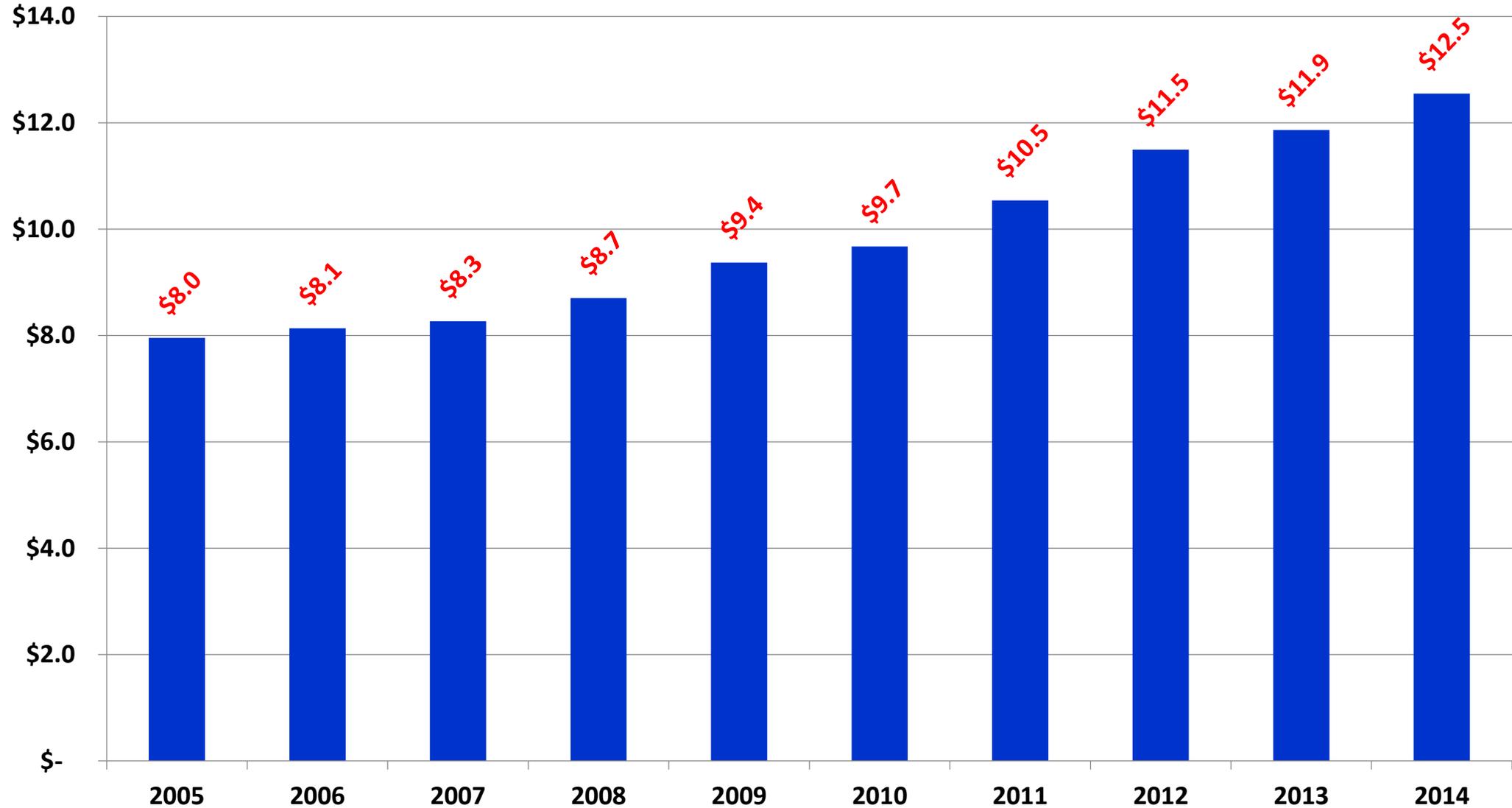
## Half of the Titles are from US and UK



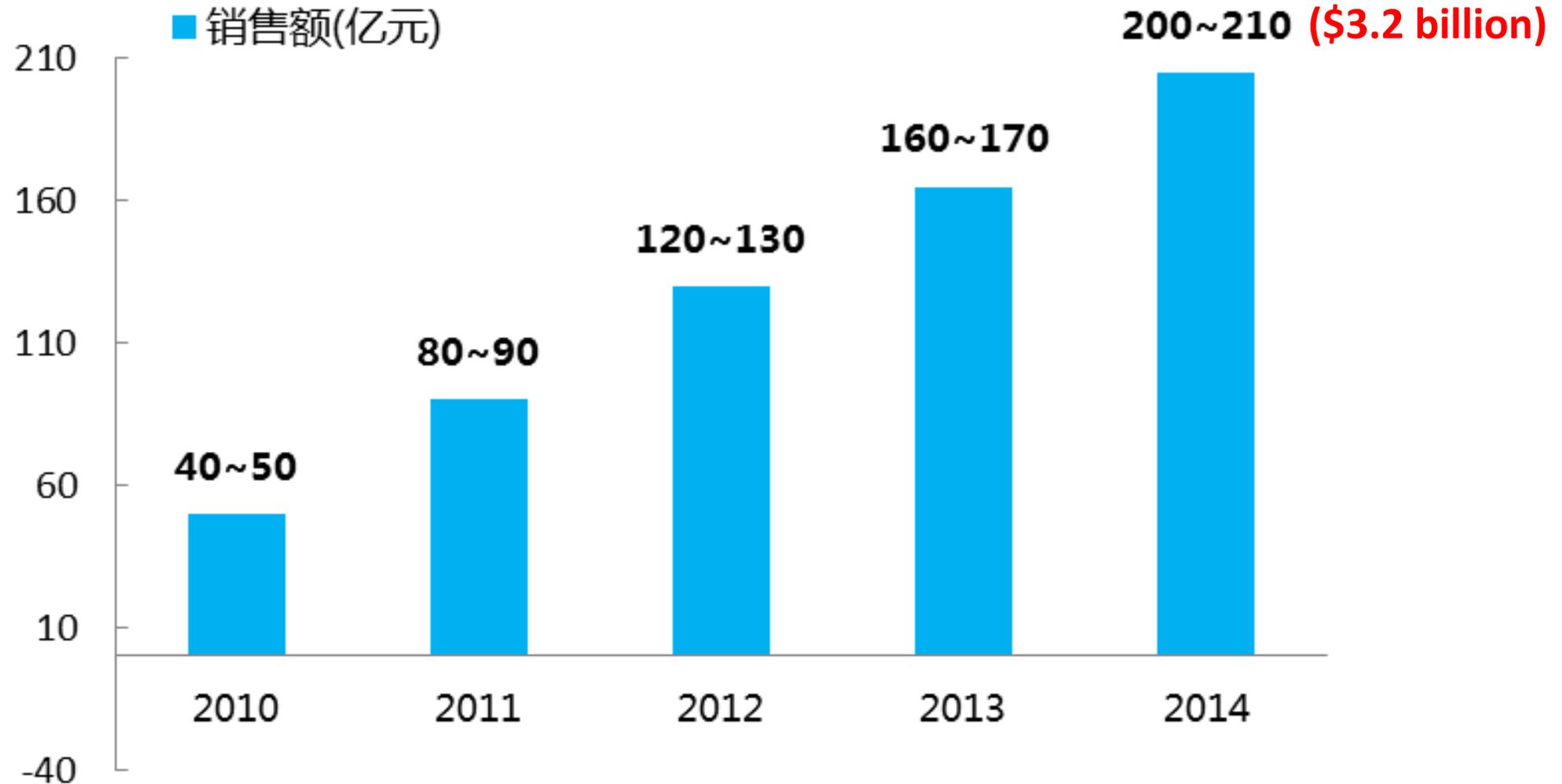
# Book Retailing

# China Book Retail Revenue (B&M Stores)

(in USD Billions)



# China Book Retail Revenue (Online Stores)



# 3 Major Online Stores: January – June, 2015



44.2%



JD.COM 京东

18.7%

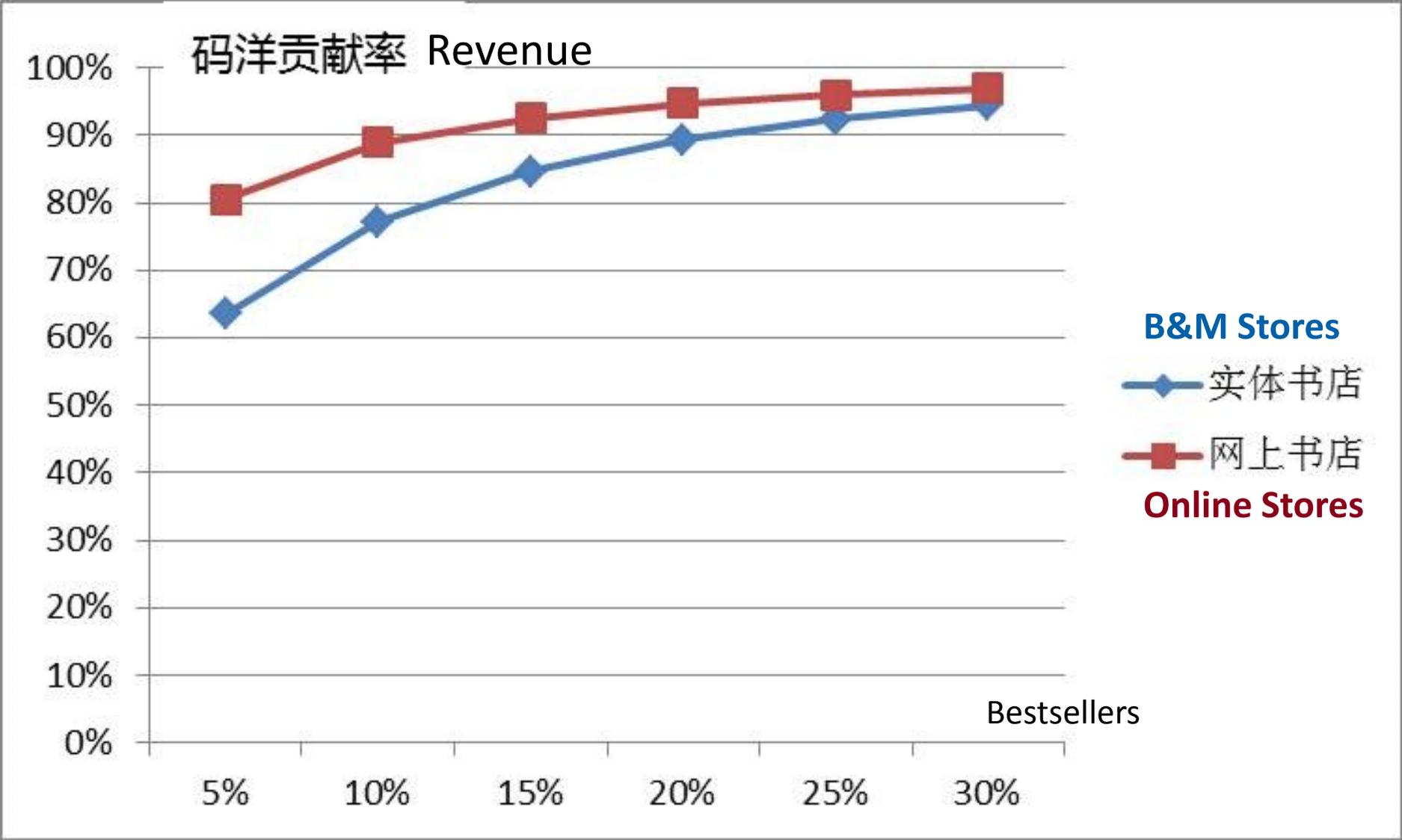


15.9%

# What Sell and Where (January - June 2015)

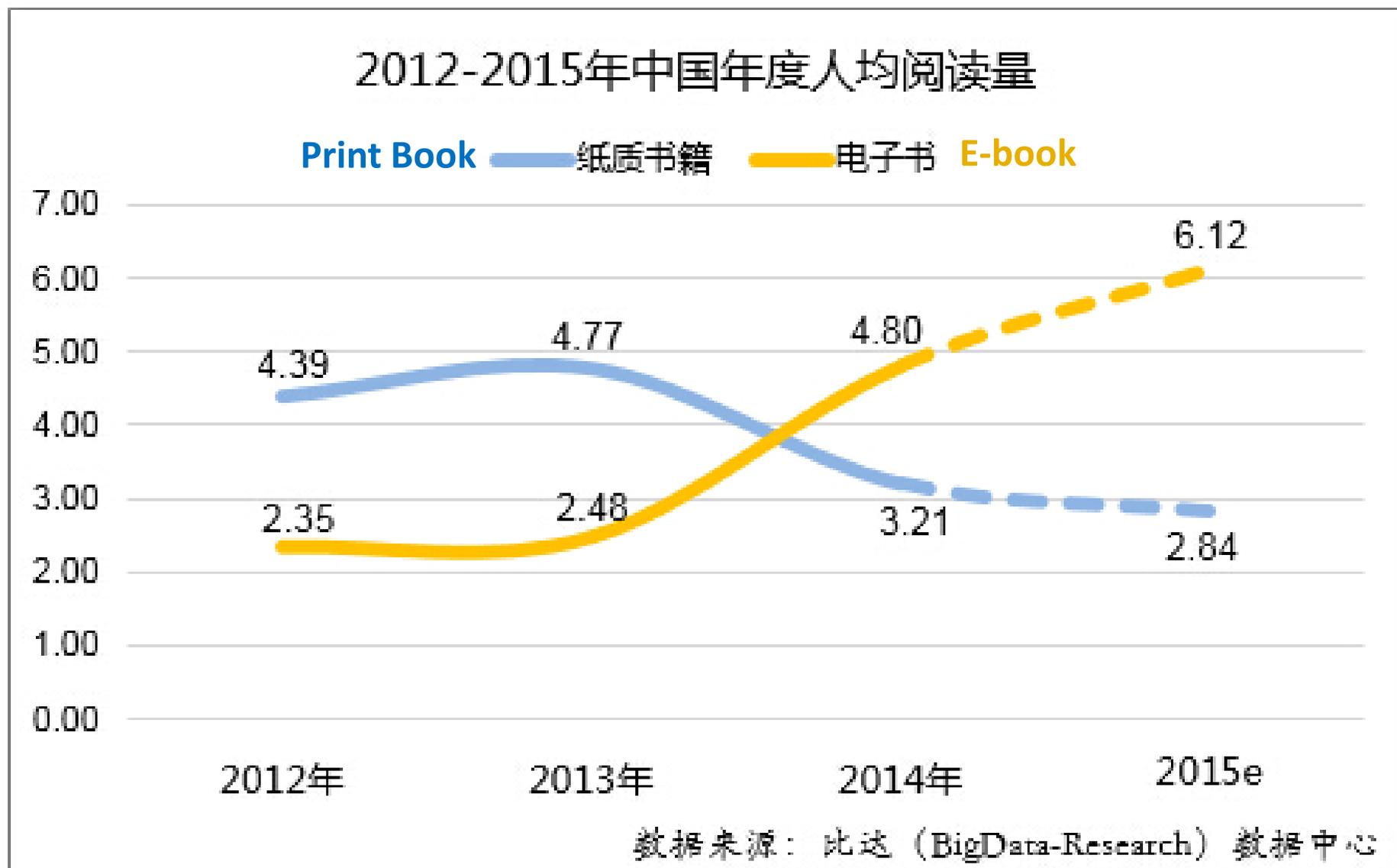
Category	Physical Bookstores	Online Bookstores
	Sales (%)	Sales (%)
Textbook & Supplementary	23.37	8.25
Social Science	21.72	27.99
Children's Books	18.66	22.85
Literature	12.18	13.24
Science & Technology	7.33	11.09
Language	5.51	6.06
Life Style	5.27	4.71
Art	4.16	4.3
Biography	1.71	1.26
General	0.08	0.23

# Revenue Contribution of Bestsellers



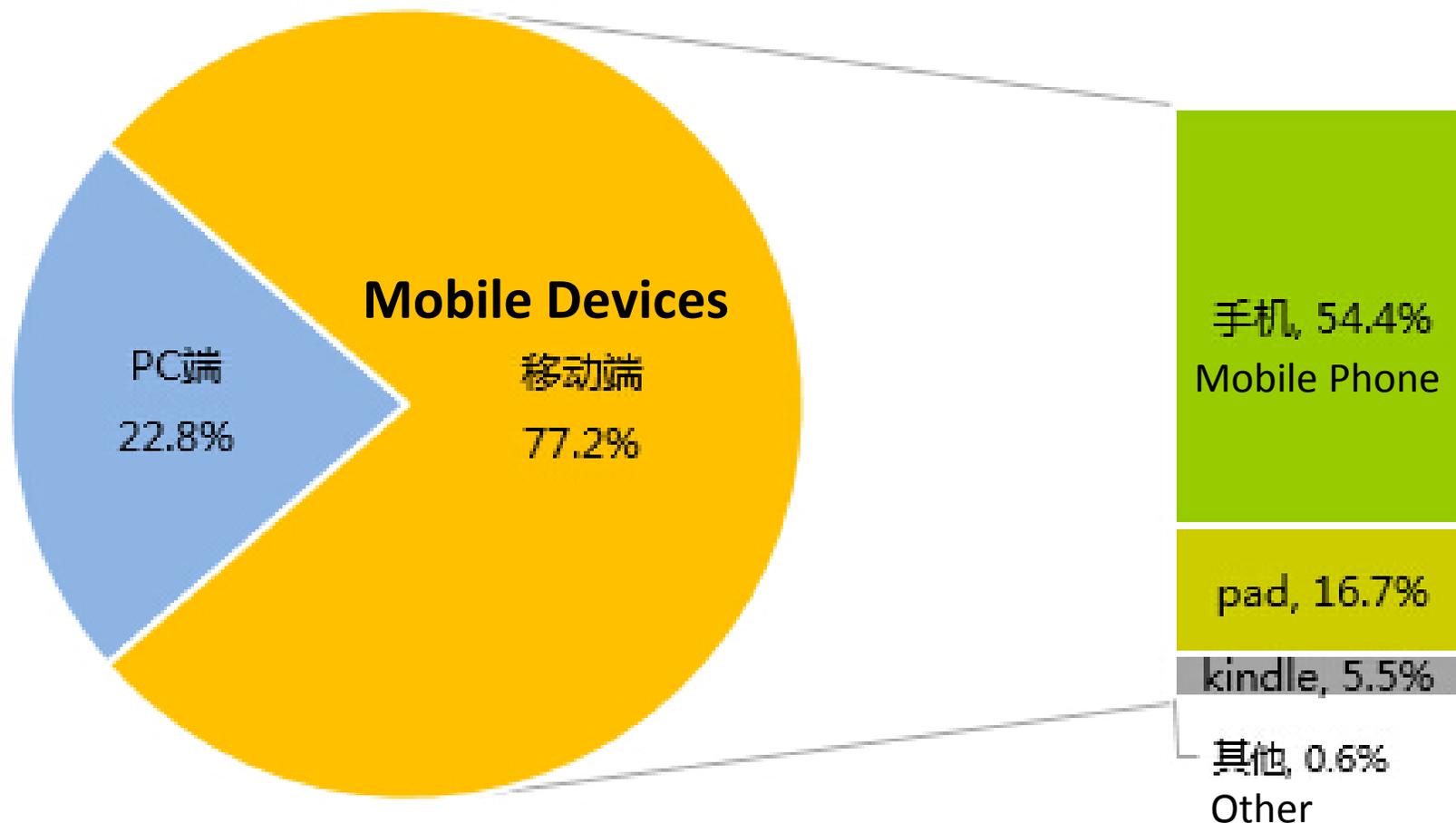
**E-Book**

# E-book Reading Is Rising



# E-book Reading Habit & Devices

2015年第2季度中国用户阅读方式及载体分布



数据来源：比达 (BigData-Research) 数据中心

# Two E-book Markets

1. E-books from Traditional Publishers
2. Online Literature

In 2014, e-book sales in China was \$726 million, including online literature

# E-Books from Traditional Publishers

- In 2014, Amazon China listed 240,000 new print titles, of which only 8,013 titles had e-book versions.

# Three Major E-book Reading Platforms



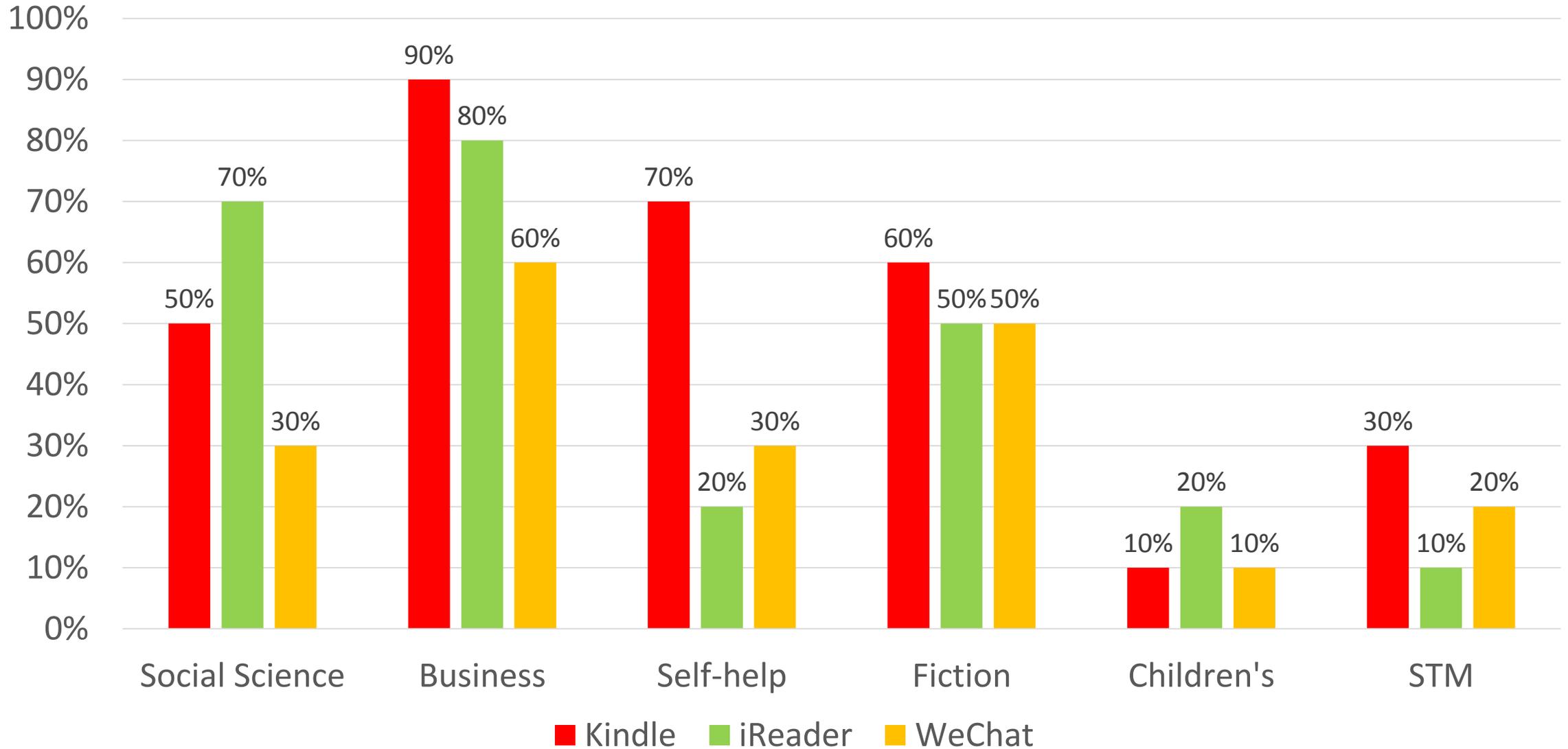
iReader



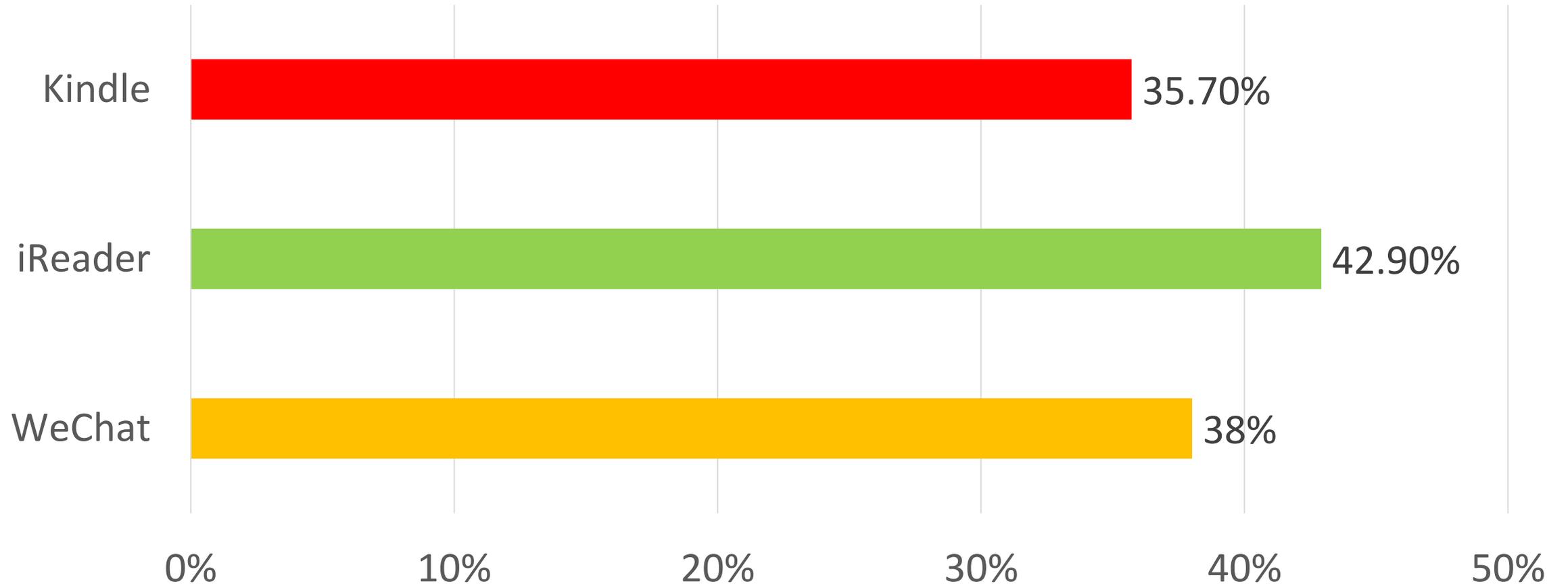
WeChat

微信读书

# E-versions of Top 10 Titles in 15 Bestseller Lists



# E-book Price: % of Print Version



# Another Market: Online Literature

- 2011: 1.76 million titles
- 2012: 2.14 million titles
- 2013: 1.76 million titles
- 2014: 2 million titles

# Trend: BAT Enter E-book Market

自有渠道资源

联盟渠道资源

渠道说明

	自有渠道资源	联盟渠道资源	渠道说明
 <p>阿里巴巴 Alibaba.com</p>	 	 	<p>自有书旗小说和淘宝阅读，并与新浪阅读、塔读文学和长江传媒签约，达成深度战略合作，同时也在微博自媒体平台的作品互动传播</p>
 <p>阅文集团 CHINA READING LIMITED</p>	 	 	<p>自有QQ阅读，并与起点中文网、创世中文网、红袖添香、潇湘书院、小说阅读网等签约，但整体更多的资源是PC端</p>
 <p>Baidu文学</p>	 	 	<p>自有91熊猫看书和百度阅读，并收购了纵横中文网，同时和苏宁阅读进行战略合作</p>

Thank You!