



LIVRES CANADA BOOKS®

The Russian Book Market

A Guide for Canadian Publishers

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Introduction

Aimed at small- to medium-sized independent Canadian publishers, this guide provides an overview of the Russian book market.

Providing timely and precise industry statistics as well as information on trends and demographics of the Russian book market, the insights herein are based on data from various sources including the acclaimed monthly publication *Book Industry Magazine*, official state statistics, the Russian Federation book charts¹ and sales data from a database managed by *Book Industry Magazine*.

The report presents an in-depth examination at the current state of the industry and the changes it is undergoing, describing in detail the underlying trends recently witnessed in the major areas of the book market. It also discusses the possible trends and challenges of the coming years, based on current changes throughout the industry. Focus is given to the prevalent supply and demand structure, main author brands, national and international book events, and opportunities for international publishers.

Although the chart of the Russian Federation's book industry ecosystem included below may look like a tangled web, its aim is to help readers get acquainted with, and navigate among, the different actors of the Russian book industry.

¹ Russian Federation book charts: https://bookunion.ru/news/vserossiyskiy_knizhnyy_reyting/.

pandemic (cancellations of professional book fairs, depreciation of the ruble, etc.), the number of books in translation may drop significantly in 2022–2023 since Russian publishers will be more careful in selecting international works.

Table 1: Top 15 print books overall (volume), 2020

	Author	Title	Publisher	Year of release	Retail price, in rubles
1	Jen Sincero	You Are a Badass: How to Stop Doubting Your Greatness and Start Living an Awesome Life	Eksmo	2018	297–740
2	Nadezhda Zukova	Your first ABC	Eksmo	2017	248–360
3	Michael Labkovski	I Want and I Will: How to Accept Myself, Love Your Life and Become Happy	Alpina/ Eksmo	2017	570–655
4	George Orwell	1984	AST	2016	194–287
5	Alex Polyarnyi	A Mint Tale	AST	2018	292–595
6	Jen Sincero	You Are a Badass at Making Money	Eksmo	2019	380–681
7	Mark Manson	The Subtle Art of Not Giving a F*ck: A Counterintuitive Approach to Living a Good Life	Alpina	2019–2020	554–647
8	Guzel Yakhina	Zuleikha Opens Her Eyes	AST	2018–2020	436–638
9	J. K. Rowling	Harry Potter and the Philosopher's Stone	Asbooka- Attikus	2018–2019	460–939
10	Boris Akunin	Just Maca	AST	2020	594–844
11	Joe Dispenza	Breaking the Habit of Being Yourself: How to Lose Your Mind and Create a New One	Eksmo	2018–2020	503–769
12	Yuval Harari	Sapiens: A Brief History of Humankind	Sindbad	2018–2020	640–1092
13	Viktor Pelevin	Invincible Sun	Eksmo	2020	763–1012
14	Robert Kiyosaki	Rich Dad, Poor Dad	Poppuri	2018–2020	539–1109
15	Mike Omer	A Killer's Mind	Eksmo	2019–2020	381–465

Source: "Trade book market in RF in 2020," *Book Industry Magazine*, issue 2, p. 18.

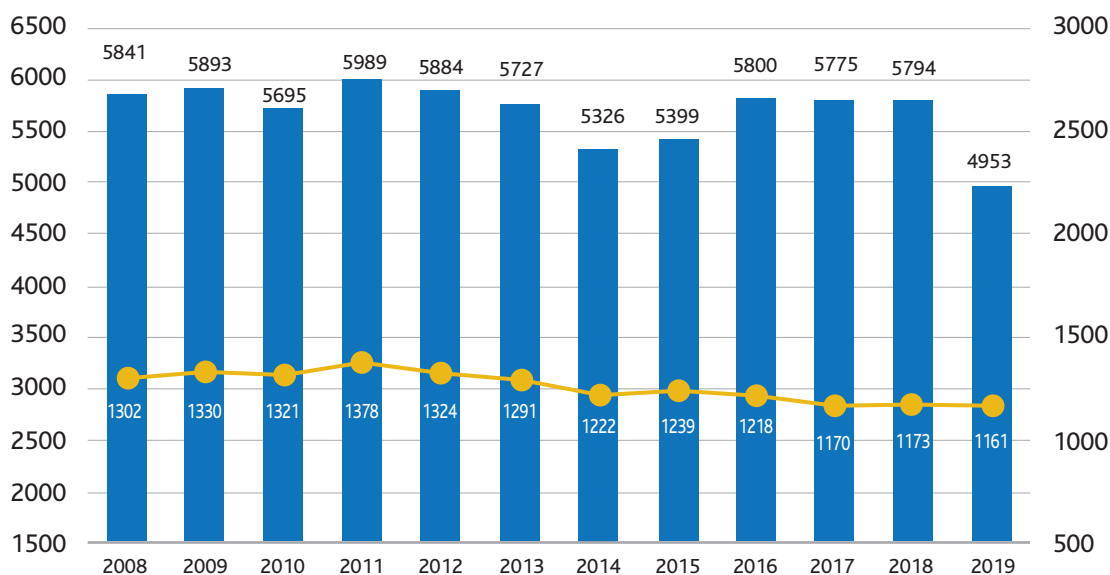
The difference in book prices for the "top 100" books between Moscow and the regions ranges from 80% (professional and business books) to 198% (education and STEM). Self-help and DIY books can cost three times as much in Moscow as in the regions.

Publishers

Key Figures

According to state statistics compiled by the Russian Book Chamber, in 2020 about 4,518 publishing houses were active in the country, down by a hefty 8.7% from 4,953 in 2019 (estimate based on the number of publishing houses that submitted at least one copy of a published title in a respective year). The drop cannot be attributed to the effect of COVID-19 alone but is rather the result of a recent trend of mergers and acquisitions in the book industry. The number of publishing houses in 2018–2019 decreased by 14.5% from 5,794. At the same time, the number producing at least 12 titles a year amounted to 1,161 in 2019 (a drop of 1% compared to 2018, and by 10.8% compared to 2008).

Figure 15: Number of book publishers in RF, 2008–2019



Source: RF Federal Agency for Press and Mass Media, *The Russian Book Market 2019* (2020), p. 10; Russian Book Union.

Publishing activity is concentrated in the big cities, with Moscow and St. Petersburg accounting respectively for 57.2% and 10.3% of the number of published titles, and for 88% and 3.8% of the number of printed copies. St. Petersburg's share significantly decreased in 2019, while Moscow's share increased. Only 12 regional centres of the Russian Federation produce a notable number of books, namely Nizhny Novgorod,

Distribution

Key Figures

From 2017 to 2019, trade books held a lucrative share of about 85%, while government institutional book purchasing covered 15% of the total book market. Government spending on books constitutes one-sixth of the total print-book market, a factor likely to remain unchanged until 2024 when schools are expected to move to digital learning resources.

According to *Book Industry Magazine* estimates, in 2019, physical retail—including all country and regional bookstore chains, independent bookstores, supermarkets, and kiosks—made over ₺RUB46.5 billion (76.76%) in revenue, while online bookstores averaged ₺RUB14.08 billion or 23.24% of all sales. Despite the growing popularity of online stores as outlets for book sales, brick-and-mortar bookstores remain the main channel for book sales, and the one most used by readers. In 2019, this channel accounted for 68% of the total retail market, or ₺RUB41.3 billion. Some leading publishers are focused on traditional stores as the way forward to capture more readers.

Nevertheless, we cannot ignore the fact that over the last five years, bookstores' share of all retail sales dropped to a record low, while online sales increased sharply, especially so in 2020 due to stay-at-home orders. Therefore, in 2020 the value of e-commerce sales for books was up by 25.9% over 2019, totalling ₺RUB17.7 billion. The pandemic also pushed some independent bookstores to grow their online presence. According to a survey conducted by *Book Industry Magazine* among book publishers in February 2021,¹³ about two-thirds (65.4%) of respondents confirmed having their own online store. Undoubtedly, in 2021 and beyond, the competition between traditional book retail and online stores will continue.

By and large, any Russian who wants to buy a book has a fairly wide selection of possible places of purchase, even without going online. For 2019, the Federal Agency of Press and Mass Communications reported about 80,000 bookstore establishments, including 30,000 bookstands in post offices throughout the country.¹⁴ That means that there is at least one physical point of book sale within 133 km². About 5,100 independent bookstores, including small independent stores and larger chain stores, operate all over the country, with about 30% of them being small businesses with an annual turnover of ₺RUB15 million or less.

¹³ "Trade book market in RF in 2020," *Book Industry Magazine*, issue 2, p. 13.

¹⁴ RF Federal Agency for Press and Mass Media, "The Russian book market 2019" (2020), p. 30.

Non/fiction International Fair

With its extensive experience in specialized fairs in the book market, Expo-Park has been the organizer of one of the biggest events in the last decade: Non/fiction International Fair for high-quality fiction and non-fiction is one of the most prominent events of the book market.

non/fiction[®]

The fair embraces diversity in the world of new-wave literature, providing an alternative to mass-market culture and introducing the public to a broad spectrum of recent intellectual achievements. Since its establishment in 2008, the fair has become the best platform for professional communications between authors, publishers, booksellers, literary critics, agents, and translators from Russia and Europe.

The fair takes place in Moscow at the end of November/beginning of December. In 2019, the fair had to change venue so it moved closer to Red Square. The frame program takes a special place within the fair: seminars and roundtables, meetings with writers and big publishing house directors, presentation of new arrivals on the scene. It is the place to visit in search of quality Russian literature, both fiction and non-fiction.

Website: <https://moscowbookfair.ru/en/>

Krasnoyarsk Book Culture Fair

Founded in 2007 by the Mikhail Prokhorov Foundation in conjunction with the administration of Krasnoyarsk Krai, the Krasnoyarsk Book Culture Fair is the main book event covering Siberia and the Far East. The Krasnoyarsk Fair takes place in Krasnoyarsk in early November, offering an innovative approach in promoting reading. It presents books in modern multimedia and analyzes the evolution and transformation of books in a competitive environment, namely with new art forms and data carriers.



The fair's program covers three of the main functions of books in society:

1. **Books as products** (a series of events for the professional book community): seminars and master classes for librarians; roundtables on the problems of book distribution, copyright, and audiobooks and ebooks; seminars on new printing technology, etc.
2. **Books as art**: exhibitions, installations, performances, music, and video programs; seminars and master classes on book design; discussions and lectures on book illustrations; discussions and presentations on the evolution of books (the revival of exclusive books, books in manuscript, genre albums).
3. **Books as a social institution**: discussions and roundtables on the condition of contemporary literature, literary prizes, genre innovations in literature; theatre tours (performances about themes in books); presentations by contemporary writers and poets.

The program is an exhibition and a literary festival, both of which are open to the public. Admission is free. The fair is frequented by international publishers, mainly from Nordic countries.

Website: <http://www.prokhorovfund.com/projects/own/169/>

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