

Selling Canadian Books in India

A Guide for Canadian Publishers

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Introduction

India, with a population of over 1.3 billion, has an estimated literacy rate of 74.4%.¹ India is also the sixth-largest book market in the world and the second-largest English-language book market. According to Nielsen's *India Book Market Report 2015: Understanding the India Book Market*,² the sector is worth approximately USD\$6.76 billion. Led by educational books, the English-language sector is set to grow by 19.3% annually until 2020 compared to growth of less than 2% for global book publishing over the next five years, according to PwC.³ Including Indian-language book markets⁴ increases the growth projection substantially⁵ for a more realistic estimate of the overall size of the book market in India.⁶ The K-12 market contributes maximum to the print book market. The Children Trade Book Market was estimated at INR 6 Billion or 90.9 million USD or 0.09 billion USD for 2017.

This report is based on extensive interviews and research with industry experts, senior managers, and publishing professionals who spoke in confidence. No names are being used, as nearly everyone I spoke to preferred to share up-to-date information but did not wish to be quoted. In addition, India's book market has a poor record of maintaining statistical data. Most of the information must be gleaned from anecdotal evidence or verified by various means before deriving a nuanced picture of the industry. Over the years there have been occasional reports by the National Council of Applied Economic Research (NCAER), the National Book Trust (NBT), the Publisher's Association (UK), the Federation of Indian Chambers of Commerce and Industry (FICCI), and Nielsen. It is only recently that Nielsen set up its Indian office and began to collect and collate data, building their catchment area methodically. In August 2017, Nielsen announced its first partnership with one of the largest Hindi newspaper groups, *Dainik Jagran*, to launch the Hindi bestseller list, to be announced every quarter.

¹ Chethan Kumar, "Literacy Rate Up, But So Is Illiteracy," *Times of India*, January 28, 2016, <https://timesofindia.indiatimes.com/india/Literacy-rate-up-but-so-is-illiteracy/articleshow/50749744.cms>. According to the 1991 census, "literacy" was defined as any individual who could sign their name, so it does not necessarily mean someone who can read and write.

² The *India Book Market Report 2015: Understanding the India Book Market* (Nielsen 2015) was commissioned by the Federation of Indian Publishers (FIP) and the Association of Publishers in India (API). The FIP consists of Indian publishers who have built their businesses locally and then developed internationally. API consists of representatives of multinational publishing houses with offices in India.

³ Iain Marlow, "India's Book-Buying Habits Say a Lot about the Country's Economy," *Bloomberg*, May 22, 2017, <https://www.bloomberg.com/news/articles/2017-05-22/india-s-book-buying-habits-say-a-lot-about-the-country-s-economy>.

⁴ Nielsen BookScan collects transactional data at the point of sale, directly from tills and dispatch systems of major Brick & Mortar and Online retailers relying on their proven methodology worldwide. This ensure detailed and highly accurate sales information on which books are selling and at what price providing up-to-date and relevant data. Traditionally regional language book sales does not happen mostly from organized retail shop which have EPOS (Electronic Point of Sales System) in place and hence far more challenging to access and tabulate the data. Having said that Nielsen covers significant proportion of regional books selling through organized retail in their BookScan database including Malayalam, Hindi, Bengali, Tamil, Telugu, Gujarati, and Marathi.

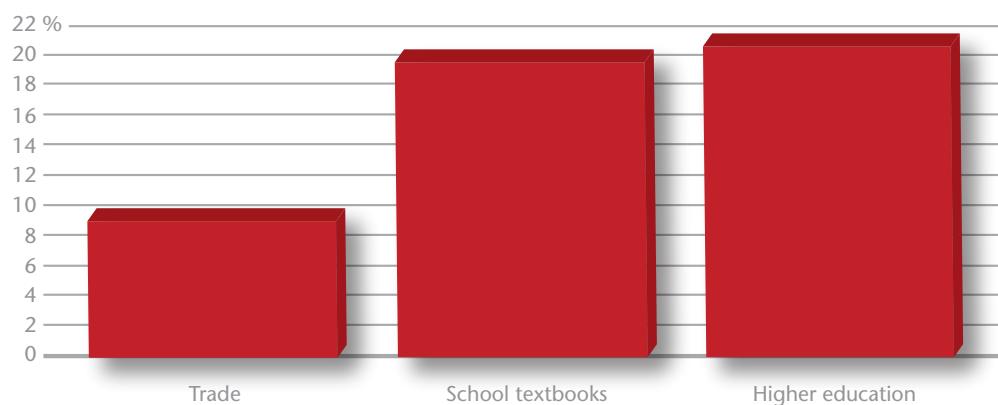
⁵ It is not clear whether the growth rate should be doubled to get a fair estimate of the size of India's book market or increased marginally. This grey area emerges because of the contribution of translated literature and regional-language markets for which there is currently no way of measuring the size of the market. It is also unclear what would be a realistic figure for the print runs of translated literature.

⁶ Nielsen's analysis is calculated based largely upon their BookScan tool, launched in India in October 2010. BookScan tracks about 40% to 45% of English Trade Book Market of Indian publishing and significant contribution goes to regional language and academic books selling through organized retail. Retailers voluntarily participate and report data to Nielsen. Booksellers who work on manual systems or who do not follow a standardized billing system cannot be tracked. Thus, most of the Indian regional language publishers are left out which may still operate on a small scale and some of their publications may not have an ISBN number to their titles.

Geographically, India is vast enough to be considered a subcontinent. It has a federal form of government with a central government and 29 states, mostly created on the basis of linguistic identity. Officially only 22 languages are recognized by the constitution whereas it is said that the language changes every 20 kilometres in India. The big six languages—Hindi, Bengali, Telugu, Marathi, Tamil, and Urdu—are each spoken by more than 50 million people.⁷ There is no national language in India, but Hindi and English are used officially. Given that Hindi is predominantly used in northern India, English is the lingua franca as the language of commerce, law, and social mobility. It is difficult to estimate the total number of English-language speakers, but they constitute a significant majority as English is a compulsory subject for undergraduates in many universities and is taught at some stage to all school students.

Figure 1.

Book bonanza: India's publishing sector is set to grow on average around 19.3 percent per year.



Source: Nielsen Inc.

*Growth figures refer to compound annual growth rate between 2014 and 2020

Source: Nielsen Inc. Quoted in Iain Marlow, "India's Book-Buying Habits Say a Lot about the Country's Economy." *Bloomberg*, 22 May 2017, <https://www.bloomberg.com/news/articles/2017-05-22/india-s-book-buying-habits-say-a-lot-about-the-country-s-economy>.

The book market of India is thrilling because of its rich diversity. Given that India consists of so many distinct languages, it provides a set of markets within a market. It is impossible to consider India homogenous as every region has its own distinct identity and character and these in turn inform people's book buying and reading habits. According to Thomas Abraham, Managing Director of Hachette India,

The English market is a bit complex to an outsider approaching it for the first time, but is fairly easy to understand when you learn the ropes. The key differences in terms of problematic issues are low price points, low margins, a distributor layer still in place that for the most part knows nothing about book content and operates on discount–returns negotiations, completely untenable credit cycles. The plus point, and a key one, is the demographic dividend that lies in wait for those who are willing to look at a ten-year horizon. So that's the key test for forays into India—this is not the country to come to if you

⁷ BBC News, "Ten 'big facts' about India," BBC World Service, February 18, 2014, <http://www.bbc.com/news/world-asia-25881705>.

want to operate in 3-year window [of business plans⁸]. The classic examples to prove what I'm saying are the setting up of Penguin India [est. 1987] and later HarperCollins India.⁹ These two took the early mover's advantage. Penguin in particular actually developed the trade market from scratch and today enjoys a dominance that looks unshakeable for the next 30 years.¹⁰

Yet, as with any other territory, there are a few challenges too, such as the fragmented nature of publishing and bookselling, a tortuous distribution system, long credit cycles that make it difficult to manage cash flows, and increasing direct costs.¹¹ As well, piracy is widespread, with virtually every street in the country home to stalls selling pirated texts.¹²

⁸ Long-term plans of at least ten years need to be considered.

⁹ HarperCollins entered India through a joint venture with Rupa Publications in 1992. A few years later they moved to the Today Group, a media house. Once 100% direct investment was allowed in India, HarperCollins India (HCI) became an independent entity.

¹⁰ Thomas Abraham, email message to author. The author thanks Mr. Abraham for agreeing to be quoted.

¹¹ Under the new GST taxation system (introduced 1 July 2017), direct costs have increased; since books are a non-taxable commodity, publishers cannot avail themselves of the input tax credit.

¹² Press Trust of India, "With Growing E-Commerce, the Indian Book Market All Set to Become Rs 739 Billion Industry by 2020," *Your Story*, December 2, 2015, <https://yourstory.com/2015/12/indian-book-market/>. (Rs = INR = Indian rupees.)

Overview of the Indian Book Market

Translated and Imported Books

The Indian subcontinent is a vast network with many languages hence different cultural identities. Many Indians are comfortable speaking not one but two and sometimes even three languages. Indians read not only the literature of the language they are most comfortable in, but also access literature from other languages via translation into their mother tongue,¹³ sometimes even accessing the same book in more than one language (if available). Languages such as Malayalam, Bengali, and Marathi have been accessing international literature for decades via translation. For many years, translations from one Indian regional language to another were such a large business that local publishers did not explore other languages. Only recently have translations begun to appear in greater numbers in English as well and many English-language publishing houses have begun to introduce dedicated translation lists. Inevitably these consist of established literature from different languages and genres being made available in English. Unfortunately it is not always possible, even with the best of translators, to translate the dialect and nuances from the language of origin; specifically, it is impossible for English to accommodate all the possible meanings and references of the translated literature. For instance, the award-winning Tamil writer Perumal Murugan,¹⁴ whose characters speak the dialect of the region from which they hail, is not easily translated.¹⁵ A reader in Tamil will immediately deduce the social context, thereby giving the story a rich texture, whereas the English translation, though award-winning and competently done, smooths out these nuances. This is not a comment on the translator's talent, but rather on the limitations of English to capture Tamil culture.

Nevertheless, this is a thriving area of publishing in India where literature in Indian languages is being translated into other Indian languages, international literature is being translated into Indian languages, and literature from Indian languages is being translated into English and other international languages such as French, Nordic, Turkish, etc. Until a few decades ago, few local publishers were interested in publishing translations from Indian languages. The few examples were by prominent authors and usually done by independent presses like KATHA, Zubaan, Women Unlimited, Stree Samya, Permanent Black, and Seagull Books. Now translated literature is being

¹³ This holds true for most languages in India, particularly the mature languages like Malayalam, Bengali, Marathi, Tamil, Telugu, and Hindi. These languages are not only very old, but have had a script for centuries, so a literary tradition too. Some other languages that thrived on an oral tradition, such as tribal languages, did not have a script until a few decades ago. They now rely on the Roman script for their languages. Absorption of other literatures via translation is thus more noticeable in the mature languages.

¹⁴ See Jaya Bhattacharji Rose, "Tamil Author Perumal Murugan Wins Landmark Court Case against Censorship of his Book *One Part Woman*," *Bookwitty*, July 28, 2016, <https://www.bookwitty.com/text/tamil-author-perumal-murugan-wins-landmark-court/579a0b24acd0d01df04c6447>.

¹⁵ On 13 January 2018, Kalachuvadu, the Tamil publisher announced a two-book deal, consisting of *One Part Woman* and *Poonachi: Story of a Goat* by Perumal Murugan to US-based publisher Grove/Atlantic. At the same time German, Czech, and French language rights for *One Part Woman* and Korean rights for *Poonachi* were also negotiated.

produced by Penguin Random House India, HarperCollins India, Hachette India, Orient Blackswan, and Westland (an Amazon company). In fact, Oxford University Press India has just announced a thrilling new Indian languages program¹⁶ with a desire to expand its product offerings to an audience whose primary language is not English. Seagull Books has an India list¹⁷ where they make available titles in translation from Indian languages, which immediately have a global release thanks to their arrangement with the University of Chicago Press.¹⁸ Now publishers even have imprints in separate Indian languages. Many begin with Hindi to make original literature in Hindi available to a larger audience and to translate their frontlist titles, as is the case with Harper Hindi.¹⁹ Even the Indian firm Westland (recently acquired by Amazon) launched a Hindi list in 2016.²⁰ Robust translation programs also exist in south India: Dravidian University hosts a Telugu–English list; Manipal University Press does translations; and Kannada University in Hampi has its Classical Kannada translation list.

One of the most brilliant plans conceived is the Thunchan Ezhuthachan Malayalam University project. The university identifies and commissions translations into English of various writers and works, then locates collaborating (private) publishers and contracts with them to co-publish the translations. The university supports these translations by buying 300 copies; the publishers reciprocate by printing the logo of the university and carrying their mission statement in the prelims. Orient Blackswan, Navayana, Women Unlimited, Yoda Press, Oxford University Press, Juggernaut Books, and Niyogi have all collaborated.

A few years ago, Aleph Books did a fantastic anthology of short stories from Indian literature called *A Clutch of Indian Masterpieces*. Although translations of many stories existed, the editor commissioned new translations meant for the modern reader. Some of the more prominent publishing Hindi houses—such as Rajkamal Prakashan, Hind Pocket Books, Rajpal & Sons, Prabhat Prakashan,²¹ Vani Prakashan, and Yatra Books—have had for years a robust program in making translated literature available on their lists. Government-run publishing firms like Sahitya Akademi and National Book Trust also make translations available from other Indian languages and world literature. Even though local publishers take the world rights for translated material, the books rarely travel abroad, though there are exceptions such as autobiographies by the Tamil poetess Salma (*The Hour Past Midnight*) and Baby Haldar (*A Life Less Ordinary*).

Most Indian publishing firms make translations available from international literature, either in the local Indian language in which they publish or in an Indian edition of the English translation. For instance, DC Books (Malayalam) has a unique model where they not only make translated literature available but also run successful pre-order

¹⁶ Jaya Bhattacharji Rose, "Interview with Sugata Ghosh on OUP India's Indian Language Publishing Programme," Confessions of an Avid Bibliophile, October 24, 2017, <http://www.jayabhattacharjirose.com/interview-with-sugata-ghosh-on-oup-indias-indian-language-publishing-programme/>.

¹⁷ See http://www.seagullbooks.org/index.php?p=book_list&cat_id=MTM3.

¹⁸ See http://press.uchicago.edu/ucp/books/publisher/pu3431381_3431382.html.

¹⁹ See <https://harpercollins.co.in/product-category/imprints/harper-hindi-imprints/>.

²⁰ "Westland to Publish First Hindi Title," *India Today*, August 23, 2016, <http://indiatoday.intoday.in/story/westland-to-publish-first-hindi-title/1/746736.html>.

²¹ Prabhat Prakashan does almost 30 international translations every year from what is available in English. In 2018 they plan to expand the list to 50 new translations.

sales campaigns, ensuring that their costs are recovered. In the state of Kerala—where Malayalam is spoken—they have for decades had a thriving translation network, where local translators are trained regularly through workshops and ongoing projects, but this model is not replicated anywhere else in the country. The publishing firm Kalachuvadu has translated many international titles into Tamil. Full Circle, and their children's imprint Tota Books, have translated French literature into English and made the books available in India at an affordable price point. Speaking Tiger Books has a well-curated list of international fiction consisting of some fine titles and many award-winning authors.²² Seagull Books, founded by legendary publisher Naveen Kishore,²³ also has a fine list of international literature—French, German, African, Italian, Swiss, and Arab to name a few.

Most of the international literature made available through translation in the Indian book market is supported by funding from different countries. For instance, the French embassy in India has a very active translation program called the Tagore Publication Assistance Program.²⁴ Three times a year they send out requests to publishers seeking interest in French titles and then financial support is offered. As of June 2017, they have also launched the Romain Rolland Book Prize.²⁵ Similarly there are programs for Norwegian, Turkish, and German literature.

Reading Habits and Consumption / Regional Languages

Reading patterns are not always easy to discern since they vary from region to region, as well as linguistically and demographically. Distributors and publishers vouch for how different strategies must be adopted for different nooks of the country. There is a deluge of books being published locally and imported. Every big publishing firm has its own product managers who figure out which books to select and bring into the country. They circulate Advance Information Sheets (AIS) of the international titles to collect orders from bookshops, online marketplaces, and individual customers. Distributors rely on publishers but also have a vast stable of titles to select from; they curate a diverse selection of titles, varied by region. Popular categories include children's literature,²⁶ fiction/trade literature, self-help, mass-market or commercial fiction, MBS (Mind, Body, Spirit), autobiographies, religious books, mythology, historical fiction,²⁷ and narrative non-fiction, particularly politics and history. There was unanimous agreement that children's literature has been selling well despite a slight recent dip in the reading patterns of children and youth, who comprise 50% of the population.

²² See <http://speakingtigerbooks.com/international-fiction-series/>.

²³ Elizabeth Kuruvilla, "Naveen Kishore: Surviving the Arts: The Seagull Books Publisher on Being a Gambler, the Romance of After-5 Projects, and Publishing as an Act of Resistance," *Live Mint*, July 28, 2017, <http://www.livemint.com/Leisure/qBooLEn1QPOaYK3Ss4EpQM/Naveen-Kishore-Surviving-the-arts.html>.

²⁴ See <https://in.ambafrance.org/Tagore-Publication-Assistance>.

²⁵ The Romain Rolland Book Prize is specifically for the "best translation of a French title in India." According to the announcement made in June 2017, "Translations into all Indian languages (including English) will be considered, for any literary fiction title published between 1st January 2015 and 31st March 2017." For regional languages, consultants will join in to assess the quality of the translation. The jury will be chaired by the Embassy of France in India. The awardee will be announced at Zee Jaipur Literature Festival 2018 / Jaipur BookMark 2018. A curated trip to the Paris Book Fair in March 2018 awaits the publisher and the translator of the winning translation.

²⁶ Whether a bookstore chain or bookstore owner, all say that children's and young adult literature is a driver of their sales. Independent bookstore owners say that they curate their books to accommodate children's literature, literary fiction, and MBS titles.

²⁷ The definition of historical fiction in India encompasses adventure stories based on mythology.