



LIVRES CANADA BOOKS®

# Exporting to France

Webinar presented by Mathias Echenay et Phi-Anh Nguyen

January 29, 2021

# **The French Publishing Market**

## **(Book Distribution and Rights Transfers)**

**January 29, 2021**



**Axiales Presentation**  
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**MATHIAS ECHENAY**

<https://www.axiales.net/>



# **SUMMARY**

**1. PUBLISHING SECTOR OVERVIEW**

**2. RIGHTS TRANSFERS TO PUBLISHERS**

**3. RETAIL DISTRIBUTION**

# **1. PUBLISHING SECTOR OVERVIEW**

## **1.1 Specifics**

## **1.2 French Readers (CNL Study)**

## **1.3 Publishing Overview**

## **1.4 Publishing Production and Circulation Averages**

## **1.5 Sales by Publishing Segment**

## **1.6 Digital Publishing**

## **1.7 Translations into French**

# 1.2 French Readers

THE FRENCH ARE STILL READING JUST AS MUCH

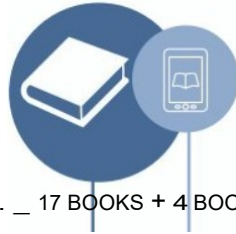
**92%** of French people have read at least one literary genre

68%  
PAPER  
EXCLUSIVE

23%  
PAPER + DIGITAL

1%  
DIGITAL EXCLUSIVE

91%  
PAPER FORMAT



\. \_ 17 BOOKS + 4 BOOKS)

= 21 BOOKS  
(read over the past twelve months)

24%  
DIGITAL  
FORMAT

25%  
SERIOUS  
READERS (20  
books and over)

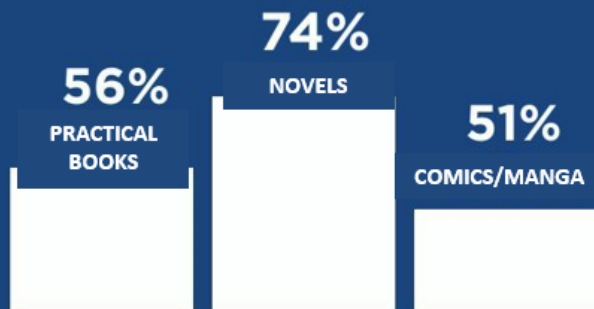
5%  
SERIOUS READERS  
(20 books and  
over)

Very attached to physical books  
84% of French people offer books as gifts  
72% prefer to read books they own

Source: CNL Study on French Readers 2019

## 1.2 French Readers

### CONTINUING SUCCESS FOR LITERATURE, PRACTICAL BOOKS AND COMICS/MANGA



#### WITH STRONG PROGRESS FOR:

Manga comics: **22% (+5 pts)**

SF books: **30% (+4 pts)**

Self-help books: **35% (+4 pts)**

### PROGRESS BROUGHT ON BY...



#### ...15-24 YEAR OLDS

Read the most: **98% (+8 pts)**

of SF novels: **57% (+21 pts)**

manga comics: **51% (+14 pts)**

& comics: **53% (+13 pts)**



#### ...WOMEN

Most readers: **95% (+2 pts)**

of manga comics: **19% (+17 pts)**

and self-help books: **44% (+6 pts)**

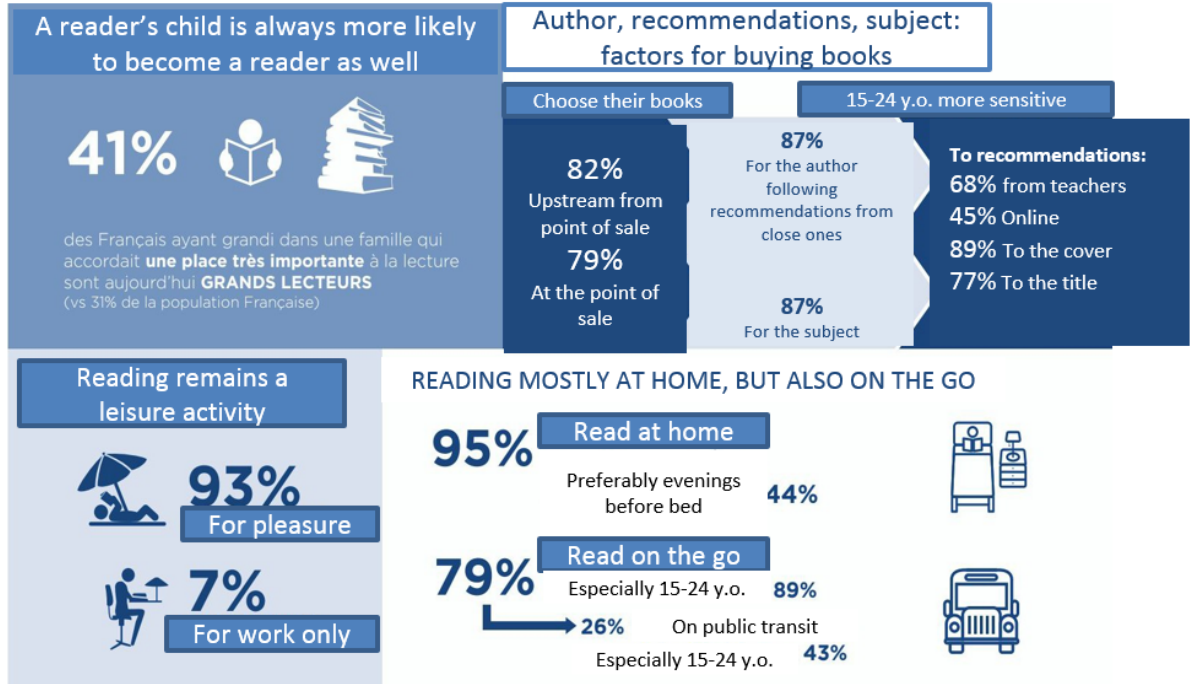
Readership for self-help has seen a notable increase in the following demographics:

**Forty Somethings: 38% (+12 pts)**

**Professionals: 36% (+8 pts)**

Source: 2019 CNL study on French readers

# 1.2 French Readers



Source: CNL Study on French Readers 2019



**MICHELIN**  
Éditrice (Ouest-France/Cap Diffusion),  
Calligram, Pearson France, Petit à Petit,  
Gouttière, De Saxe, Les 2 royaumes,  
Médias, **FRANCIS & TAYLOR**

**MÉDIA PARTICIPATIONS**  
CA 2018 : 548 M€

**POLE IMAGE**  
Dargaud, Dupuis,  
Lombard, Kailash, Urban  
Comics, Little Urban,  
Urban China (30 %),  
Usky Comics,  
Ed. Blake &  
Mortimer, Chronique,  
Hugin & Munin,  
Cité Vidéo,  
Dargaud Media,  
Éliphanine, Microdis,  
Mediation, Piatyby,  
Dopis Audiovisuel,  
Storages, VF Films,  
Revelation, Dreamwall

**FLEURUS**  
Mame, Tardy, Desclée,  
éd. Bruckmann, Belfrage,  
Vagnon, Ed. 365, Edisior

**ED. NAT. DU PERMIS DE CONDUIRE**

**PRESSE**  
Cambium Media,  
Rustica, Systeme D,  
Maison de la Presse,  
Dopis Audiovisuel,  
Storages, VF Films,  
Revelation, Dreamwall

**ÉTRANGER**  
Abrams (USA), Gallimard  
Turtle (USA), Stewart,  
Tabori & Cornig (USA),  
Knechtel Verlag  
(Allemagne)

**Anno Carrière**  
(« diff. Emmentaler, Aux  
Caves, Noyau Active, Aux  
Caves de la Vallée d'Aoste »)

**SEUIL**  
Points, L'Olivier  
(30 %), Le Sorbier,  
A. N. Méteilé (85 %),  
Don Guichotte,  
Éditions du sous-sol,  
Raconter la vie

**LA MARTINIÈRE**  
Delachaux et Niestlé,  
Sallimbanque,  
Le Serpent à Plumes

**GRUPE LIBELLA**  
Buchet-Chastel, Phébus,  
Libretto, Casterman, Desclée,  
Photolibrairie, Paris, Noir sur  
Blanc, Netobla, Delors, World  
Editions, Le Temps asperges,  
Au diable vauvert (ma), Oficina  
Liberacka (Pologne)

**EYROLLES**  
(CA 2018 : 44 M€)  
Diffusion déléguée : John Libbey  
eurodix (Arnette, Dion,  
Pinedo), Larmande, Quae, etc.

**GRUPE AUZOU**  
Diffusion Ed.

**GRUPE REVUE FIDUCIAIRE**  
(CA 2018 : 33,9 M€)

**LEXTENSO**  
LGD, Monobrasion,  
Quatro, Cadréon, Joly,  
Gazette du Palais

**PRISMA**  
National Geographic, Prat,  
ESP, Herscher & Ed. Prisma  
(diff. Interforum)

**CLASSIQUES GARNIER**

**ESKA**

# LIVRES HEBDO

**MADRIGALL**  
CA 2018 : 574 M€

**SODIS**

**GALLIMARD**  
Gallimard,  
Gallimard Jeunesse,  
Gallimard Lottini,  
Folio, La Pléiade,  
Verticales,  
Blus de Chine,  
Denoël,  
Mercur de France,  
La Tête ronde,  
Quai Voltaire,  
POL (80%),  
Soyuzdetlit,  
Alternatives,  
Les grandes personnes,  
Futuroopol,  
Nodbebe, etc.

**CASTERMAN**  
Casterman,  
Casterman,  
Aubier, GF,  
Arthaud,  
Faramon,  
Autrement,  
Nelson native,  
Père Castor

**J'AI/LIBRIRIO**  
(35 % Hachette)

**FLAMMARION**  
Flammarion,  
Casterman,  
Aubier, GF,  
Arthaud,  
Faramon,  
Autrement,  
Nelson native,  
Père Castor

**DE FALLOIS**

**BAYARD**  
(CA 2018 : 25,3 M€)  
Bayard Éditions, Milan,  
BD Kids

**HARPERCOLLINS FRANCE**  
Harlequin

**ODILE JACOB**

**GRUPE DELCOURT**  
(CA 2017 : 57 M€)  
Delcourt, Soleil,  
Les Arvès  
Diffusion Deltail

**BAMBOO**  
Grand Angil, Flûde Glacé

**BRAGELONNE**  
Héliot, Casterman,  
Stéphane Marsan,  
H Comics

**GRUPE GLÉNAT**  
(CA 2018 : 81 M€)  
Glénat, Vents d'Ouest,  
Treize étrange, Comix  
burn, Glénat Jeunesse,  
Montballon (Milan)

**SARBACANE**

**ACTES SUD**  
(CA 2018 : 74,7 M€)  
Babel, Soubouf, Soles Actes  
Sud Junior, Hélium, Papers,  
Photo Poche, Rouevac,  
J. Chambon, Errance,  
Henry Magasin, imprimerie  
Nol-Picard, Ed. de Fan 2,  
Gala, Textuel (85 %), Payot-  
Rivages, Inouïe (83%),  
Combarquis (60%), Les  
Bis qui libèrent (30%)

**GRUPE GLENET**  
(CA 2018 : 81 M€)  
Glénat, Vents d'Ouest,  
Treize étrange, Comix  
burn, Glénat Jeunesse,  
Montballon (Milan)

**HUMENIS**  
(CA 2019 : 36,4 M€)  
Que-sait-on ? PUF,  
L'Observatoire, Balaï,  
Herschel, Le Potemiar, Les  
Équivalents, Pour la Science,  
Premières Jolies

**GRUPE DU 27**  
(CA 2018 : 20,6 M€)

**ELIDIA**  
Artique, Le Rocher,  
DDB, Motifs, Zoologie,  
Ad Solem

**HACHETTE LIVRE**  
CA 2019 : 2 384 M€

**BRANCHE LITTÉRATURE**  
Grasset, Fayard  
« 9 Mille et une nuits,  
Mazarine, Pluriel,  
Pauvert, Stock, JC  
Lattès, Le Masque,  
Ed. des deux terres,  
Flare, Calligram, City,  
Éditions (85 %), Veret

**HACHETTE BOARDGAMES**  
Gigamic, Studio H,  
Famiboio, Backrack  
Games

**HACHETTE MOBILE STUDIO**

**HACHETTE ILLUSTRÉ**  
Hachette enfants  
(« Deux Coqs d'or,  
Gautier Langoustes »)  
Hachette romans  
(« Livre de poche  
Jeunesse »)  
HJ (Hachette Jeunesse  
Disney), Hachette  
Jeunesse Francos  
(Bibliothèque Rose  
et Verts)  
Chêne, Hazan, Hachette  
Pratique, EPA, Hachette  
Tourisme (Drouart,  
Guides Bleus...),  
Marenoir, Plage (ex-Nol)

**PRINCIPALES FILIALES À L'ÉTRANGER**

**GRANDE-BRETAGNE**  
(Hachette UK) : Hodder  
Headline, Oribase,  
Watts, Orion, Little  
Brown, John Murray,  
Borestone, Quercus,  
Harrod's

**ÉTATS-UNIS**  
(Hachette Book  
Group USA) : Grand  
Central, Corner  
Stone, FairWords, Little,  
Simon & Schuster,  
Orion, Bantam Books,  
Hachette Nashville,  
Hachette Audio

**HACHETTE EDUCATION**  
Istra, Hachette FLE

**ESPAÑE**  
(Hachette España) :  
Anaya, Salvat, Bruño,  
Alfina Editorial

**GRUPE HATIER**  
Hatier, Foucher,  
Didier, Rageot, Edifc  
Hachette Inter

**AMERIQUE LATINE**  
París (Mexico), Bessas  
Larousse, Vox

**ITALIE**  
Larousse, Hachette,  
Passicoll

**INDIE**  
Hachette India

**LIBAN**  
Hachette-Antoine  
(80 %)

**CHINE**  
Hachette Phoenix (49 %)

**RUSSE**  
Asbook-Artisoul (49 %)

**LAROUSSE**  
Dessan & Toim,  
Harrap's

**DUNOD**  
Armand Colin

**LIBAN**  
Le Livre de Poche,  
Preludes, Audiofil

**INTERFORUM**

**MICHEL LAFON**  
(CA 2018 : 58,5 M€)  
Privé

**HUGO & CIE**

**AC MEDIA**  
Ki-on, Lumen,  
Mama Books

**L'OPPORTUN**  
L'Étudiant, Nisha, Kaya

**STEINKIS**  
Splash, Virgali, Zunglo  
Wozam Wozam

**ALBAY, L'Homme, Sandi-  
Tchou, Mengla/Place des  
Victoires, Bartilaz, Gault-  
Millias, Alma, Aguila, Ring,  
Le Cerf, Bottin Gourmand,  
Gérard de Villiers,  
White Star, Maxima,  
Assouline, Alain Ducasse,  
Parigramme, Club  
International du Livre/  
Sélection Readers Digest,  
L'âge d'Homme, Max Milo,  
Media 1000, Usborne  
(UK), Arléa, Mollat,  
Caster Astral, Philippe  
Rey, Plume de coraïte,  
Ed. du Patrimoine, Viviane  
Hamy, CNRS éditions, etc.**

**ROBERT LAFFONT**  
Saguen, Boudoin,  
Julliard, NL, Sédigier

**EDITIS EDUCATION**  
Nathan, Bosses, Le Robert,  
Rey, CIE International,  
Syros, Design, École  
vivante, L'Agence

**L'ARCHIPEL**  
Écriture, Archibook,  
Presses du Châtelet

**PARASCHOOL**

**EDITIS**  
CA 2018 : 750 M€

**PLACÉ DES ÉDITEURS**  
Presses de la cité, Omnibus,  
Belfrage, Don, Perrin,  
Presses de la Renaissance,  
Chemin vert, L'Express  
(France)

**EDI 8**  
Fini, Grégo, 404, Hors  
collection, Le Pré aux Clercs,  
Acropole, Pouipe Fictions,  
Les Écoutes, Le Dragon d'Or,  
Tara, Soter, Heurtois, Langue  
au chat, Salmou, Lowely  
Planis (Grecos)

**XO/OHI EDITIONS**

**UNIVERS-POCHE**  
Pocket, PKJ, 10/78, Fleury,  
Kumobata, Langue pour  
tous, 12/21

**LE CHERCHE MIDI**

**SONATINE**

**HÉLOÏSE D'ORMESSON**

**TELEMAQUE**

**LA DÉCOUVERTE**  
Zones, Dominique Carré,  
Les empêcheurs de penser  
en rond

**ELLIPSES**

**LITO**

**ETAI**

**ASSIMIL**

**ÉCONOMICA**

**L'HARMATTAN**  
Michalon, Sutton (37,5 %)

**KARTHALA**

**FRANCE LOISIRS**  
(CA 2018 : 89 M€)  
Grand Livre du mois

**ENI**

**LAVOISIER**  
Tec & Doc, EM,  
Hermès, Med-Sciences,  
Symbiose agricole

**GRUPE LEFEBVRE-SARRUT**  
CA 2018 : 508 M€

Éditions Législatives,  
Francis Lefebvre,  
Dalloz (« Sirey »),  
Deimex, Juris  
(distribution Hachette)

El Derecho (Espagne)  
SDU (Pay-Bas)  
Indicator (Belgique),  
Royaume-Uni)  
Ipsos Francis Lefebvre  
(Italie, 50 %)  
Juris (Allemagne,  
50 %)

**SALVATOR**  
« diff. Beaudouin,  
Coublier, etc. »

**LES BELLES LETTRES**

**GRUPE PIKTOS**  
Grainier, Dangnet,  
Trajectoire, Charlot  
d'Or, Terrain, Ouss,  
Guinnesseca

Adi, Ariane, Bussière, etc.

« L'Albatros Ph. Picolot,  
Champ Vallon, Finibato, Allis,  
Sud de la mer, Honey Fall,  
Médias, F. Bourin, etc. »

**GRUPE TREDANIEL**  
Exergue, Devry, Diesteo,  
Janet, Lyon

Alphons, Rue des  
écoles (« Milla,  
Garnier, Circonflexe-  
Millegagnol »), Ed. Marie-  
Claire, Ely, Modus  
Vivendi, Studiogram  
(« Break »), Yoyo, Terre  
vivante, etc.

**DILA**  
La Doc, L'Association,  
Journaux Officiels

**GRUPE GLENET**  
(CA 2018 : 81 M€)  
Glénat, Vents d'Ouest,  
Treize étrange, Comix  
burn, Glénat Jeunesse,  
Montballon (Milan)

**ELIDIA**  
Artique, Le Rocher,  
DDB, Motifs, Zoologie,  
Ad Solem

**Citadelles & Mazoud,  
Nouveau monde,  
Humaines associées,  
L'Équipe, Codes Rousseau,  
Carabias, Play Bac, Le  
Monteur (info digitaal),  
Kaze, Ed. du Toucan, City,  
Hermann, Né éditions,  
Le Ballon, Panini, etc.**

**GRUPE DU 27**  
(CA 2018 : 20,6 M€)

**ELIDIA**  
Artique, Le Rocher,  
DDB, Motifs, Zoologie,  
Ad Solem

**HALLE**  
divers  
éditeurs

**COOP**  
divers  
éditeurs

**LES BELLES LETTRES**

**GRUPE PIKTOS**  
Grainier, Dangnet,  
Trajectoire, Charlot  
d'Or, Terrain, Ouss,  
Guinnesseca

Adi, Ariane, Bussière, etc.

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Garnier, Circonflexe-  
Millegagnol »), Ed. Marie-  
Claire, Ely, Modus  
Vivendi, Studiogram  
(« Break »), Yoyo, Terre  
vivante, etc.

**DILA**  
La Doc, L'Association,  
Journaux Officiels

**HACHETTE DISTRIBUTION**

**ALBIN MICHEL**  
CA 2018 : 201 M€

Magnard/Vuibert Delagrave, Librairie des écoles,  
De Boeck supérieur, Hory, Leducs (94%),  
Jouvence (80 %)

**DILISCO**

**LEGÈNDE**

Participation  
au capital

Centre de  
distribution

Carte conçue par Fabrice  
Pisat / Livres Hebdo  
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préalable  
© Livres Hebdo  
Mars 2020

PRIS : 10 € TTC  
ISBN : 978-2-3635-98-8

## 1.3 Publishing Overview

Two largest publishing groups = +/- 35% of book sales

Twelve largest publishers = +/- 80% of book sales

However, French publishing is also characterized by several independent actors of varying sizes whose production contributes to the diversity of the publishing offered.

**More than 8,000 publishing structures are known,**

**4,000 where publishing is the primary activity and 1,000 where publishing is a significant part of their economic success.**

(source: *Ministère de la Culture*)

# 1.4 Publishing Production and Circulation Averages

## Production and average circulation

	2018	2019	Change
<b>Titles produced</b>	<b>106 799</b>	<b>107143</b>	<b>0,32%</b>
New releases	44 968	44 660	-0,69%
Reprints	61 831	62 483	1,05%
<b>Units produced (millions)</b>	<b>505,4</b>	<b>516,8</b>	<b>2,27%</b>
New releases	287,5	296,8	3,24%
Reprints	217,9	220,1	0,98%
<b>Average circulation – New releases</b>	<b>6 393</b>	<b>6 645</b>	<b>3,95%</b>
<b>Average circulation – Reprints</b>	<b>3 524</b>	<b>3 522</b>	<b>-0,07%</b>
<b>Average circulation – Total</b>	<b>4 732</b>	<b>4824</b>	<b>1,94%</b>

## Evolution of net total publishing revenue and copies sold

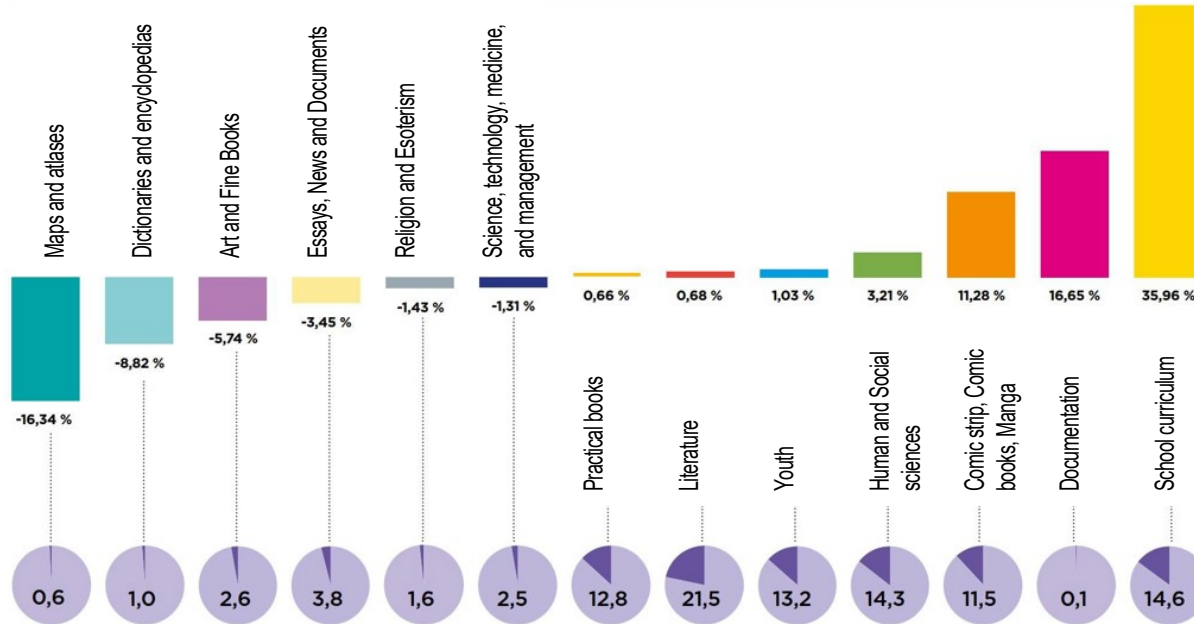


Source: 2019-2020 SNE Activity Report

# 1.5 Sales by Publishing Segment

Sales figures progress in 2019, by publishing segment

Market shares in 2019, by percentage



# 1.6 Digital Publishing

## Digital Publishing Sales Figures (in euros)

	2018*	2019	Change 2018/2019
General public (w/o literature)	15 533 257	14 299 070	-7,9%
Literature	28 327 247	29 816 438	5,3%
School	11 480 949	24 332 872	111,9%
Professional / University	157 304 051	163 858 767	4,2%
<b>TOTAL</b>	<b>212 645 504</b>	<b>232 307 147</b>	<b>9,2%</b>

Figure 14

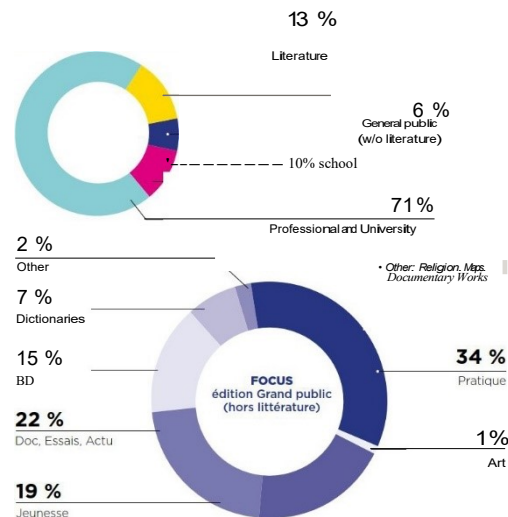
\* 2018: restated numbers

## Share of digital publishing sales for publishers (by segment)

	2018*	2019
General public (w/o literature)	1,26%	1,14%
Literature	4,99%	5,21%
School	4,02%	6,27%
Professional / University	35,98%	36,56%
<b>TOTAL</b>	<b>8,42%</b>	<b>8,72%</b>

\* 2018: restated numbers

## Share of digital publishing sales (232,3 M€) by segment



## Sales figures by format

Digital book sales with physical support (CD, DVD, USB key)	1.9%
Digital book sales (downloading or streaming)	50.6%
Application sales	0.2%
Subscriptions and sales of user licenses for content (portal, packages)	47.3%
<b>Total</b>	<b>100%</b>

# 1.7 Translations into French

In 2018, nearly 14,000 titles were translated into French, or approximately 17% of BnF titles.

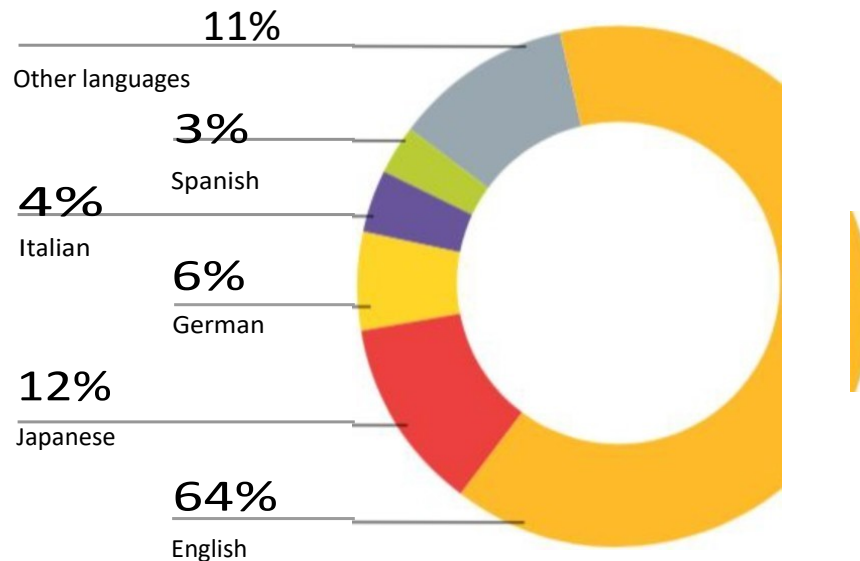
Main genres:

Fiction 31% (76% from English)

Comics 19% (with 56% from Japanese and 36% from English)

Youth 14% (77% from English)

Breakdown of languages for all translated titles



## **2. RIGHTS TRANSFERS**

**2.1 General Principles**

**2.2 Different modes of entry: Rights transfers, Co-publishing**

**2.3 Identify potential titles**

**2.4 Create prospecting materials**

**2.5 Prospecting**

**2.6 Negotiating and contracts**

**2.7 Institutional partners and subsidies**

## 2.1 General Principles

Set up a partnership with a French publisher who will publish the book or collection under their brand name.

Preliminary step: Verify the chain of rights

- Author's contract
- Operational area
- Possibility of transfer to a third party
- Compensation provided in case of transfer
- Rights transfers (With or without fabrication)
- Co-publishing (Joint account, joint venture)



## 2.2 Modes of entry

### **RIGHTS TRANSFERS:**

Rights transfers from a Canadian publisher to a French publisher:

- For a book initially published in Canada (with some exceptions)
- On a well-defined territory: European Union at a minimum; be careful to exclude the original publisher's specific distribution areas
- Determine the language: French (with or without translation, which includes important contract modifications)
- With or without fabrication of French copies

## 2.2 Modes of Entry

### **CO-PUBLISHING:**

- Specific contract
- Sharing costs: publishing, translation, layout, fabrication, circulation, distribution, marketing, commerce, advertising, promotion.
- Sharing tasks, namely circulation, distribution, management, promotion, marketing, secondary rights.
- Sharing operating benefits
- Generally 50/50, though not systematic

## 2.2 Modes of entry

	<b>Rights Transfers</b>	<b>Co-publishing</b>
<i>Advantages</i>	<ul style="list-style-type: none"><li>•Speed</li><li>•Ease of implementation</li></ul>	<ul style="list-style-type: none"><li>•Knowledge of target market and local awareness</li><li>•Higher unit margin</li></ul>
<i>Disadvantages</i>	<ul style="list-style-type: none"><li>•CA and reduced margins</li><li>•Reduced control (quality and sales)</li></ul>	<ul style="list-style-type: none"><li>•All decisions are shared</li><li>•Broader management requirements</li></ul>

## 2.3 Identify Potential Titles

### Selection criteria:

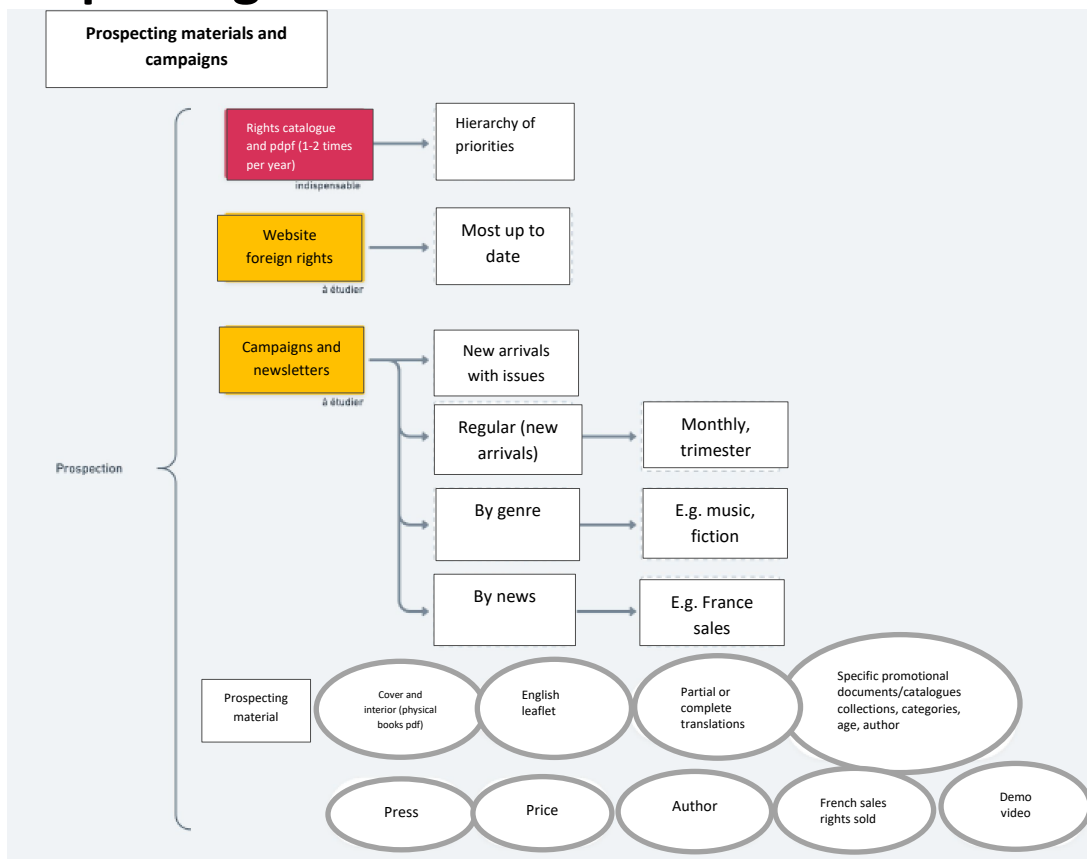
- All relevant publishing fields with a few rare exceptions. Some genres are more conducive to transfers: Literature, youth, comics, textbooks, illustrated textbooks and books with complex manufacturing processes.
- Success criteria: author, theme, style, relevance, sales, press, audiovisual relevance, price, original publisher's reputation.

## 2.3 Identify Potential Titles

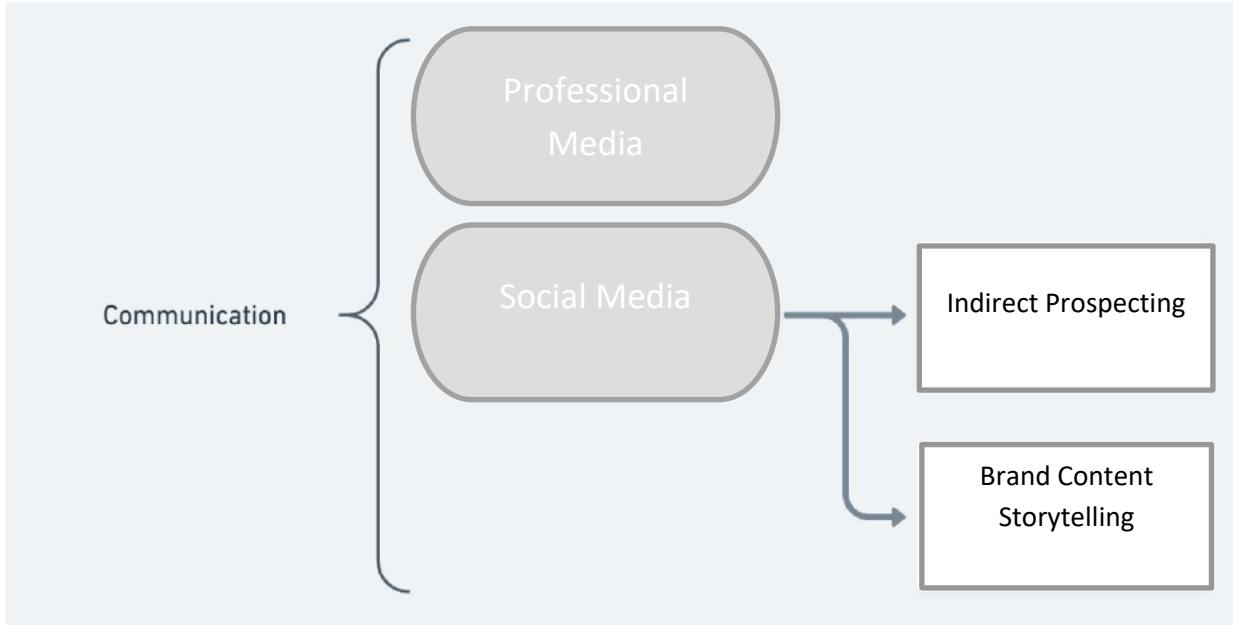
### Helpful tips:

- Don't hesitate to include niche, unexpected, original or “more difficult” titles
- Avoid “average”, reproducible titles
- Prioritize; aim to reduce the offer
- Test catalog presentations and adapt

## 2. 4 Create Prospecting Materials



## 2.4 Create Prospecting Materials



## 2.4 Create Prospecting Materials

### Catalogues or leaflets

- Present your publishing house and its editorial line –  
very important
- The presentation must differ from your local catalogues and leaflets
- Prioritise



## 2.5 Prospecting

### Checklist – Identifying targets for a title

Similar collection or title  
within own catalogue

Similar collection or  
title competitor

Match criteria

Theme

Genre/  
category

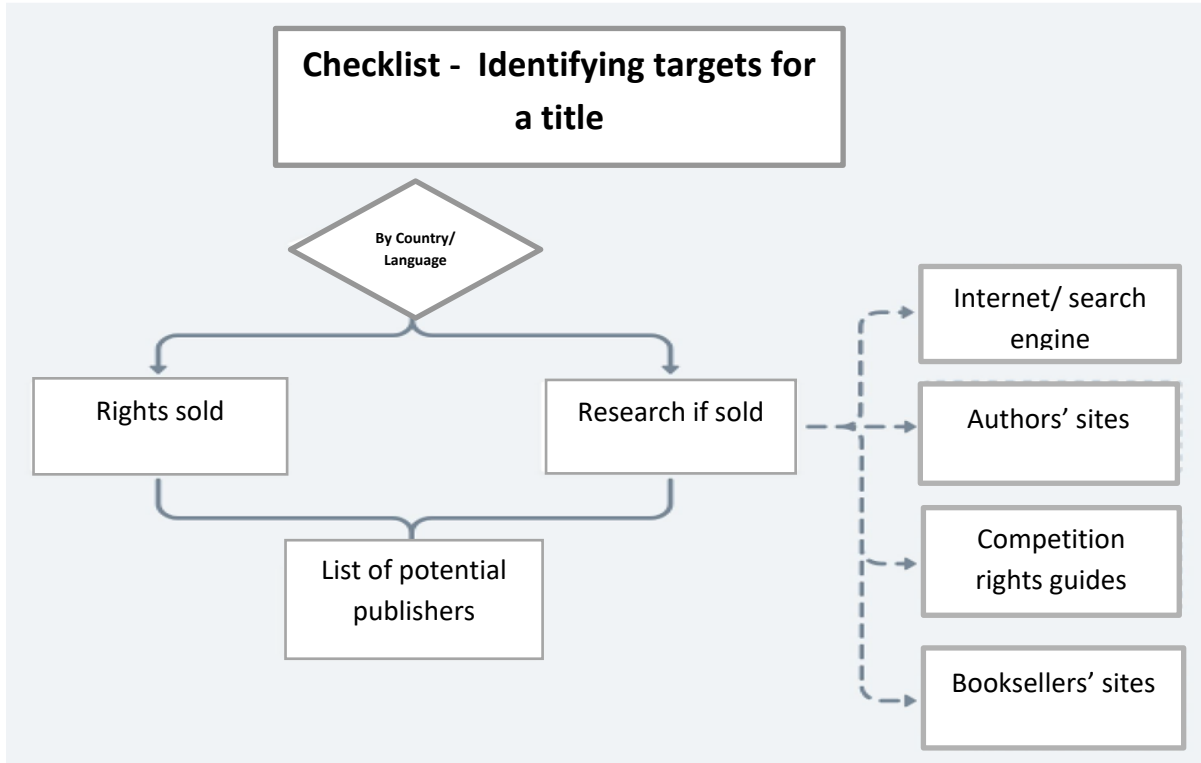
Graphics

Editorial  
Angle

Target age  
group

Author

## 2.5 Prospecting



## 2.5 Prospecting

Identify the publisher

Identify the contact person

Types of individualised prospecting:

- physical: book fairs (such as *Livre Paris*), special meetings
- remote: email, videoconferences, telephone

## 2.5 Prospecting

### Presentation Meeting

- Always be well prepared and rehearse presentations if possible
- Know all the titles (authors, content)
- Learn to omit personal preferences
- Understand and adapt to the audience
- Time management and presentation sequencing
- Verify and learn presentation content
- Understand context: competition and market
- Anticipate and manage questions/objections

## 2.5 Prospecting

**Direct prospection or with agents?** Criteria to consider:

- Initial investment: build an address book, prospecting materials
- Ratio of elapsed time/sales turnover
- Direct representation
- Agent portfolio

The agent collects a commission on all revenue from contracts they bring in.

## 2.5 Prospecting

Mass prospecting (physical or digital)

- mailings
- catalogues
- publications
- newsletters

Sustained follow-up with prospect

## 2.6 Negotiating and contracts

Prior to negotiations, understand forecasts:

- local public sales price
- circulation
- languages and territories (European Union, Francophonie, and other territories at a minimum)

Topics to negotiate:

- duration, language and territories, type of diffusion, distribution, records
- transfer: percentage, advance, duration, language, and territories
- co-publishing: first printing, unit sales price
- other clauses: translation approval, secondary rights, renewal

## 2.6 Negotiating and contracts

Written and signed contracts are strongly recommended.

Points to monitor and specifics of the French market:

- unit sales price (paper and digital)
- first printings in decline
- growing digital publishing (albeit marginal)
- audiobook development



## 2.7 Institutional partners and subsidies

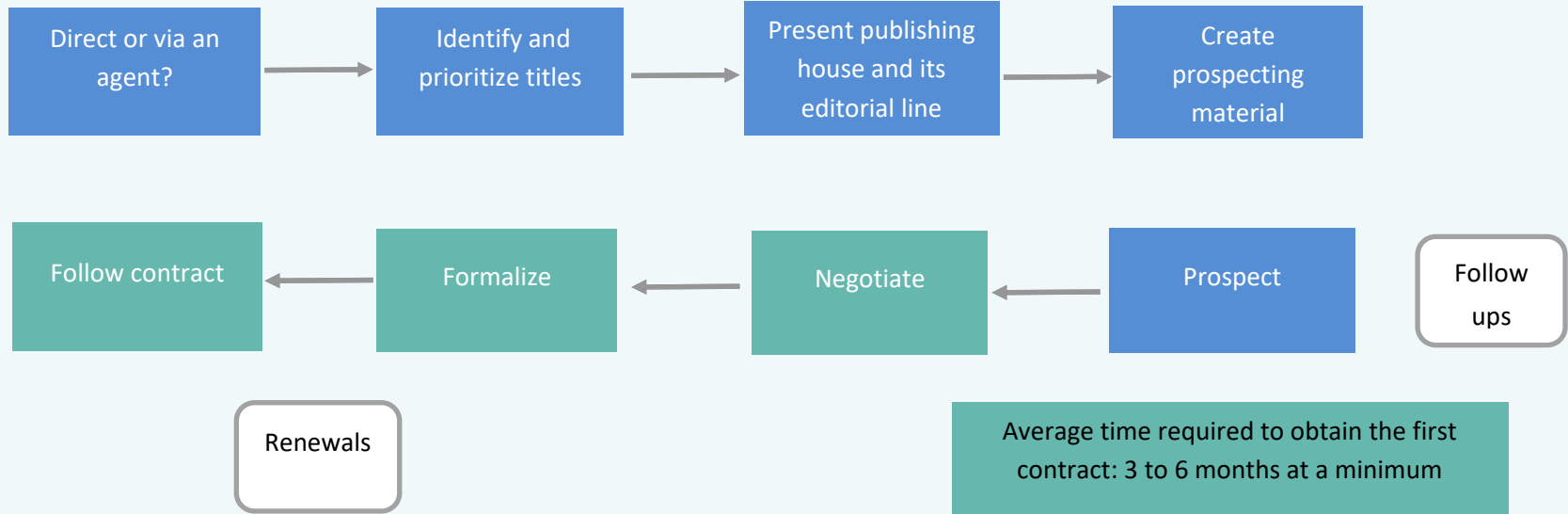
Centre National du Livre (CNL)

The French Publisher may ask CNL for financial aid for translation to “accompany publishers who are taking financial risks while providing quality and diverse products made accessible to as many people as possible.”

Funding up to 35,000€ (40 or 60% of translation costs)

## 2.7 Summary

### Process to sell translation rights



## **3. CIRCULATION & DISTRIBUTION**

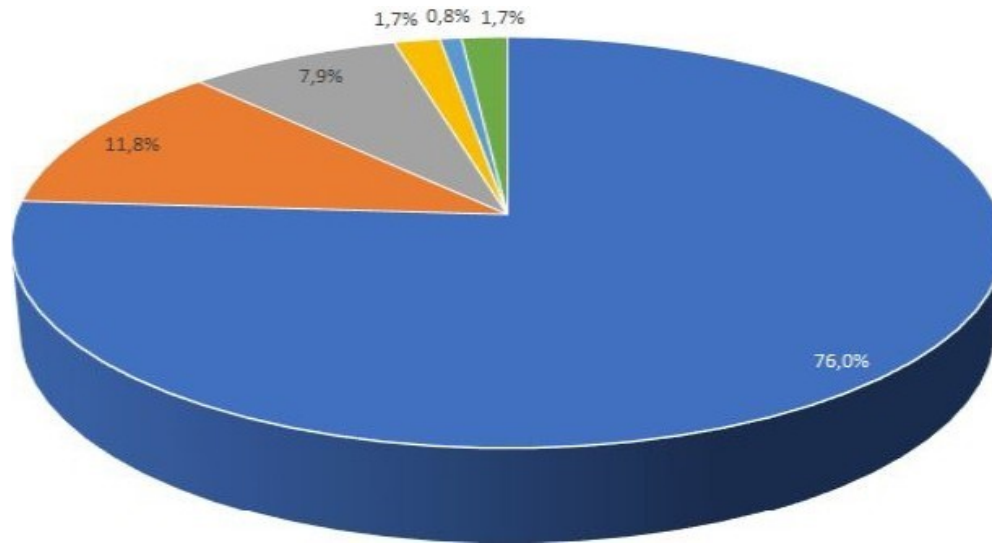
3.1 Channel Sales

3.2 Commercial Chain

3.3 Swiss and Belgian Markets

3.4 Being in Canada and circulating in France

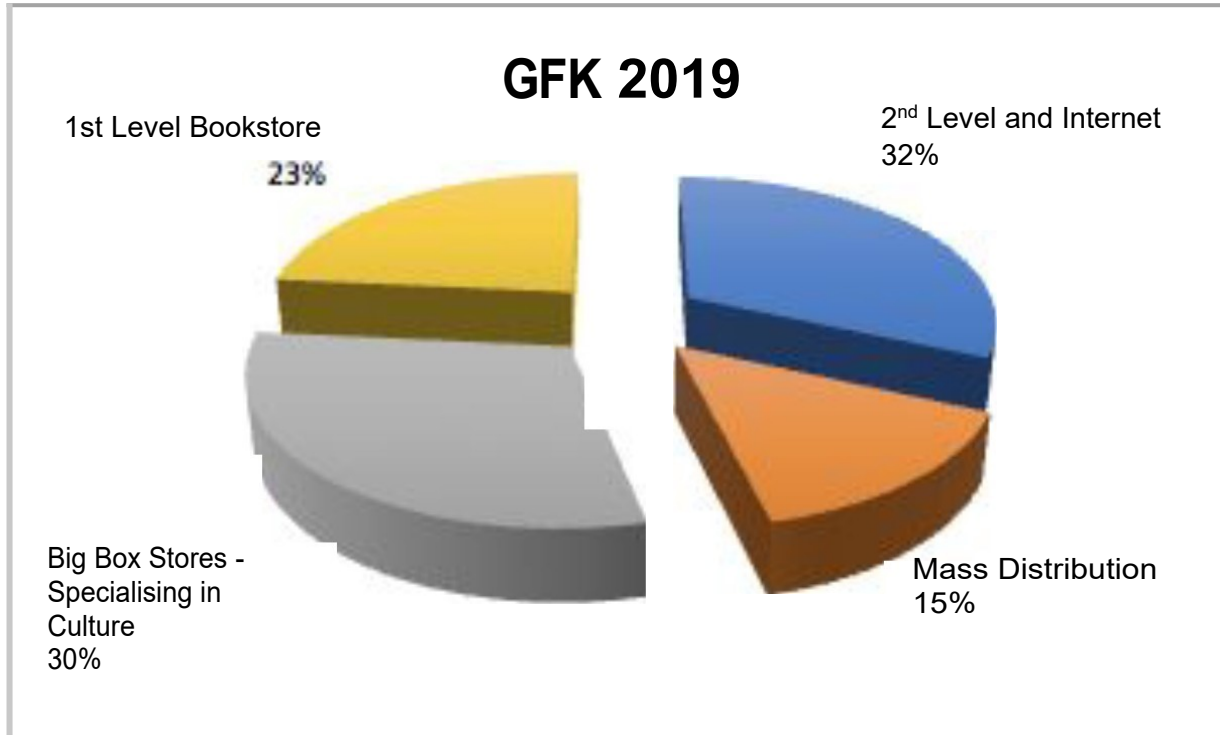
# Publisher Sales Channels



- Traditional Distribution/Circulation
- Mail Order Sales
- Direct Sales to Wholesalers and Retailers
- Club Sales
- Direct Sales to Associations and Administrations
- Other Channels

Source: 2019-2020 SNE Activity Report

# 3.1 Sales by Bookstore Classification (France)



## 3.1 Points of sale for books

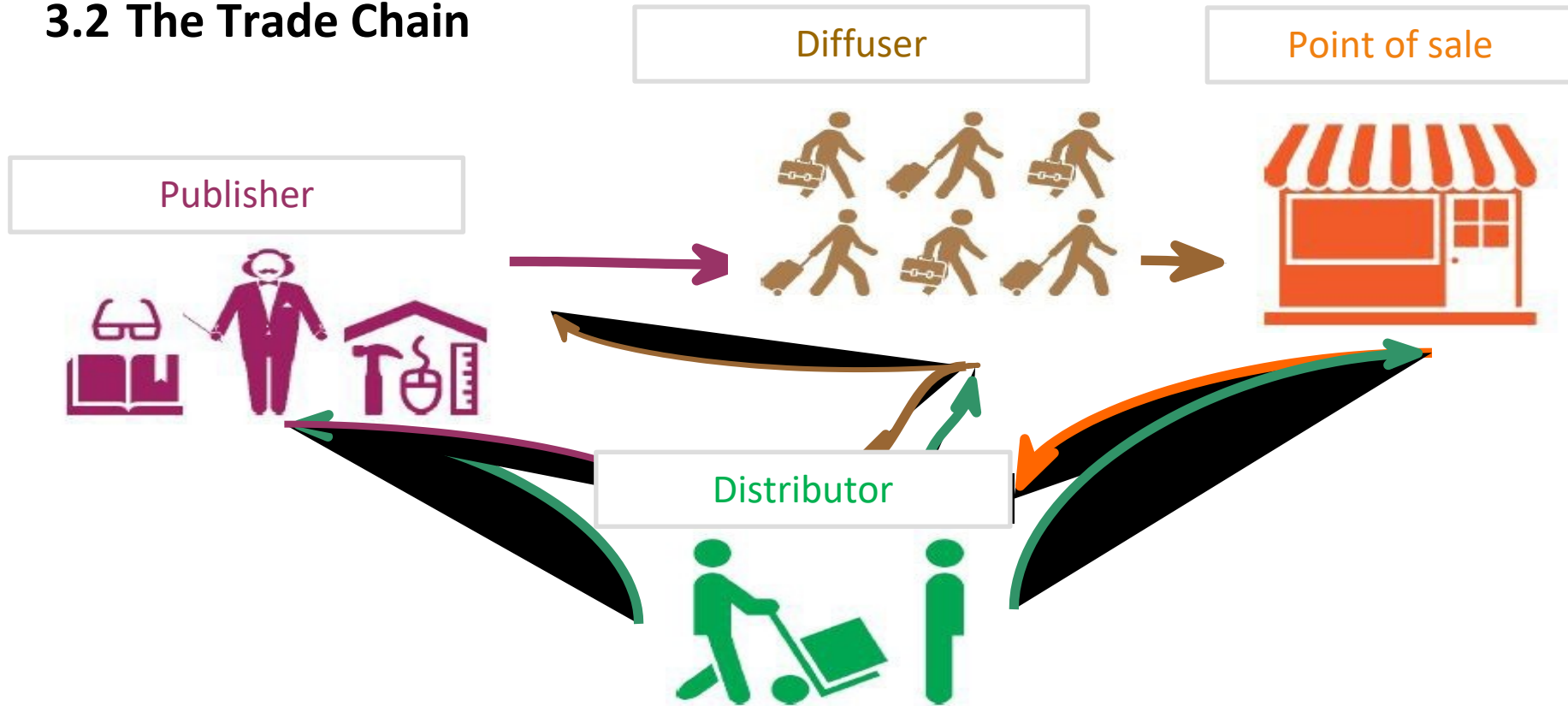
The total number of points of sale for books (bookstores, cultural mass-merchandisers, superstores, supermarkets, and popular stores) in France is estimated to be between **20,000 and 25,000**.

From this total, 15,000 sell books as a regular business activity.

And **only 3,500 to 4,500** operate principally as booksellers or generate a significant portion of their revenue from books.

(source: *Ministère de la Culture*)

## 3.2 The Trade Chain



## Focus on Diffusion

“The Book Diffuser refers to the whole commercial and marketing operations implemented by publishers, from the various sales networks, with dedicated teams of representatives (and educational delegates for scholastic publishing)”.

### Focus on Diffusion



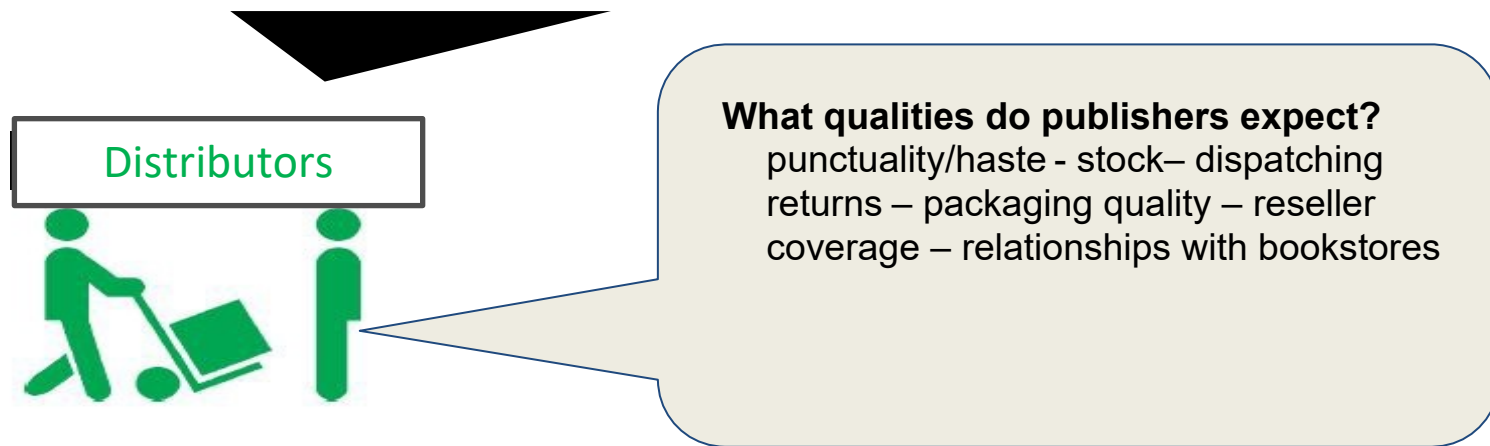
#### **What qualities do publishers expect?**

A strong connection, availability, responsiveness — capable of covering a network of resellers with its sales force, able to implement new releases and commercial operations; along with funding and guidance (marketing, analytics)



## Focus on Distribution

Book distribution includes activities linked to physical circulation (storage, transportation) and workflow management for existing works (service, restocking, returns), finances (billing, collection) and informatics (orders, bookstore and publisher information)”



## 3.2 The Value Chain

A Value Chain details how revenue is distributed between stakeholders.

Stakeholders in the "Book Chain"	(% of RSP before tax)	
	Low Est.	High Est.
Author (Writer, Illustrator, photographer, translator, etc.)	8%	12%
Fabrication	15%	19%
Editor (Literary direction, press service, public relations advertising, POS advertising, promotion...)	11%	20%
Diffuser (representatives)	6%	10%
Distributor (storage, handling, billing)	11%	14%
Bookstore	25%	38%

} 26 to 39%

} 17 to 24%

### 3.3 Diffusers in Belgium and Switzerland

The **Belgian** market is similar to the French market since it is in the euro zone and books are priced the same in both countries, with a few exceptions.

In recent years, in most cases, diffusion in Belgium has been integrated to diffusion and distribution in France.

This is not the case for **Switzerland**, whose currency is Swiss francs (CHF). Four companies operate as their main domestic diffusers/distributors with access to different language markets. Large French distribution groups have a partner, or subsidiary, giving access to Swiss publishers with a 20% price mark-up (with a tabulated statement).

## 3.4 Canadian Publishers

As far as the English language is concerned, the market in France is limited. Bookstores with dedicated sections are dedicated to bestsellers.

Several Quebec publishers have successfully invested in the French market – LUX, LA PASTÈQUE, LA PEUPLADE, LE QUARTANIER – what are their **best practices**?

- Having a relay person in France
- Using a key player to diffuse/distribute
- Eventually print on-site

**Diffusion du Nouveau Monde** (DNM and *Librairie du Québec*) is devoted to Quebec publishers in partnership with CED-CEDIF. Its role is to interface with the French market, namely the diffuser, bookstores, communications, liaise with advising publishers. Distribution is covered by DNM, with press services and inventory management in collaboration with the Quebec-based company.



# **CONCLUSION**

# Conclusion

The choice to seek rights transfers or to get established in France is part of the publishing house's strategy:

1. **Diffusion/distribution in France for the entire catalogue**
2. **Diffusion/distribution in France for a few DNM titles**
3. **Rights transfers with third-party publishers**

Being diffused and distributed in France requires significant investments, not just to find a partner, but also to actively work with them, bookstore/publisher relations and the media (with a communication strategy adapted to the market). A minimum of new releases to potentially enter the market.

If some titles appear to have potential, the choice may be related to rights transfers to publishers who will have the means to promote the books under their own name, or to rely on DNM for marketing under your own brand.



**YOUR QUESTIONS...**



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