



LIVRES CANADA BOOKS®

# English-Language Book Markets in Africa

A Guide for Canadian Publishers

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# Introduction

This report is a practical, commercially based, realistic investigation into the main English-language book markets in sub-Saharan Africa. It will look at their history and how present realities have been conditioned by that history. It will bear in mind its Canadian publisher readership and be unflinchingly frank but constructive in the possibilities it sets out.

Most reports of this kind confine themselves to a single country. Africa is not a country but a continent, with an estimated 1500–2000 Indigenous languages, many of which are predominantly oral, and at least five colonial languages. Great cultural variety, and differing approaches to such key elements as education, attend upon that variation in language. Nevertheless, there are sufficient elements common to the countries on which we focus here to offer good reasons for reporting on them together. To explain the rationale for that focus, here are our defining principles for including a country in this report:

- English is an official language.
- English is the principal medium of education.
- English is the principal language of business.
- English is the *lingua franca*.
- The country has been a priority market within Africa for the major UK educational publishers, some of which may have an established local publishing presence and not merely a sales office.

These criteria provide a list of the following first-tier countries:

WEST AFRICA: Ghana, Nigeria

EAST AFRICA: Kenya

SOUTHERN AFRICA: South Africa

Where our research has produced information of interest on countries below this threshold, we have created a Mini-Survey. This second tier comprises Rwanda, Tanzania, and Uganda.

# West Africa: Nigeria

Nigeria has the largest population of any country on the African continent as well as its largest economy. From 1975 onwards, its burgeoning oil revenues transformed many economic sectors, but also created an environment in which corruption became notorious. Education received substantial funding windfalls, which presented specialist educational publishers overseas, mostly in the UK, with huge opportunities for selling bespoke resources developed in association with state and federal curriculum institutions and ministries of education. By 1982, however, that phase of plenty had ended. Nevertheless, the steep population growth and the high school-age segment of the population mean it remains a market of significant potential.

## Population and Language

- According to the World Bank, Nigeria accounts for about half of West Africa's population with over 200 million people.<sup>3</sup> According to the World Population Review, Nigeria has the largest population in Africa.
- The United Nations projects that the overall population of Nigeria will reach 401.31 million by the end of 2050. By 2100, if current trends continue, the population of Nigeria will be over 700 million.<sup>4</sup>
- Nigeria has one of the largest youth populations in the world: those aged under 14 represent 44% of the total.<sup>5</sup>
- Abuja, in the centre of the country, 700 km northeast of Lagos, was built to replace Lagos as the federal capital as of 1991. Lagos remains the commercial capital and, with a population of over 20 million, is the most populous city in the country.
- In 2020, Nigeria had 99.05 million Internet users. This figure is projected to grow to 131.7 million users by 2023. Internet penetration amounted to 46.6% of the population in 2020<sup>6</sup> and is set to reach 65.2% in 2025.<sup>7</sup>
- English is the official language of Nigeria, with Hausa, Yoruba, Igbo, Fula, and English Creole (also known as 'Pidgin') being widely spoken. There are, however, over 520 languages spoken in Nigeria.<sup>8</sup>

<sup>3</sup> "The World Bank in Nigeria," The World Bank, November 3, 2020, <https://www.worldbank.org/en/country/nigeria/overview>.

<sup>4</sup> See Worldometer for the most up-to-date population figure for Nigeria: <https://www.worldometers.info/world-population/nigeria-population/>.

<sup>5</sup> UNESCO, Nigeria: <http://uis.unesco.org/en/country/ng>.

<sup>6</sup> Joseph Johnson, "Nigeria Online Usage Penetration 2015–2025," Statista, January 27, 2021, <https://www.statista.com/statistics/484918/internet-user-reach-nigeria/>.

<sup>7</sup> Joseph Johnson, "Nigeria: Number of Online Users 2015–2025," Statista, January 27, 2021, <https://www.statista.com/statistics/183849/internet-users-nigeria/>.

<sup>8</sup> What Languages Do People Speak in Nigeria? World Population Review: <https://worldpopulationreview.com/languages/nigeria>.

# East Africa: Kenya

Kenya is the largest book market in East Africa and is an established regional hub for educational publishers and booksellers.

## Population and Language

Kenya, like its neighbours, is a highly multilingual country. English and Swahili are the official languages.<sup>31</sup> Kenya was once part of the British Empire and became independent of British rule in December 1963.

- With a population of approximately 54 million,<sup>32</sup> Kenya is the second most populous country in the East African Community (EAC) after Tanzania.
- Young population with a median age of 20.
- The population has grown on average by 1 million per year over the last 20 years.
- Nairobi, the capital, is home to 2.75 million residents and is a regional hub for air travel.
- Mombasa, the second-largest city with 800,000 inhabitants, is the port of entry for much of the sea freight destined for other countries in the EAC.

## Economy

- Currency: Kenya Shilling (KES)

In 2019, Kenya's economic growth averaged 5.7% and the country has a GDP of US\$95 billion, making Kenya one of the fastest growing economies in sub-Saharan Africa and the largest economy of the six nations (Burundi, Kenya, Rwanda, South Sudan, Tanzania, and Uganda) comprising the East African Community (EAC). The recent economic expansion has been boosted by a stable macroeconomic environment, positive investor confidence, and a resilient services sector.<sup>33</sup>

The Kenya Vision 2030,<sup>34</sup> which "aims to transform Kenya into a newly industrializing, middle-income country providing a high quality of life to all its citizens by 2030 in a clean and secure environment," is the major framework for government policy in Kenya. The impact of this on education is the development of a new competency-based curriculum (CBC) launched in 2017, which is a key component of Kenya Vision 2030.

<sup>31</sup> "Kenya: Languages," African Studies Center, University of Pennsylvania: <https://www.africa.upenn.edu/NEH/klanguages.htm>.

<sup>32</sup> See Worldometer for the most up-to-date population figure for Kenya: <https://www.worldometers.info/world-population/kenya-population/>.

<sup>33</sup> "The World Bank in Kenya," The World Bank, July 31, 2020, <https://www.worldbank.org/en/country/kenya/overview>.

<sup>34</sup> Kenya Vision 2030: <https://vision2030.go.ke/>.

# Southern Africa: South Africa

South Africa is the most complex of the book markets in all of Africa and, by most reliable estimates, its largest. It is also the best-documented in terms of local data. Although it shares with the other sub-Saharan African countries covered in this report a market dominated by educational publishing, it differs from them in having a mature, wide-ranging trade sector in both publishing and bookselling, and in two languages: English and Afrikaans. This means that, whereas in other countries educational publishing comprises 80–90% of the market, in South Africa this figure is 60%. Thus, the market access possibilities for overseas publishers are of a different order, even if the relevant qualifying factors and recommendations in the introduction to this report would nevertheless apply.

## Population and Language

- Although the population of South Africa is estimated at 60 million in 2020, a firm estimate is elusive because of continual immigration across the porous land-borders with its neighbours to the north. Migrant workers come south in search of jobs in South Africa, which offers better prospects despite its own high unemployment rate of 30.1% as released by Stats SA in June 2020. This destabilizing rate makes a combustible combination with the continuing large-scale immigration, and the immigrants are subject to chronic violence.
- The median age is low, as in other African populations, at 27.6 years.
- Language in South Africa is a remarkable, complex, and fascinating element in the culture. The country has 11 official languages including Afrikaans (the linguistic legacy of the early Dutch settlers) and English, as well as a further 25 or so unofficial languages.
- All the remaining official languages (and the unofficial ones) are indigenous to South Africa. Although English is spoken as a first language by only 10% of the population (behind Zulu at 23%, Xhosa at 16%, and Afrikaans at 14%), it is on the rise as a first language. It is, in addition, the primary language of government and of secondary and higher education, which supports its dominance in the publishing arena. English is also increasingly the dominant second language and thus the main language of business, a sphere where Afrikaans also features prominently.

# **PART II: Minor Book Markets**

# Conclusion

## Summary Conclusions, Expectations, Recommendations, Opportunities

### General

- The book markets of sub-Saharan Africa are dominated by educational publishing, and most other publishing and bookselling opportunities take place in the hinterland of that sector.
- The exception to this general picture is South Africa, where educational publishing is still dominant, but also has a highly developed consumer publishing and bookselling sector. It is also the only market with regular, reliable, and consistent locally produced market data. Significantly, South Africa is in the top 15 export markets for UK publishers in all book areas except school and English Language Teaching (ELT; see Appendix 3).
- The major prize in educational publishing lies in Ministry of Education contracts to publish bespoke materials for primary and secondary schools. This is a fiercely competitive winner-takes-all territory where a relatively small number of players have acquired expertise, applied deep local knowledge, and developed long-term relationships through sustained presence on the ground.
- It is also territory where the landscape is changing. Whereas in the past publishing has been controlled by the local offices of large players from overseas, there is a shift towards indigenous suppliers and, ominously in the view of some, towards government publishing with all its adverse implications for quality and freedom to publish.
- The status of copyright is of great concern in South Africa in particular, where exceptions for educational use would massively diminish the sector for commercial publishers, reducing choice and quality.
- This core area is thus not to be enterprised lightly, and the barriers to entry are even higher than previously.