

LIVRES CANADA BOOKS®

Canada, at home in the world



For close to fifty years, **Livres Canada Books** is the only national industry association providing key support in advancing international sales and building export expertise of the Canadian-owned and controlled English- and French-language book publishers. Based in Ottawa, the not-for-profit organization connects publishers across Canada with a variety of services.

This brochure has been produced for distribution during the **2021 Virtual Trade Mission to Germany** to help inform German publishers, potential partners, and cultural officers about Canadian book publishing, to deepen understanding, and further collaboration with this important cultural market.

A nation of diversity

Canada—with the second largest land mass facing three oceans and one of the longest borders in the world—is a country of 37 million people with specific regional characteristics in each of its ten provinces and three territories.

About 22 percent of the population are francophones primarily living in Québec, while 60 percent are anglophones. The official French and English languages have been joined by an impressive expanse of cultures across the country, while First Nations, Métis, and Inuit peoples and languages gain needed attention.

Canada's geography and historic openness to others have challenged and shaped its politics, social programs, and culture. It is that acknowledged diversity and openness to the world that have continued to help showcase Canadian culture and values.

Toronto, the largest city, boasts a diverse population, with over half its citizens born outside Canada. That openness to welcoming others is evident in the languages heard daily, constantly infusing the city with culture in many forms.

Montréal is the largest city in Québec where French is the majority official language and where over 80 percent of the country's francophones reside. More francophone communities can be found across Canada, primarily in New Brunswick, Ontario, and the prairie provinces.



Publishing in Canada

The earliest bookseller opened in Halifax on the Atlantic coast in 1761, and others in Montréal in the 1840s carried imported books from the UK and US, with some books printed locally under license.

Much later, small chains took hold in the more populated centres in Ontario and Québec. Today, with the advent of online book buying and various digital formats available to the consumer, the bookselling landscape has changed dramatically.

In Ontario and across the country, the Chapters-Indigo bookstore chain has a monopoly, although independent booksellers are holding their ground. In Québec, the provincial government requirement that all books be sold by accredited bookstores as a means of providing support and financial security to the sector and to lessen the impact of imports from overseas, has given stability to French-language publishing. Changing markets and store mergers have resulted in just one French-language chain, Renaud-Bray.

The book publishing industry known today came of age in the early 1960s to present “Canadian culture” and to counter the many imported titles from the UK, US, and France against which Canadian-owned publishers must compete, still an important consideration. Today, domestic print and ebook sales from the independent English- and French-language publishers amount to almost \$290 million, attesting to the value placed on this cultural sector. According to *Publishers Weekly*, Canada’s publishing market is the 12th largest in the world.

To extend and bolster domestic sales, independent Canadian publishers in both languages have been active on the export side for well over 50 years. The most recent figures up to 2019 surpassed \$108 million in export sales, with an increase to \$95 million of finished books, almost \$7 million for rights and translation sales from trade publishers, and \$6.2 million ebook sales. Sales of ebooks continue to surge. Not surprisingly, rights and translation sales dropped in 2020 as all major book fairs were cancelled or moved to virtual meetings. With Canada’s Guest of Honour presence at Frankfurt Book Fair 2021, these are expected to return to previous levels.



Print book sales have been the constant for all publishers, but independent firms are more heavily engaged in ebook production. The most recent survey of readers in the first half of 2020 shows the ebook market continues to expand. BookNet Canada, which tracks 85% of all English-language Canadian print book sales, multi-nationals and independent publishers combined, indicates print is preferred by 58% of respondents, by 20% on mobile devices, and with 13% listening to audio. The impact of COVID on book sales in all formats was significant in 2020.

The most recent year-over-year sales summary indicates Canadian book sales were down in the first six months of 2020 from 23.5 million books to 20.9 million sold. With bookstores closed initially during spring lockdown, and public libraries often closed except for ebook loans, this decrease was expected, especially in print sales from 2019. As mentioned, ebook sales increased with more readers finding time and students learning at home during school closures.

In comparison to the US, 2019 YTD sales in Canada remained somewhat flat in print sales in fiction and non-fiction, while digital sales of ebooks and audio showed slight increases. While 2020 YTD sales are not fully available, publishers can attest to the challenge of selling in a pandemic, with fewer titles and copies released into the market as a response to closures and lockdowns. One item of note is growth in podcasts. Research shows readers are more likely to be podcast listeners than non-readers, while ebook readers and audio listeners surpass print readers in their listening to podcasts.

Publishers Weekly reports that according to NPD BookScan, unit sales of print books rose 8.2% in 2020 over 2019, the largest annual increase since 2010, which confirms the importance of export sales for Canadian publishers, especially south of the border.

Further afield, the EU has been an important market for publishers as Canada's second largest trading partner. Through the CETA (Comprehensive Economic and Trade Agreement) and with the Guest of Honour role at Frankfurt, Canadian publishers are entering or deepening their presence in the EU, whether in rights and translations agreements or distribution of print and ebooks.

What kinds of books do Canadians read?

Canada is a country of readers with literacy rates among the highest in the world. BookNet Canada's latest survey reported that 80% of respondents had read or listened to a book in 2020, with 42% who said reading or listening had increased over the previous year.

While adult fiction and non-fiction titles saw increases, the largest increase was in juvenile and young adult titles. Parents and educators were often vying for books and materials for students while pivoting around periods of in-class and at-home instruction.

Canada has long valued the importance of public libraries, which help create community and give access to books and other materials. Half of Canadians borrowed an item out of a library in the past year. The Toronto Public Library, one of the largest library systems in the world, is ranked first in North America in circulation, visits and electronic visits per capita among libraries serving populations of two million or more. It has materials in more than 40 languages.

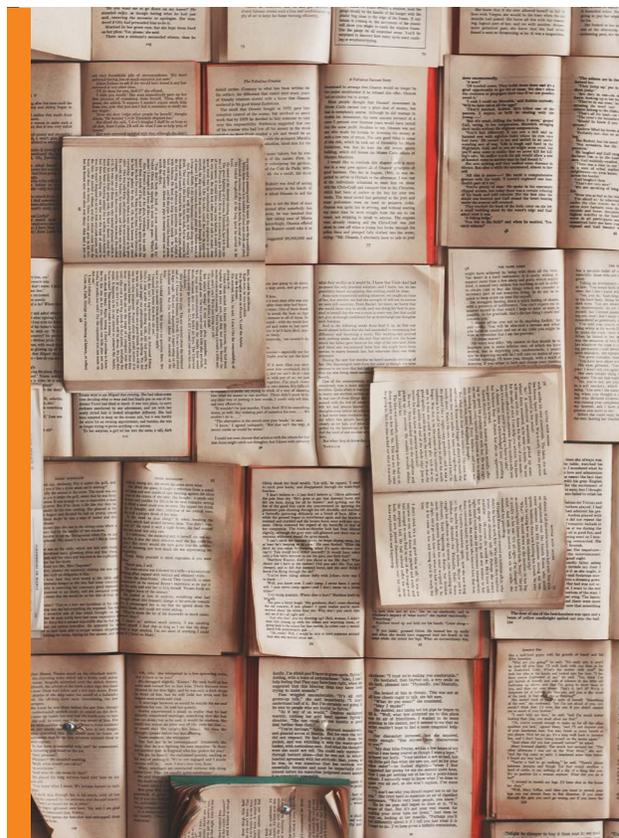
Canadian books are sold as export sales of finished books, ebooks, and translated titles around the world. They are made into award-winning films reaching wide audiences. A diverse list of authors and illustrators with a uniquely Canadian perspective on an even longer list of stories and subjects have brought the country, its people, and its vibrancy to enviable attention and acclaim in all genres and for readers of all ages.

National publisher associations have offices in cities where the majority of book publishers are based, but independent publishers are found everywhere. Regional affiliates provide services and advocacy at the local level.

Publishers are nimble and creative, using many strategies to reach new audiences and encourage innovation, as witnessed during this challenging past year. In 2019–2020, 173 publishers received support to export their books, and take advantage of the Livres Canada Books’ programs and services.

One of the key goals for Livres Canada Books is “to sustain and expand the research and development, promotion, and ongoing sales activities in international markets by Canadian book publishers” present on the world stage at major book fairs in London, Bologna, Guadalajara, and, of course, Frankfurt 2021 where Canada is Guest of Honour. Planning has been underway for several years on a range of activities and events in Germany, a highly regarded nation of readers. Canadian publishers are united in helping make this international project a great export success, setting lists, and selling and buying rights accordingly.

As part of the Guest of Honour initiative, more than 200 books have been sold for translation into German—an astonishing accomplishment proving the quality of our literature. The collaboration of Canadian federal departments and agencies with provincial governments and arts organizations recognize this great opportunity to showcase our books and authors, and broader Canadian culture at its best.



Canadian publishing organizations

In Montréal

ASSOCIATION
NATIONALE
DES ÉDITEURS
DE LIVRES

L'Association nationale des éditeurs de livres (ANEL) has 110 French-language members from Québec and within Canada publishing a variety of literary genres. ANEL's mission is to support the growth of French-language publishing through professional development, promoting reading, and marketing of members' books to ensure the influence of Quebec and Franco-Canadian books nationally and internationally. With a collective 25,000 title ebook warehouse through their digital arm **Entrepôt du livre numérique**.



Québec Édition is a committee of ANEL dedicated to promoting Québécois and Canadian French-language publishing by supporting publishers' export activities, organizing collective stands, and putting together scouting missions to various export markets.

BTLF
SOCIÉTÉ DE GESTION DE LA
BANQUE DE TITRES DE LANGUE FRANÇAISE

Banque de titres de langue française (BTLF) provides technology and services to the French-language publishing supply chain. BTLF aggregates metadata from publishers and distributors, tracks sales data, and promotes industry standards to help improve the marketing of French-language publishing products throughout Canada.

UNEQ
UNION DES ÉCRIVAINES
ET DES ÉCRIVAINS QUÉBÉCOIS

Union des écrivaines et des écrivains québécois (UNEQ) founded in 1977, now has more than 1,600 members—writers from all genres. UNEQ works on the promotion of Québec literature while also defending the socio-economic rights of its members.

In Toronto



The Association of Canadian Publishers (ACP) represents approximately 115 Canadian-owned and controlled book publishers from across the country, a diverse group proving vital to the development of new Canadian authors by publishing a variety of genres including children's, general trade, educational, and scholarly works.



Literary Press Group
of Canada

The Literary Press Group of Canada (LPG) started as an ACP affiliate. Its mandate is to support the growth of Canadian literary culture, helping its 60 member publishers from across Canada to sell, distribute, and market their books of poetry, fiction, drama, and creative nonfiction.



The Canadian Publishers Council (CPC) has 16 members, comprising foreign-owned publishing companies with a history that goes back to when imported books from the UK and US were the norm. These international publishers have continued to dominate the market and have developed publishing programs with Canadian writers and illustrators.



The 16-members of the **Association of Canadian University Presses / Association des presses universitaires canadiennes** (ACUP/ APUC) publish, distribute, and support the interest of Canadian scholarship, assisting higher learning institutions and their scholars through the exchange of ideas to a broader public.



BookNet Canada is a non-profit organization that develops technology, standards, and education to serve all those involved in the book chain, from creation and production through to retailers and wholesalers. BookNet Canada tracks 85% of all English-language Canadian print book sales through BNC SalesData.



E-bound Canada, the ACP's not-for-profit digital arm, reports sales of Canadian ebooks in more than 100 territories around the world. It provides conversion, distribution, digital asset management (DAM), reporting, and other research information with the aim of advancing digitization of books.



The Writers' Union of Canada (TWUC) is a national organization with 2,200 professionally published authors, working to improve the conditions of Canadian writers. TWUC is responsible for the establishment of Public Lending Right and Access Copyright, providing writers with financial compensation for the use of their work by libraries and electronic reproduction.

In Ottawa, the nation's bilingual capital:



Regroupement des éditeurs franco-canadiens (REFC) represents francophone publishers in Canada outside Québec. REFC has 16 members and focuses on activities around marketing, promotion, sales representation, and professional development.



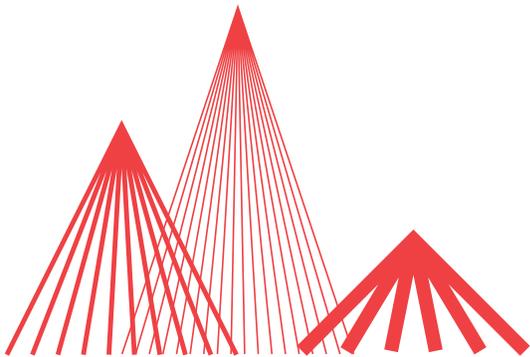
Canada FBM2021 is the bilingual entity responsible for managing the Canadian book publishing industry's involvement in the Canada as Guest of Honour (GoH) initiative at the 2021 Frankfurt Book Fair. Established in cooperation with the Association of Canadian Publishers (ACP) and l'Association nationale des éditeurs de livres (ANEL), it receives its funding from the Department of Canadian Heritage and has strategic oversight from a steering committee comprised of members from various government departments and cultural organizations.



Livres Canada Books has a mandate to support Canadian-owned book publishers in their export sales activities, in developing international partnerships, and to assist publishers in improving their overall results through a range of services. Organizing a stand at major book fairs, building a network of worldwide contacts and fostering relationships between international publishers, national publishers' associations, and other trade partners are strategic actions. Marketing initiatives include *Rights Canada*, a collective foreign rights catalogue, and the *Canadian Studies Collection*, which introduces Canadian books to publishers, literary agents, distributors, booksellers, librarians, and Canadianists around the world.

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Canada



Singular Plurality

CANADA
Guest of Honour
Frankfurt
Book Fair
2020/2021

Singulier Pluriel

CANADA
Invité d'honneur
Foire du livre
de Francfort
2020/2021

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