



LIVRES CANADA BOOKS®

# MEXICO

## The Book Market

Webinar presented by PIEDAD SAENZ

Oct 5

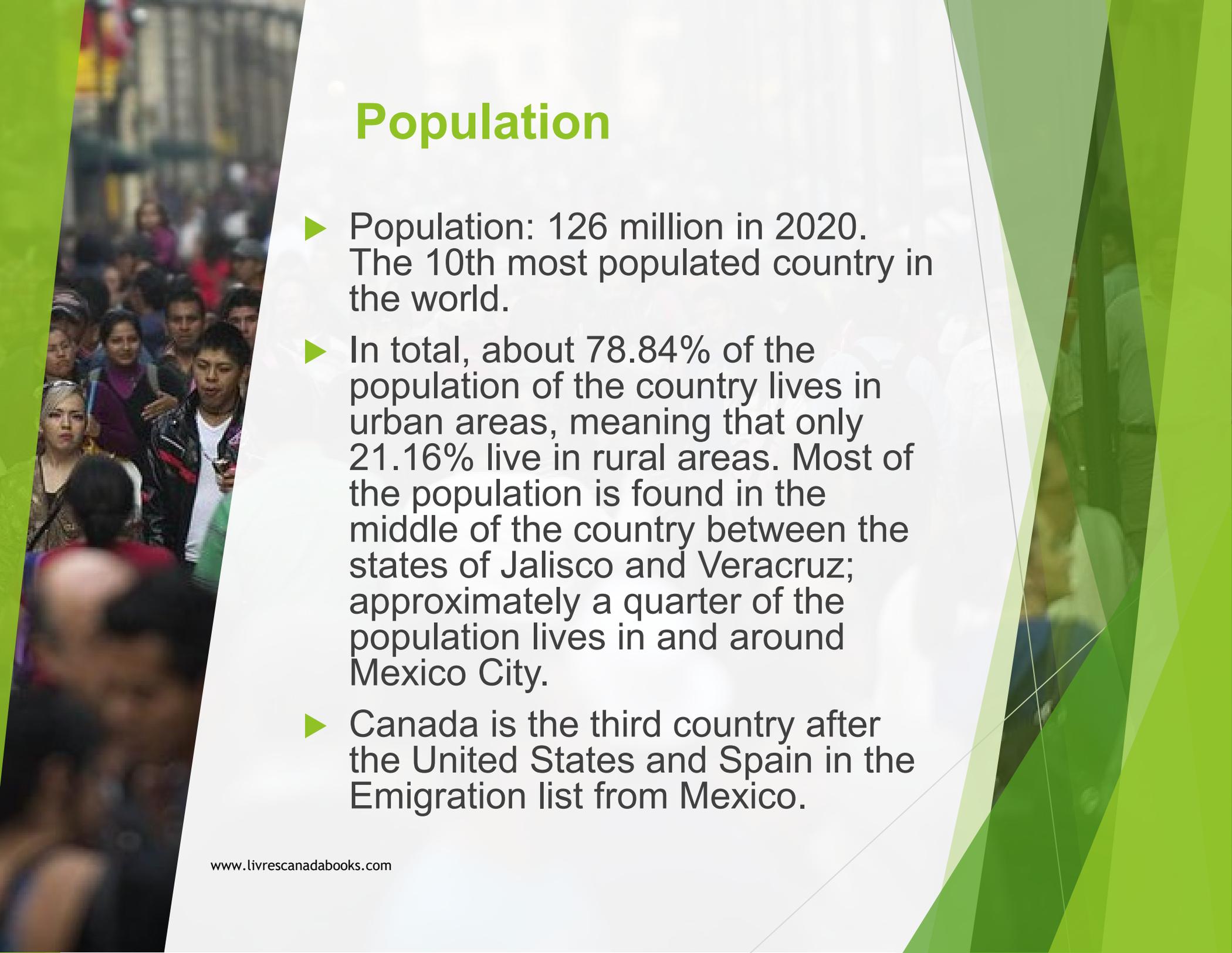
# Content

- OVERVIEW OF THE MEXICAN BOOK MARKET
- MEXICAN PUBLISHERS
- FORMATS AND PRICING
- SALES CHANNELS
- READING HABITS
- MAIN PLAYERS
- AUTHORS PUBLISHED



## OVERVIEW

- ▶ The Mexican book market is facing a variety of challenges. The number of books printed in Mexico has decreased for the better part of a decade, and while Mexico's book sales revenue has recently experienced an upward trend, unit sales visibly suffered as a result of the coronavirus pandemic.
- ▶ For 2020 Nielsen estimates that trade sales decreased of 25% in quantity of copies sold and 23% in sales value as a result of the Covid Pandemic.
- ▶ In 2019 CERLALC\* issued 26,635 new ISBNs. This is 7.1% less than in 2018.
- ▶ The Mexican metropolis Guadalajara was named UNESCO World Book Capital for the year 2022. Home to one of the world's most prestigious international book fairs, "La FIL" Guadalajara International Book Fair.



# Population

- ▶ Population: 126 million in 2020. The 10th most populated country in the world.
- ▶ In total, about 78.84% of the population of the country lives in urban areas, meaning that only 21.16% live in rural areas. Most of the population is found in the middle of the country between the states of Jalisco and Veracruz; approximately a quarter of the population lives in and around Mexico City.
- ▶ Canada is the third country after the United States and Spain in the Emigration list from Mexico.

# Literacy

- ▶ Definition: age 15 and over can read and write (2016 est.)
- ▶ Total population: 94.9%
- ▶ More than 70 percent of Mexico's population is older than 15 years.
- ▶ Mexico's compulsory education comprises grades 1 to 9, with an optional secondary education up to grade 12.
- ▶ Literacy is considered basic education.

# Age Structure

- ▶ 0-14 years: 26.61%  
(male 17,143,124 /female 16,378,309)
- ▶ 15-24 years: **17.35%**  
(male 11,072,817 /female 10,779,029)
- ▶ 25-54 years: **40.91%**  
(male 24,916,204 /female 26,612,272)
- ▶ 55-64 years: 7.87%  
(male 4,538,167 /female 5,375,867)
- ▶ 65 years and over: 7.26%  
(male 4,079,513 /female 5,063,903) (2018 est.)

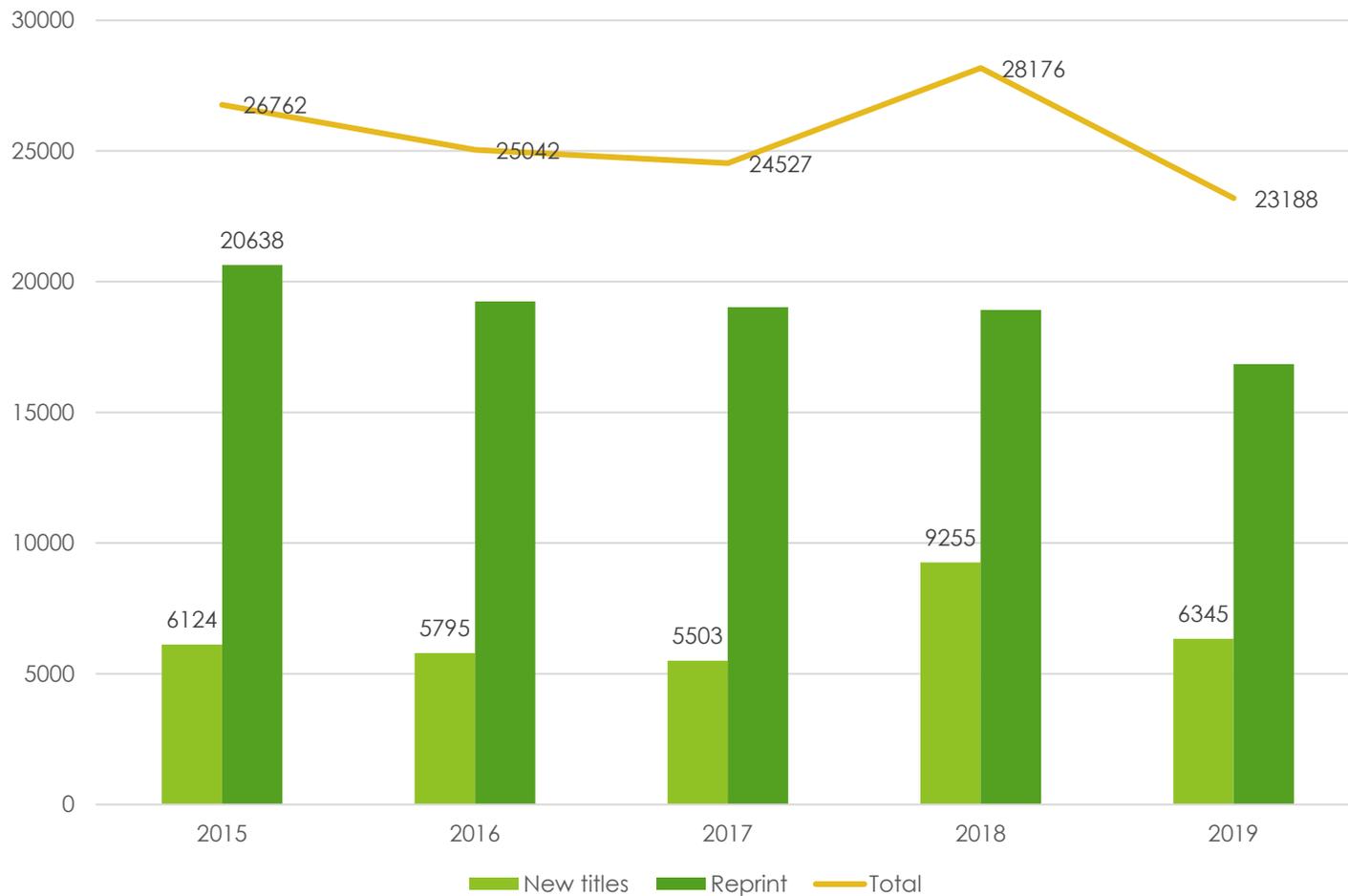


# Statistics & Facts

Production 2019	
23,188 new titles ( -17.7% from 2018)	118,879,870 copies ( -11.8% from 2018)
Printed Books Sales :	
123,449,789 copies (-7.6% from 2018)	\$715,582,300 CAN ( 6.1% from 2018)
E-books Sales:	
\$14,812,340 CAN (19% from 2018)	

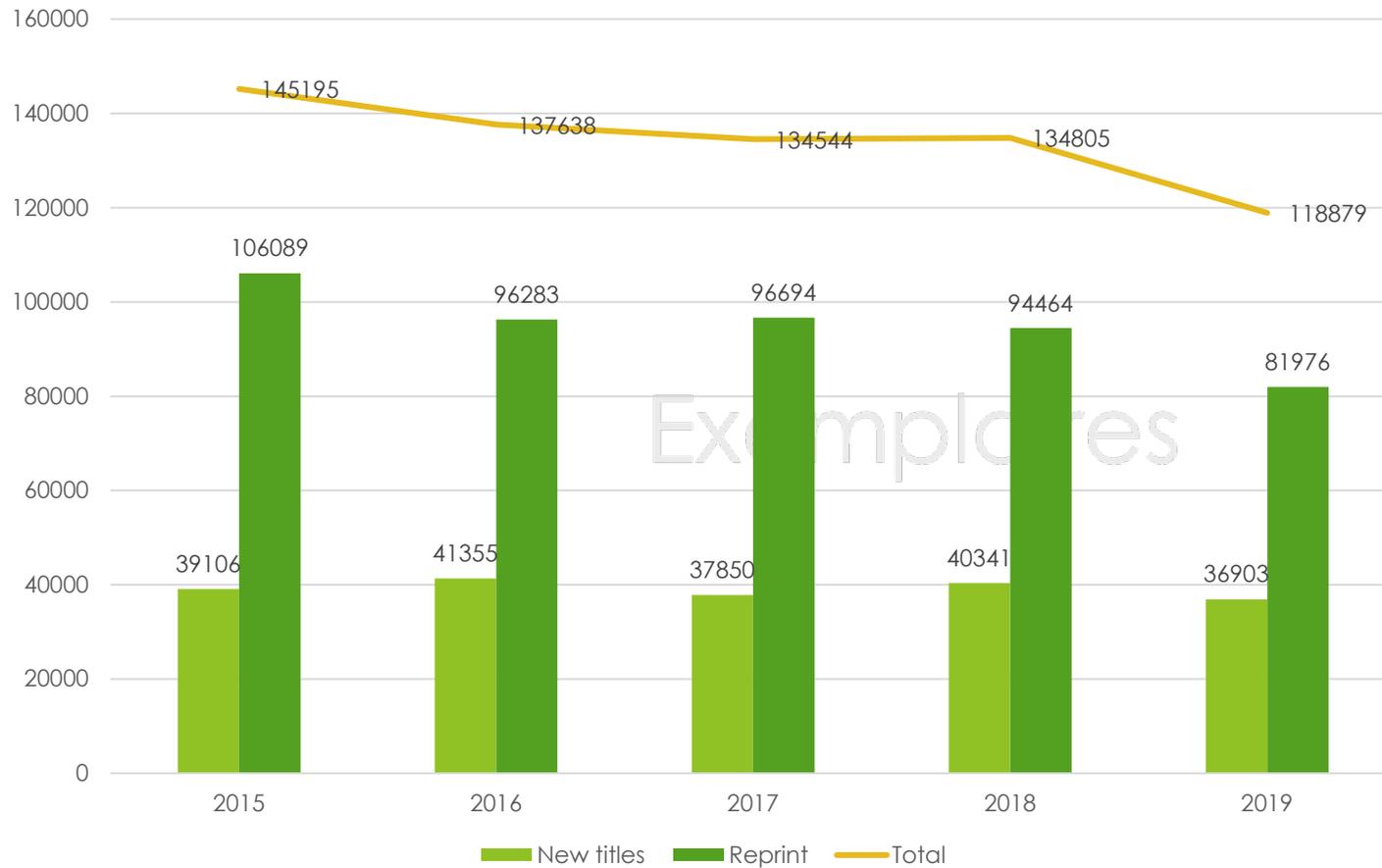
- ▶ This data considers exclusively the private sector in 2019. It is the production and sales of 230 private sector publishers.

# Total Production – Copies



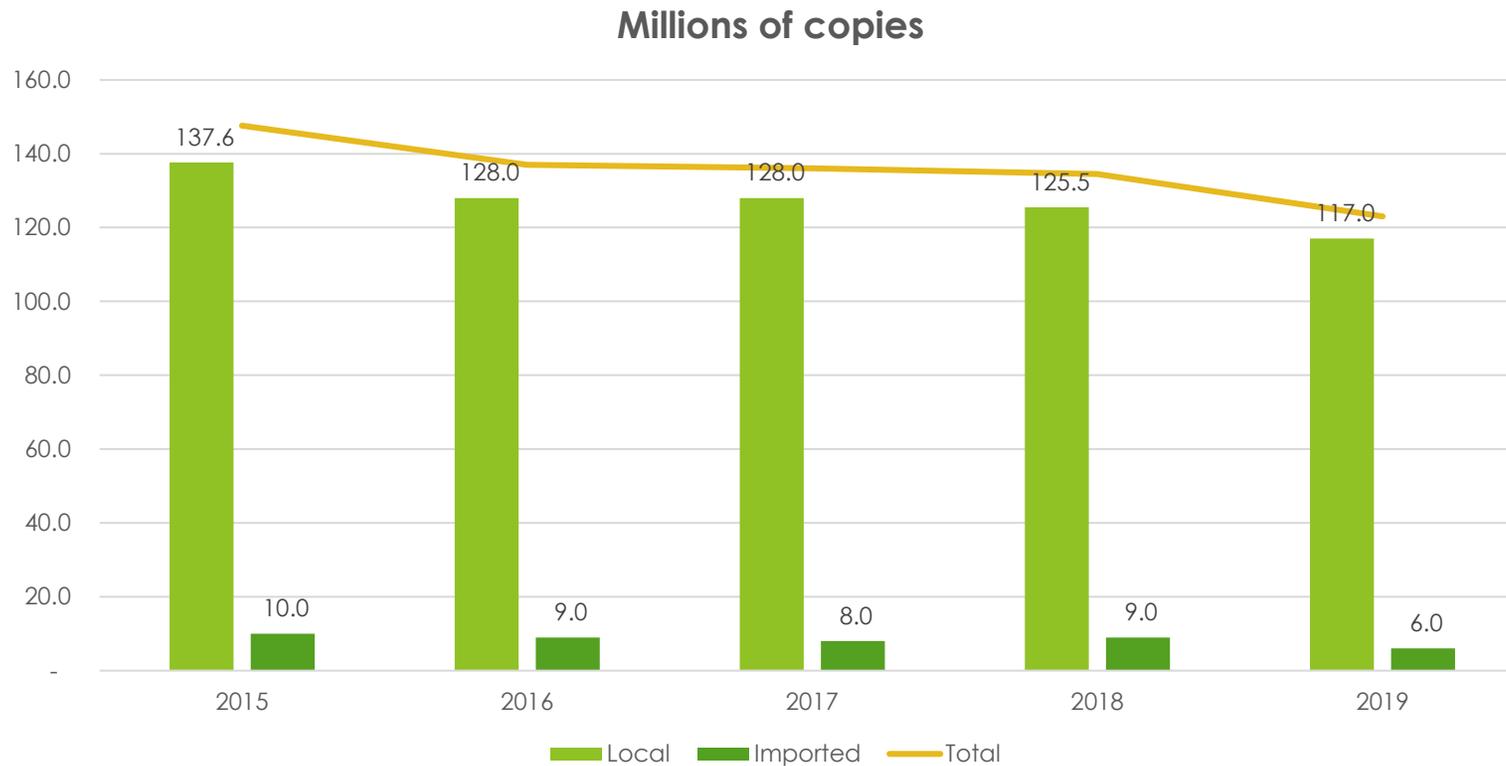
In 2019 decrease of 17.7%, with 31% in new releases and 11% in reprints.

# Quantity - Copies



- In 2019, the quantity decreased, with 16 million fewer copies (11.8%).
- 8.5% less in new titles and 13% less in reprints.

# Sales



- In 2019, the sales quantity decreased, 7.6% following the trend since 2015
- This decrease changed in 2 points the percentage composition of local sales 95% vs imported 5%.

## Sales in CAN \$

- ▶ Sales in 2019 were 714.4 million dollars, which represents an increase of 6%.
- ▶ The increase is mainly due to local editions, which grew by 8.5%.
- ▶ On the other hand, the sale of imported editions was reduced by 14%.



# Private Sales – By Category

Category		Copies (Millions)		Net Sales (Millions CAN)	
		Qty	%	\$	%
Education	Elementary School - Open Market	18.9	15.3%	\$210.09	29.40%
	High School - Government	29	23.50%	\$ 70.04	9.80%
Children's and Young Adults	Open Market	20.3	16.50%	\$ 79.01	11.10%
Learning	Government Programs	0.3	0.20%	\$ 0.78	0.10%
ESL	English Learning Open Market	6.2	5%	\$ 89.91	12.60%
	Government Programs	6.1	4.90%	\$ 10.13	1.40%
Religious Books		10.9	8.90%	\$ 16.23	2.30%
Literature, Fiction and Similar		10.7	8.60%	\$ 79.98	11.20%
Languages		6.4	5.20%	\$ 14.95	2.10%
Personal Growth		3.8	3.10%	\$ 27.23	3.80%
Economy, Finances, Business and Management		1.8	1.50%	\$ 20.63	2.90%
Social Sciences		1.6	1.30%	\$ 17.87	2.50%
Life Style		1.5	1.20%	\$ 10.57	1.50%
Biography and History		1	0.80%	\$ 8.03	1.10%
Others		4.9	4%	\$ 59.03	8.20%
Total		123.4	100.00%	\$714.48	100.00%

# Private Sales – By Category

- ▶ The Elementary School sales are the most important, representing 39% in sales quantities and value.
- ▶ In second place, Children's and Young Adults with a contribution of 16% in quantities and 11% in value.
- ▶ The third place is for ESL programmes, representing 9.9% in quantities sold and 14% in value.

# Main Sales Channels

- ▶ In 2019 bookstores were in first place, a novelty in many years. The increase was 19% in copies sold, which represents 31% of the total sales.
- ▶ Government sales were in second place despite a decrease of 24%.
- ▶ Internet sales had the most important increase of 153%. However, it continues to be the channel with less participation in the total sales.

# Main sales channels

Sales Channels	2015	2016	2017	2018	2019
Bookstores	35,888	32,758	33,072	31,800	38,082
Government	51,049	43,842	43,486	48,500	36,504
Schools	25,059	3,302	23,613	21,494	18,554
Department stores	7,725	9,222	10,559	10,238	10,077
Exports	11,005	9,556	10,592	7,497	4,742
Small stores	5,854	8,484	4,316	4,246	3,624
Institutional sales	2,760	2,594	2,627	2,186	1,868
Book Fairs	1,257	1,263	1,225	1,162	1,153
Internet	231	163	169	280	711
Others	5,866	6,238	6,279	6,179	8,135
<b>Total</b>	<b>146,694</b>	<b>137,422</b>	<b>135,938</b>	<b>133,582</b>	<b>123,450</b>



FCE - Rosario Castellanos



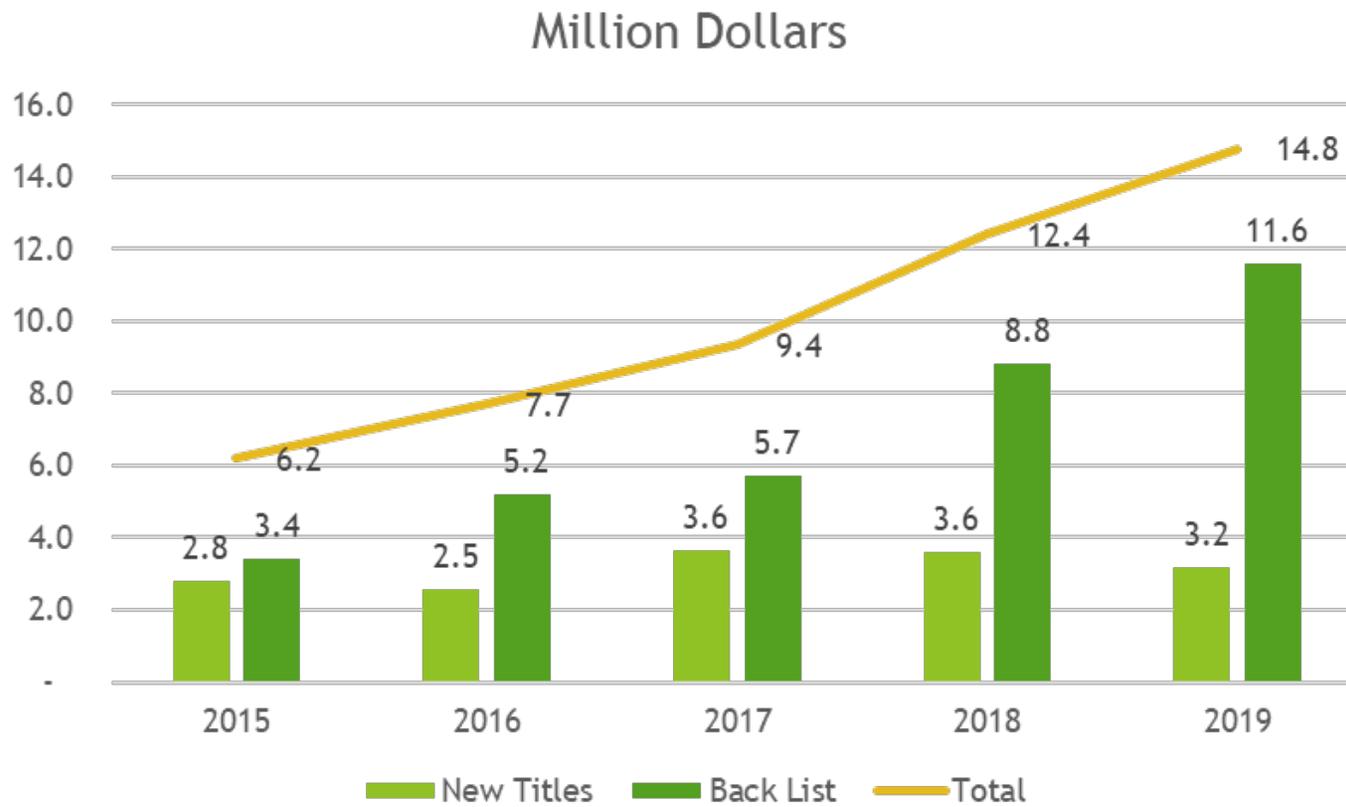
## Sales Channels

- ▶ Looking at Mexico's leading book distribution channels, bookstores accounted for roughly a third of book sales and revenues in 2019.
- ▶ Schools and universities brought in another 30 percent, indicating that educational facilities and the public publishing sector are among the main drivers of reading engagement in Mexico.

# E-book Sales

- ▶ E-book sales continue their growing trend. In 2019 it was 19%; reaching an amount of \$14.75 CAN.
- ▶ Publishers have been increasing their digital catalogues by converting titles into e-book formats. The quantity of titles available in e-book format grew from 55% in 2015 to 79% in 2019.

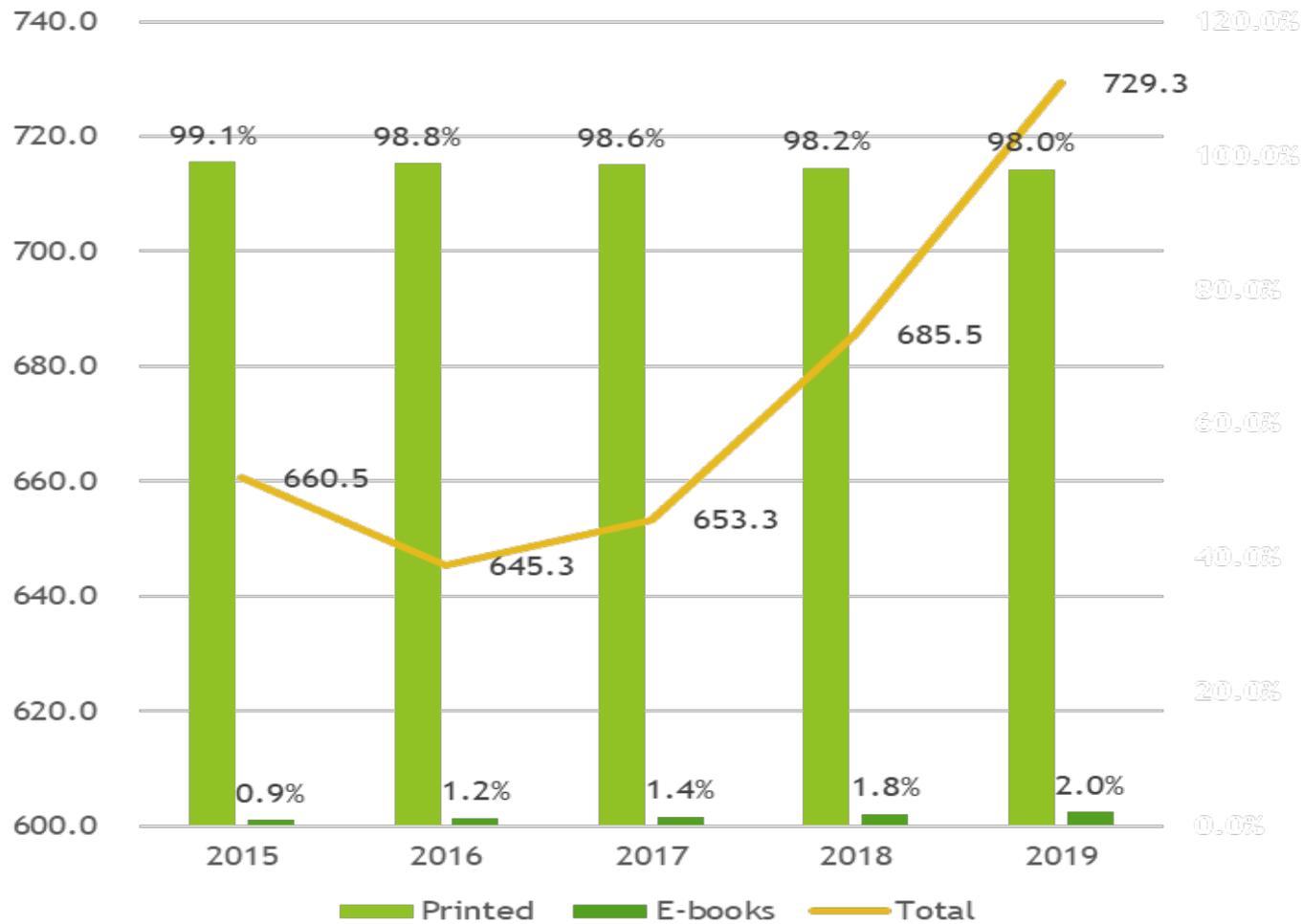
# E-book Sales



# Total Sales - Print and E-books

- ▶ In 2019 the total sales reached \$729.3 million dollars (CAN).
- ▶ Compared with 2018, an increase of 6.4% is observed, while the annual growth of the last 5 years is 2.5%.
- ▶ Even if e-book sales represents only 2% of total sales, the trend is upward.

# Total Sales - Print and E-books





# Digital Developments

- ▶ Print remains the preferred book format among Mexican readers.
- ▶ While e-book sales revenue in Mexico reached 14.8 million Canadian dollars in 2019 and the country remained the largest Spanish-language e-book market in Latin America, e-book sales accounted for only 2% of total Mexican book sales.
- ▶ Leading reasons for the slow adoption of e-books are a lack of purchasing power and internet access in many parts of the country.
- ▶ Following the COVID-19 outbreak, however, digital offerings experienced a spike in popularity and became a safety net for the Mexican book market. Since then, the sector has taken several steps towards digital transformation by converting titles into e-book formats and increasing the digital catalog.

An aerial photograph of a port area, showing numerous colorful shipping containers stacked in rows. The containers are in various colors including red, blue, green, and orange. The port is situated near a body of water, and the overall scene is captured from a high angle, looking down at the containers.

## Exports

Mexico's book export value amounted to 8.1 million Canadian dollars in 2018. While Spanish-speaking countries such as Ecuador and Colombia were among the leading importers of Mexican print literature, the lion's share of revenue was generated via exports to the United States. Mexico's northern neighbour also accounted for the largest share of book imports into Mexico that year.

In 2018, 126 million U.S. dollars worth of printed reading books were exported from Mexico, up from 94.3 million a year earlier. The Mexican book publishing market was estimated at 10.6 billion Mexican pesos in 2018.

# Special Programs

- ▶ PROTRAD is a translation support program offered by the Ministry of Culture to stimulate international buyers.
- ▶ The amount is from \$19000 CAN up to \$63500 CAN
- ▶ Three (3) categories:
  - Up to \$19000 will be offered for translation and publication of specialized books in the humanities, literature, children's and YA whose completion period is a maximum of 12 months
  - Up to \$44500 to Art Book projects whose completion period is a maximum of 12 months
  - From \$44500 up to \$63500 for at least two specialized books in the following disciplines: books on art, humanities, literature and children's and youth literature, whose completion period is 24 months maximum.
- ▶ <https://fonca.cultura.gob.mx/>

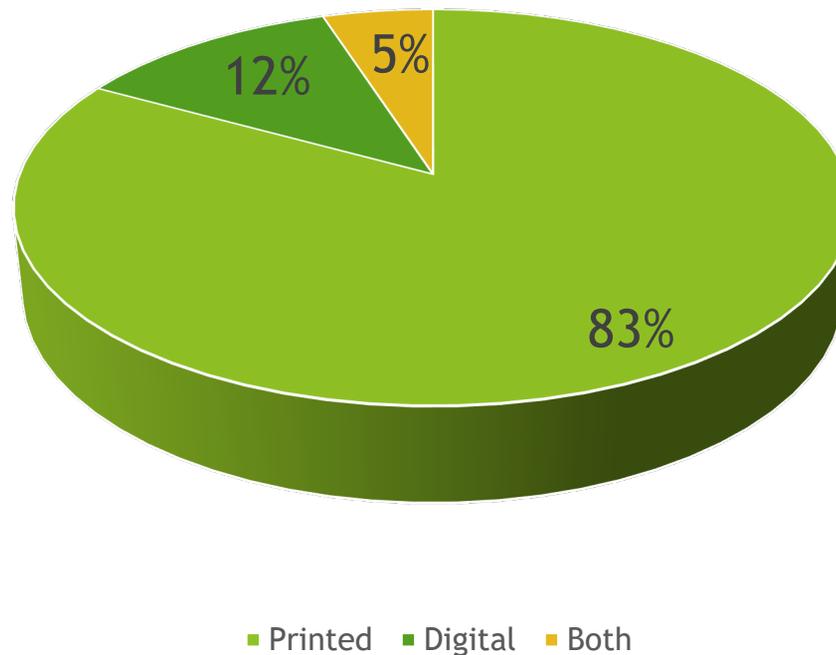
# Reading Habits and Trends

- ▶ While Mexico boasts the largest Spanish-speaking population and higher literacy rates than many other Latin American countries, it does not have a large active readership.
- ▶ According to a recent survey on reading habits in Mexico, roughly 50 percent of adults read three books or less in 2019, while another 18 percent of respondents stated that they did not read any books at all. The same survey revealed that a lack of time and interest were the main reasons for not reading. Simultaneously, the scarcity of bookshops in remote regions and price variations among bookstores also visibly impact reading behaviour.
- ▶ Between 2015 and 2020, the share of book readers among the Mexican adult population fell from 50 to 40 percent, which issued a significant challenge for small bookstores and the Mexican publishing industry as a whole.



# Reading Habits by Format

- ▶ Most continue reading exclusively print books (83%)
- ▶ 12% read in digital formats
- ▶ Only 5% read in both formats
- ▶ In 2020, 12.3% of the population read in digital formats, a slight increase from 2019 (12%) but a larger increase when compared to 2016 (7.3%)



## Most Important Book Fairs

- ▶ Guadalajara International Book Fair is the most important in the Spanish-speaking market and the second largest after the Frankfurt Book Fair with more than 1 million visitors per year.
- ▶ Monterrey International Book Fair
- ▶ International University Book Fair
- ▶ Palacio de Minería
- ▶ Children's and YA International Book Fair
- ▶ Oaxaca International Book Fair
- ▶ FIL Zócalo



# FIL Guadalajara

- ▶ The Rights Center at the FIL in 2019 had 131 participating companies from 27 different countries.
- ▶ FIL Rights Exchange, a Fellowship program that is managed for the FIL Guadalajara is for publishers interested in acquiring the rights of authors from Latin America. In 2019 they had 104 publishers from 38 different countries. Participation is only by invitation.



# Main Players - Multinationals

- ▶ Mexico has 416 publishers country wide.
- ▶ 301 in Mexico City, 21 in the State of Jalisco, and 20 in the State of Mexico, with the remainder dispersed throughout the country.

Grupo  Planeta

Penguin  
Random House  
Grupo Editorial

loqueleo

 SANTILLANA

 FONDO  
DE CULTURA  
ECONÓMICA

ediciones 

**OCEANO**

 EDELVIVES

# Main Players - Indies



algarabía



# Canadian Authors Published in Mexico

- ▶ Alice Munro
- ▶ Margaret Atwood
- ▶ Leonard Cohen
- ▶ Mélanie Watt
- ▶ Kim Thuy
- ▶ Karine Gottot – Maxim Cry
- ▶ Diana Bélice
- ▶ Sophie Laroche
- ▶ Christian Guay-Poliquin
- ▶ Children's books from Dominique et Co. and La courte échelle

# Mexican Authors Published in Canada

- ▶ Octavio Paz
- ▶ Carlos Fuentes
- ▶ Laura Esquivel
- ▶ Elena Poniatowska
- ▶ Yuri Herrera
- ▶ Jorge Volpi
- ▶ Sandra Cisneros
- ▶ Valeria Luiselli
- ▶ Xavier Velasco
- ▶ Fernanda Melchor

# Sources

- ▶ CANIEM – Mexican Chamber of Books  
<https://caniem.online/>
- ▶ Mexican Government <https://sic.cultura.gob.mx/>
- ▶ Guadalajara International Book Fair  
<https://www.fil.com.mx/ingles/>
- ▶ IBBY Mexico <https://www.ibbymexico.org.mx/>
- ▶ Editamos <https://editamos.com.mx/>
- ▶ CERLALC <https://cerlalc.org/>

# Q&A

Please type your questions in the Q&A panel



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