

AECB SCOUTING MISSION to NEW DELHI, INDIA

and the NEW DELHI WORLD BOOK FAIR

Association for the Export of Canadian Books

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Introduction and Background

India, a country where eighteen official languages are recognized, where one can easily find twelve different alphabets, a country labeled as one of the two fastest growing markets in the world... India, a diverse and complex book publishing industry facing major issues: distribution and supply chain challenges, lack of centralized book intelligence (e.g. BookNet, Nielsen), pricing (books have not followed inflation rates as is the case for other products), small print runs, parallel importation, and more. The biggest issue remains piracy (in 2003, the International Intellectual Property Alliance estimated India's piracy cost at over 45 million dollars; the industry's estimate is ten times higher); notwithstanding this, publishers are concerned that raising prices may increase photocopying, and unauthorized course packs are particularly targeted at this time. Moreover, in 2004, 40% of books published in India had no ISBN, and 60% had no bar code, thus greater challenges at sales points.

Notwithstanding the above challenges, 75% of the retail market in India is still independent. The book buying population is estimated at 20 million, with English readers being estimated at 5 million. Poverty has been reduced from 44% of population in 1980 to 26% today. There are some 16,000 publishers, most of them members of one of the two major publishers associations: the Federation of Publishers' and Booksellers' Associations in India (FPBAI) and the Federation of Indian Publishers (FIP). India imports close to 400 million dollars worth of books, mostly from the UK and US, and smaller numbers from Australia, Germany, and the Netherlands. Of the

total number of titles produced, 45% are in English and the industry is expanding at a furious pace and becoming more professionalized and rationalized.

AECB's objective in organizing the scouting mission to New Delhi was to report on India as a potential market for Canadian publishers in terms of rights sales and distribution. In view of the increasing interest in this country, and taking into account that the New Delhi World Book Fair is held every two years, 2008 presented a great opportunity for the AECB and the Canadian publishing industry to seek trusted intelligence on the Indian market.

The AECB delegation consisted of three Canadian publishers, who have had some active interest in or dealings with the Indian market, the AECB's Executive Director, and consultant Gaye Facer. Delegates met with relevant Indian publishers, agents, distributors, associations, and government officials prior to the New Delhi World Book Fair and attended the first few days of the Fair to gain an understanding of the Indian publishing market. In addition, the AECB partnered with the Canadian High Commission in Delhi, which mounted and staffed a Canadian stand at the Book Fair, where the traveling children's book collection and promotional materials were prominently displayed. The AECB delegates also met with officials at the Canadian High Commission to discuss possible future support and to build upon the work and findings of the scouting mission.

Discussions will be held in the upcoming months regarding AECB's future participation in the next New Delhi World Book Fair and how Canadian publishers can best partner with Indian publishers, agents, distributors, etc. During the mission itself, numerous Indian publishers and agents confirmed that they do attend the major, international, book fairs, such as Frankfurt, London, and Bologna. Indeed we did see at the 2008 London Book Fair some of the firms and individuals we met in India and a number of them enquired about purchasing rights from the publishers exhibiting at the Canadian stand. As well, one of the publishers on the mission, McGill-Queen's University Press has signed an agreement with an Indian publisher regarding distribution of its list and co-publication of selected titles.

The Scholarly and Trade Perspective
Philip Cercone, McGill-Queen's University Press

As one of the team members of the Canadian publishing scouting mission that visited India in February 2008, I was responsible for investigating opportunities for Canadian trade and scholarly publishers in that country's book industry. India is a country with some 18 major languages (24 are spoken by more than 1 million people) and 844 dialects among a population of some 1,147 million, which is growing at a rate of about 20 million per year. It has 28 states and seven centrally administered Union Territories, with 29% of the population living in urban areas and 71% in rural areas. Hindi is the official national language and the mother tongue of some 40% of the country's population. The next major language is practised by less than 10% of the Indian population. The literacy rate is around 57%, and there are more than 250 major research universities.

India is undergoing an unprecedented economic boom, and many of the educated aspire to join the middle class. To be considered middle-class, one has to make more than US\$5,000 per year. In a city like Delhi (India's second-largest city, with a population of more than 12 million) and its surrounding region, suburban life for the middle class is very expensive: half of one's salary goes for rent or owning a house. We were told that some 20 million people per year are joining the middle class, the same approximate number as the yearly growth of its population. But it is also a country where the discrepancy between rich and poor is unparalleled in the world, where a few are very rich and many, very poor (our private driver made \$3 per day for 10 hours of work, and he was considered one of the lucky ones). While we were there, we heard of people in some areas complaining about the rise of basic food prices, especially rice and grains. One international reporter opined that India would be all right as long as people could afford to eat basic food.

We arrived in a country where its middle class is brimming with hope and promise for a better economic life, and where the individuals below the middle class hope to join it soon. Our delegation (consisting of three publishers, the Executive Director of the AECB, and expert Gaye Facer) spent one day being briefed on the Book Fair and the state of Indian book publishing by experienced Indian hands, including the staff from the

Canadian High Commission, who also arranged for, and staffed, the Canada booth at the Delhi Book Fair, which was held from February 2 to 10. We spent four days visiting publishers and bookstores, and three days at the Fair. All the halls displayed English-language publications; and one large hall contained books published in other Indian languages, with Hindi being the most prevalent. A publisher (Penguin) had a second stand in this hall where its non-English published titles were displayed. I also stayed behind and spent a very informal day with the publisher of Research Press and vice-president of the association of Publishers of India, Ajay Pamar, an old friend of some 20 years, who spoke frankly and passionately about the realities of his country's publishing industry.

At the beginning of the mission, we also attended the International Publishers in India – Issues and Solutions seminar (conducted by the Association of Publishers in India, the Publishers Association – UK, and the London Book Fair) where some of the big Indian publishing players participated. Here we learned about the potential as well as the numerous challenges of the Indian book market, which is in fact five to seven different markets. One should have offices in all the areas in order to cover the whole country.

A number of significant multinational players have established offices in the Indian book market in the last three years, including Taylor and Francis's Routledge, Harper Collins, a joint venture with India Today, Springer, Cambridge, Oxford University Press (OUP opened an office in Mumbai in 1912, and other offices were established later at Chennai and Kolkata. In 1972, it opened an office in Delhi, where its headquarters were moved to from Mumbai) and Canada's very own Harlequin, which goes under the name of Mills and Boon in India. Harlequin launched its entry in the Indian market at the Fair, and its business plan, according to Torstar president and chief Executive Officer Robert Pritchard, we were told at the gala launch called for India to be the company's biggest income generator within five years. Before this time, multinational publishers had entered into agreements with Indian agents, some of whom were either publishers and/or distributors. Another current phenomenon is that companies like Penguin, which had a separate Indian office for some time, has just appointed one of its UK employees of some 30 years standing with the company to head and integrate the Indian operations and lists with the parent company in London. This means that indigenous Indian publishers will most likely be losing out on distributing and promoting the foreign

multinational publishers and will be concentrating more on building their own publishing list, as well as looking after the second tier of international publishers, which have had little penetration to date in India. The general reaction from indigenous Indian publishers/printers is mostly favourable, as they see the setting up of these multinational publishing offices in India as beneficial to the publishing industry. Indeed, there is hope that they will “professionalize, standardize and rationalize” the industry, and higher book prices will ensue.

The professional development seminar we attended just before the start of the Fair was an eye-opener for the Canadian delegation. Along with the statistics found in the report of the team member representing children’s publishers, we learned that the average price of a book published and sold in India is around \$3. Given that photocopying is very cheap, the biggest problems in India are the illegal photocopying of texts and the selling of unauthorized, pirated, or second-, third- or fourth-hand editions. I visited one university on my own after the Fair and saw first-hand the long lineups at the photocopying machines, where business was both continuous and brisk. This contrasted with the delegation’s visit to a textbook store (Jain) where the aisles were bereft of people and we were told that only “the rich and upper-middle class can afford to purchase textbooks and most of the textbooks published were in fields such as business or medicine.” It was no wonder then that the Pearson publisher on the panel estimated that his company had lost some \$2 million to illegal photocopying last year. As far as pirated editions of books are concerned, the problem is also severe: makeshift “book places” are set up everywhere: on street corners, sidewalks and stoplights during certain parts of the day, and sell knock-offs, printed in illegal print shops. While the Indian publishing association trumpeted their success in trying to stop this piracy through raids and prosecution, a number of Indian publishers, who were the first to go after this illegal printing, were of the opinion that enforcement had been a total failure and they had stopped going after the print shops, because as soon as one was closed, another one or two sprang up. These forces had kept prices for books more or less frozen for fear that, if prices rose steeply, it would drive more individuals to resort to even greater illegal photocopying and/or purchasing of pirated editions. While prices for books have remained stable in India, the industry, in order to retain professional staff, has been faced in the last few years with an almost 20% yearly jump in salaries. The effect has been that the small profit margins have been reduced further in the industry.

Other problems highlighted at the seminar were plagiarism, outsourcing and leakage. Leakage is, in effect, the smuggling of cheaply priced books, printed in India and exported illegally to Africa mainly. The Indian customs authorities have started to seize these illegal shipments, and great fanfare is made when they catch someone at times shipping as many as 9,000 books at a time, but some claim that only the tip of the iceberg is being scratched. Indeed, people practising this illegal trade worked quite openly at the Fair. For example, when I visited the Simon and Schuster stand at the Fair, a man with a Yorkshire accent with his three-member Indian entourage asked an employee if they shipped orders of multiple copies out of the country to England and Africa. When the publisher's representative replied in the negative, he moved on. I kept seeing him, however, in other halls of Pragati Maidan doing brisk business with a few publishers and publisher's representatives.

The retail book market in India is very small: between 5 million and 20 million people buy trade books, and the market generates one-quarter billion Canadian dollars in yearly sales. Over four days of visiting some bookstores, which were tiny and seemed to stock books to reflect the tastes of their repeat customers – one bookstore owner said that he sells many books to western individuals working in embassies and multinational companies working in India. Even the centrally located, more spacious, heavily guarded and upscale Oxford bookshop, which we at first thought was owned by Oxford University Press because it had many OUP books and the lettering of the word "Oxford" was the same, had little traffic and had nothing to do with that English university or town whose name it carried. Given the high rents the bookstore owners referred to, it was hard to imagine how these establishments made ends meet. Bestsellers in India have about the same sales as they do in Canada, whose population is but a single-digit percentage of India's.

It makes no sense to ship books to India from Canada to a bookstore or distributor or agent. Shipping and custom costs from North America are high – one distributor said that to bring in a single, special-order copy from Canada, regardless of list price, might cost \$200.00. If the Canadian publisher had stock with a large UK distributor from England, it would be easier and cheaper, as that copy could be piggybacked with the shipment of other publishers' copies at that distributor. Sending books from North America to India, whether from Canada or the USA, is more expensive and a less

familiar mode of transport to an Indian publisher: trade between England and India is a more familiar, historical pattern. Still India is a country where publishers from the USA are now challenging the companies from the UK, which have traditionally seen India as part of its sphere of influence. Indeed, according to the current President of Penguin India, Mike Bryan, at times Penguin USA competes with Penguin UK in that market. If a book, however, is on India or the surrounding area, then it might be worthwhile to sell the rights, but one should expect very small advances (from \$400 \$600) as the Indian co-publisher will want to print in India.

For scholarly works and textbooks, there is some market in India, but the scholarly book sales are few: at \$85.00 (50 pound sterling), it is still quite expensive. Nevertheless, a few copies of each title can still be sold if one has a publisher/distributor there willing to look after the sales and distribution. Even at \$19.95, textbooks are still too expensive in India, and would probably be photocopied as quickly as a copy reaches the bookstore or library. But for some books in the scholarly/textbook fields and some trade books, it would be worthwhile to have a publisher/distributor on board in India. What could happen in such a situation is for a Canadian publisher to partner with a trusted Indian publisher, who can both distribute and represent the entire list for India and the subcontinent. One can start with a term of three years and the Canadian and Indian publisher can agree on general, overall list discounts, as well as greater discounts on some selected titles. When any title is printed in India in the Export Zone, the Indian publisher/distributor could pay the Canadian publisher anywhere from the equivalent to twice the costs of reprinting (paper, print, and binding), which is usually around \$1.00 per copy, and then keep any income from the sales of the title. In some cases, the Indian publisher will want to licence the rights under its own imprint and the Canadian publisher will receive an advance on royalties of at least 1,000 copies, based on a percentage of the Indian retail price. It is preferable that the Canadian publisher have stock in England for its list, which can be accessed more easily from India; in this case the Canadian publisher will deliver all books FOB to the distributor's appointed freight forwarders. The Indian publisher will then be responsible for all subsequent shipping charges and insurance and customs clearance.

Perhaps the greatest opportunity now in India is for scholarly publishers, as universities are expanding and libraries are being built there at a rapid pace. Empty, new libraries

need books, as did those libraries in the West during the rapid expansion of universities in the 1960s and 1970s and the expansion of students going to university. Electronic dissemination of a publisher's books is not a problem currently in India, as most students and professors do not possess a computer or laptop, but again photocopying is of extreme worry. With the passage of time, the price of books is expected to rise in India and it would be best for a Canadian publisher to get in on the ground floor now if they are of a substantial size and publish to an international audience in the social sciences, business and humanities. For trade and scholarly presses publishing fewer than 50 books per year, or books on Canadian themes, partnering with an Indian publisher/distributor might not be an option just yet.

The French-Language Trade Perspective
Marie-Claire Borgo, Éditions de Mortagne

During the course of this scouting mission, we visited over thirty publishers, either at their offices or at the New Delhi Book Fair, a dozen bookstores, 2 literary agents, several distributors and a number of authors. We also attended an international symposium on publishing in India, as well as several book launches.

My purpose on this mission, as the representative of French-language trade books in Canada, was mainly to explore how this literature is received in India and to expand the scope of possible joint ventures between our two countries. To this end, in addition to the usual questions posed during our meetings, I offered as a possible rights sale, a French language series considered to be a bestseller in Quebec and Europe as well as a successful book in the field of pop-psychology: "Les Chevaliers d'Émeraude" (1 million 200 copies sold in Canada and also propelled to the top of the *Livro-Hebdo* bestseller list by the holders of the French-language rights for Europe) as well as another popular book on spirituality, "Les Clés du secret" (24,000 copies sold in 2 months).

For further insights into the common interests of the publishing industry in our two countries, I was looking for an English language bestseller originally published in India

on the topic of personal growth, esotericism or spirituality, with the aim of purchasing world-wide French-language rights. The following report summarizes my principal observations gathered during the various meetings as well as my overall conclusions.

At the outset, it should be mentioned that the BIEF (Bureau international de l'Édition française) conducted a study in February, 2005, "L'Édition en Inde: une unité dans la diversité." A synopsis of this study, by Karen Poitis, is available from BIEF (www.bief.org). The conclusions of this study are still very relevant today and should be read by all interested French-language publishers in Canada.

By all accounts, publishing in India at the present time is in a period of dynamic growth, with local publishers competing furiously with multinationals. With the devaluation of the Indian rupee and the correspondingly high prices of imported books, local publishers have increased their output of scholarly works and expanded their editorial policy to include other categories: trade books, children's literature, how-to books. At the same time, there is a concerted and highly organized effort to combat the practice of purchasing books at cut rate prices in India and reselling them at higher prices in the West.

The dynamic growth of publishing in India mirrors the overall growth in the country as a whole. For example, India now represents the second biggest international market in.. cell phones!

At the symposium we attended we learned the following general facts:

- 45% of all titles published in India (31,000 annually) are published in English. The rest are published in India's other languages.
- With 16,000 publishing companies, India ranks third in the world in terms of number of books published. 75% of India's biggest publishers are located in New Delhi.
- Average retail prices are in the order of: 350 rupees for a hard cover book, 150 rupees for a paperback and 40 rupees for a children's book.

- A good selling novel will sell 3,000 copies and a bestseller, 10,000.

The following general findings of the scouting mission are of particular relevance to French-language publishers in Canada:

- Some publishers expressed an interest in the titles proposed, mainly based on higher than average sales figures. However, there is very little incentive on the part of publishers in India to look at a manuscript or book in French. It is essential to provide an English translation from the outset.

- There are excellent opportunities to acquire titles in the area of personal growth, spirituality and children's books. However, it is essential to develop contacts with several publishers since few of them have rights agents, except of course, the multinationals.

- There are also many very talented novelists and novels that would easily cross cultural borders and be of interest to French-language readers in Canada and Europe.

In fact, a number of novels have been successfully translated into other languages. Sagas of Indian history, the country's current reality, the effects of colonization, the struggles of ordinary people to overcome poverty are all topics of interest to the West. Novels that deal with such subjects have seen an increase in foreign rights sales.

Take for example the case of author and journalist Tarun Djépal, from New Delhi, singled out by Business Week as one of the top 50 leaders of the changing face of Asia. It also appears easy for authors to travel to Canada, the U.S. and Europe to promote their books, an important factor in the sale of rights. Also, poetry seems to be strong in India and highly promoted.

- Another important literary reality is the fact that a number of authors from India or of Indian descent live in Canada or other countries. Indian publishers, both independent and multinational representatives, are very interested in buying English language and local language translation rights to these authors' works for the market in India. They are also interested in publishing such authors directly, as was the case for 17-year old

twins living in Switzerland with an Indian father and English mother. The trilogy was published in English for the Indian market by a publisher in New Delhi; the publisher sold Italian and German rights three months after publishing the English version.

- In the case of rights sales from a Canadian publisher to a publisher in India, royalties are generally in the order of 7% to 10%, with advances ranging from \$400 to \$800.

Taking into account the weak rupee, we received several offers for printing in New Delhi at what seemed to be a lower price than that offered by China. We also received offers to translate our books directly by specialists in India at a "more than competitive price."

Below is an account of some of the meetings that led to these conclusions, but that also might serve to pave the way for future contacts between Canadian and Indian publishers.

Literary Agents

Redink

Represented by Anuj Bahri Malhotra whom we met on several occasions. In addition to the literary agency, Anuj Bahri owns a highly regarded bookstore as well as 2 publishing companies, Tara Press and India Research Press. We met with him in his capacity as a literary agent. Married to a Canadian of Indian descent (also involved professionally in the publishing companies and the bookstore), A. Bahri travels to Canada twice a year and works in partnership with several well known international agents.

He published the first volume of a trilogy and then sold the German rights to Rowohl Publishers.

His agent fees are as follows (unless he publishes with one of his two publishing companies, in which case there is no commission):

- for a national sale in India: 20%
- for an international sale with 2 agents: 25%
- for an international sale with two agents but with initial royalties of 30,000 euros or more: 22.5%

On behalf of his publishing companies, he acquired the rights to several Canadian titles and even to some French language books from Quebec. When these publishers were contacted for confirmation, it was clear that the rights sales were done in accordance with standard practice in terms of royalty advances and annual reports.

Conclusion: Resource person of interest for all sorts of information. Open to many different projects and keen to assist.

OSIANS: the literary agency (The Publishing and Design House)

Represented by Renuka Chatterjee, Senior Vice-President and met at their offices.

This agency started with a proposal from Ms. Chatterjee, formerly with Harper Collins and with Roli. She initially tried to launch the agency on her own but eventually joined forces with a firm specializing in art and cinema and interested in adding a section devoted to literary rights sales. She describes herself as a "literary" agency, specializing in the sale of rights to manuscripts by Indian authors in India and abroad.

This part of the agency has only been in existence for 2 years and she has come to the conclusion that it is better to sell manuscripts abroad, even before trying to sell them in India, in order to generate publicity and increased interest.

At the moment, Ms. Chatterjee represents a dozen or so authors from India.

Conclusion: Interesting contact for rights sales to "future bestsellers," in the fiction category.

Publishing houses

Palijor Publications

Represented by the owner and one of the volunteers, met at their headquarters.

Mr. Dorjee Dewatshang, founder of the publishing house initially called "Library of Tibetan Works and Archives" (established in 1971 to publish the works of his holiness the XIVth Dalai Lama and owned by the Tibetan government), is an architect by trade and a disciple of the Dalai Lama. In 2000, he bought back the publishing house and

renamed it. Since then, he has expanded its editorial policy, once limited to Tibetan studies, culture, history, politics and the Dalai Lama, to include children's literature.

The books he publishes are based on Tibetan fables and legends preserved in the company's archives. The books all promote the Tibetan ideals of compassion and wisdom. The publishing house intends to create art books by commissioning young visual artists to illustrate the corresponding legends. We also met the volunteer editor of this collection in progress (PhD in education and a follower of the Dalai Lama). She is also the author of numerous essays published by other publishers.

The books are published primarily in English but some are bilingual (Hindi). The publishing house has never sold rights abroad; such a policy does not really fit their basic mission. However, they are considering the possibility in years to come.

Even though the Dalai Lama publishes his bestsellers with international publishers, he has maintained a special relationship with Paljor and has written the prefaces to several of their titles.

Retail prices vary between 50 and 750 rupees and for them, the price factor does not really seem to be an issue. The retail price of 750 rupees is far higher than that offered by "international" publishers who aim for prices no higher than 295-300 rupees.

Conclusion: Interesting contact for rights sales.

Full Circle (The HPB Group: publishing since 1958)

Individuals met: Shekhar, Poonam and Priyanka Malhotra, the three owners are father, mother and daughter (who has just completed her training in publishing in England and will one day assume control of the company).

This group, celebrating their 50th anniversary in 2008, is one of the largest independent groups in India. They publish in English and Hindi under 6 imprints according to subject: HIND POCKET BOOK, FULL CIRCLE, MAIN STREET, GLOBAL BUSINESS PRESS, SARASVATI VIHAR, CLARION BOOKS. They also operate their own distribution outlet (Book Supply Co.) as well as a large bookstore with I, proof of their adjustment to the

times! The HPB Group was also the first in India to adopt the “Bookclub” concept popular with Québec-Loisirs. Their publications are known for their high quality!

This group is to be consulted and is very open to joint ventures for any project relating to India.

Manjul Publishing House Pvt.

The publisher of Harry Potter in Hindi. In English, Harry Potter is sold directly by Bloomsbury at a competitive price. This publisher expressed an interest in Hindi rights for our bestseller collection and requested one or two volumes in English. The French copies on display did not interest him.

Harper Collins Publishers India

We met with Karthika V.K., publisher and chief editor. She accepted and read the documents pertaining to the Quebec bestseller collection and immediately expressed an interest in receiving reading copies... again in English.

This publishing house aims to offer its customers books selling for between 195 and 295 rupees.

B.Jain Group of Companies

Founded in 1968, this group publishes 300 titles annually and is internationally recognized for their works on homeopathy. Apparently, at least two titles from B.Jain can be found in nearly every doctor’s office abroad.

On February 2, 2008 they launched a new publishing arm called Pegasus and put 100 children’s titles on the market. The group publishes under 4 imprints in all, the others being Health Harmony, Impact (fashion and design) and Leads Press (business and learning), and is interested in selling rights.

The owner, Sawan Jain, later invited us to visit his printing works and handed out a comprehensive publicity package demonstrating the quality of their colour printing. The group has in fact won two awards of excellence for printing quality and for the

intellectual quality of their publications.

A Children's Book Publisher's Perspective

Bob Tyrrell, Orca Book Publishers

A first visit to both New Delhi and the Delhi World Book Fair is an eye-opening experience. From the majesty of historic monuments, such as the India Gate and the Red Fort, and the bedlam that is traffic night and day to the dense crowds and squalor of the markets of Old Delhi, this is definitely a unique experience. And the site of the New Delhi World Book Fair offers a similar study in contrasts. Grand in scope and elegantly laid out, Pragati Maidan has been sadly neglected of late – the “facilities” (or lack thereof) are quite astounding to a westerner. Nevertheless for nine days in early February 2008, exhibitors filled 12 medium-sized to large halls, displaying books and book-related media across the complete spectrum of the publishing world.

The market in general

On Day Two of our mission, we attended a professional development session “International Publishers in India – Issues and Solutions.” In the most relevant of the six speakers (15–20 minute presentations followed by a 10-minute Q&A), Mike Bryan of Penguin India spoke on “Issues Facing Trade Publishers in India,” and offered the following facts (among many others):

- The (so-called) middle class in India numbers perhaps 200 million.
- The actual book-buying public is estimated variously at between 5 million and 20 million.
- The market for trade books amounts to £125 million.
- Approximately 75% of retail bookstores are independent.
- The majority of trade books sell between 2,000 and 3,000 copies.

These facts and those raised in other sessions (piracy, plagiarism, outsourcing) brought a sense of reality to any notions we might have been entertaining of the enormous market potential of this vast country.

Our mission was to assess the potential offered by the India book industry for trading opportunities for Canadian publishers. My own focus was the children's market. After spending three very full days at the book fair and meeting with publishers, booksellers and others for the better part of four days off-site, my overall assessment is that Indian children's publishers, and the Indian book market in general, have little real *need* for Canadian children's books. This is not to say that there is no potential market for our books in India, but it is very clear that the children's publishing industry there is well developed and appears to be thriving. At least two halls were devoted almost entirely to children's books, with individual publishers with children's lists also scattered through many of the other halls.

Another initial impression was that in the area of children's publishing, overall production values and print and paper quality are somewhat substandard compared to what we are used to. The Indian retail market remains very price sensitive, and I think this is the most likely explanation for these issues rather than a lack of expertise or access to better paper. And there are certainly exceptions to this (Tara Books, Random House India, Harper Collins India, etc.). As the middle class continues to grow, one can hope that there will be an increasing demand for higher quality on the production side of children's books.

We met with a number of children's publishers and/or publishers with some children's content on their lists:

- Karthika V. K., publisher and chief editor of [Harper Collins India](#), is just beginning to develop a children's list. Over tea, she and two of her editors spoke of many of the same difficulties that we face (distribution, printing costs, marketing, etc.) and suggested that print runs for picture books would be in the range of between 2,000 and 3,000 copies.
- Chiki Sarkar, publisher and editor at [Random House India](#), also spoke of just starting to develop a children's list, and discussed similar issues. She expressed a strong

interest in signing new, strong East Asian writers from any country. She has experience in the UK publishing world and displayed a very savvy marketing sense.

- [Tara Books](#), based in Chennai in south India, is a collective of writers, artists and designers, who produce some very interesting and innovative children's books (picture books through teen fiction).

- [Rupa and Company](#) is a large trade publisher with a quality children's list. The company has been around for more than 70 years and bills itself as "one of the largest publishers, distributors and importers of books in India."

- [Zubaan](#) is an independent non-profit publishing house that grew out of India's first feminist press, Kali for Women. The Young Zubaan list specializes in picture books and young adult fiction.

- [Katha Books](#) is another independent non-profit publisher "working with and for children and adults through story and storytelling." The focus in the publishing program is on introducing "children to an array of stories *from India* (emphasis mine) in its varied traditions of storytelling." Katha Books for children are developed from Kathakar, the centre for children's literature. Katha publishes books in up to 21 Indian languages.

- Rahul Singhal, president of XACT Design, runs a large packaging house offering hundreds of titles of fact-based children's books in series (www.xactstudio.com).

Sample titles include *Children's Encyclopedia*, *100 Questions and Answers*, *Illustrated Atlas of Amazing Animals*, etc., each in multi-volume series).

The retail market

We visited a number of bookstores in Delhi, including The Oxford Bookstore, Jain Books, The Bookshop and at least one other. The market appears to be quite fragmented in nature. Many bookstores are quite small and attempt to appeal only to a specific market segment (fiction, technical, etc.). The Oxford Bookstore doesn't carry the books of some local publishers (no reason given). The manager told us that they cater mainly to foreigners and typically see something in the order of 150 customers per day. There are apparently some larger chain-type booksellers now emerging in the market, but we did not visit any.

The educational market

Judging by the number of exhibitors at the book fair, it appears that this market is well served by indigenous publishing houses, at least for the lower grade levels (primary/elementary school levels). I do not feel I am able to provide any assessment of the market at any level beyond this. Once again, the materials are for the most part produced on inexpensive paper and with relatively low production values. Based on the number of exhibitors and the quantity of materials on display, this appears to be a highly competitive market segment.

Distribution issues

We heard from numerous sources that distribution problems plague the Indian market. In such a vast country with a less sophisticated infrastructure, this is not surprising. There are lots of distributors, but few if any who service the entire country. Transportation issues, the fragmented nature of the retail market (the large number of independent and often very specialized bookstores), language and distance would all seem to contribute to this problem. From the point of view of Canadian publishers hoping to get books into the Indian market, the most obvious issues are the cost of getting books to India and the discounts requested from distributors there.

I met with Sujit Dey (director) and Vinod Vasishtha (managing director) of Viva Books, which appeared to be one of the larger distributors exhibiting at the fair. Only a small portion of their catalogue is devoted to children's books. Along with their own publishing program, Viva represents (among many others) Allen & Unwin, Hodder Education, Norton, Routledge and Dover. After expressing some initial interest, they doubted the financial viability of bringing books in from Canada and suggested that the only way an arrangement would work would be if they controlled the printing in India. I don't think any of us are prepared to turn over this kind of control in a new and relatively unknown market, and certainly no one that we talked to who had an independent perspective recommended this approach.

I also met with Rajiv Jha of Parrot Reads Publishers, who advertised at his booth that he represents a couple of Canadian houses. As he described his business to me, he tried to introduce the books of these publishers to other distributors (using catalogues, sell-sheets, samples, etc.) and it is then up to them to order books, etc. He does not

actually get involved in the distribution himself, but takes a fee of 10% to 15% for his services. On my return home, I spoke to one of the Canadian publishers he claims to represent, who reported that in spite of having “sent lots of samples, several rush parcels of books and heard lots of great things” over a period of several years, no business has actually been done. This arrangement would appear to be well intentioned but ineffective.

Conclusions

My overall impression after this one, short visit to the New Delhi World Book Fair is that in the area of children’s publishing, there are probably greater opportunities to buy projects from Indian publishers than to sell our books to them. Although in general the standards of production and paper quality are lower than ours, there are exceptions to this, and there is plenty of creative and innovative children’s publishing happening in India.

The issues that appear to make selling rights to Canadian children’s books to Indian publishers difficult at this time include cultural differences and diversity, language, production quality and costs, distribution issues, the size of the real market (much smaller than it initially appears, and both diverse and fragmented) and a lack of capital on the part of indigenous publishers.

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