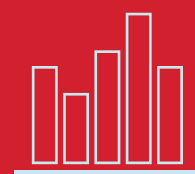
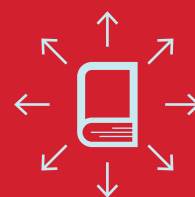
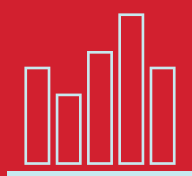
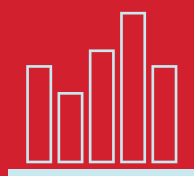


LIVRES CANADA BOOKS®

Selling Canadian Books in Colombia



A Guide for Canadian Publishers



Contents

1 Introduction

2 Overview of the Publishing Market

2 Size and Characteristics of the Market

4 Analysis of the ISBN Registrations

8 Translated and Imported Books

9 Reading and Book Purchasing Habits

10 State of the Digital Market

11 Publishers

11 Trade Publishers

13 Children's and Young Adult Publishers

14 Educational Publishers

14 University Presses

15 Religious Publishers

15 Opportunities and Challenges for Canadian Publishers

17 Formats and Pricing

17 Formats

17 Printed and Digital Books Pricing

20 Sales Channels

20 Bookstores

21 Online and Subscription-Based Sales

Introduction

Colombia has the third-largest Spanish-language publishing market in Latin America, after Mexico and Argentina.¹ According to the 2021 edition of the report *El español: una lengua viva*, Colombia's population was 51,049,498—the second most populated country in the Spanish-speaking world after México.² Due to its geographical location, Colombia sits at a crossroad with South America on one side and Central America, the Caribbean, and North America on the other, connecting the country culturally, commercially, and economically.

Colombia has a high level of political and economic stability. From the beginning of the 21st century until the COVID-19 pandemic, its economy was in constant state of expansion, often exhibiting particularly high growth.³ Colombia's 2020 gross domestic product (GDP) was \$CAD344,589 million, falling 6.8% from 2019 when it peaked at \$CAD410,593 million.⁴ In 2020, the country's per capita GDP was \$CAD6,772.25, compared to \$CAD8,156.48 in 2019, a 7.8% decrease.⁵

Some indicators of Colombia's potential as a publishing market on a global scale include the size of the country's population, its reading habits, its publishing industry's productivity, its economic growth before the pandemic, and its economic recovery projections post-pandemic.

1 Brazil has the largest publishing market in the region, but it is a Portuguese-speaking country.

2 Fernández Víttores, *El español: una lengua viva*.

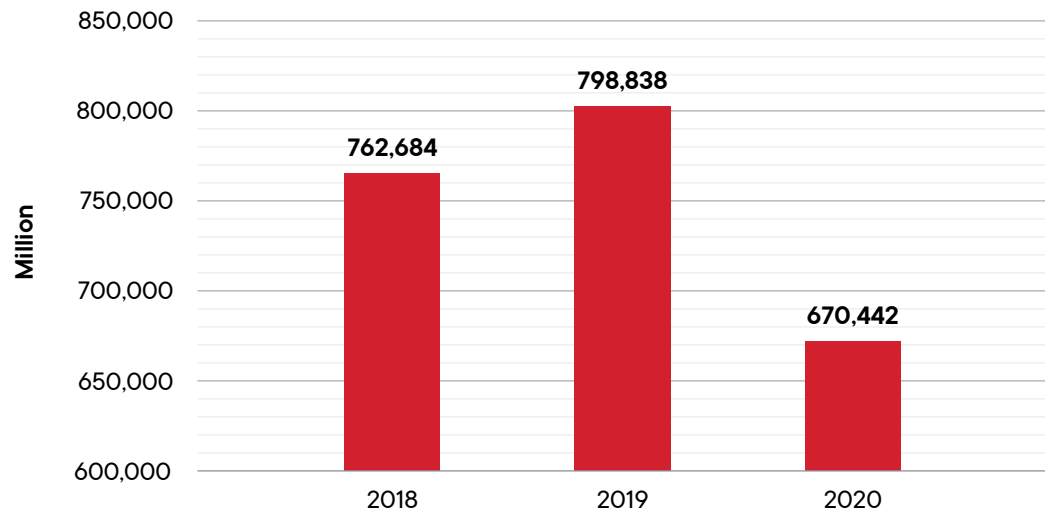
3 "Crecimiento del PIB (% anual) 2000–2020," Banco Mundial.

4 "PIB (US\$ a precios actuales) 2019–2020," Banco Mundial.

5 "Crecimiento del PIB (% anual) 2019–2020," Banco Mundial.

6 "PIB per cápita (US\$ a precios actuales) 2019–2020," Banco Mundial.
7 "Crecimiento del PIB per cápita (% anual) 2019–2020," Banco Mundial.

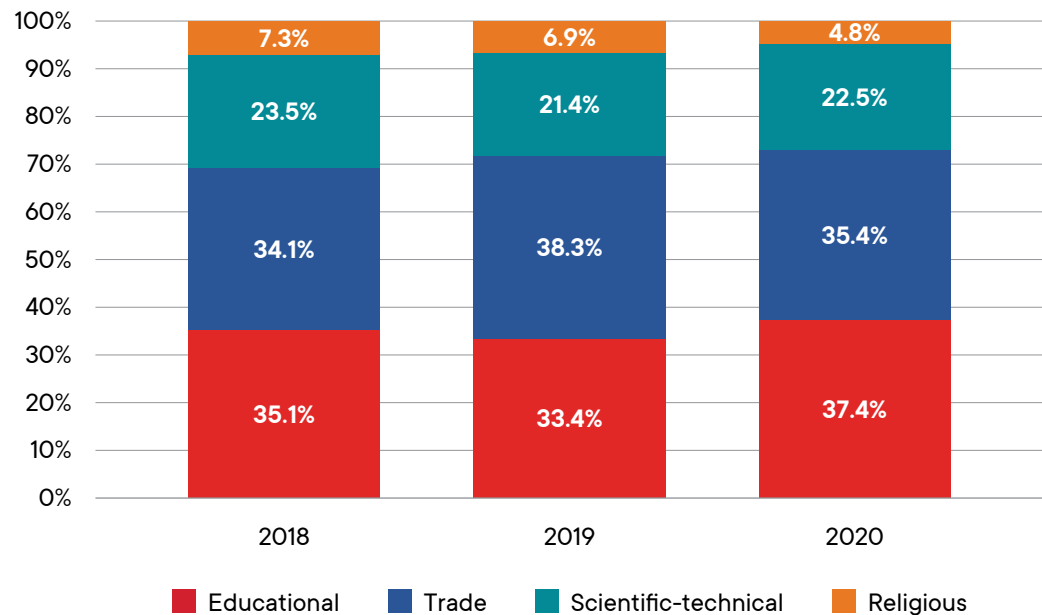
Publishing industry revenue (2018–2020). Figures in Colombian peso millions.



Source: Cámara Colombiana del Libro, *Encuesta Estadísticas del Libro*.

Colombia’s 2020 net sales in books was \$CAD223 million, a 16.1% decrease from 2019. Educational books comprised 37.4% of sales, trade 35.4%, scientific/technical 22.5%, and religious 4.8%.⁸

Share of net sales per market (2018–2020).



Source: Cámara Colombiana del Libro, *Encuesta Estadísticas del Libro*.

8 “La edición comercial en Colombia,” Cámara Colombiana del Libro.

Educational Publishers

In the educational segment of the publishing market, some publishers belong to large groups, both foreign and Colombian, as well as medium- and small-sized national publishers. Educational publishers active in Colombia include the following:

1. Ediarte
2. Ediciones Norma
3. Editorial Huellas
4. Editorial Limusa
5. Editorial Magisterio
6. Editorial Vicens Vives
7. Editorial Voluntad
8. Educar Editores
9. Enlace Editorial
10. Libros y Libros
11. McGraw Hill
12. Panamericana editorial
13. Pearson Educación de Colombia
14. SM
15. Santillana
16. Susaeta Ediciones
17. Tiempo de Leer

University Presses

University publishing in Colombia includes publishers from various regions of the country and generates abundant, rich, diverse, high-quality productions in many fields, including social sciences, law, humanities, sciences, medicine, business management, economy, architecture, and more. Its high-quality production, reach, and impact demonstrate the health of this segment.

University publishers are natural outlets for works stemming from the institution's research. Some university publishers also issue titles from literary genres such as narrative, poetry, and drama.

The Colombian Association of University Publishers (ASEUC) is the organization in charge of assembling university presses. The ASEUC's function is to "affiliate and represent Colombian university presses, as well as to foster production and distribution of university books in their printed and digital formats."²⁰ Currently, over 65 university presses are associated with ASEUC.²¹

20 Retrieved from <https://unilibros.co/acerca-de-aseuc/>.

21 Publishers associated to ASEUC: <https://unilibros.co/editoriales/>.

The most important bookstore chains in Colombia are not only those specialized in the trade market (Panamericana and Librería Nacional) but also those in the religious market (Librería San Pablo and Centros de Literatura Cristiana de Colombia).

Currently, 39 bookstores in Colombia are affiliated with the Colombian Association of Independent Bookstores (known as ACLI), of which nearly two-thirds are in Bogotá.

In 2020, bookstore sales in Colombia represented \$CAD78,511, a 15.9% decrease from 2019.²⁷ Due to the closure of nonessential businesses, increased unemployment, and a loss in purchasing power, bookstore chain sales decreased by 35.5% from 2019, publisher-owned bookstore sales decreased by 8.1%, and independent bookstore sales decreased by 16.9%. However, “Sales of printed books through e-commerce grew by 70.4%” and sales in virtual bookstores increased by 500% due to consumers’ changing purchasing habits.²⁸

During the pandemic, e-commerce allowed some bookstores to offset plummeting sales in their brick-and-mortar stores while nonessential businesses were closed. Likewise, some bookstores created their e-commerce platform during the pandemic, which helped them broaden the scope of their commercial activity, strengthen their relationship with their clientele, and increase their reach. According to “Cartografía de las librerías de Colombia”, one of the most important public policy demands of Colombian bookstores is supporting digitalization.²⁹

Online and Subscription-Based Sales

Closing nonessential businesses between March and December 2020 because of the pandemic changed consumer buying habits. This is why “sales of printed books through e-commerce grew 70.4%” in 2020 and sales of digital bookstores increased by 500% from 2019, totalling \$CAD8.28 million compared to \$CAD1.63 million in 2019.

In 2020, online sales in the educational, scientific/technical, religious, and trade markets represented 3.3% of net sales, while their share in 2019 was 0.2%. Online sales share was 2.4% for education, 2.6% for scientific/technical, and 5.4% for trade. In 2019, the online share for scientific/technical was 0.7% and trade was 0.1%—neither the educational nor the religious market sold through this channel.

27 Cámara Colombiana del Libro, *Estadísticas del libro*.

28 “La edición comercial en Colombia,” Cámara Colombiana del Libro.; Cámara Colombiana del Libro, *Estadísticas del libro*.

29 “Cartografía de las librerías de Colombia,” Lado B.

Book Sales Catalogues

Currently, the Colombian publishing market includes over 200,000 available titles, about 35% published in Colombia and 65% imported. According to the *Colombia Lee* catalogue, in 2022, the market included 241,071 titles—68,276 published in Colombia and 172,795 imported, of which 120,664 came from Spain. In total, 160,543 of these titles were printed and 25,985 were digital.

Colombia Lee [Colombia Reads] segments the Colombian publishing market into the following areas:

- arts, language, and linguistics
- biographies, literature and literary studies
- fiction and related topics
- consultancy, information and interdisciplinary subjects
- society and social sciences
- economy, finance, business, and management
- law
- medicine, nursing, and veterinary
- history and archeology
- mathematics and science
- philosophy and religion
- Earth sciences, geography, environment and planning
- sports and outdoor leisure activities
- technology, engineering, agriculture, and industrial processes
- computing and information technologies
- health, relationships, and personal development
- lifestyle, hobbies, and leisure
- graphic novels, comic books, and cartoons
- children's, young adult, and textbooks

Colombia Lee's portal enables book searches based on the following filters: ISBN, title, author, publisher, co-publisher, language, subject (Thema), format, year of publication, country, city, and distributor.

Titles included in *Colombia Lee*'s catalogue “can be acquired through their bookstore directory, which includes 107 bookstores from 31 cities in the country, with 224 points of sale to the public, most of them offering online sale through their websites and social media channels.”³⁹

39 See the bookstore directory: <https://colombiale.com/Directorio%20de%20Librerias.pdf?s=6127622>.

Public Policies on Books and Reading

Book Related Legislation

In 1993, Law 98—known as the “law on books”—was sanctioned in Colombia. This is a law “through which norms on the democratization and promotion of Colombian books were established.”⁴⁰ The law on books created the conditions to boost and foster the development of the publishing industry in Colombia and to facilitate access to books.

This law pursues several objectives, such as “achieving complete democratization of books, their broader use as the main and irreplaceable vehicle for the dissemination of culture, sharing knowledge, fostering social and scientific research, preserving national heritage and improving quality of life for all Colombians,” “turning Colombia into a large publishing hub, for it to be able to compete in international markets,” “substantially increasing exports of Colombian books,” “supporting the free circulation of books in Colombia and the Americas” and “offering writers and publishing companies the conditions that make it possible to reach the goals established in this article.”⁴¹

The law on books also created a framework not only to “equip [the] publishing industry and institutions from the book sector that offer services to communities, such as bookstores and libraries, with adequate staff with technological training” through initiatives such as “technological training throughout the phases of publishing, promotion and [the] distribution of books, magazines, leaflets or collectables series, and on management of libraries and other book-related services,” but also to stimulate “the creation of postgraduate degrees and/or professional specialization courses in the field of publishing.”⁴²

40 “Ley 98 de 1993,” SIIUN.
[Law 98 through which norms on democratization and promotion of Colombian books were established].

41 “Ley 98 de 1993,” SIIUN.

42 “Ley 98 de 1993,” SIIUN.

Appendices

Appendix 1: Selected Publishers

1. Albaricoque libros: <https://www.albaricoquelibros.com>
2. Angosta editores: <https://www.angosta.co>
3. Animal extinto editorial: <https://animalextingto.com>
4. Apidama Ediciones: <http://apidama.blogspot.com>
5. Caballito de acero editorial: <https://www.caballitodeacero.com>
6. Caín Press: <https://cainpress.com>
7. Calixta Editores: <https://calixtaeditores.com>
8. Cangrejo Editores: <https://cangrejoeditores.com>
9. Collage Editores: <https://collage-editores.com>
10. Ediciones Vestigio: <https://edicionesvestigio.com>
11. Editorial El Malpensante: <https://elmalpensante.com/libros>
12. Editorial Escarabajo: <https://escarabajoeditorial.com>
13. Editorial GatoMalo: <https://www.editorialgatomalo.com>
14. Editorial Huellas (Grupo Edebé): <https://editorialhuellas.com>
15. Editorial Magisterio: <https://magisterio.com.co>
16. Editorial Mackandal: <https://editorialmackandal.com>
17. Editorial Monigote: <https://editorialmonigote.com>
18. Editorial San Pablo: <https://sanpablo.co>
19. Editorial Siete Gatos: <https://editorialsietegato.wixsite.com/misitio-2>
20. Editorial Vicens Vives: <https://www.vicensvives.com.co>
21. El Salmón Editores: <http://www.elsalmoneditores.com>
22. Enlace Editorial: <https://enlaceeditorial.com/col>
23. Enredadera: <https://enredadera.co>
24. Entela Libros: <https://entelalibros.com>
25. Favila Editorial: <https://favilaeditorial.com>
26. Filomena edita: <https://filomenaedita.com>
27. Frailejón Editores: <https://www.frailejoneditores.com>
28. Fundación Editores Verbo Divino: <https://verbodivino.co>
29. Fundación Universitaria Seminario Bíblico De Colombia: <https://www.unisbc.edu.co>