



**TURKISH PUBLISHERS  
ASSOCIATION  
2020  
BOOK MARKET  
REPORT**

## **TURKISH PUBLISHERS ASSOCIATION** **2020 BOOK MARKET REPORT**

Turkish Publishers Association compiles our country's publishing industry data every year and prepares and shares with the public a yearly market report of the industry.

In the evaluation of the developments in the publishing industry in our country in 2020, it is clear that the pandemic, taking hold of other industries and the world in general, made its mark on daily operations, financial developments and the course changing of societal habits. The pandemic, while causing negative or uncertain effects such as: narrowing of sales channels in the publishing sector, re-reviewing of annual publication plans, suspension of the publication of some new titles or their postponement, reviewing reprints according to developments in financial resources, having annual budgets re-laid under the microscope in terms of costs and human resources and sometimes their limitation or consideration of decrease in budgetary expectations, increase in digital piracy along with the increased interest in digital; digital platforms taking on a role that is more in the foreground in our daily life due to society spending more time at home created some positive effects as well. While the increase in book shopping through online channels during the pandemic compared to previous years and the act of reading becoming important positively affected the demand of printed books in the society; it positively triggered the call on audiobooks, e-books, digital meetings, digital book clubs and digital interviews.

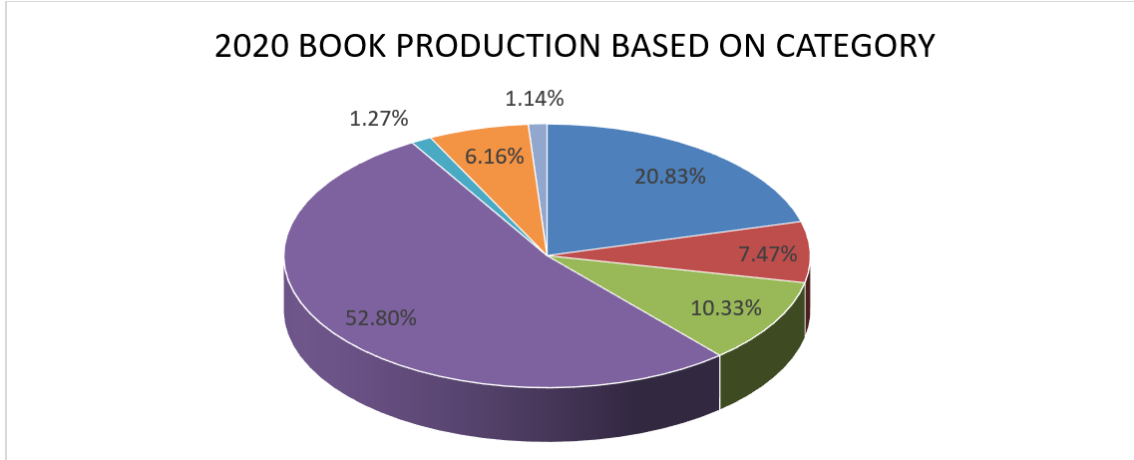
Aside from the positive and negative effects of the pandemic in 2020 on the publishing sector for 9 months, the Ministry of National Education's (MoNE) decision to distribute free-of-charge supplementary books for the first time for 17.5 million students in the 2020-2021 school year, independent of the pandemic, is seen as a concerning development, affecting the sector negatively.

Another issue that needs to be considered while evaluating the year 2020 is the loss of value of the Turkish Lira against the USD and the Euro. This adverse development has also been an important reason for the decline in the market size calculations of the sector based on USD, explained in more detail below (Table 6 and Table 10).

According to the Address Based Population Registration System 2020 Results of the Turkish Statistical Institute (TÜİK) in 2020, the population of Turkey is 83,614,362. When the population-based book production figures are evaluated, it is seen that the number of books per person is 7.3. This was calculated as 6.9 in the year 2019.

The retail (Tables 2, 3, 4, 5, 6, 11) and wholesale (Tables 7, 8, 9, 10) sectoral size reports of issue in the segment-based tables below have been obtained in the calculations resulting from the consultations of the Turkish Publishers Association with the actors in the sector. The bandrol (Table 1) and ISBN (Table 12) figures have been generated by using the data of YAYFED (Federation of Publisher Societies) and the ISBN Turkey Agency under the Ministry of Culture and Tourism of the Turkish Republic.

## BOOK PRODUCTION AND TURNOVER IN 2020



Adult non-fiction	Adult fiction
Children and young adult	Educational
Academic	Religion (All kinds of religious publications)
Imported	

### ***Growth rate of book production in Turkey has declined***

According to production data of 2020, a total of 433,213,632 books were produced by independent publishers. In the total book production announced by YAYFED (Federation of Publisher Societies) which distributes and sells bandrols, the increase that reached up to 30% in the first three months went into decline with the pandemic, ending the year with only an increase of 2.28% compared to the previous year (Table 1).

The total production number of books produced by the Ministry of National Education together with the private sector in 2020 was 184.200.000, these books comprising textbooks, open high school books and supplementary books. For the 2020-2021 school year, the Ministry decided to distribute free-of-charge supplementary books for the first time for 17.5 million students. The total book production became 617,413,632 including the books printed by the MoNE.

■ *Table-1*

2019- 2020 BANDROL DATA BASED ON CATEGORY*			
	2019	2020	2019-2020 Change %
<b>Trade Publishing</b>	<b>147,961,782</b>	<b>167,359,158</b>	<b>13.11%</b>
Adult non-fiction	79,387,610	90,241,549	13.67%
Adult fiction	27,303,062	32,354,331	18.50%
Children and young adult	41,271,110	44,763,278	8.46%
<b>Educational</b>	<b>228,559,913</b>	<b>228,730,321</b>	<b>0.07%</b>
<b>Academic</b>	<b>4,890,495</b>	<b>5,514,246</b>	<b>12.75%</b>
Religion (All kinds of religious publications)	36,899,907	26,693,426	-27.66%
<b>Imported</b>	<b>5,290,731</b>	<b>4,956,481</b>	<b>-6.32%</b>
<b>Total</b>	<b>423,602,828</b>	<b>433,253,632</b>	<b>2.28%</b>

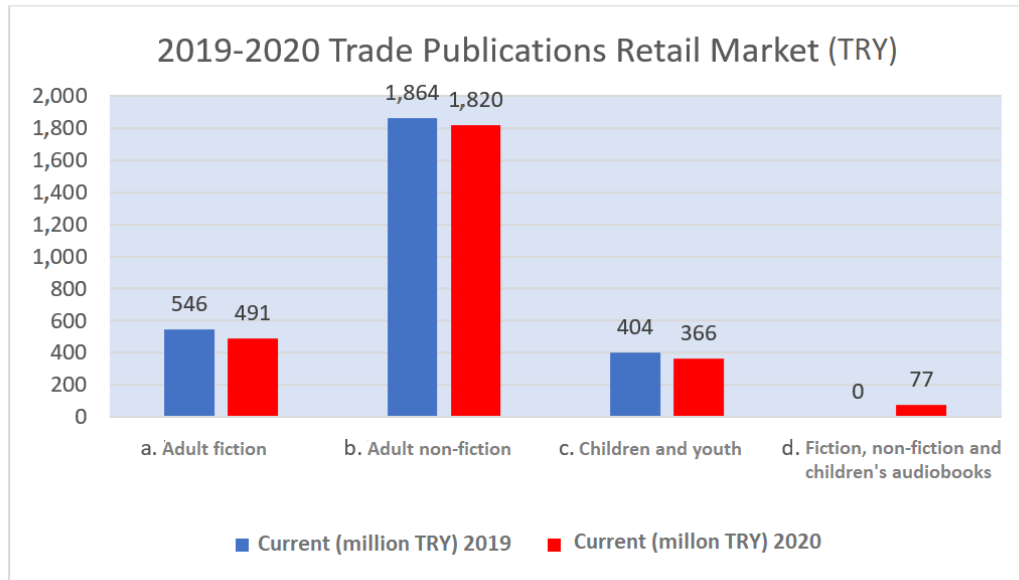
\*Bandrol data shows the number of books produced by independent publishers.

***Educational publishing, striking with its leading aspect in the sector – stable in production, in decline for the first time in turnover***

Educational publishing, with an increase of 0.07% according to bandrol data, has a share of 52.8% in all production with 228,730,321 units. Alongside factors like school closures and no book fairs because of the pandemic, especially the MoNE’s distribution of free-of-charge supplementary books to all grades except for high school in 2020 put educational publishing in a difficult state. Total share of turnover of educational publishing in the retail market of the publishing sector decreased from 52.99% to 44.20%. Compared to the year 2019, 25.99% of decline in turnover is seen in this field (Table 5).

***Trade publishing increased in book production, decreased in turnover***

▪ Table- 2



Trade publishing, comprising non-fiction, literature, and children’s publishing, accounted for 38.63% of one year of book production with 167,359,158 books; there’s an increase of 13.11% in this field compared to 2019. The non-fiction field accounted for 20.83% of one year of book production with 90,241,549 bandrols, meaning an increase of 13.67% compared to 2019. Literature books accounted for 7.47% of the total production with 32,354,331 units, with an increase of 18.50% compared to last year. Children and young adult books accounted for 10.33% of the total production with 44.763.278 units, with an increase of 8.46% (Table 1).

**Although addressing 5 million university students, our academic publishing is constrained around as low as 1%-2.5% of both production and book sales compared to developed countries, because of illegal photocopying and unauthorized pirate PDF sharing, and has 5,514,246 units of production, which is 1 book per student. There is a decrease of 27.66% in religion books, which make up 6.16% of one year of total production with 26.693.426 bandrols. Imported publications showed a decrease of 6.32% and have a share of 1.14% with 4.956.481 bandrols (Table 1).**

**Size of the retail book market in 2020 came down to 7,855 million TRY**

In 2020, publishing retail market size in Turkey came down 11.26% compared to 2019 in current prices. The biggest reason of this setback is the 25.99% drop in the educational publications segment. Another factor that caused the setback is the drop of 4.81% in trade publications (Table 5). While the decline in educational publications is connected to the free-of-charge supplementary books distribution of the MoNE, the most important reason for the decline in trade publications is the adverse commercial circumstances caused by the pandemic and the long-term closure of bookstores, followed by weekend closures.

▪ *Table- 3*



▪ *Table- 4*



▪ Table-5

### 2019- 2020 Comparative Turkish Book Retail Market (TRY)

Segments	Current (million TRY) 2019	Market Share (%) 2019	Current (million TRY) 2020	Market Share (%) 2020	2019-2020 Change (%)
<b>Educational Books</b>	<b>4,691</b>	<b>52.99%</b>	<b>3,472</b>	<b>44.20%</b>	<b>-25.99%</b>
a. Free textbooks	834	9.42%	604	7.69%	-27.58%
b. Supplementary materials and exam preparation books	3,857	43.57%	2,787	35.48%	-27.74%
c. Digital platforms educational and supplementary books	NA	NA	81	1.03%	NA
<b>Trade Books</b>	<b>3,307</b>	<b>37.36%</b>	<b>3,148</b>	<b>40.08%</b>	<b>-4.81%</b>
a. Adult fiction	546	6.17%	491	6.25%	-10.07%
b. Adult non-fiction	1,864	21.06%	1,820	23.17%	-2.36%
c. Children and young adult	404	4.56%	366	4.66%	-9.41%
d. Fiction, non-fiction and children's audiobooks	NA	NA	77	0.98%	NA
e. Religion	493	5.57%	394	5.02%	-20.08%
<b>Academic Books</b>	<b>171</b>	<b>1.93%</b>	<b>173</b>	<b>2.20%</b>	<b>1.17%</b>
a. Printed academic textbooks and reference books	NA	NA	169	2,15%	NA
b. Books and subscriptions through digital databases	NA	NA	4	0.05%	NA
<b>Imported Books</b>	<b>683</b>	<b>7.72%</b>	<b>1,062</b>	<b>13.52%</b>	<b>55.49%</b>
a. Imported language education books	NA	NA	493	6.28%	NA
b. Imported language education digital platform sales	NA	NA	90	1.15%	NA
c. Imported academic and reference books	NA	NA	23	0.29%	NA
d. Imported digital book and digital database subscriptions	NA	NA	447	5.69%	NA
e. Imported culture and arts printed books	NA	NA	9	0.11%	NA
<b>TOTAL</b>	<b>8,852</b>	<b>100%</b>	<b>7,855</b>	<b>100%</b>	<b>-11.26%</b>
<b>TOTAL DIGITAL BOOK MARKET IN ALL SEGMENTS</b>			<b>699</b>	<b>8.90%</b>	

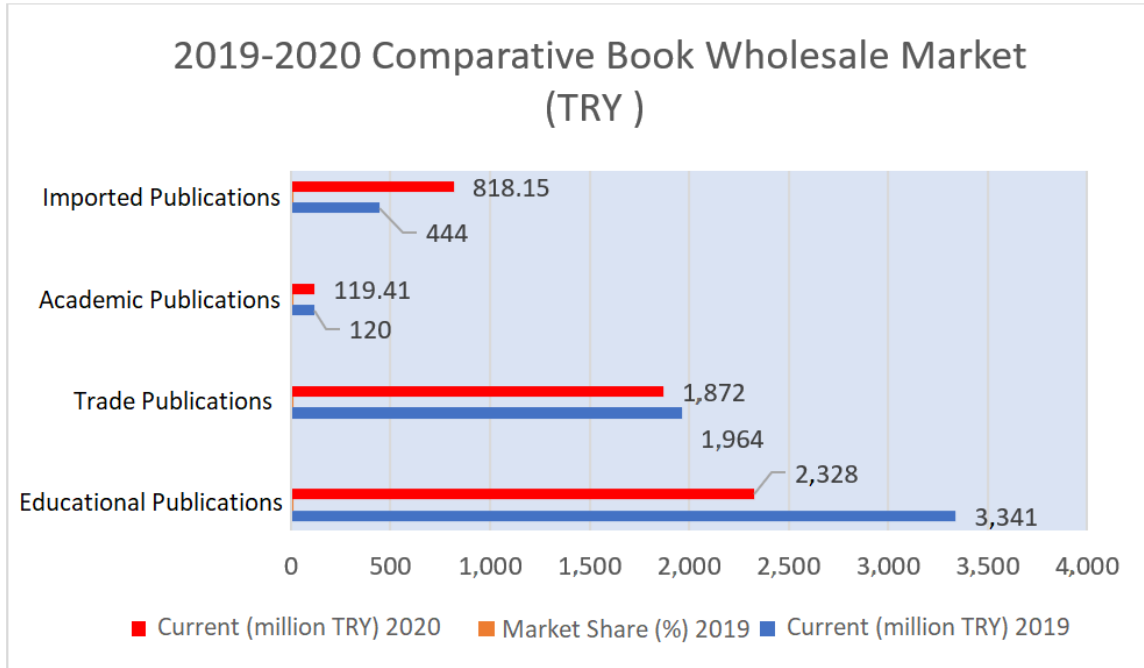
Table-6

**2019- 2020 Comparative Turkish Book Retail Market (USD)\***

Segments	Current (million \$) 2019	Market Share (%) 2019	Current (million \$) 2020	Market Share (%) 2020	2019-2020 Change (%)
<b>Educational Books</b>	<b>775</b>	<b>52.99%</b>	<b>483.45</b>	<b>37.14%</b>	<b>-37.65%</b>
a. Free textbooks	138	9.42%	82.83	7.48%	-39.91%
b. Supplementary materials and exam preparation books	638	43.57%	389.30	35.16%	-38.94%
c. Digital platforms educational and supplementary books	NA	NA	11.31	1.02%	NA
<b>Trade Books</b>	<b>547</b>	<b>37.36%</b>	<b>439.76</b>	<b>46.52%</b>	<b>-19.55%</b>
a. Adult fiction	90	6.17%	68.58	6.19%	-24.00%
b. Adult non-fiction	308	21.06%	254.23	22.96%	-17.49%
c. Children and young adult	67	4.56%	51.17	4.62%	-23.38%
d. Fiction, non-fiction and children's audiobooks	NA	NA	10.76	0.97%	NA
e. Religion	81	5.57%	55.03	4.97%	-32.47%
<b>Academic Books</b>	<b>28</b>	<b>1.93%</b>	<b>24.17</b>	<b>2.53%</b>	<b>-14.49%</b>
a. Printed academic textbooks and reference books	NA	NA	23.61	2.13%	NA
b. Books and subscriptions through digital databases	NA	NA	0.56	0.05%	NA
<b>Imported Books</b>	<b>113</b>	<b>7.72%</b>	<b>159.91</b>	<b>13.82%</b>	<b>41.65%</b>
a. Imported language education books	NA	NA	68.86	6.22%	NA
b. Imported language education digital platform sales	NA	NA	12.57	1.14%	NA
c. Imported academic and reference books	NA	NA	3.21	0.29%	NA
d. Imported digital book and digital database subscriptions	NA	NA	74.00	6.68%	NA
e. Imported culture and arts printed books	NA	NA	1.26	0.11%	NA
<b>TOTAL</b>	<b>1,463</b>	<b>100%</b>	<b>1,107.29</b>	<b>100%</b>	<b>-24.32%</b>

\*1 USD= 6 TRY for the year 2019, 1 USD=7.18 TRY for the year 2020. Annual foreign exchange increase of 20% is included in the annual change calculations.

▪ *Table- 7*



▪ *Table- 8*





▪ Table-9

### 2019- 2020 Comparative Book Wholesale Market (TRY)\*

Segmentler	Current (million TRY) 2019	Market Share (%) 2019	Current (million TRY) 2020	Market Share (%) 2020	2019- 2020 Change (%)
<b>Educational Books</b>	<b>3,341</b>	<b>56.93%</b>	<b>2,328</b>	<b>45.31%</b>	<b>-30.32%</b>
a. Free textbooks	834	14.21%	604	11.76%	-27.58%
b. Supplementary materials and exam preparation books	2,507	42.72%	1,661	32.33%	-33.75%
c. Digital platforms educational and supplementary books	NA	NA	63	1.23%	NA
<b>Trade Books</b>	<b>1,964</b>	<b>33.47%</b>	<b>1,872</b>	<b>36.43%</b>	<b>-4.68%</b>
a. Adult fiction	328	5.58%	307	5.98%	-6.29%
b. Adult non-fiction	1,118	19.06%	1,119	21.78%	0.05%
c. Children and young adult	296	3.79%	201	3.91%	-9.54%
d. Fiction, non-fiction and children's audiobooks	NA	NA	29	0.56%	NA
e. Religion	222	5.04%	216	4.20%	-26.98%
<b>Academic Books</b>	<b>120</b>	<b>2.04%</b>	<b>119.41</b>	<b>2.32%</b>	<b>-0.24%</b>
a. Printed academic textbooks and reference books	NA	NA	116.61	2.27%	NA
b. Books and subscriptions through digital databases	NA	NA	2,8	0.05%	NA
<b>Imported Books</b>	<b>444</b>	<b>7.57%</b>	<b>818.15</b>	<b>15.92%</b>	<b>84.29%</b>
a. Imported language education books	NA	NA	290	5.64%	NA
b. Imported language education digital platform sales	NA	NA	58.5	1.14%	NA
c. Imported academic and reference books	NA	NA	17.25	0.34%	NA
d. Imported digital book and digital database subscriptions	NA	NA	447	8.70%	NA
e. Imported culture and arts printed books	NA	NA	5,4	0.11%	NA
<b>TOTAL</b>	<b>5,869</b>	<b>100%</b>	<b>5,138</b>	<b>100%</b>	<b>-12.45%</b>

\*The Wholesale Book Sales Report has been prepared based on publishers' wholesale net sales amounts to distributors, bookstores and dealers.

▪ Table-10

### 2019- 2020 Comparative Book Wholesale Market (USD)

Segments	Current (million \$) 2019	Market Share (%) 2019	Current (million \$) 2020	Market Share (%) 2020	2019-2020 Change (%)
<b>Educational Books</b>	<b>552</b>	<b>56.93%</b>	<b>323.63</b>	<b>38.03%</b>	<b>-41.40%</b>
a. Free textbooks	138	14.21%	82.83	11.38%	-39.91%
b. Supplementary materials and exam preparation books	414	42.72%	232	31.88%	-44.01%
c. Digital platforms educational and supplementary books	NA	NA	8.80	1.21%	NA
<b>Trade Books</b>	<b>325</b>	<b>33.46%</b>	<b>261.49</b>	<b>40.04%</b>	<b>-19.45%</b>
a. Adult fiction	54	5.58%	42.88	5.89%	-20.81%
b. Adult non-fiction	185	19.06%	156.31	21.48%	-15.45%
c. Children and young adult	37	3.79%	28.08	3.86%	-23.55%
d. Fiction, non-fiction and children's audiobooks	NA	NA	4.05	0.56%	NA
e. Religion	49	5.04%	30.17	4.15%	-38.29%
<b>Academic Books</b>	<b>20</b>	<b>2.04%</b>	<b>16.68</b>	<b>2.55%</b>	<b>-15.91%</b>
a. Printed academic textbooks and reference books	NA	NA	16.29	2.24%	NA
b. Books and subscriptions through digital databases	NA	NA	0.39	0.05%	NA
<b>Imported Books</b>	<b>73</b>	<b>7.57%</b>	<b>125.84</b>	<b>19.38%</b>	<b>71.47%</b>
a. Imported language education books	NA	NA	40.51	5.57%	NA
b. Imported language education digital platform sales	NA	NA	8.17	1.12%	NA
c. Imported academic and reference books	NA	NA	2.41	0.33%	NA
d. Imported digital book and digital database subscriptions	NA	NA	74	10.17%	NA
e. Imported culture and arts printed books	NA	NA	0.75	0.10%	NA
<b>TOTAL</b>	<b>970</b>	<b>100%</b>	<b>727.64</b>	<b>100%</b>	<b>-24.99%</b>

\* 1 USD= 6 TRY for the year 2019, 1 USD=7.18 TRY for the year 2020. Foreign exchange increase of 20% is included in the annual change calculations.

### **2020 end year online retail market (TRY)**

When the trade books sales market share of online book sales in 2006 was 2.24%, this share was measured as 22.49% at the end of 2019. Along with the closures of the pandemic that started in March 2020, sales rates of online book sales occurred nearly 65.5% in trade publications and academic publications, close to 20% in supplementary books, 35% in imported language education and culture-arts books. It is estimated that in general **36.17%** of the publishing sales occurred online (Table 11).

### **Surprise increase in the interest for digital platforms**

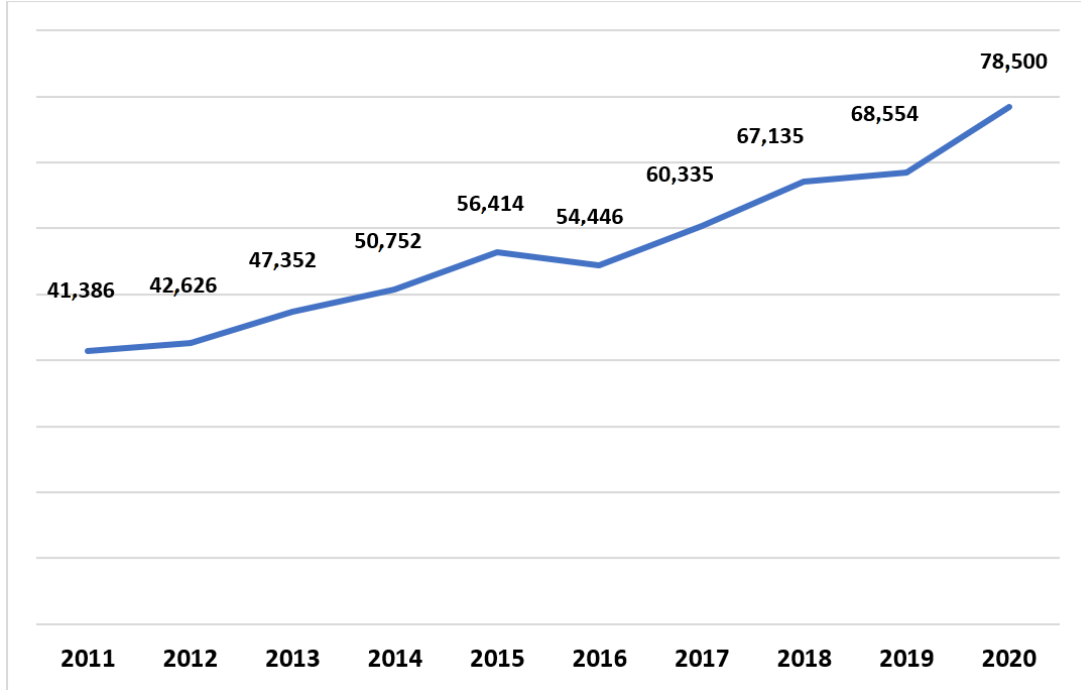
Audiobook sales increasing with the pandemic in 2020 in the market shares, showed an improvement for the first time, although as 1.10% share. Also, this year for the first time, with diligent measurements, both in education and in higher education and in university libraries, it is observed that the market reached around 10.19% with digital database subscriptions.

▪ Table- 11

<b>2020 Online Retail Market (TRY)</b>	
<b>Segments</b>	<b>Online Sales Total (Million) TRY</b>
<b>Educational Books</b>	<b>557</b>
a. Free textbooks	NA
b. Supplementary materials and exam preparation books	557
c. Digital platforms educational and supplementary books	NA
<b>Trade Books</b>	<b>2,012</b>
a. Adult fiction	322
b. Adult non-fiction	1,192
c. Children and young adult	240
d. Fiction, non-fiction and children's audiobooks	NA
e. Religion	258
<b>Academic Books</b>	<b>111</b>
a. Printed academic textbooks and reference books	111
b. Books and subscriptions through digital databases	NA
<b>Imported Books</b>	<b>161</b>
a. Imported language education books	158
b. Imported language education digital platform sales	NA
c. Imported academic and reference books	NA
d. Imported digital book and digital database subscriptions	NA
e. Imported culture and arts printed books	3
<b>TOTAL</b>	<b>2,841</b>

## ISBN DATA OF LAST 10 YEARS

▪ Table- 12



### **Number of newly published books went up to 78,500**

In 2019 in our country, 68,554 new titles were produced. According to the data obtained from the ISBN Agency under the Ministry of Culture and Tourism, 78,500 new titles were produced in 2020. Overall, an increase of 14.51% occurred. 68,685 of the total number of titles were printed books; 9,815 were audiobooks or e-books. Last year the number of audiobook and e-book titles was 6,487. It can be said that the course of the pandemic has had an effect in this increase.

According to the information obtained from the ISBN Agency, 69,984 of the books (89%) with an active ISBN in 2020 in Turkey were produced by independent publishers.