



**TURKISH PUBLISHERS
ASSOCIATION
REPORT
2022 TURKISH BOOK MARKET**

Published in 2023

The Turkish Publishers Association compiles the data of our country's publishing sector every year, prepares an annual market report on the sector, and shares it with the public.

The challenging conditions that have arisen along with the pandemic since 2020 continued in 2022, continuing to affect our country's publishing sector and other industries. Negative or uncertain effects such as the contraction of sales channels in the publishing sector, reevaluation of annual publishing plans, suspension or postponement of the publication of some new titles, reconsideration of reprints based on developments in financial resources, the reexamination of annual budgets in terms of costs and human resources, and occasional constraints or considerations of budget expectations, along with the increase in interest in digital media, have persisted. Additionally, the increase in digital piracy remains a concern.

Moreover, with the global paper crisis and the foreign exchange crisis in our country, our sector has entered a serious bottleneck.

The increase in global cellulose prices and freight costs for imported paper once again reminded us of our dependence on imports. Price increases in imported pulp and book cover paper reaching around 200% and around 30-35% in the case of book paper, and over 100% for coated papers in terms of foreign exchange, along with the sharp depreciation of the currency, have caused a price increase of nearly 300% in our sector's paper prices.

In addition to the more than 100% increase in raw material and paper prices in foreign exchange terms, the sector has also experienced price increases of over 300% and other cost increases due to the exchange rate in the paper sector, which is dependent on imports. According to a survey we conducted in September, our costs increased by 84% in foreign exchange terms, while there was a 15% decrease in the recommended retail selling prices set by our publishers.

In addition, the decision of the Ministry of National Education to distribute supplementary books for the first time to 17.5 million students for the 2021-2022 academic year has been seen as a worrying development negatively affecting the sector.

According to the "Address-Based Population Registration System Results 2022" announced by the Turkish Statistical Institute (TUIK), as of December 31, 2022, the population of Turkey increased by 599,280 people compared to the previous year, reaching 85,279,553 people.

According to the data provided by the Ministry of Culture, when evaluating book production figures per capita, the number of books per person increased by 5% compared to 2021, reaching 7.97.

In this report, the retail and wholesale sectoral size reports subjects of the tables provided on a segment basis have been calculated as a result of consultations with the actors in the sector by the Turkish Publishers Association. The numbers of *bandrol* and ISBNs have been generated using data from YAYFED (Federation of Publisher Societies) and the ISBN Türkiye Agency affiliated with the Ministry of Culture and Tourism of the Republic of Türkiye.

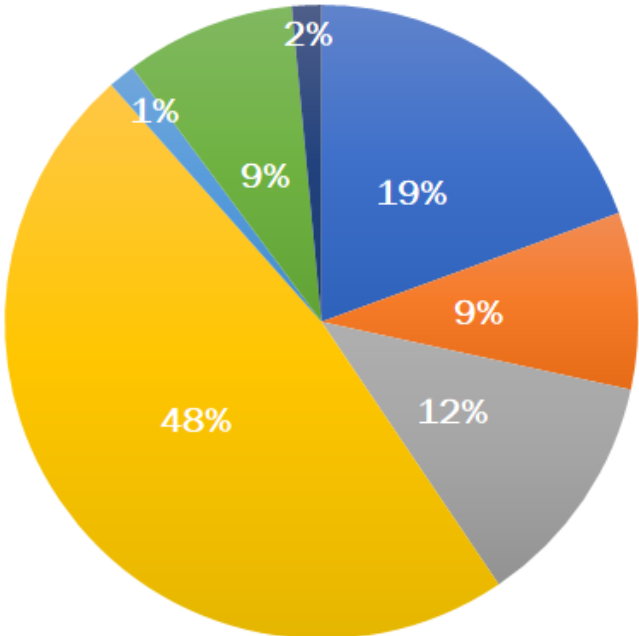
BOOK PRODUCTION IN TÜRKİYE REVERTS TO LEVELS OF 7 YEARS AGO

The independent publishing sector completed the year 2021 with a total book production of 438,679,864 units. However, in 2022, it concluded the year with 380,296,402 units. In 2022, there was a decrease of 58.3 million units compared to the previous year, representing a proportional decrease of 13.3%. With this decline, which our sector has experienced for the first time in the last ten years, book production has regressed to the level of the year 2015. The results indicate that the industry has gone back 7 years.

	2022		CHANGE %	2021	
	Quantity	Ratio		Quantity	Ratio
Adult (Research, etc.)	73.844.863	19,42%	-18,29%	90.379.535	20,60%
Adult Fiction (Literature, arts, etc.)	34.299.328	9,02%	9,99%	31.183.411	7,10%
Children's & Young Adult	46.048.282	12,11%	4,72%	43.973.357	10,00%
Education	182.148.008	47,90%	-22,23%	234.204.906	53,40%
Academic	5.236.945	1,38%	-15,81%	6.220.481	1,40%
Religion/Faith (All kinds of religious publications)	33.009.072	8,68%	18,27%	27.909.066	6,40%
Imported	5.709.704	1,50%	18,73%	4.809.108	1,10%
TOTAL	380.296.402	100,00%	-13,31%	438.679.864	100,00%

In 2022, the composition of published books was as follows:

- 19.4% of the books were adult research and reference books.
- Approximately 9% were adult literature and art books.
- 12.1% were children's and young adult books.
- Approximately 8.7% were religious books.
- Approximately 1.4% were academic publications.
- 1.5% consisted of imported publications.
- 47.9% were books in the field of education.

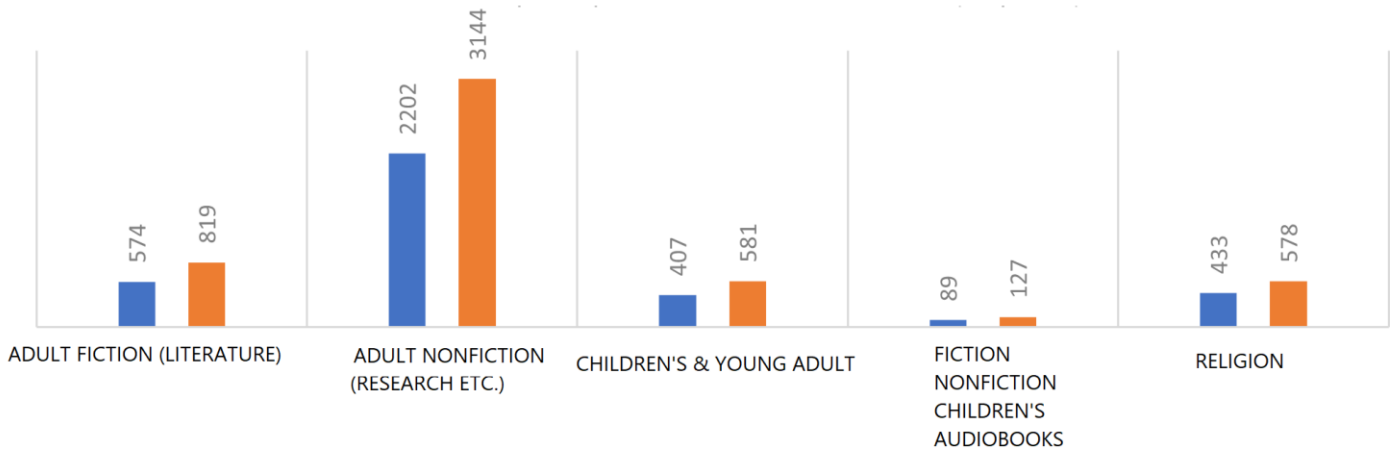


- Adult Nonfiction (Research, review, etc.)
- Adult Fiction (Literature, arts, etc.)
- Children's & Young Adult
- Education
- Academic
- Religion/Faith (All kinds of religious publications)
- Imported

In the research and reference category, there were 73,844,863 books produced. For literature and art books, there were 34,299,328 books produced. Children's and young adult books saw 46,048,282 units produced. The total production for trade publishing amounted to 154,192,473 units. The overall share of trade publishing in the entire sector was 40.55%.

2022 END OF YEAR BOOK RETAIL MARKET TRADE PUBLICATIONS

- 2022 End of Year Turkish Book Retail Market TRY Current (million TRY) 2021
- 2022 End of Year Turkish Book Retail Market TRY Current (million TRY) 2022



The share of academic publishing, which is one of the cornerstones of scientific education and production, has declined in recent years, from around 5% to the 1% range, due to the significant damage caused by illegal photocopying and unauthorized digital PDF sharing. In the academic world, where there are a total of 8,240,997 students in two-year, four-year, master's, and doctoral programs, academic publishing has been squeezed into a very low range of around 1% to 2.5% in both production and book sales, due to illegal photocopying and unauthorized pirate PDF sharing. With only 6,220,481 units produced, academic publishing currently stands at **0.63 books per student**, meaning that not even one book is available per student. According to YAYFED data, the share of academic publishing in the entire sector was 1.38% in 2022.

THE MINISTRY OF NATIONAL EDUCATION (MEB) IS THE LARGEST PUBLISHER IN THE COUNTRY

In 2022, educational publishing saw a decline of 22.23% in book production compared to the previous year, and for the first time, books produced in the education sector fell below 50% of the industry. The announcement by the Ministry of National Education (MEB) that 110 million supplementary books would be distributed for free significantly reduced the production numbers for books in the education category. When free textbooks are included, MEB holds the position of being the country's largest publisher with a total of 262,100,000 units.

In the 2021-2022 academic year, when MEB distributed free supplementary materials for the first time, accounted for 14.56% of the 2022 retail education publishing market, as shown below. The proportion of textbooks that MEB continues to distribute for free is 15.30%. MEB's total share in this market, which is 29.86%, can be seen as a loss for the private sector.

2022 End of Year Turkish Book Retail Market TRY

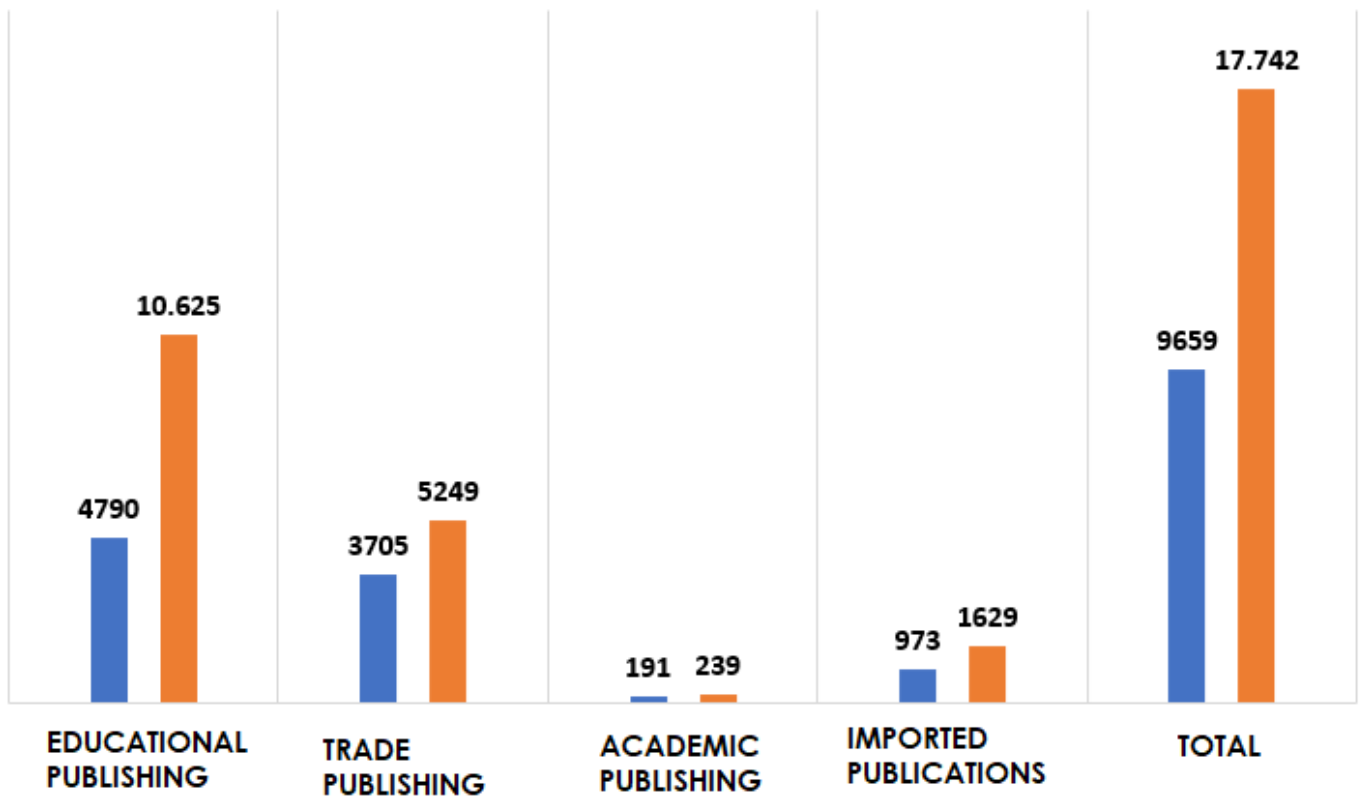
Segments	Current (million TRY) 2020	Market Share (%) 2020	Current (million TRY) 2021	Market Share (%) 2021	2020-2021 Change (%)	Current (million TRY) 2022	Market Share (%) 2022	2021-2022 Change (%)
Educational Publishing	3.472	44,20%	4790	49,59%	37,96%	10.625	59,89%	121,82%
a. Textbooks distributed free of charge by MEB	604	7,69%	1011	10,47%	67,38%	2714	15,30%	168,45%
b. Supplementary materials and exam preparation books distributed free of charge by MEB						2583	14,56%	
b. Supplementary materials and exam preparation books	2.787	35,48%	3683	38,13%	32,15%	5207	29,35%	41,38%
c. Digital platforms educational and supplementary books	81	1,03%	96	0,99%	18,52%	121	0,68%	26,04%
Trade Publishing	3.148	40,08%	3705	38,36%	17,69%	5249	29,59%	41,67%
a. Adult fiction (literature)	491	6,25%	574	5,94%	16,90%	819	4,62%	42,68%
b. Adult nonfiction (Research, etc.)	1.820	23,17%	2202	22,80%	20,99%	3144	17,72%	42,78%
c. Children's & Young Adult	366	4,66%	407	4,21%	11,20%	581	3,27%	42,75%
d. Fiction, Nonfiction and Children's Audiobooks	77	0,98%	89	0,92%	15,58%	127	0,72%	42,70%
e. Religion	394	5,02%	433	4,48%	9,90%	578	3,26%	33,49%
Academic Publishing	173	2,20%	191	1,98%	10,40%	239	1,35%	25,13%
a. Printed academic textbooks and reference books	169	2,15%	186	1,93%	10,06%	232	1,31%	24,73%
b. Books and subscriptions on digital databases	4	0,05%	5	0,05%	25,00%	7	0,04%	40,00%
Imported Publications	1.062	13,52%	973	10,07%	-8,38%	1629	9,18%	67,42%
a. Imported language learning books	493	6,28%	418	4,33%	-15,21%	707	3,98%	69,14%
b. Imported language learning digital platform sales	90	1,15%	114	1,18%	26,67%	212	1,24%	85,96%
c. Online language competence exam sales						83	0,47%	
d. Imported academic and reference books	23	0,29%	18	0,19%	-21,74%	12	0,07%	
e. Imported digital academic and reference books						18	0,10%	
e. Imported digital books and digital database subscriptions	447	5,69%	415	4,30%	-7,16%	579	3,26%	39,52%
f. Imported arts & culture print books	9	0,11%	8	0,08%	-11,11%	9	0,05%	12,50%
TOTAL	7.855	100,00%	9659		22,97%	17.742	100%	83,68%
TOTAL DIGITAL BOOK MARKET OF ALL SEGMENTS	699	8,90%						

SIZE OF THE 2022 RETAIL BOOK MARKET

In 2022, the size of the retail book market in Türkiye reached 17,742 million Turkish Lira (TRY). In 2022, there was an increase of 83.68% in current prices compared to 2021, without adjusting for inflation.

2021-2022 BOOK RETAIL MARKET (TRY)

- 2022 End of Year Turkish Book Retail Market TRY Current (million TRY) 2021
- 2022 End of Year Turkish Book Retail Market TRY Current (million TRY) 2022



When evaluated in foreign currency terms, there was a decline of 17.57% in the sector compared to the year 2021.



2022 End of Year Turkish Book Retail Market USD				
Segments	Current (million \$) 2021	Current (million \$) 2022	Market Share (%) 2022	2021-2022 Change (%)
Educational Publishing	576,69	574,32	60%	-0,41%
a. Textbooks distributed free of charge by MEB	121,72	146,70	15%	20,53%
b. Supplementary materials and exam preparation books distributed free of charge by MEB		139,62	14%	
c. Supplementary materials and exam preparation books	443,41	281,46	29%	-36,52%
d. Digital platforms educational and supplementary books	11,56	6,54	1%	-43,41%
Trade Publishing	446,06	283,73	29%	-36,39%
a. Adult fiction (literature)	69,11	44,27	4%	-35,94%
b. Adult nonfiction (research, etc.)	265,11	169,95	17%	-35,90%
c. Children's & Young Adult	49,00	31,41	3%	-35,91%
d. Fiction, nonfiction, children's audiobooks	10,72	6,86	1%	-35,93%
e. Religion	52,13	31,24	3%	-40,07%
Academic Publishing	23,00	12,92	1%	-43,82%
a. Print academic textbooks and reference books	22,39	12,54	1%	-44,00%
b. Books and subscriptions made on digital databases	0,60	0,38	0%	-37,14%
Imported Publications	117,14	87,57	9%	-25,25%
a. Imported language learning books	50,33	38,22	4%	-24,06%
b. Imported language learning digital platform sales	13,73	11,46	1%	-16,51%
c. Online language competence exam sales		4,49	0,46%	
d. Imported academic and reference books	2,17	0,65	0,07%	-70,07%
e. Imported digital academic and reference books		0,97	0,10%	
e. Imported digital books and digital database subscriptions	49,96	31,30	3%	-37,36%
f. Imported arts & culture print books	0,96	0,49	0,05%	-49,49%
TOTAL	1162,89	958,54		-%17,57

*For the year 2022, 1 USD=18,50 TRY; for the year 2021, 1 USD=8,306 TRY.

INCREASE IN ONLINE SALES

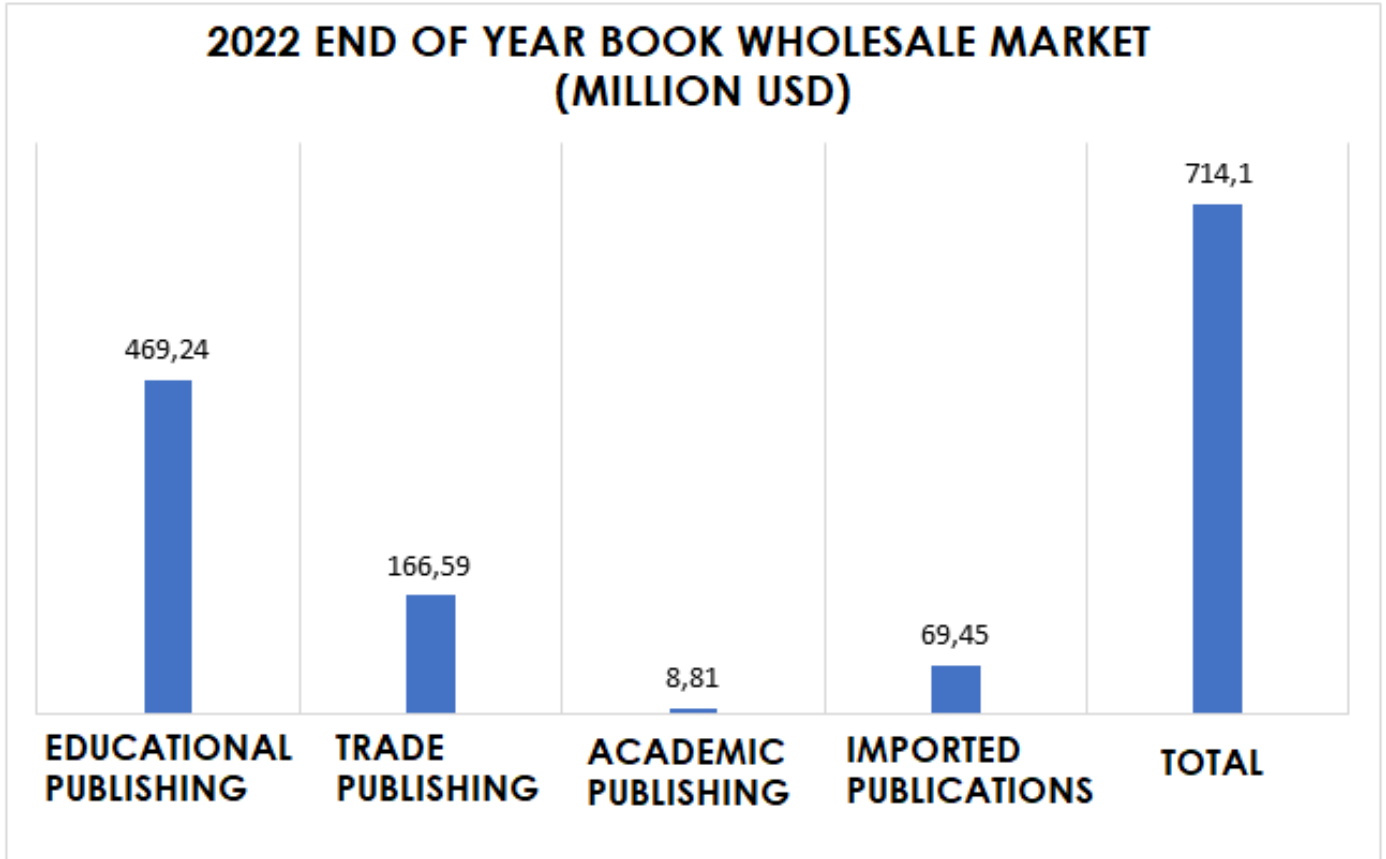
According to the online sales figures for the year 2022, 23% of total sales occurred online. This percentage was 21.7% in 2021. When we look at the breakdown by types, it can be seen that the highest percentage is in trade publishing. Nearly 49.95% of trade publications were sold online. It is understood that almost one out of every two trade books is sold online.

Segments	Revenue from Online Sales (Million TRY) 2022	Ratio of Online Sales Among Own Category (%) 2022*
Educational Publishing	552,45	
Supplementary materials and exam preparation books	552,45	10,61%
Trade Publishing	2622	49,95%
a. Adult fiction (literature)	399,00	48,72%
b. Adult nonfiction (research-review)	1532,00	48,73%
c. Children's & Young adult	283,00	48,71%
d. Fiction, nonfiction and children's audiobooks	127	100,00%
e. Religion/Faith	281	48,62%
Academic Publishing	85	35,56%
a. Printed academic and reference books	82	35,34%
b. Books and subscriptions on digital databases	7	100,00%
Imported Publications	874	53,65%
a. Imported language learning books	0	0,00%
b. Imported language learning digital platform sales	212	100,00%
c. Online linguistic competence exam sales	83	100,00%
d. Imported academic and reference books	0	0,00%
e. Imported digital books and digital database subscriptions	579	100,00%
f. Imported trade and arts printed books	0	0,00%
TOTAL	4.133,45	23,30%

**The percentage of online sales compared to retail sales in Turkish lira reflects the current publishing category. For example, in educational publishing, 10.61% of total sales of supplementary materials and exam preparation books were conducted online.*

WHOLESALE SALES MARKET (USD)

The data are obtained based on the wholesale net sales amounts made by publishers to distributors, bookstores, and dealers.



INCREASED INTEREST IN DIGITAL PLATFORMS

In 2022, there was a 55.63% increase in audiobook sales and digital database subscriptions compared to 2021.

2022 End of Year Turkish Book Retail Market (TRY) Sales of Digital Publications Online*			
Segments	Sales amount of digital databases, subscriptions and audiobooks (million TRY) 2021	Sales amount of digital databases, subscriptions and audiobooks (million TRY) 2022	2021-2022 Change Ratio (%)
Educational Publishing	96	121	26,04%
c. Digital platforms educational and supplementary books	96	121	26,04%
Trade Publishing	89	127	42,70%
d. Fiction, Nonfiction and children's audiobooks	89	127	42,70%
Academic Publishing	5	7	40,00%
b. Books and subscriptions on digital databases	5	7	40,00%
Imported Publications	547	892	63,07%
a. Imported Language Learning Books	0	0	
b. Imported Language Learning Digital Platform Sales	114	212	85,96%
c. Online Linguistic Competence Exam Sales	0	83	
d. Imported Academic and Reference Books	18		
e. Imported Digital Academic and Reference Books	0	18	
f. Imported Digital Books and Digital Database Subscriptions	415	579	39,52%
TOTAL	737	1147	55,63%

**In 2022, the share of online digital publications in the overall retail market was 6.46%. In 2021, this figure was recorded at 7.63%.*

ISBN DATA FOR 2022

According to information obtained from the ISBN Agency affiliated with the Ministry of Culture and Tourism, a total of 83,653 works received ISBN numbers in the year 2022. Among these, 69,211 were printed books, 559 were audiobooks (online/offline), and 13,623 were e-books (online/offline).

Material Type	Konu						TOTAL
	Adult Fiction Literature	Adult Trade/ Nonfiction	Children's & Young Adult	Education	Academic	Religion/Faith	
Printed Books	14.833	10.973	10.509	17.618	11.508	3.770	69.211
Electronic Books (Online/ Web based)	1.673	1.768	1.041	2.518	5.481	765	13.246
Electronic Books (DVD, VCD, CD, Memory)	12	45	7	37	274	2	377
Audiobooks (Online)	116	326	86	6	9	8	551
Audiobooks (Cassette, CD, DVD, Memory)	1	4	0	0	3	0	8
TOTAL	16.635	13.116	11.643	20.179	17.275	4.545	83.393

(Posters, educational kits, Braille, maps, holy books, posters, theses, etc., and various other materials have not been included.)

When we examine the last 10 years, the increase in ISBN acquisition, which persisted until 2021, started to decline.

