Global book publishing market, segmented by forecast rate of growth and scale, 2013–2018

Established markets lead the way with growth stimulated by e-books

Higher-growth, larger-scale markets
This market comprises established books markets such as the US, Canada and Australia, as well as countries such as Brazil and Thailand, where print revenue is still growing alongside e-books revenue. Among the higher-growth, larger-scale markets, Thailand will see the highest growth in total books revenue with a CAGR of 7% over the next five years. India will also see high growth at a 6% CAGR driven by an increasing middle class.

Lower-growth, larger-scale markets
This market is almost entirely made up of Western European countries, with these markets having highly developed print publishing industries. Many of these markets are seeing low growth or shrinkage as digital revenues fail to compensate for falling print revenues. Russia will see a CAGR of -4% over the next five years as publishing in the country struggles to combat increased piracy enabled by the digital medium.

Higher-growth, smaller-scale markets
Egypt, Saudi Arabia, UAE and Rest of MENA fall into this market, with their book publishing industries boosted by e-books. These markets have previously been hindered by poor distribution methods. Smaller European countries such as Austria, Belgium and the Czech Republic are also higher-growth, smaller-scale markets, with sales of e-books also driving growth.

Lower-growth, smaller-scale markets
Nine of the 17 countries which make up this market are seeing falling total books revenue, with print revenue falling faster than can be mitigated by e-books growth. In some markets, Pakistan and Venezuela for example, this will be due to poor e-reader and tablet penetration, while in others, like Denmark and Sweden, slower growth in electronic revenue is due to the relatively small numbers of local-language titles on offer in the country.

Source: Global entertainment and media outlook 2014–2018, PwC, Informa Telecoms & Media

Methodology note: Each market’s location within the quadrant is calculated by assessing their average growth rate in book publishing revenue between 2013 and 2018, then dividing the markets in terms of overall scale.

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