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BOOK PUBLISHING INDUSTRY ANNUAL SURVEY

Broad Trends over Three Years (2008-2010)

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Contextualisation

The analysis of data from the *Annual Book Industry Surveys* (2008, 2009 and 2010) rests on the assumption that the data received from the individual participating companies is accurate.

It is not possible to compare the results of the 2010 annual survey with that of the previous years. The participants of the survey differ, and some participants experienced significant changes in their business operations, which had an effect on the survey results. Some participants moved into a higher turnover category, either through organic growth or through mergers and acquisitions. Others dropped into lower categories having sold off parts of their publishing lists.

This Broad Trends Report is based on a like-for-like comparison of all the entities that participated in all three of the 2008, 2009 and 2010 annual surveys, in order to highlight the patterns and trends manifested over these three years.

The Notes accompanying each table serve the following purposes:

- Illustrating some of the interpretations of the data in the preceding table. The notes are by no means exhaustive of all the deductions to be made from the accompanying tables.
- Adding context to the data by providing general background information.
- Adding additional information extracted from the data received from respondents.
- Cross-referencing to other tables.

Adjustments made to the comparative database

A number of parameters were redefined in the 2009 and 2010 annual surveys, and adjustments needed to be made to the 2008 database to be able to make true comparisons with the 2009 and 2010 data.

The academic publishers engaged in professional publishing have extended their core business to become suppliers of professional data, knowledge and skills. They use a number of strategies to satisfy their customers' needs, including publishing (books and journals), training and consultancy.

In all surveys up to 2009 the income derived from training and consultancy was reported under the category "other income". As these sources of income were not related to publishing activities, and hence not of interest to the book publishing industry surveys, the definition was changed to "other book-related income". Only income generated from products or services that are the by-products of publishing activities was captured. As a result of this redefinition, income of R63 307 000 was deleted from the "other income" reported in the academic sub-sector of the 2008 database. This is an important adjustment, as there is an increasing trend to convert digital products into online services.

A further distinction was made in the professional book category in the academic sub-sector between income derived from the sale of digital products and from the sale of online services. In the first instance a physical product in CD or DVD format is sold to the end-user, with a transfer of ownership from supplier to end-user. In the case of online services there is no physical product nor a transfer of ownership. As the online service database is derived directly from publishing activities the income derived from these services is recorded under "other book-related income". A total income of R81 316 000 was transferred from "non-book product income" to "other book-related income" in the 2008 comparative database.

General publishers have also started offering online access to their encyclopaedia, dictionaries and gazetteer databases. The income derived from these services is also reported under "other book-related income".

Religious publishers reported non-book product sales of R54 150 000 in 2008. As these products have little or no connection to their book publishing activities, they were eliminated from the 2008 comparative database.

Not all participants completed every section of the questionnaire in each of the three surveys being compared. Care was taken to eliminate all data supplied in any one of two of the surveys if the participant had not completed a particular section in all three surveys, thus ensuring a truly comparative analysis.

1 The comparative sample

1.1 Participant profile

The following 38 business entities participated in all three of the 2008, 2009 and 2010 annual surveys (in alphabetical order):

Fig. 1.1 List of participants

Awareness Publishing
Best Books*
Bible Society of South Africa
Book Promotions
Briza Publications
Cambridge University Press
CUM
Derek Prince Ministries
Fantasi Publications
Fernwood Press**
Hay House Publishing
Heinemann
HSRC Press
Jonathan Ball Publishers
Juta & Company Limited
LAPA Publishers
Lectio
LexisNexis Butterworth SA
Macmillan South Africa
Maskew Miller Longman
Metz Press
Naledi Publishers
NB Publishers
New Readers Publishers
Oxford University Press Southern Africa
Pan Macmillan SA
Pearson Educational SA
Penguin Publishers SA
PSD Promotions
Publitech
Random House Struik
Shuter & Shooter Publishers
Stimela Publications
Struik Christian Books
The African Moon Press
Trinity Books
Van Schaik Publishers
Via Afrika Publishers

Notes

* 2009 and 2010 results incorporated in NB Publishers

** 2009 and 2010 results incorporated in Random House Struik Publishers

Fig. 1.2 Participant profile

Industry sub-sector	All sub-sectors	General Trade	Religious Trade	Education	Academic
Membership category	38	16	4	11	7
PASA member	25	8	1	11	5
Not PASA member	13	8	3	0	2
Main sub-sector category	38	16	4	11	7
General trade	16	16	0	0	0
Religious trade	4	0	4	0	0
Educational	11	0	0	11	0
Academic	7	0	0	0	7
Size category	38	16	4	11	7
Large turnover	18	5	2	8	3
Medium turnover	12	8	1	2	1
Small turnover	8	3	1	1	3
Supplier category	38	16	4	11	7
Local publisher only	14	7	0	3	4
Local publisher and distributor	19	6	3	8	2
Local distributor only	5	3	1	0	1

Notes

- The profile is based on the status of the participants in 2008. Two participants merged with others during the reporting period, and a number of participants moved into different turnover categories in 2009 and 2010 as a result of mergers or acquisitions.

1.2 Representative nature of the comparative sample

The table below indicates the degree to which the comparative sample of 38 common participants across all three annual surveys represented the annual surveys as well as the estimated total industry values. As no accurate estimate could be made of the total industry income (which includes income derived from the sale of services and rights), the turnover derived from the sale of products (including print books, electronic books and non-book products) in the home market was selected as the parameter for comparison.

Fig. 1.3 Representative nature of the comparative sample

Total turnover in home market	2008	2009	2010
Total turnover of comparative sample	R 3,114,360,000	R 2,747,370,000	R 2,708,928,000
% Annual growth/decline		*-11.8%*	*-1.4%*
Total turnover of annual survey	R 3,340,520,000	R 2,918,340,000	R 2,868,943,000
% Annual growth/decline		*-12.6%*	*-1.7%*
Sample turnover as % of total survey turnover	93.2%	94.1%	94.4%
Estimated industry turnover	R 3,653,849,000	R 3,479,179,000	R 3,444,098,000
Sample turnover as % of total industry turnover	85.2%	79.0%	78.7%

Notes

- The survey sample represented 94.1% of the total annual survey turnover in 2009 as the decline in turnover its contributing participants experienced was less than the total survey decline in home market turnover. This trend was somewhat reversed in 2010 with a corresponding decline in sample representation.

- There was a net loss of 12 participants in the 2009 survey relative to 2008, resulting in the survey sample representing only 79.0% of the total industry estimate, as opposed to 82.5% in 2008.
- There was a net gain of two new participants in 2010 relative to 2009, but their contribution to total estimated industry home market turnover was insufficient to reverse the trend of declining industry representation, which declined to 78.7% in 2010.
- The comparative survey sample is nevertheless regarded as being sufficiently representative of the total industry to be used to make meaningful comparisons among the three successive annual surveys.

Please Note

The analysis below is based on the data provided by the 38 entities that participated in all three annual surveys, and NOT on the total results of the 2008, 2009 and 2010 annual surveys.

2 Total income profile

Note that, throughout this report, the term 'turnover' implies total net turnover, unless specified otherwise. "Net" implies both of the following:

- Total value of sales after deduction of returns;
- Net invoice value to retailers and end-users after subtraction of all discounts, rebates or other price reductions granted by suppliers.

Fig. 2.1 Total income by product category: All sub-sectors

All products and services	**2008**	**2009**	**2010**
Local sales of locally published books	R 2,340,693,000	R 2,033,272,000	R 1,959,689,000
% Annual growth/decline		*-13.1%*	*-3.6%*
Local sales of imported books	R 734,437,000	R 688,490,000	R 715,199,000
% Annual growth/decline		*-6.3%*	*3.9%*
Local sales of electronic books	R 939,000	R 1,018,000	R 1,253,000
% Annual growth/decline		*8.4%*	*23.1%*
Local sales of non-book products	R 38,291,000	R 24,590,000	R 32,787,000
% Annual growth/decline		*-35.8%*	*33.3%*
Total local sale of products	**R 3,114,360,000**	**R 2,747,370,000**	**R 2,708,928,000**
% Annual growth/decline		*-11.8%*	*-1.4%*
Export of products	R 29,663,000	R 73,335,000	R 75,478,000
% Annual growth/decline		*147.2%*	*2.9%*
Local sales of rights	R 3,962,000	R 1,333,000	R 1,530,000
% Annual growth/decline		*-66.4%*	*14.8%*
Export sales of rights	R 3,895,000	R 1,567,000	R 1,258,000
% Annual growth/decline		*-59.8%*	*-19.7%*
Other book-related income	R 82,272,000	R 103,238,000	R 125,780,000
% Annual growth/decline		*25.5%*	*21.8%*
Total income	**R 3,234,152,000**	**R 2,926,843,000**	**R 2,912,974,000**
% Annual growth/decline		*-9.5%*	*-0.5%*

Notes

- There was a decline of 9.5% in the total income reported by the 38 participant book suppliers between 2009 and 2008, and a decline of 0.5% between 2010 and 2009.
- The income derived from the sale of locally published books in the home market declined by 13.1% in 2009 and 3.6% in 2010.
- There was a decline of 6.3% between 2008 and 2009 in the income derived from the sale of imported books in the home market, but a corresponding increase of 3.9% between 2009 and 2010.
- During the reporting period electronic books constituted only a very small percentage of income, but showed substantial growth from this very low base.
- The sharp decline in the income generated by non-book products is due to an academic publisher replacing its professional book service on CD with an online service, which is regarded as "other book-related income". This partly accounts for the rapid increase in the income derived from this category.
- The income derived from the sale of all products in the home market declined by 11.8% in 2009 and 1.4% in 2010.

- The rapid increase in income derived by the export of products was mainly driven by sales of educational books to neighbouring countries.
- The sale of publishing or reproduction rights in both the home and export markets contributed little to total income.
- Other book-related income was primarily derived from the sale of online electronic services by professional legal and accounting publishers. The high growth rate of 25.5% and 21.8% respectively was driven both by the conversion of CD-based products to online services, and by new online services being offered to professional users.

Fig. 2.1a Relative contribution to total income by category of income: All industry sub-sectors

Contribution to total income	2008	2009	2010
Local sales of locally published books	72.4%	69.5%	67.3%
Local sales of imported books	22.7%	23.5%	24.6%
Local sales of electronic books	0.0%	0.0%	0.0%
Local sales of non-book products	1.2%	0.8%	1.1%
Total local sales of products	**96.3%**	**93.9%**	**93.0%**
Export of products	0.9%	2.5%	2.6%
Local sales of rights	0.1%	0.0%	0.1%
Export sales of rights	0.1%	0.1%	0.0%
Other book-related income	2.5%	3.5%	4.3%

Notes

- The home market for sales of locally published books lost market share over the reporting period, from 72.4% in 2008 to 67.3% in 2010.
- The relative share of income generated by the sale of imported books in the home market concomitantly increased from 22.7% in 2008 to 24.6% in 2010.
- Electronic books contributed less than 0.1% to total income over the reporting period, in spite of the growth in sales.
- Locally produced non-book products contributed slightly less to total income in 2010 as compared to 2008. The decline in the sale of professional CD-based products was partially offset by increased sales of educational products.
- The sales of all products in the home market declined from 96.3% of total income in 2008 to 93.0% in 2010. The export of products and income generated from book-related services made up the balance of total annual incomes.
- The export of locally published books contributed 2.6% to total income, up from 0.9% in 2008. The education sub-sector contributed most to the exports of locally published books.
- There was no significant change in the income derived from the sales of rights in either the home or the export markets. The figure remains very low.
- The contribution to total income made by other book-related income increased from 2.5% in 2008 to 4.3% in 2010. This income is derived from online services to professional end-users, which are increasing in scope.

Fig. 2.2 Total income by product category: General trade sector

General trade products and services	**2008**	**2009**	**2010**
Local sales of locally published books	R 258,629,000	R 256,809,000	R 269,786,000
% Annual growth/decline		*-0.7%*	*5.1%*
Local sales of imported books	R 471,651,000	R 456,118,000	R 459,071,000
% Annual growth/decline		*-3.3%*	*0.6%*
Local sales of electronic books	R 109,000	R 0	R 102,000
% Annual growth/decline			
Local sales of non-book products	R 2,537,000	R 3,547,000	R 2,573,000
% Annual growth/decline		*39.8%*	*-27.5%*
Total local sales of products	**R 732,926,000**	**R 716,474,000**	**R 731,532,000**
% Annual growth/decline		*-2.2%*	*2.1%*
Export of products	R 11,630,000	R 11,657,000	R 11,715,000
% Annual growth/decline		*0.2%*	*0.5%*
Local sales of rights	R 211,000	R 43,000	R 21,000
% Annual growth/decline		*-79.6%*	*-51.2%*
Export sales of rights	R 3,471,000	R 1,559,000	R 1,256,000
% Annual growth/decline		*-55.1%*	*-19.4%*
Other book-related income	R 0	R 307,000	R 1,416,000
% Annual growth/decline			*361.2%*
Total income	R 748,238,000	R 730,040,000	R 745,940,000
% Annual growth/decline		*-2.4%*	*2.2%*

Notes

- The income derived from the sale of locally published general trade books in the home market declined by 0.7% year-on-year from 2008 to 2009, but increased again by 5.1% from 2009 to 2010, ending at a higher value in 2010 than in 2008. However, the increase in sales value over the reporting period remains well below the rate of inflation for the same period.
- The home market ended in 2010 at almost the same turnover value as in 2008, despite inflation.
- The income derived from the sale of imported books in the home market declined by 3.3% in 2009 and increased by 0.6% in 2010, ending at a lower value in 2010 than in 2008. This decline was recorded despite a very stable exchange rate for the rand over the reporting period.
- Electronic books made very little contribution to total income over the period.
- The income derived from the sale of non-book products was flat over the period.
- The export of locally published books was also flat over the period.
- The sale of publishing or reproduction rights in both the local and export markets contributed little to total sub-sector income.
- One publisher introduced an online service to add to its dictionary and gazette database, which contributed most of the income reported as other book-related income.

Fig. 2.2a Relative contribution to total income by category of income: General trade sub-sector

Contribution to total income	2008	2009	2010
Local sales of locally published books	34.6%	35.2%	36.2%
Local sales of imported books	63.0%	62.5%	61.5%
Local sales of electronic books	0.0%	0.0%	0.0%
Local sales of non-book products	0.3%	0.5%	0.3%
Total local sales of products	**98.0%**	**98.1%**	**98.1%**
Export of products	1.6%	1.6%	1.6%
Local sales of rights	0.0%	0.0%	0.0%
Export sales of rights	0.5%	0.2%	0.2%
Other book-related income	0.0%	0.0%	0.2%

Notes

- The income derived from the sale of locally published general trade books in the home market recorded a moderate increase from 34.6% to 36.2% over the reporting period.
- Correspondingly, the sale of imported books in the home market lost market share from 63.0% to 61.5%.
- Electronic books and non-book products contributed very little to total income over the reporting period.
- The sale of locally produced products in the home market increased from 98.0% to 98.1% over the three-year period.
- Income from the export of products remained stable at 1.6% of total income.
- The export of rights contributed very little to total income.
- One publisher created a new income stream by introducing an online reference service to accompany its dictionary database.

Fig. 2.3 Total income by product category: Religious trade sub-sector

Religious trade products and services	2008	2009	2010
Local sales of locally published books	R 105,997,000	R 101,458,000	R 112,273,000
% Annual growth/decline		*-4.3%*	*10.7%*
Local sales of imported books	R 96,377,000	R 73,177,000	R 84,051,000
% Annual growth/decline		*-24.1%*	*14.9%*
Local sales of electronic books	R 0	R 0	R 0
% Annual growth/decline			
Local sales of non-book products	R 158,000	R 1,117,000	R 638,000
% Annual growth/decline		*607.0%*	*-42.9%*
Total local sales of products	**R 202,532,000**	**R 175,752,000**	**R 196,962,000**
% Annual growth/decline		*-13.2%*	*12.1%*
Export of products	R 0	R 5,118,000	R 5,831,000
% Annual growth/decline			*13.9%*
Local sales of rights	R 944,000	R 356,000	R 597,000
% Annual growth/decline		*-62.3%*	*67.7%*
Export sales of rights	R 26,000	R 8,000	R 2,000
% Annual growth/decline		*-69.2%*	*-75.0%*
Other book-related income	R 0	R 0	R 0
% Annual growth/decline			
Total income	R 203,502,000	R 181,234,000	R 203,392,000
% Annual growth/decline		*-10.9%*	*12.2%*

Notes

- A significant local religious publisher not part of the comparative sample used for this analysis lost its overseas agencies as a result of an internal restructuring process during 2009. This event may be the main reason for the significant growth in income derived from the sale of imported books in 2010, as some of the comparative sample members gained these agencies in the latter half of 2009 and 2010.
- The sale of locally published religious trade books declined by 4.3% in 2009 but regained 10.7% in 2010, to end with a higher income value in 2010 as compared to 2008.
- Income derived from the sale of imported books declined sharply in 2009 but regained most of its losses in 2010.
- Religious publishers reported no income from the sale of electronic books.
- Home market sales of non-book products increased substantially over the reporting period.
- The home market sales of all religious products recorded a total value of R 196,962,000 in 2010, down from R 202,532,000 in 2008.
- Export sales were recorded for the first time in 2009 and showed an increase of 13.9% in 2010.
- The sale of rights and other book-related services made very little contribution to overall sub-sector income.

Fig. 2.3a Relative contribution to total income by category of income: Religious trade sub-sector

Contribution to total income	2008	2009	2010
Local sales of locally published books	52.1%	56.0%	55.2%
Local sales of imported books	47.4%	40.4%	41.3%
Local sales of electronic books	0.0%	0.0%	0.0%
Local sales of non-book products	0.1%	0.6%	0.3%
Total local sales of products	**99.5%**	**97.0%**	**96.8%**
Export of products	0.0%	2.8%	2.9%
Local sales rights	0.5%	0.2%	0.3%
Export sales rights	0.0%	0.0%	0.0%
Other book-related income	0.0%	0.0%	0.0%

Notes

- Locally published books increased their share of total income from 52.1% to 55.2% over the reporting period.
- Imported books saw their market share decline from 47.4% to 41.3% over the same period.
- All other product and services contributed very little to total sub-sector income.

Fig. 2.4 Total income by product category: Education sub-sector

Education products and services	**2008**	**2009**	**2010**
Local sales of locally published books	R 1,621,786,000	R 1,308,297,000	R 1,202,939,000
% Annual growth/decline		*-19.3%*	*-8.1%*
Local sales of imported books	R 101,034,000	R 89,918,000	R 105,565,000
% Annual growth/decline		*-11.0%*	*17.4%*
Local sales of electronic books	R 830,000	R 1,018,000	R 1,151,000
% Annual growth/decline		*22.7%*	*13.1%*
Local sales of non-book products	R 21,535,000	R 11,882,000	R 23,975,000
% Annual growth/decline		*-44.8%*	*101.8%*
Total local sales of products	**R 1,745,185,000**	**R 1,411,115,000**	**R 1,333,630,000**
% Annual growth/decline		*-19.1%*	*-5.5%*
Export of products	R 2,951,000	R 36,470,000	R 32,078,000
% Annual growth/decline		*1135.9%*	*-12.0%*
Local sales of rights	R 7,000	R 7,000	R 20,000
% Annual growth/decline		*0.0%*	*185.7%*
Export sales of rights	R 398,000	R 0	R 0
% Annual growth/decline		*-100.0%*	
Other book-related income	R 0	R 0	R 2,000
% Annual growth/decline			
Total income	R 1,748,541,000	R 1,447,592,000	R 1,365,730,000
% Annual growth/decline		*-17.2%*	*-5.7%*

Notes

- During 2008 the implementation of the NCS school curriculum was completed, with the supply of new textbooks for Grades 9 and 12. The result was a significant drop in the sales of school books during 2009 and 2010.
- The year 2008 saw the introduction of the FET Curriculum at colleges at NQF level 3 and 2009 at level 4. Significant growth in the sale of textbooks was recorded in these years, but this surge largely fell away in 2010.
- The sale of locally published educational books recorded a sharp decline of 19.3% in 2009 and a further decline of 8.1% in 2010.
- The total income derived from these sales declined by 25.8% from R1,621,786,000 in 2008 to R1,202,939,000 in 2010.
- The sale of imported educational books was virtually constant over the reporting period.
- Electronic books recorded a small increase but from a very low base.
- The year 2008 saw the end of a state programme introducing non-book teaching aids to schools, and hence a sharp decline in such income in 2009. The sales income more than doubled in 2010 compared to 2009 as new products were developed for the schools market.
- A few local educational publishers have been successful in exporting school books to neighbouring countries when the home market demand declined. Sharp income growth was recorded in 2009 and 2010.
- The sales of rights and book-related services contributed very little to this sub-sector’s total income

Fig. 2.4a Relative contribution to total income by category of income: Education sub-sector

Contribution to total income	2008	2009	2010
Local sales of locally published books	92.8%	90.4%	88.1%
Local sales of imported books	5.8%	6.2%	7.7%
Local sales of electronic books	0.0%	0.1%	0.1%
Local sales of non-book products	1.2%	0.8%	1.8%
Total local sales of products	**99.8%**	**97.5%**	**97.6%**
Export of products	0.2%	2.5%	2.3%
Local sales rights	0.0%	0.0%	0.0%
Export sales rights	0.0%	0.0%	0.0%
Other book-related income	0.0%	0.0%	0.0%

Notes

- In a falling market the sale of imported educational books, mainly for the FET colleges, gained some market share from locally published books, albeit from a fairly low basis.
- The export of school books contributed 2.3% to total income in 2010, up from 0.2% in 2008.

Fig. 2.5 Total income by product category: Academic sub-sector

Academic products and services	2008	2009	2010
Local sales of locally published books	R 354,281,000	R 366,708,000	R 374,691,000
% Annual growth/decline		*3.5%*	*2.2%*
Local sales of imported books	R 65,375,000	R 69,277,000	R 66,512,000
% Annual growth/decline		*6.0%*	*-4.0%*
Local sales of electronic books	R 939,000	R 1,018,000	R 1,253,000
% Annual growth/decline		*8.4%*	*23.1%*
Local sales of non-book products	R 14,061,000	R 8,044,000	R 5,601,000
% Annual growth/decline		*-42.8%*	*-30.3%*
Total local sales of products	**R 434,656,000**	**R 445,047,000**	**R 448,057,000**
% Annual growth/decline		*2.4%*	*0.7%*
Export of products	R 15,079,000	R 20,090,000	R 25,853,000
% Annual growth/decline		*33.2%*	*28.7%*
Local sales of rights	R 2,800,000	R 926,000	R 892,000
% Annual growth/decline		*-66.9%*	*-3.7%*
Export sales of rights	R 0	R 0	R 0
% Annual growth/decline			
Other book-related income	R 82,272,000	R 102,931,000	R 124,362,000
% Annual growth/decline		*25.1%*	*20.8%*
Total income	**R 534,807,000**	**R 568,994,000**	**R 599,164,000**
% Annual growth/decline		*6.4%*	*5.3%*

Notes

- The surveys collected data only from locally based suppliers. In this sub-sector, foreign suppliers contribute significantly to total textbook sales by supplying booksellers and academic institutions directly. In the more comprehensive 2008 survey, such overseas suppliers were included in the survey, with an estimated 22.5% contribution to total sub-sector turnover. There is no evidence of this contribution having either increased or declined significantly over the reporting period. The main cost factor, the dollar and sterling exchange rates, was very stable over the reporting period.
- The income derived from the sale of locally published books in the home market recorded a year-on-year increase of 3.5% and 2.2% in 2009 and 2010 respectively. This is well below the inflation rate for the period. Although the number of registered students increased over the reporting period, bursary amounts for books were reduced by many institutions, or paid to students in the form of cash allowances, as opposed to being earmarked for textbook purchases only.
- The sales of imported textbooks was relatively flat over the reporting period, gaining a mere R1,200,000 over the three years.
- The sales of electronic academic books remained stable off a very low base. Most suppliers appear to be opting for the alternative of an online reference service.
- Non-book products recorded a steady decline, as CD-based products were replaced with online services.
- The total income derived from the sale of products in the home market increased by only 2.4% year-on-year in 2009 and 0.7% in 2010.
- The export of products increased sharply by 33.3% and 28.7% respectively.
- The sale of rights contributed very little to total income.

- Online services account for nearly all the income recorded under other book-related income, and increased by 25.1% in 2009 and 20.8% in 2010. Approximately 30% of this growth in income can be attributed to the conversion of CD based products to online services, and the remaining 70% to the development of new products and increased use of existing services.
- The total income of the academic sub-sector increased by 6.4% year-on-year in 2009 and a further 5.3% in 2010, making it the fastest growing sector over the reporting period.

Fig. 2.5a Relative contribution to total income by category of income: Academic sub-sector

Contribution to total income	**2008**	**2009**	**2010**
Local sales of locally published books	66.2%	64.4%	62.5%
Local sales of imported books	12.2%	12.2%	11.1%
Local sales of electronic books	0.2%	0.2%	0.2%
Local sales of non-book products	2.6%	1.4%	0.9%
Total local sale of products	**81.3%**	**78.2%**	**74.8%**
Export of products	2.8%	3.5%	4.3%
Local sales of rights	0.5%	0.2%	0.1%
Export sales of rights	0.0%	0.0%	0.0%
Other book-related income	15.4%	18.1%	20.8%

Notes

- Locally published books sold in the home market recorded a diminished contribution to total sub-sector income from 66.2% in 2008 to 62.5% in 2010.
- Imported books sold by local suppliers in the home market recorded a decline in market share from 12.2% in 2008 to 11.1% in 2010.
- The export of products recorded a gain in market share from 2.8% to 4.3% over the three-year period.
- The income derived from online services gained market share from 15.4% to 20.8%, mainly in the professional book sub-category of this industry sub-sector.

Fig. 2.6 Total income in home market by source of product

All industry sub-sectors	**2008**	**2009**	**2010**
Local sales of locally produced products	R 2,379,923,000	R 2,058,880,000	R 1,993,729,000
% Annual growth/decline		*-13.5%*	*-3.2%*
Local sales of imported product	R 734,437,000	R 688,490,000	R 715,199,000
% Annual growth/decline		*-6.3%*	*3.9%*
Local sales of all products	R 3,114,360,000	R 2,747,370,000	R 2,708,928,000
% Annual growth/decline		*-11.8%*	*-1.4%*

Notes

- The home market sales of locally produced products (print books, electronic books and non-book products) declined by 13.5% and 3.2% respectively, and cumulatively by 16.2% over the three-year period.
- Imported products recorded a decline in income of 6.3% in 2009 followed by an increase of 3.9% in 2010, resulting in a cumulative decline of 2.6% over the reporting period.
- In total the home market shrank by 11.8% in 2009 and 1.4% in 2010, and cumulatively by 13.0% over the three years.

3 Turnover by category of sales outlet (2008 and 2010 only)

Not all turnovers could be allocated to the sales outlet categories specified above. The totals will hence not correspond exactly with those reported in other sections of the report. Only home market sales were taken into consideration.

3.1 At net turnover values

Fig. 3.1 Total net turnover by sales outlet category: General trade products

	2008		2010	
General trade	**Net turnover**	**%**	**Net turnover**	**%**
National bookseller chains	R 502,006,000	70.3%	R 509,288,000	70.4%
% Growth/decline over 2 years			*1.5%*	
Independent booksellers	R 67,623,000	9.5%	R 67,468,000	9.3%
% Growth/decline over 2 years			*-0.2%*	
Non-book retail outlets	R 19,732,000	2.8%	R 20,151,000	2.8%
% Growth/decline over 2 years			*2.1%*	
Wholesalers, etc.	R 23,272,000	3.3%	R 17,703,000	2.4%
% Growth/decline over 2 years			*-23.9%*	
Internet booksellers	R 16,841,000	2.4%	R 19,682,000	2.7%
% Growth/decline over 2 years			*16.9%*	
Book clubs	R 39,866,000	5.6%	R 39,990,000	5.5%
% Growth/decline over 2 years			*0.3%*	
Corporation direct sales	R 6,973,000	1.0%	R 9,787,000	1.4%
% Growth/decline over 2 years			*40.4%*	
Public direct sales	R 9,825,000	1.4%	R 7,724,000	1.1%
% Growth/decline over 2 years			*-21.4%*	
Libraries	R 13,632,000	1.9%	R 24,569,000	3.4%
% Growth/decline over 2 years			*80.2%*	
State & provincial departments	R 3,428,000	0.5%	R 501,000	0.1%
% Growth/decline over 2 years			*-85.4%*	
Schools	R 3,971,000	0.6%	R 2,683,000	0.4%
% Growth/decline over 2 years			*-32.4%*	
School book distributors	R 6,892,000	1.0%	R 3,761,000	0.5%
% Growth/decline over 2 years			*-45.4%*	
Total	**R 714,061,000**		**R 723,307,000**	
% Growth/decline over 2 years			*1.3%*	

Notes

- General trade books are sold to schools and academic institutions as set works. This accounts for the turnovers reported in the distribution channels serving schools and tertiary education institutions.
- Over the three-year reporting period only minor changes in the distribution patterns of general trade books were recorded.
- The total turnover in the home market increased by 1.3% to R 723,307,000. The national bookseller chains recorded an increase of 1.5% to R 509,288,000, thus increasing their share of the market from 70.3% to 70.4%.
- The sharp fall in turnover recorded in the categories serving schools corresponds to the decline in the sale of educational products.

Fig. 3.2 Total net turnover by sales outlet category: Religious trade products

	2008		2010	
Religious trade	**Net turnover**	**%**	**Net turnover**	**%**
National bookseller chain	R 122,152,000	64.2%	R 161,480,000	81.4%
% Growth/decline over 2 years			*32.2%*	
Independent bookseller	R 42,768,000	22.5%	R 18,533,000	9.3%
% Growth/decline over 2 years			*-56.7%*	
Non-book retail outlet	R 18,577,000	9.8%	R 7,567,000	3.8%
% Growth/decline over 2 years			*-59.3%*	
Wholesalers, etc.	R 2,064,000	1.1%	R 494,000	0.2%
% Growth/decline over 2 years			*-76.1%*	
Internet booksellers	R 700,000	0.4%	R 3,906,000	2.0%
% Growth/decline over 2 years			*458.0%*	
Book clubs	R 3,678,000	1.9%	R 1,956,000	1.0%
% Growth/decline over 2 years			*-46.8%*	
Public direct sales	R 297,000	0.2%	R 2,406,000	1.2%
% Growth/decline over 2 years			*710.1%*	
Libraries	R 0	0.0%	R 51,000	0.0%
% Growth/decline over 2 years				
Total	**R 190,236,000**		**R 198,388,000**	
% Growth/decline over 2 years			*4.3%*	

Notes

- The significant increase in distribution through national bookseller chains is due to the rapid expansion of one of the religious bookseller chains.

Fig. 3.3 Total net turnover by sales outlet category: Educational products

	2008		2010	
Educational sector	**Net turnover**	**%**	**Net turnover**	**%**
Booksellers	R 495,935,000	29.4%	R 368,310,000	27.0%
% Growth/decline over 2 years			*-25.7%*	
Non-book retail outlet	R 139,000	0.0%	R 367,000	0.0%
% Growth/decline over 2 years			*164.0%*	
Wholesalers, etc.	R 12,386,000	0.7%	R 1,935,000	0.1%
% Growth/decline over 2 years			*-84.4%*	
Internet booksellers	R 1,130,000	0.1%	R 359,000	0.0%
% Growth/decline over 2 years			*-68.2%*	
Book clubs	R 228,000	0.0%	R 26,000	0.0%
% Growth/decline over 2 years			*-88.6%*	
Corporation direct sales	R 852,000	0.1%	R 33,061,000	2.4%
% Growth/decline over 2 years			*3780.4%*	
Public direct sales	R 1,848,000	0.1%	R 6,735,000	0.5%
% Growth/decline over 2 years			*264.4%*	
Libraries	R 20,581,000	1.2%	R 5,743,000	0.4%
% Growth/decline over 2 years			*-72.1%*	
State & provincial departments	R 772,077,000	45.8%	R 448,372,000	32.8%
% Growth/decline over 2 years			*-41.9%*	
Schools	R 124,932,000	7.4%	R 89,645,000	6.6%
% Growth/decline over 2 years			*-28.2%*	
School book distributors	R 256,537,000	15.2%	R 406,903,000	29.8%
% Growth/decline over 2 years			*58.6%*	
Total	**R 1,686,645,000**		**R 1,365,024,000**	
% Growth/decline over 2 years			*-19.1%*	

Notes

- Significant changes occurred in the distribution patterns of educational product suppliers. These can be attributed to the following changes:
  - A change in the composition of product. In 2008 FET textbooks constituted 3.7% of total educational product sales, and ABET workbooks 2.2%. In 2010 the corresponding contributions were 5.8% and 0.6% respectively.
  - The demise of a large national educational bookseller in 2008 reduced the contribution made by this category of outlet.
  - Changes in departmental purchase policies and practices.
- The turnovers recorded above include the sales of general trade books supplied as set works or readers by general trade suppliers.
- The sharp decline in turnover recorded by wholesalers can be attributed to a very successful promotion in 2008 of school dictionaries through a national wholesaler (not repeated in 2010).
- Corporate direct sales are made up largely of direct purchases of FET textbooks by colleges and ABET workbooks by training institutions.
- The state and provincial education departments purchased much less directly from publishers, and channelled their procurement through school book distributors (the holders of provincial supply tenders) instead.

Fig. 3.4 Total net turnover by sales outlet category: Academic products

	2008		2010	
Academic sector	**Net turnover**	**%**	**Net turnover**	**%**
National bookseller chain	R 176,577,000	41.2%	R 214,632,000	46.7%
% Growth/decline over 2 years			*21.6%*	
Independent bookseller	R 32,736,000	7.6%	R 49,851,000	10.8%
% Growth/decline over 2 years			*52.3%*	
Non-book retail outlet	R 50,000	0.0%	R 153,000	0.0%
% Growth/decline over 2 years			*206.0%*	
Wholesalers, etc.	R 260,000	0.1%	R 0	0.0%
% Growth/decline over 2 years			*-100.0%*	
Internet booksellers	R 5,702,000	1.3%	R 4,408,000	1.0%
% Growth/decline over 2 years			*-22.7%*	
Book clubs	R 39,000	0.0%	R 0	0.0%
% Growth/decline over 2 years			*-100.0%*	
Corporation direct sales	R 194,638,000	45.4%	R 165,104,000	35.9%
% Growth/decline over 2 years			*-15.2%*	
Libraries	R 2,210,000	0.5%	R 3,778,000	0.8%
% Growth/decline over 2 years			*71.0%*	
State & provincial departments	R 1,497,000	0.3%	R 47,000	0.0%
% Growth/decline over 2 years			*-96.9%*	
Schools	R 13,244,000	3.1%	R 19,808,000	4.3%
% Growth/decline over 2 years			*49.6%*	
School book distributors	R 1,571,000	0.4%	R 1,013,000	0.2%
% Growth/decline over 2 years			*-35.5%*	
Total	**R 428,524,000**		**R 459,507,000**	
% Growth/decline over 2 years			*7.2%*	

Notes

- The income derived from the online services offered to professional corporations and individual practitioners is excluded from the above turnover values
- Academic textbooks are sold largely through booksellers, and professional products directly to corporations and state departments.
- Some academic publishers publish for the FET market. These sales are reflected in the schools and school book distributor categories.

3.2 At gross retail values

The analysis of net turnover per sales outlet category does not accurately reflect the flow of product, because of the differing discount structures among the outlet categories. The analyses below are done at uniform price values, or gross retail values, and are hence more representative of the flow of product to the market.

Fig. 3.5 Total turnover at gross retail price values by sales outlet category: General trade products

	2008		2010	
General trade	**Gross turnover**	**%**	**Gross turnover**	**%**
National bookseller chain	R 857,388,000	73.2%	R 921,150,000	70.5%
Independent bookseller	R 91,599,000	7.8%	R 111,475,000	8.5%
Non-book retail outlet	R 32,367,000	2.8%	R 32,794,000	2.5%
Wholesalers, etc.	R 42,273,000	3.6%	R 29,662,000	2.3%
Internet booksellers	R 25,440,000	2.2%	R 35,028,000	2.7%
Book clubs	R 85,518,000	7.3%	R 103,188,000	7.9%
Corporation direct sales	R 3,944,000	0.3%	R 14,265,000	1.1%
Public direct sales	R 766,000	0.1%	R 11,959,000	0.9%
Libraries	R 15,643,000	1.3%	R 38,036,000	2.9%
State & provincial departments	R 4,775,000	0.4%	R 851,000	0.1%
Schools	R 5,799,000	0.5%	R 4,236,000	0.3%
School book distributors	R 5,856,000	0.5%	R 4,420,000	0.3%
Total	**R 1,171,368,000**		**R 1,307,064,000**	

Notes

- Whereas the net turnover tables recorded an increase of 1.3% between 2008 and 2010, the gross turnover values record an increase of 11.6% in the retail value common denominator of these sales through the various categories of outlets.
- This discrepancy can be attributed to:
  - Increases in the average discounts granted to the various outlets.
  - An increased market share of those outlets granted larger than average trade discounts by suppliers. (Retail price values are directly proportional to discounts granted by suppliers.) This is illustrated by the sale to book clubs, which are granted an average of 68% discount on the recommended retail price. Their contribution to total turnover value in 2010 increased from 5.5% at net turnover value to 7.9% at retail price value.

Fig. 3.5a Average trade discount granted: General trade sub-sector

General trade sub-sector	2008	2010
Net turnover value	R 714,061,000	R 723,307,000
% Growth / decline over 2 years		*1.3%*
Retail price value	R 1,171,368,000	R 1,307,064,000
% Growth / decline over 2 years		*11.6%*
Average discount granted	39.0%	44.7%
Retail value realised by supplier	61.0%	55.3%

Notes

- A combination in the factors noted above resulted in suppliers retaining only 55.3% of the retail price value of products sold in 2010 as compared to 61.0% in 2008.

Fig. 3.6 Total turnover at gross retail price values by sales outlet category: Religious trade products

	2008		2010	
Religious trade	**Gross turnover**	**%**	**Gross turnover**	**%**
National bookseller chain	R 217,664,000	67.3%	R 278,673,000	82.5%
Independent bookseller	R 63,787,000	19.7%	R 31,040,000	9.2%
Non-book retail outlet	R 26,956,000	8.3%	R 11,297,000	3.3%
Wholesalers, etc.	R 2,971,000	0.9%	R 847,000	0.3%
Internet booksellers	R 1,273,000	0.4%	R 7,102,000	2.1%
Book clubs	R 10,508,000	3.2%	R 6,111,000	1.8%
Public direct sales	R 457,000	0.1%	R 2,550,000	0.8%
Libraries	R 0	0.0%	R 79,000	0.0%
Total	**R 323,616,000**		**R 337,699,000**	

Fig. 3.6a Average trade discount granted: Religious trade sub-sector

Religious trade sub-sector	**2008**	**2010**
Net turnover value	R 190,236,000	R 198,388,000
% Growth / decline over 2 years		*4.3%*
Retail price value	R 323,616,000	R 337,699,000
% Growth / decline over 2 years		*4.4%*
Average discount granted	41.2%	41.3%
Retail value realised by supplier	58.8%	58.7%

Notes

- There has been virtually no change in the average discount granted to retailers and end-users, despite a significant change in the mode of distribution through booksellers. This is because religious suppliers in general grant the same discounts to all booksellers.

Fig. 3.7 Total turnover at gross retail price values by sales outlet category: Educational products

	2008		2010	
Educational sector	**Gross turnover**	**%**	**Gross turnover**	**%**
Booksellers	R 716,263,000	30.9%	R 536,231,000	27.6%
Non-book retail outlets	R 194,000	0.0%	R 523,000	0.0%
Wholesalers, etc.	R 17,364,000	0.7%	R 2,931,000	0.2%
Internet booksellers	R 1,621,000	0.1%	R 593,000	0.0%
Book clubs	R 327,000	0.0%	R 31,000	0.0%
Corporation direct sales	R 1,297,000	0.1%	R 44,106,000	2.3%
Public direct sales	R 670,000	0.0%	R 8,555,000	0.4%
Libraries	R 30,777,000	1.3%	R 8,390,000	0.4%
State & provincial departments	R 1,088,517,000	47.0%	R 639,077,000	32.9%
Schools	R 149,922,000	6.5%	R 123,763,000	6.4%
School book distributors	R 310,889,000	13.4%	R 577,148,000	29.7%
Total	R 2,317,841,000		R 1,941,348,000	

Fig. 3.7a Average trade discount granted: Education sub-sector

Education sub-sector	**2008**	**2010**
Net turnover value	R 1,686,645,000	R 1,365,024,000
% Growth / decline over 2 years		*-19.1%*
Retail price value	R 2,317,841,000	R 1,941,348,000
% Growth / decline over 2 years		*-16.2%*
Average discount granted	27.2%	29.7%
Retail value realised by supplier	72.8%	70.3%

Notes

- The change in distribution patterns cost educational product suppliers an additional 2.5% in discount.

Fig. 3.8 Total turnover at gross retail price values by sales outlet category: Academic products

	2008		2010	
Academic sector	**Gross turnover**	**%**	**Gross turnover**	**%**
National bookseller chain	R 261,108,000	49.8%	R 318,087,000	53.1%
Independent bookseller	R 49,503,000	9.4%	R 73,065,000	12.2%
Non-book retail outlet	R 77,000	0.0%	R 186,000	0.0%
Wholesalers, etc.	R 453,000	0.1%	R 1,000	0.0%
Internet booksellers	R 7,740,000	1.5%	R 6,394,000	1.1%
Direct sales to end-users	R 196,067,000	37.4%	R 166,503,000	27.8%
Libraries	R 3,459,000	0.7%	R 5,328,000	0.9%
State & provincial departments	R 2,265,000	0.4%	R 58,000	0.0%
Schools	R 3,288,000	0.6%	R 28,075,000	4.7%
School book distributors	R 502,000	0.1%	R 1,406,000	0.2%
Total	**R 524,462,000**		**R 599,103,000**	

Fig. 3.8a Average trade discount granted: Academic sub-sector

Academic sub-sector	**2008**	**2010**
Net turnover value	R 428,524,000	R 459,507,000
% Growth / decline over 2 years		*7.2%*
Retail price value	R 524,462,000	R 599,103,000
% Growth / decline over 2 years		*14.2%*
Average discount granted	18.3%	23.3%
Retail value realised by supplier	81.7%	76.7%

Notes

- The average discount granted by academic suppliers is low as a significant proportion of professional products are sold directly to end-users at no discount or a very small discount.
- The sharply reduced sales to such end-users has allowed the average discount to increase from 18.3% to 23.3% off the recommended retail price.
- However, the income derived from online services provided is not included in the table above, and will reverse the trend of an increased average trade discount.

Fig. 3.8b Average trade discount granted: Academic booksellers

Academic booksellers	**2008**	**2010**
Net turnover value	R 209,313,000	R 264,483,000
% Growth / decline over 2 years		*26.4%*
Retail price value	R 310,611,000	R 391,152,000
% Growth / decline over 2 years		*25.9%*
Average discount granted	32.6%	32.4%
Retail value realised by supplier	67.4%	67.6%

Notes

- Most academic textbooks are sold through booksellers. The average discounts granted to them by suppliers remained virtually constant over the three-year period.

4 Educational product turnover by province (2008 and 2010 only)

Fig. 4.1 Total net turnover of educational products by province

Net turnover: Education	**2008**	**2010**	**% Change over 3 years**
Western Cape	R 216,696,000	R 177,060,000	-18.3%
Eastern Cape	R 318,770,000	R 178,929,000	-43.9%
KwaZulu-Natal	R 260,337,000	R 227,407,000	-12.6%
Northern Cape	R 29,324,000	R 14,167,000	-51.7%
Free State	R 31,386,000	R 45,898,000	46.2%
North West	R 94,806,000	R 111,648,000	17.8%
Gauteng	R 469,497,000	R 279,777,000	-40.4%
Mpumalanga	R 166,515,000	R 120,685,000	-27.5%
Limpopo	R 154,605,000	R 194,820,000	26.0%
Total provincial departments	R 1,741,936,000	R 1,350,391,000	-22.5%
National Dept. of Education	R 13,489,000	R 7,977,000	-40.9%
Total	R 1,755,425,000	R 1,358,368,000	-22.6%

Notes

- The above turnover values are for the sale of all educational products to the various provinces, including the sale of set works by general trade publishers and FET textbooks by academic publishers.
- Not all educational sales could be allocated to specific provinces.
- The average decrease in the value of sales of educational products was 22.6%.
- This decrease was largest in the Northern Cape (51.7%), Eastern Cape (43.9%), Gauteng (40.4%), and Mpumalanga (27.5%), who all exceeded the average 22.6% decrease in turnover.
- The decrease in educational product sales was least in KwaZulu-Natal (12.6%) and the Western Cape (18.3%), whose decreases were below the national average.
- Two provinces recorded substantial increases in turnover over the reporting period: the Free State recorded an increase of 46.2% (albeit from a relatively low base in terms of school enrolment numbers), and the North West province an increase of 17.8%.

5 Print book turnover

The turnover values in this section include the values of exported books.

Fig. 5.1 Total book turnover by industry sub-sector

All industry sub-sectors	2008	2009	2010
Turnover general trade books	R 741,910,000	R 724,584,000	R 740,572,000
% Growth/decline		*-2.3%*	*2.2%*
Turnover religious trade books	R 202,374,000	R 179,753,000	R 202,155,000
% Growth/decline		*-11.2%*	*12.5%*
Turnover educational books	R 1,725,771,000	R 1,434,685,000	R 1,340,582,000
% Growth/decline		*-16.9%*	*-6.6%*
Turnover academic books	R 434,735,000	R 456,075,000	R 467,056,000
% Growth/decline		*4.9%*	*2.4%*
Turnover all books	R 3,104,790,000	R 2,795,097,000	R 2,750,365,000
% Growth/decline		*-10.0%*	*-1.6%*

Notes

- Three of the four sub-sectors recorded a decline in turnover over the three year period, with only the academic sub-sector recording a growth of 7.4% over the reporting period.
- The sharpest decline was recorded in 2009, with three of the four sub-sectors returning to growth in 2010.
- The sharp decline in the education sub-sector can be ascribed to the end of the implementation of the new school curriculum in 2008 and the FET curriculum in 2009.
- Across all sub-sectors the turnover of books declined by 10.0% in 2009 and a further 1.6% in 2010.

Fig. 5.2 Turnover of book product by sub-sector: General trade

General trade sub-sector	2008	2009	2010
Turnover local general trade books	R 270,259,000	R 268,466,000	R 281,501,000
% Growth/decline		*-0.7%*	*4.9%*
Turnover imported general trade books	R 471,651,000	R 456,118,000	R 459,071,000
% Growth/decline		*-3.3%*	*0.6%*
Turnover all general trade books	R 741,910,000	R 724,584,000	R 740,572,000
% Growth/decline		*-2.3%*	*2.2%*
Local book market share	36.4%	37.1%	38.0%

Notes

- The general trade sub-sector recorded a decline in turnover in both locally published and imported books in 2009, and a return to growth in both these categories in 2010. The rate of growth was well below the inflation rate for the reporting period.
- Locally published general trade books recorded an increase in their share of the market in both 2009 and 2010. The decline in turnover of imported books was greater than that of local product in 2009, and the return to growth smaller in 2010.

Fig. 5.3 Turnover of book product by sub-sector: Religious trade

Religious trade sub-sector	2008	2009	2010
Turnover local religious trade books	R 105,997,000	R 106,576,000	R 118,104,000
% Growth/decline		*0.5%*	*10.8%*
Turnover imported religious trade books	R 96,377,000	R 73,177,000	R 84,051,000
% Growth/decline		*-24.1%*	*14.9%*
Turnover all religious trade books	R 202,374,000	R 179,753,000	R 202,155,000
% Growth/decline		*-11.2%*	*12.5%*
Local book market share	52.4%	59.3%	58.4%

Notes

- The turnover of locally published religious trade books recorded growth in both 2009 and 2010, whereas imported books recorded a sharp decline in turnover in 2009 and a partial recovery in 2010, ending the period 12.8% below the 2008 turnover values.
- A prominent local religious trade publisher terminated all its import agency agreements in 2009. Most of these had been taken up by its competitors by 2010. This publisher is not part of the comparative sample for this report, and its loss of these agencies is not the reason for the 2009 decline. However, its competitors are part of the comparative sample, and their new import agencies will account for some of the increase in turnover in 2010.
- The growth in market share of locally published books may be temporary as the issue around the changed import agencies settles.

Fig. 5.4 Turnover of book product by sub-sector: Education

Education sub-sector	2008	2009	2010
Turnover local educational books	R 1,624,737,000	R 1,344,767,000	R 1,235,017,000
% Growth/decline		*-17.2%*	*-8.2%*
Turnover imported educational books	R 101,034,000	R 89,918,000	R 105,565,000
% Growth/decline		*-11.0%*	*17.4%*
Turnover all educational books	R 1,725,771,000	R 1,434,685,000	R 1,340,582,000
% Growth/decline		*-16.9%*	*-6.6%*
Local book market share	94.1%	93.7%	92.1%

Notes

- The turnover of locally published education books fell sharply over the reporting period as the program to provide school books for the changed curriculum ended in 2008. Level 4 of the NQF curriculum for colleges received new textbooks in 2009, cushioning the decline somewhat in that year.
- This decline in turnover would have been greater if some education publishers had not found export markets in neighbouring countries for some of their products.
- Imported educational books recorded a modest growth of 4.5% over the period from a low base.
- Locally published books still dominate the market with a share of 94.1% to 92.1%.

Fig. 5.5 Turnover of book products by sub-sector: Academic

Academic sub-sector	**2008**	**2009**	**2010**
Turnover local academic books	R 369,360,000	R 386,798,000	R 400,544,000
% Growth/decline		*4.7%*	*3.6%*
Turnover imported academic books	R 65,375,000	R 69,277,000	R 66,512,000
% Growth/decline		*6.0%*	*-4.0%*
Turnover all academic books	R 434,735,000	R 456,075,000	R 467,056,000
% Growth/decline		*4.9%*	*2.4%*
Local book market share	85.0%	84.8%	85.8%

Notes

- The academic sub-sector recorded growth in both years and an overall growth of 7.4% over the reporting period.
- The sub-sector consists of two equally strong components, viz. academic textbooks for use by students at tertiary institutions, and professional books used largely by legal and accounting practitioners. These two product categories show vastly different distribution and growth patterns. An attempt was made to report on them separately, but with only two major players in the professional book trade this could not be done without compromising the confidentially of the data supplied.
- Only local suppliers participated in the surveys. Overseas suppliers account for an estimated 12% to 15% of academic textbooks, raising the market share for imported books, whether supplied by local suppliers or directly imported by booksellers from abroad, to nearly 30%.

Fig. 5.6 Turnover by industry sub-sector and product sub-category: General trade

General trade sub-sector	**2008**	**2009**	**2010**
Turnover general trade fiction	R 253,325,000	R 340,477,000	R 327,981,000
% Growth/decline		*34.4%*	*-3.7%*
Turnover general trade non-fiction	R 488,585,000	R 384,107,000	R 412,591,000
% Growth/decline		*-21.4%*	*7.4%*
Turnover general trade books	R 741,910,000	R 724,584,000	R 740,572,000
% Growth/decline		*-2.3%*	*2.2%*

Notes

- Fiction recorded a growth of 34.4% in 2009 and a decline of 3.7% in 2010. The 2010 turnover was 29.5% higher than the 2008 turnover.
- Non-fiction declined by 21.4% in 2009 and then grew by 7.4% in 2010, ending the period with a decline of 15.6% on the 2008 turnover.

Fig. 5.7 Turnover by industry sub-sector and product sub-category: Education

Education sub-sector	**2008**	**2009**	**2010**
Turnover school books	R 1,633,582,000	R 1,320,760,000	R 1,260,923,000
% Growth/decline		*-19.1%*	*-4.5%*
Turnover FET textbooks	R 56,559,000	R 103,526,000	R 72,846,000
% Growth/decline		*83.0%*	*-29.6%*
Turnover ABET workbooks	R 35,630,000	R 10,399,000	R 6,813,000
% Growth/decline		*-70.8%*	*-34.5%*
Turnover educational books	R 1,725,771,000	R 1,434,685,000	R 1,340,582,000
% Growth/decline		*-16.9%*	*-6.6%*

Notes

- The total of figures 5.4 and 5.7 correspond as all respondents provided separate turnover values for each product sub-category.
- School books recorded a decline of 22.8% in turnover over the reporting period.
- FET textbooks peaked in 2009 with the supply of books for the new NQF level 4 curriculum, and then fell sharply in 2010.
- The turnover derived from the sale of ABET workbooks recorded a steady decline in sales over the period.

Fig. 5.8 Turnover of books by industry sub-sector and product sub-category: Academic

Academic sub-sector	**2008**	**2009**	**2010**
Turnover academic textbooks	R 251,181,000	R 256,147,000	R 266,171,000
% Growth/decline		*2.0%*	*3.9%*
Turnover professional books	R 178,364,000	R 191,328,000	R 192,583,000
% Growth/decline		*7.3%*	*0.7%*
Turnover scholarly books	R 5,190,000	R 8,600,000	R 8,302,000
% Growth/decline		*65.7%*	*-3.5%*
Turnover academic books	R 434,735,000	R 456,075,000	R 467,056,000
% Growth/decline		*4.9%*	*2.4%*

Notes

- Academic textbooks recorded growth of 2.0% in 2009 and a further 3.9% in 2010. These growth rates are well below the inflation rate for the period.
- Professional books recorded growth rates of 7.3% and 0.7% respectively.
- The sale of scholarly books is still very limited. Of the four local university presses, only one responded (UCT Press was included in the Juta Publishers data).

6 Print book turnover by origin

Fig. 6.1 Turnover of books by origin and product sub-category: General trade fiction

General trade: Fiction	**2008**	**2009**	**2010**
Turnover local fiction	R 82,844,000	R 98,034,000	R 91,903,000
% Growth/decline		*18.3%*	*-6.3%*
Turnover imported fiction	R 170,481,000	R 242,443,000	R 236,078,000
% Growth/decline		*42.2%*	*-2.6%*
Turnover fiction	R 253,325,000	R 340,477,000	R 327,981,000
% Growth/decline		*34.4%*	*-3.7%*
Market share of local fiction	32.7%	28.8%	28.0%

Notes

- The turnover of locally published fiction grew by 18.3% in 2009 and then declined by 6.3% in 2010. The overall growth over the period was 10.9%.
- Imported fiction grew by 42.2% in 2009 and declined by 2.6% the following year. Its overall growth in turnover was 38.5%.
- As a result of the abovementioned trends, the market share of locally published fiction fell from 32.7% in 2008 to 28.0% in 2010.

Fig. 6.2 Turnover of books by origin and product sub-category: General trade non-fiction

General trade: Non-Fiction	**2008**	**2009**	**2010**
Turnover local non-fiction	R 187,415,000	R 170,432,000	R 189,598,000
% Growth/decline		*-9.1%*	*11.2%*
Turnover imported non-fiction	R 301,170,000	R 213,675,000	R 222,993,000
% Growth/decline		*-29.1%*	*4.4%*
Turnover non-fiction	R 488,585,000	R 384,107,000	R 412,591,000
% Growth/decline		*-21.4%*	*7.4%*
Market share of local non-fiction	38.4%	44.4%	46.0%

Notes

- Locally published non-fiction declined by 9.1% in 2009 and grew by 11.2% the following year, ending the reporting period with a net growth of 1.2%.
- Imported non-fiction recorded a new decline of 26.0% over the reporting period.
- The result of the abovementioned trends was an increase in the market share of locally published non-fiction from 38.4% in 2008 to 46.0% in 2010.

Fig. 6.3 Turnover of books by origin and product sub-category: School books

School books	2008	2009	2010
Turnover local school books	R 1,536,333,000	R 1,233,068,000	R 1,156,738,000
% Growth/decline		*-19.7%*	*-6.2%*
Turnover imported school books	R 97,249,000	R 87,692,000	R 104,185,000
% Growth/decline		*-9.8%*	*18.8%*
Turnover school books	R 1,633,582,000	R 1,320,760,000	R 1,260,923,000
% Growth/decline		*-19.1%*	*-4.5%*
Market share of local school books	94.0%	93.4%	91.7%

Notes

- The decline in the turnover of locally published school books was greater than that of imported school books, giving rise to a decline in the market share of locally published school books from 94.0% to 91.7% over the three-year period.

Fig. 6.4 Turnover of books by origin and product sub-category: FET textbooks

FET textbooks	2008	2009	2010
Turnover local FET textbooks	R 55,624,000	R 102,191,000	R 71,466,000
% Growth/decline		*83.7%*	*-30.1%*
Turnover imported FET textbooks	R 935,000	R 1,335,000	R 1,380,000
% Growth/decline		*42.8%*	*3.4%*
Turnover FET textbooks	R 56,559,000	R 103,526,000	R 72,846,000
% Growth/decline		*83.0%*	*-29.6%*
Market share of local FET textbooks	98.3%	98.7%	98.1%

Notes

- The turnover of locally published FET textbooks reached a peak in 2009 with the introduction of the new NQF level 4 curriculum.
- At this more advanced level some imported books were introduced in 2009 and retained their new share in 2010.
- Locally published FET textbooks books dominate the market with a 98% market share throughout the reporting period.

Fig. 6.5 Turnover of books by origin and product sub-category: ABET workbooks

ABET Workbooks	2008	2009	2010
Turnover local ABET workbooks	R 32,780,000	R 9,508,000	R 6,813,000
% Growth/decline		*-71.0%*	*-28.3%*
Turnover imported ABET workbooks	R 2,850,000	R 891,000	R 0
% Growth/decline		*-68.7%*	*-100.0%*
Turnover ABET workbooks	R 35,630,000	R 10,399,000	R 6,813,000
% Growth/decline		*-70.8%*	*-34.5%*
Market share of local ABET workbooks	92.0%	91.4%	100.0%

Notes

- The turnover of ABET workbooks fell sharply during the reporting period, but it remained dominated by locally published books.

Fig. 6.6 Turnover of books by origin and product sub-category: Academic textbooks

Academic textbooks	2008	2009	2010
Turnover local academic textbooks	R 198,977,000	R 223,046,000	R 233,672,000
% Growth/decline		*12.1%*	*4.8%*
Turnover imported academic textbooks	R 52,204,000	R 33,101,000	R 32,499,000
% Growth/decline		*-36.6%*	*-1.8%*
Turnover academic textbooks	R 251,181,000	R 256,147,000	R 266,171,000
% Growth/decline		*2.0%*	*3.9%*
Market share of academic textbooks	79.2%	87.1%	87.8%

Notes

- Locally published academic textbooks recorded a growth in turnover of 12.1% in 2009 and a further 4.8% in 2010, resulting in a cumulative growth rate of 17.4%, well above the inflation rate for this period.
- Imported academic textbooks recorded a decline of 36.6% in 2009 and a further decline of 1.8% in 2010, ending the reporting period with a net loss of turnover of 37.7%.
- However, the direct importingof academic textbooks by booksellers and end-users fell outside the scope of the surveys. Any changes in turnover trends of direct importers may influence the above results.
- The market share of locally published academic textbooks expressed as a percentage of all locally supplied books increased from 79.2% to 87.8%.

Fig. 6.7 Turnover of books by origin and product sub-category: Professional books

Professional books	2008	2009	2010
Turnover local professional books	R 167,676,000	R 160,395,000	R 163,166,000
% Growth/decline		*-4.3%*	*1.7%*
Turnover imported professional books	R 10,688,000	R 30,933,000	R 29,417,000
% Growth/decline		*189.4%*	*-4.9%*
Turnover professional books	R 178,364,000	R 191,328,000	R 192,583,000
% Growth/decline		*7.3%*	*0.7%*
Market share of local professional books	94.0%	83.8%	84.7%

Notes

- Locally published printed professional books recorded a decline of 4.3% in 2009 and a growth of 1.7% in 2010, ending the reporting period 2.7% lower in 2010.
- Professional books are the market niche most affected by the trend of increased digitisation, where print books are being replaced by electronic books and online services. As a whole this market sub-sector recorded above average growth.
- Imported professional books nearly tripled in turnover over the period.
- The market share of locally published books declined from 94.0% to 84.7% over the three-year period.

Fig. 6.8 Turnover of books by origin and product sub-category: Scholarly books

Scholarly books	2008	2009	2010
Turnover local scholarly books	R 2,707,000	R 3,357,000	R 3,706,000
% Growth/decline		*24.0%*	*10.4%*
Turnover imported scholarly books	R 2,483,000	R 5,243,000	R 4,596,000
% Growth/decline		*111.2%*	*-12.3%*
Turnover scholarly books	R 5,190,000	R 8,600,000	R 8,302,000
% Growth/decline		*65.7%*	*-3.5%*
Market share of local scholarly books	52.2%	39.0%	44.6%

Notes

- Participation in the surveys in this niche of the market was poor, and the sample may not represent the industry sufficiently to be able to draw general conclusions on the state of the industry.
- Generally speaking a growth of 60% over the period was recorded, with the share of locally published books declining from 52.2% to 44.6%.

7 Turnover of local books by language

Fig. 7.1 Turnover of local books by language: General trade fiction

General Trade: Fiction	**2008**	**2009**	**2010**
Turnover local fiction: English	R 27,310,000	R 24,439,000	R 18,821,000
% Growth / decline		*-10.5%*	*-23.0%*
Turnover local fiction: Afrikaans	R 63,801,000	R 73,156,000	R 71,560,000
% Growth / decline		*14.7%*	*-2.2%*
Turnover local fiction: African languages	R 549,000	R 937,000	R 672,000
% Growth / decline		*70.7%*	*-28.3%*
Turnover local fiction: All languages	R 91,660,000	R 98,532,000	R 91,053,000
% Growth / decline		*7.5%*	*-7.6%*
Market share: English fiction	29.8%	24.8%	20.7%
Market share: Afrikaans fiction	69.6%	74.2%	78.6%
Market share: African languages fiction	0.6%	1.0%	0.7%

Notes

- Local English fiction experienced declines in turnover in both 2009 and 2001 and ended the three-year period 31.1% below its 2008 value.
- Afrikaans fiction experienced a growth in 2009 and a decline in 2010, ending the reporting period 12.2% above its 2008 turnover value.
- The turnover in African languages fiction remained low, although it showed an increase of 22.4% over the reporting period.
- Afrikaans fiction increased its market share from 69.6% in 2008 to 78.6% in 2010, at the expense of local English fiction.

Fig. 7.2 Turnover of local books by language: General trade non-fiction

General Trade: Non-Fiction	**2008**	**2009**	**2010**
Turnover local non-fiction: English	R 120,937,000	R 115,378,000	R 125,891,000
% Growth / decline		*-4.6%*	*9.1%*
Turnover local non-fiction: Afrikaans	R 44,820,000	R 47,260,000	R 55,923,000
% Growth / decline		*5.4%*	*18.3%*
Turnover local non-fiction: African languages	R 669,000	R 471,000	R 458,000
% Growth / decline		*-29.6%*	*-2.8%*
Turnover local non-fiction: Multilingual	R 388,000	R 6,451,000	R 6,834,000
% Growth / decline		*1562.6%*	*5.9%*
Turnover local non-fiction: All languages	R 166,814,000	R 169,560,000	R 189,106,000
% Growth / decline		*1.6%*	*11.5%*
Market share: English non-fiction	72.5%	68.0%	66.6%
Market share: Afrikaans non-fiction	26.9%	27.9%	29.6%
Market share: African languages non-fiction	0.4%	0.3%	0.2%
Market share: Multilingual non-fiction	0.2%	3.8%	3.6%

Notes

- Local English non-fiction turnover grew 4.1% over the reporting period, while Afrikaans non-fiction turnover grew 24.8% over the same period.
- African languages non-fiction turnover declined by 31.5%.
- The turnover of multilingual non-fiction is mostly made up by the sale of adult dictionaries. It recorded a growth of 1,700% over the period. As there is a sharp decline in the reported turnover of multilingual school books, i.e. school dictionaries, is it suspected that one of the respondents changed its classification of one or more titles from school dictionaries to adult dictionaries in 2009 and 2010.
- Excluding the multilingual non-fiction turnover, the market shares of English and Afrikaans non-fiction were generally unchanged over the reporting period.

Fig. 7.3 Turnover of local books by language: Religious trade

Religious trade	**2008**	**2009**	**2010**
Turnover religious trade: English	R 21,032,000	R 26,626,000	R 32,107,000
% Growth / decline		*26.6%*	*20.6%*
Turnover religious trade: Afrikaans	R 63,358,000	R 59,034,000	R 61,757,000
% Growth / decline		*-6.8%*	*4.6%*
Turnover religious trade: African languages	R 21,286,000	R 20,835,000	R 24,239,000
% Growth / decline		*-2.1%*	*16.3%*
Turnover religious trade: All languages	R 105,676,000	R 106,495,000	R 118,103,000
% Growth / decline		*0.8%*	*10.9%*
Market share: English religious trade	19.9%	25.0%	27.2%
Market share: Afrikaans religious trade	60.0%	55.4%	52.3%
Market share: African languages religious trade	20.1%	19.6%	20.5%

Notes

- English religious trade book turnover grew by 52.6% over the reporting period.
- Afrikaans religious trade book turnover declined by 2.5% over the same period.
- African language turnover is almost exclusively derived from the sale of Bibles in the various African languages. Such turnover grew by 13.9% over the reporting period.
- The result of these differing trends was an increase in the market share of English-language religious books from 19.9% in 2008 to 27.2% in 2010, and a corresponding decline of 8% in the market share of the Afrikaans books.
- The increased sales of locally published English-language religious books may be one of the contributing factors to the decline in the sale of imported religious books.

Fig. 7.4 Turnover of local books by language: School books

School books	2008	2009	2010
Turnover school books: English	R 876,796,000	R 879,412,000	R 835,310,000
% Growth / decline		*0.3%*	*-5.0%*
Turnover school books: Afrikaans	R 128,497,000	R 117,077,000	R 115,583,000
% Growth / decline		*-8.9%*	*-1.3%*
Turnover school books: African languages	R 211,157,000	R 235,048,000	R 204,984,000
% Growth / decline		*11.3%*	*-12.8%*
Turnover school books: Multilingual	R 3,768,000	R 1,514,000	R 845,000
% Growth / decline		*-59.8%*	*-44.2%*
Turnover school books: All languages	R 1,220,218,000	R 1,233,051,000	R 1,156,722,000
% Growth / decline		*1.1%*	*-6.2%*
Market share: English school books	71.9%	71.3%	72.2%
Market share: Afrikaans school books	10.5%	9.5%	10.0%
Market share: African languages school books	17.3%	19.1%	17.7%
Market share: Multilingual school books	0.3%	0.1%	0.1%

Notes

- Not all respondents were able to provide turnover breakdowns of school books by language. For this reason the totals in the above figure differ from those of previous analyses of school books.
- English-language school books recorded a decline in turnover of 4.7% over the three-year period.
- Afrikaans-language school books recorded a similar decline of 10.1%.
- The corresponding decline for African language school books was 2.9%.
- The decline in multilingual school dictionaries may be due to a reclassification of one or more titles from school dictionaries to adult dictionaries.
- The higher-level school years (Grades 9 and 12) which received new curriculum books in 2008 are more likely to use English-language textbooks. This may partially explain the bigger decline in English-language books compared to African-language books. To offset this decline it is presumed that most of the school books exported to neighbouring countries were published in English.

Fig. 7.5 Turnover of local books by language: FET textbooks

FET textbooks	**2008**	**2009**	**2010**
Turnover FET textbooks: English	R 46,240,000	R 100,746,000	R 70,621,000
% Growth / decline		*117.9%*	*-29.9%*
Turnover FET textbooks: Afrikaans	R 0	R 123,000	R 5,000
% Growth / decline			*-95.9%*
Turnover FET textbooks: African languages	R 21,000	R 1,000	R 0
% Growth / decline		*-95.2%*	*-100.0%*
Turnover FET textbooks: All languages	R 46,261,000	R 100,870,000	R 70,626,000
% Growth / decline		*118.0%*	*-30.0%*
Market share: English FET textbooks	100.0%	99.9%	100.0%
Market share: Afrikaans FET textbooks	0.0%	0.1%	0.0%
Market share: African languages FET textbooks	0.0%	0.0%	0.0%

Notes

- English dominated the sale of FET textbooks with a market share of almost 100%.

Fig. 7.6 Turnover of local books by language: ABET workbooks

ABET workbooks	**2008**	**2009**	**2010**
Turnover local ABET workbooks: English	R 31,363,000	R 9,380,000	R 6,384,000
% Growth / decline		*-70.1%*	*-31.9%*
Turnover local ABET workbooks: Afrikaans	R 184,000	R 1,000	R 0
% Growth / decline		*-99.5%*	*-100.0%*
Turnover local ABET workbooks: African languages	R 1,203,000	R 127,000	R 429,000
% Growth / decline		*-89.4%*	*237.8%*
Turnover local ABET workbooks: All languages	R 32,750,000	R 9,508,000	R 6,813,000
% Growth / decline		*-71.0%*	*-28.3%*
Market share: English ABET workbooks	95.8%	98.7%	93.7%
Market share: Afrikaans ABET workbooks	0.6%	0.0%	0.0%
Market share: African languages ABET workbooks	3.7%	1.3%	6.3%

Notes

- English dominated the sale of ABET workbooks with a market share of almost 95%.

Fig. 7.7 Turnover of local books by language: Academic textbooks

Academic textbooks	**2008**	**2009**	**2010**
Turnover academic textbooks: English	R 167,384,000	R 207,512,000	R 217,242,000
% Growth / decline		*24.0%*	*4.7%*
Turnover academic textbooks: Afrikaans	R 20,390,000	R 15,534,000	R 16,430,000
% Growth / decline		*-23.8%*	*5.8%*
Turnover academic textbooks: African languages	R 168,000	R 0	R 0
% Growth / decline		*-100.0%*	
Turnover academic textbooks: All languages	R 187,942,000	R 223,046,000	R 233,672,000
% Growth / decline		*18.7%*	*4.8%*
Market share: English academic textbooks	89.1%	93.0%	93.0%
Market share: Afrikaans academic textbooks	10.8%	7.0%	7.0%
Market share: African languages academic textbooks	0.1%	0.0%	0.0%

Notes

- Locally published English-language academic textbooks recorded year-on-year turnover growth throughout the reporting period, with a cumulative growth rate of 29.8% over the period.
- Afrikaans textbook sales continued the declining trend reported in previous studies and fell by a cumulative 19.4% over the three-year period.
- No sales of academic textbooks in any of the African languages were recorded in 2009 or 2010.
- The market share of locally published English textbooks increased from 89.1% to 93.0%. Assuming that almost all of the directly imported textbooks are in English, the use of English textbooks in tertiary education is estimated to be 97% of all textbooks used.

Fig. 7.8 Turnover of local books by language: Professional books

Professional books	**2008**	**2009**	**2010**
Turnover professional books: English	R 151,276,000	R 144,019,000	R 146,767,000
% Growth / decline		*-4.8%*	*1.9%*
Turnover professional books: Afrikaans	R 16,400,000	R 16,376,000	R 16,398,000
% Growth / decline		*-0.1%*	*0.1%*
Turnover professional books: All languages	R 167,676,000	R 160,395,000	R 163,165,000
% Growth / decline		*-4.3%*	*1.7%*
Market share: English professional books	90.2%	89.8%	90.0%
Market share: Afrikaans professional books	9.8%	10.2%	10.0%

Notes

- This table should be read in the context of the total sales of professional products. Whilst printed books show a decline in turnover, electronic books and online services record above average growth.
- Locally published English-language professional books recorded a small decline of 3.9% over the reporting period.
- The sale of Afrikaans professional books was virtually flat over the three years.
- English managed to retain its market share of 90% over the three-year period.

Fig. 7.9 Turnover of local books by language: Scholarly books

Scholarly books	**2008**	**2009**	**2010**
Turnover local scholarly books: English	R 2,707,000	R 3,351,000	R 3,706,000
% Growth / decline		*23.8%*	*10.6%*
Turnover local scholarly books: Afrikaans	R 0	R 6,000	R 0
% Growth / decline			*-100.0%*
Turnover local scholarly books: All languages	R 2,707,000	R 3,357,000	R 3,706,000
% Growth / decline		*24.0%*	*10.4%*
Market share: English scholarly books	100.0%	99.8%	100.0%
Market share: Afrikaans scholarly books	0.0%	0.2%	0.0%

Notes

- English is the preferred language in locally published scholarly books.

8 Author and Royalty Profile

Fig. 8.1 Number of authors and third parties receiving royalties

Number of authors receiving royalties	2008	2009	2010
Individual authors	14,928	13,170	14,227
% Growth / decline		*-11.8%*	*8.0%*
Estates, etc.	926	954	1,057
% Growth / decline		*3.0%*	*10.8%*

Notes

- There was a decline in the number of individual authors earning royalties, and an increase in other legal entities such as estates, trusts, etc. earning royalties.

Fig. 8.2 Rand value of total royalties based on turnover

All industry sub-sectors	2008	2009	2010
Rand value of total royalties paid	R 257,165,000	R 193,126,000	R 189,005,000
% Growth / decline		*-24.9%*	*-2.1%*
Net turnover on which royalties are based	R 2,005,261,000	R 1,600,349,000	R 1,511,652,000
% Growth / decline		*-20.2%*	*-5.5%*
Average % royalties in terms of turnover	12.8%	12.1%	12.5%

Notes

- Not all publishing sales are subject to the payment of royalties. Professional authors are remunerated for their work in other ways, and virtually all Bible sales are not subject to royalties.
- The average percentage of net turnover paid as royalties remained constant within the 12.1% to 12.8% range.

Fig. 8.3 Rand value of royalties based on turnover by sub-sector: General trade

General trade sub-sector	2008	2009	2010
Rand value of total royalties paid	R 36,161,000	R 35,709,000	R 38,566,000
% Growth / decline		*-1.2%*	*8.0%*
Net turnover on which royalties are based	R 249,945,000	R 284,251,000	R 293,183,000
% Growth / decline		*13.7%*	*3.1%*
Average % royalties in terms of turnover	14.5%	12.6%	13.2%

Notes

- Royalty payments as a percentage of net turnover declined from 14.5% in 2008 to 12.6% in 2009 and then increased to 13.2% in 2010. There is no apparent reason for these changes, which may be driven by changes in the relative contribution of fiction and non-fiction to total sub-sector turnover.

Fig. 8.4 Rand value of royalties based on turnover by sub-sector: Religious trade

Religious trade sub-sector	2008	2009	2010
Rand value of total royalties paid	R 4,108,000	R 4,992,000	R 5,465,000
% Growth / decline		*21.5%*	*9.5%*
Net turnover on which royalties are based	R 73,172,000	R 120,591,000	R 143,840,000
% Growth / decline		*64.8%*	*19.3%*
Average % royalties in terms of turnover	5.6%	4.1%	3.8%

Notes

- Bible sales are not subject to royalties. This accounts for the low overall percentage of royalties paid relative to turnover.
- There was a significant decrease in the percentage of royalties paid relative to turnover. No reason for this decline could be established.

Fig. 8.5 Rand value of royalties based on turnover by sub-sector: Education

Education sub-sector	2008	2009	2010
Rand value of total royalties paid	R 198,658,000	R 127,737,000	R 119,414,000
% Growth / decline		*-35.7%*	*-6.5%*
Net turnover on which royalties are based	R 1,568,650,000	R 1,058,009,000	R 927,189,000
% Growth / decline		*-32.6%*	*-12.4%*
Average % royalties in terms of turnover	12.7%	12.1%	12.9%

Notes

- The percentage relative to turnover of royalties paid remained fairly constant over the reporting period.

Fig. 8.6 Rand value of royalties based on turnover by sub-sector: Academic

Academic sub-sector	2008	2009	2010
Rand value of total royalties paid	R 18,238,000	R 24,688,000	R 25,560,000
% Growth / decline		*35.4%*	*3.5%*
Net turnover on which royalties are based	R 113,494,000	R 137,498,000	R 147,440,000
% Growth / decline		*21.2%*	*7.2%*
Average % royalties in terms of turnover	16.1%	18.0%	17.3%

Notes

- Academic textbook authors generally earn a higher percentage of turnover as royalties.
- The trend appears to be towards an increase in this percentage.

9 Local book production profile

Not all respondents provided production data. The production profile can hence not be directly related to the turnover data recorded previously.

Note that "new" editions in this context refers to "first and revised" editions.

9.1 Local production of new editions by industry sub-sector

Fig. 9.1 Total local production of new editions and reprints

Total local production	**2008**	**2009**	**2010**
Total number of new editions	3,839	3,270	3,592
% Growth / decline		*-14.8%*	*9.8%*
Total number of reprints	8,586	5,785	7,289
% Growth / decline		*-32.6%*	*26.0%*

Notes
- Both the number of new editions and the number of reprints declined sharply in 2009 and then recovered in 2010.
- As a number of the larger educational and academic publishers were unable to provide accurate production data, the comparative sample may not be an accurate reflection of trends in the industry as a whole.

Fig. 9.2 Local production of new editions by industry sub-sector

Number of new editions	**2008**	**2009**	**2010**
General trade new editions	837	738	819
% Growth / decline		*-11.8%*	*11.0%*
Religious trade new editions	343	260	266
% Growth / decline		*-24.2%*	*2.3%*
Education new editions	2,484	2,098	2,325
% Growth / decline		*-15.5%*	*10.8%*
Academic new editions	175	174	182
% Growth / decline		*-0.6%*	*4.6%*

Notes
- In all sub-sectors except academic, the new title output in 2010 was less than that in 2008.
- The decline in output over the three-year period was 2.2% in the general trade sub-sector, 22.4% in religious trade books, and 6.4% for educational books, and an increase of 4.0% in the academic sub-sector.

Fig. 9.3 Local production of new editions by industry sub-sector: General trade

General trade sub-sector	2008	2009	2010
Trade fiction	406	309	392
% Growth / decline		*-23.9%*	*26.9%*
Trade non-fiction	431	429	427
% Growth / decline		*-0.5%*	*-0.5%*

Notes
- Trade fiction new title output was 3.4% lower in 2010 than in 2008.
- Trade non-fiction output was 0.9% lower over the same period.

Fig. 9.4 Local production of new editions by industry sub-sector: Education

Education sub-sector	2008	2009	2010
Education: School books	2,186	1,967	2,217
% Growth / decline		*-10.0%*	*12.7%*
Education: FET textbooks	285	117	51
% Growth / decline		*-58.9%*	*-56.4%*
Education: ABET workbooks	13	14	57
% Growth / decline		*7.7%*	*307.1%*

Notes
- School book new title production recorded a decline of 10.0% in 2009 and an increase of 12.7% in 2010, with an accumulated increase of 1.4% over the three-year period.
- The production of new FET textbook titles dropped sharply in 2009 and again in 2010.
- There was a sharp increase in the production of new ABET workbooks in 2010. However, there was no corresponding increase in turnover recorded. (See Fig. 5.7.)

Fig. 9.5 Local production of new editions by industry sub-sector: Academic

Academic sub-sector	2008	2009	2010
Academic textbooks	126	99	103
% Growth / decline		*-21.4%*	*4.0%*
Academic professional books	22	39	49
% Growth / decline		*77.3%*	*25.6%*
Academic scholarly books	27	36	30
% Growth / decline		*33.3%*	*-16.7%*

Notes

- These data are not representative of the sub-sector as major participants could not provide accurate production data.
- The publication of new academic textbook titles fell sharply in 2009, and that of professional books increased albeit from a very low base.
- New title production of scholarly books was steady over the reporting period.

9.2 Local production of new editions by language

Fig. 9.6 Local production of new editions by industry sub-sector and language: English

English	2008	2010	% change
Trade fiction	94	94	0.0%
Trade non-fiction	287	310	8.0%
Religious books	156	112	-28.2%
School books	874	350	-60.0%
FET textbooks	284	51	-82.0%
ABET workbooks	5	37	640.0%
Academic textbooks	116	96	-17.2%
Professional books	20	49	145.0%
Scholarly books	27	30	11.1%
All sub-sectors	1,863	1,129	-39.4%

Notes

- Across all sub-sectors, the decline in the production of new editions was 39.4%. This is a significant drop in new editions.
- The largest declines were recorded in religious trade books (28.2%), school books (60.0%) and academic textbooks (17.2%).
- Trade non-fiction (8.0%) and scholarly books(11.1%) recorded modest increases in new title output.

Fig. 9.7 Local production of new editions by industry sub-sector and language: Afrikaans

Afrikaans	2008	2010	% change
Trade fiction	292	258	-11.6%
Trade non-fiction	143	112	-21.7%
Religious books	173	138	-20.2%
School books	256	184	-28.1%
FET textbooks	1	0	-100.0%
ABET workbooks	2	0	-100.0%
Academic textbooks	9	7	-22.2%
Professional books	2	0	-100.0%
Scholarly books	0	0	
All sub-sectors	878	699	-20.4%

Notes

- All sub-sectors recorded a decline in the publishing of new titles in Afrikaans. The overall decline recorded was 20.4%.
- School books (28.1%), trade non-fiction (21.7%) and academic textbooks (22.2%) recorded the greatest declines.
- No new titles in Afrikaans were recorded in FET textbooks, ABET workbooks or professional books.

Fig. 9.8 Local production of new editions by industry sub-sector and language: African languages

African languages	2008	2010	% change
Trade fiction	20	30	50.0%
Trade non-fiction	1	3	200.0%
Religious books	14	16	14.3%
School books	1,056	889	-15.8%
FET textbooks	0	0	
ABET workbooks	6	20	233.3%
Academic textbooks	1	0	-100.0%
Professional books	0	0	
Scholarly books	0	0	
All sub-sectors	1,098	958	-12.8%

Notes

- School books are the only sub-sector with a significant production of new titles. The decline in new title production was 15.8% over the reporting period.

Fig. 9.8 Local production of new editions by industry sub-sector and language: All languages

All languages	**2008**	**2010**	**% change**
Trade fiction	406	382	-5.9%
Trade non-fiction	431	425	-1.4%
Religious books	343	266	-22.4%
School books	2,186	1,423	-34.9%
FET textbooks	285	51	-82.1%
ABET workbooks	13	57	338.5%
Academic textbooks	126	103	-18.3%
Professional books	22	49	122.7%
Scholarly books	27	30	11.1%
All sub-sectors	3,839	2,786	-27.4%

Notes

- These values correspond with those per industry sub-sector as reported in section 9.1 above.

10 Employment profile

The reporting period was one of declining turnover and lower production levels. The general economic conditions were unfavourable and many book suppliers consolidated their positions by reducing the number of staff. Other suppliers merged or acquired smaller entities. In at least two instances, very significant restructuring took place amongst separate business units within holding companies. These changes resulted in some loss of independence or business status. In both instances, many of the support functions were centralised and then shared by the operating units. Many positions were abolished in these processes.

Another complicating development was the diversification of holding companies into areas outside the scope of the surveys on which this analysis is based. In many instances support staff members were employed across these diverse operating units and could not be allocated to book supply only. In such cases they were not taken into consideration at all.

Although the analysis is based on a like-for-like comparison over the three years, a decline in staff numbers may not necessarily indicate a reduction of staff. It could also be attributed to their application outside the book supply industry.

In this section, the term 'black" refers to all previously disadvantaged population groups.

Fig. 10.1 All permanent employees by industry sub-sector

Total employment by sub-sector	**2008**	**2010**
General trade	431	413
% Growth / decline		*-4.2%*
Religious trade	335	380
% Growth / decline		*13.4%*
Education	871	730
% Growth / decline		*-16.2%*
Academic	690	647
% Growth / decline		*-6.2%*
All sub-sectors	2,327	2,170
% Growth / decline		*-6.7%*

Notes

- All sub-sectors except religious trade publishing recorded a decline in employment numbers.
- The book supply industry as a whole recorded a decline of 6.7% in total employment numbers.

Fig. 10.2 All permanent employees by employment position

Total employment by position	2008	2010
Senior top executives	113	70
% Growth / decline		*-38.1%*
Other top executives	286	249
% Growth / decline		*-12.9%*
Editorial	291	215
% Growth / decline		*-26.1%*
Design and production	147	142
% Growth / decline		*-3.4%*
Marketing and sales	603	640
% Growth / decline		*6.1%*
Finance	187	180
% Growth / decline		*-3.7%*
Human resources	24	23
% Growth / decline		*-4.2%*
Office administration	337	215
% Growth / decline		*-36.2%*
Information technology	42	42
% Growth / decline		*0.0%*
Other	297	275
% Growth / decline		*-7.4%*
All employees	2,327	2,170
% Growth / decline		*-6.7%*

Notes

- The distinction between senior top executives and other top executive managers can be misleading. The CEO of a single employee supplier will fall in the first employment category together with the CEOs of multinational corporations. In the restructuring of operating units within holding companies, some employees' positions were reduced in status and recorded at the lower level.
- The greatest loss of employment positions was recorded among senior top executives (38.1%), office administration (36.2%) and editorial (26.1%).
- Only marketing and sales recorded an increase in employment numbers of 6.1%, while the number of information technology employees remained unchanged.

Fig. 10.3 All permanent employees by gender

Employment by gender	**2008**	**2010**
Male employees	734	701
% Growth / decline		*-4.5%*
Female employees	1,593	1,470
% Growth / decline		*-7.7%*
All employees	2,327	2,171
% Growth / decline		*-6.7%*
Contribution to total employment		
Male employees	32%	32%
Female employees	68%	68%

Notes

- Female employers experienced a greater decline in employment numbers (7.7%) than did male employees (4.5%).
- The education sub-sector employs relatively more female employees than the other industry sub-sectors, and experienced the greatest decline in employment numbers.

Fig. 10.4 All permanent employees by race and gender

All employees	**2008**	**2010**
Black male employees	473	423
% Growth / decline		*-10.6%*
Black female employees	857	717
% Growth / decline		*-16.3%*
White male employees	261	278
% Growth / decline		*6.5%*
White female employees	736	753
% Growth / decline		*2.3%*
All employees	2,327	2,171
% Growth / decline		*-6.7%*
Contribution to total employment		
Black male employees	20%	19%
Black female employees	37%	33%
White male employees	11%	13%
White female employees	32%	35%

Notes

- The largest decline in employment numbers was recorded among black female employees (16.3%) followed by black male employees (10.6%). This can be attributed to the greater loss in positions in the education sub-sector, which employs relatively more black employees than the other sub-sectors.

Fig. 10.5 Profile of black male employees by position held

Black male employees	**2008**	**2010**	**% Change**
Senior top executives	12	7	-41.7%
Other top executives	55	35	-36.4%
Editorial	17	21	23.5%
Design and production	21	28	33.3%
Marketing and sales	132	123	-6.8%
Finance	20	18	-10.0%
Human resources	2	0	-100.0%
Office administration	41	18	-56.1%
Information technology	12	14	16.7%
Other	161	159	-1.2%
All employees	**473**	**423**	**-10.6%**

Notes

- The greatest percentage declines were recorded in the executive positions and office administration.
- There was some gain in employment numbers in editorial, production and information technology positions.

Fig. 10.6 Profile of black female employees by position held

Black female employees	**2008**	**2010**	**% Change**
Senior top executives	8	5	-37.5%
Other top executives	32	27	-15.6%
Editorial	95	102	7.4%
Design and production	44	40	-9.1%
Marketing and sales	281	246	-12.5%
Finance	99	87	-12.1%
Human resources	10	9	-10.0%
Office administration	182	99	-45.6%
Information technology	8	7	-12.5%
Other	98	95	-3.1%
All employees	857	717	-16.3%

Notes

- The only gain in employment numbers was recorded in editorial positions.
- The large sum of 83 positions was lost in the office administration category, although some may have moved to centralised support divisions rendering services to business units outside the book supply industry.

Fig. 10.7 Profile of white male employees by position held

White male employees	2008	2010	% Change
Senior top executives	50	31	-38.0%
Other top executives	80	83	3.8%
Editorial	27	45	66.7%
Design and production	21	20	-4.8%
Marketing and sales	37	45	21.6%
Finance	13	8	-38.5%
Human resources	1	2	100.0%
Office administration	5	18	260.0%
Information technology	20	19	-5.0%
Other	7	7	0.0%
All employees	261	278	6.5%

Notes

- Position losses were recorded in the senior top executive, finance and production categories.
- Editorial, marketing and sales and office administration recorded net gains in employment numbers.

Fig. 10.8 Profile of white female employees by position held

White female employees	2008	2010	% Change
Senior top executives	43	27	-37.2%
Other top executives	119	104	-12.6%
Editorial	152	167	9.9%
Design and production	61	54	-11.5%
Marketing and sales	153	226	47.7%
Finance	55	67	21.8%
Human resources	11	12	9.1%
Office administration	109	80	-26.6%
Information technology	2	2	0.0%
Other	31	14	-54.8%
All employees	736	753	2.3%

Notes

- Employment losses were greatest in the executive positions and design and production departments, as well as office administration.
- Gains were recorded in the editorial, marketing and finance positions.

11 Final remarks

In conducting this research, the research team is constantly trying to strike a balance between standardising the survey questionnaire and sample (in order to make true comparisons between succeeding years possible) and expanding the survey questionnaire and sample (in order to extract more generic industry-related information from more participants). This report was particularly challenging as major changes occurred during this period in the book supply industry as far as both structure and sales and production trends were concerned. Not all the underlying causes and consequences of these changes could be revealed by the report as not all the required data had been captured in the 2008 annual survey.

Current profiles are continuously revisited in order to define the kind of data needed for more in-depth analysis of the four industry sub-sectors (general trade, religious trade, educational, and academic publishing).

Active participation by all PASA members is encouraged, including the members in the small publisher category.

Important role-players, which are not members of PASA, participated in the surveys from 2007 onwards, adding value to the project. It is important to ensure their future participation so that they can form part of future broad trend analysis.

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November 2011

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Appendix: Long-term trends 2006–2010

The sample of participants has been sufficiently representative and stable over the last five years to illustrate the cumulative effects of the annual growth / decline rates as reported by the last three Broad Trend Reports.

These growth and decline rates are then applied to a base value of 100 set for the 2008 results to obtain indices illustrating the cumulative effects over the period 2006 to 2010. For many parameters, the 2008 values are the turning point where growth gives way to decline.

This illustration will have greater accuracy in the headline parameters, where the survey samples are more representative of the industry as a whole. The accuracy of these relative indices diminishes as more specific turnover and production parameters are estimated.

The values below serve only as an illustration of the cumulative result of the annual growth / decline rates. They are not based on a common survey sample for all five years under consideration, which is a requirement for a scientifically based longitudinal analysis.

The production volume statistics will be less accurate than the turnover projections, as not all publishers provided the number of new editions published every year.

Turnover	**Year-on-year change percentage**					**Relative index based on 2008 = 100**				
	2007/6	**2008/7**	**2009/8**	**2010/09**		**2006**	**2007**	**2008**	**2009**	**2010**
All products	9.7%	5.7%	-11.8%	-1.4%		86.2	94.6	100.0	88.2	87.0
Local products	5.3%	4.6%	-13.1%	-3.6%		90.8	95.6	100.0	86.9	83.8
Imported products	29.0%	4.8%	-6.3%	3.9%		74.0	95.4	100.0	93.7	97.4
All trade books	10.3%	0.7%	-2.3%	2.2%		90.0	99.3	100.0	97.7	99.8
All educational books	8.6%	6.9%	-16.9%	-6.6%		86.1	93.5	100.0	83.1	77.6
All academic books	14.4%	6.3%	4.9%	2.4%		82.3	94.1	100.0	104.9	107.4
Local trade books	-1.6%	-3.0%	-0.7%	4.9%		104.8	103.1	100.0	99.3	104.2
Local education books	9.2%	6.9%	-17.2%	-8.2%		85.6	93.5	100.0	82.8	76.0
Local academic books	36.2%	4.2%	3.5%	2.2%		70.5	96.0	100.0	103.5	105.8
All local books	5.3%	4.6%	-13.1%	-3.6%		90.8	95.6	100.0	86.9	83.8
Imported trade books	19.9%	3.2%	-3.3%	0.6%		80.8	96.9	100.0	96.7	97.3
Imported education books	0.1%	6.8%	-11.0%	17.4%		93.5	93.6	100.0	89.0	104.5
Imported academic books	-44.8%	20.2%	6.0%	-4.0%		150.7	83.2	100.0	106.0	101.8
All imported books	29.0%	4.8%	-6.3%	2.2%		74.0	95.4	100.0	93.7	95.8
Local trade fiction	-14.4%	2.4%	18.3%	-6.3%		114.1	97.7	100.0	118.3	110.8
Imported trade fiction	0.8%	-17.8%	42.2%	-2.6%		120.7	121.7	100.0	142.2	138.5
All trade fiction	-4.0%	-11.9%	34.4%	7.4%		118.2	113.5	100.0	134.4	144.3
Local trade non-fiction	3.6%	-4.9%	-9.1%	11.2%		101.5	105.2	100.0	90.9	101.1
Imported trade non-fiction	39.1%	18.5%	-29.1%	4.4%		60.7	84.4	100.0	70.9	74.0
All trade non-fiction	20.2%	7.6%	-21.4%	7.4%		77.3	92.9	100.0	78.6	84.4

Turnover	Year-on-year change percentage					Relative index based on 2008 = 100				
	2007/6	2008/7	2009/8	2010/09		2006	2007	2008	2009	2010
Local school books	7.4%	90.0%	-19.7%	-6.2%		49.0	52.6	100.0	80.3	75.3
Imported school books	-4.1%	7.5%	-9.8%	18.8%		97.0	93.0	100.0	90.2	107.2
All school books	6.6%	4.0%	-19.1%	-4.5%		90.2	96.2	100.0	80.9	77.3
Local FET textbooks	780.0%	105.1%	117.9%	-29.9%		5.5	48.8	100.0	217.9	152.7
Local ABET workbooks	70.0%	118.1%	-70.1%	-31.9%		27.0	45.9	100.0	29.9	20.4
Local educational books	9.2%	6.9%	-17.2%	-8.2%		85.6	93.5	100.0	82.8	76.0
Imported educational books	0.1%	6.8%	-11.0%	17.4%		93.5	93.6	100.0	89.0	104.5
All educational books	8.6%	6.9%	-16.9%	-6.6%		86.1	93.5	100.0	83.1	77.6
Local academic textbooks	5.1%	9.2%	12.1%	4.8%		87.2	91.6	100.0	112.1	117.5
Imported academic textbooks	-65.8%	87.8%	-36.6%	-1.8%		155.6	53.2	100.0	63.4	62.3
All academic textbooks	20.9%	20.7%	2.0%	3.9%		68.6	82.9	100.0	102.0	106.0
All professional books	7.4%	-9.2%	7.3%	0.7%		102.5	110.1	100.0	107.3	108.1
Scholarly books	173.2%	-0.3%	65.7%	-3.5%		36.7	100.3	100.0	165.7	159.9

Turnover	Year-on-year change percentage					Relative index based on 2008 = 100				
	2007/6	2008/7	2009/8	2010/09		2006	2007	2008	2009	2010
Local English trade fiction	-30.2%	8.1%	-10.5%	-23.0%		132.5	92.5	100.0	89.5	68.9
Local Afrikaans trade fiction	3.0%	9.5%	14.7%	-2.2%		88.6	91.3	100.0	114.7	112.2
Local English non-fiction	16.1%	-24.7%	-4.6%	9.1%		114.4	132.8	100.0	95.4	104.1
Local Afrikaans non-fiction	-21.0%	30.6%	5.4%	18.3%		97.0	76.6	100.0	105.4	124.7
Local English school books	17.2%	-0.3%	0.3%	-5.0%		85.6	100.3	100.0	100.3	95.3
Local Afrikaans school books	30.3%	-18.1%	-8.9%	-1.3%		93.7	122.1	100.0	91.1	89.9
Local African language school books	14.3%	24.8%	11.3%	-12.8%		70.1	80.1	100.0	111.3	97.1
Local English academic textbooks	23.4%	12.6%	24.0%	4.7%		72.0	88.8	100.0	124.0	129.8
Local Afrikaans academic textbooks	-44.9%	-13.8%	-23.8%	5.8%		210.5	116.0	100.0	76.2	80.6
Local English professional books	9.7%	-6.1%	-4.8%	1.9%		97.1	106.5	100.0	95.2	97.0
Local Afrikaans professional books	-69.2%	43.2%	-0.1%	0.1%		226.6	69.8	100.0	99.9	100.0
Royalty as % net turnover						**2006**	**2007**	**2008**	**2009**	**2010**
						12.2%	12.8%	14.5%	12.6%	13.2%
						16.6%	13.3%	12.8%	12.1%	12.9%
						10.3%	10.9%	16.1%	18.0%	17.3%

Production	Year-on-year change percentage				Relative index based on 2008 = 100				
	2007/6	2008/7	2009/8	2010/09	2006	2007	2008	2009	2010
Number of titles published									
New editions	69.9%	-45.0%	-14.8%	9.8%	107.0	181.8	100.0	85.2	93.5
Reprints	19.8%	-7.7%	-32.6%	26.0%	90.4	108.3	100.0	67.4	84.9
Number of new editions									
Trade	0.2%	3.1%	-11.8%	11.0%	96.8	97.0	100.0	88.2	97.9
Education	129.5%	-54.6%	-15.5%	10.8%	96.0	220.3	100.0	84.5	93.6
Academic	-20.7%	-32.8%	-0.6%	4.6%	187.6	148.8	100.0	99.4	104.0
Trade fiction	-4.0%	-11.9%	-23.9%	26.9%	118.2	113.5	100.0	76.1	96.6
Trade non-fiction	20.2%	7.6%	-0.5%	-0.5%	77.3	92.9	100.0	99.5	99.0
School books	6.6%	4.0%	-10.0%	12.7%	90.2	96.2	100.0	90.0	101.4
FET textbooks	421.5%	88.7%	-58.9%	-56.4%	10.2	53.0	100.0	41.1	17.9
ABET workbooks	160.1%	93.4%	7.7%	307.1%	19.9	51.7	100.0	107.7	438.4
Academic textbooks	-16.6%	20.7%	-21.4%	4.0%	99.4	82.9	100.0	78.6	81.7
Professional books	-8.6%	-9.2%	77.3%	25.6%	120.5	110.1	100.0	177.3	222.7
Scholarly books	173.2%	-0.3%	33.3%	-16.7%	36.7	100.3	100.0	133.3	111.0
English trade fiction	-45.1%	9.9%		-6.0%	165.8	91.0	100.0		94.0
Afrikaans trade fiction	85.5%	-28.1%		-13.4%	75.0	139.1	100.0		86.6
English trade non-fiction	-21.9%	54.7%		28.6%	82.7	64.6	100.0		128.6
Afrikaans trade non-fiction	-31.2%	55.7%		-41.1%	93.3	64.2	100.0		58.9
English school books	70.3%	-45.0%		-60.0%	106.8	181.8	100.0		40.0
Afrikaans school books	26.6%	-59.2%		-28.1%	193.6	245.1	100.0		71.9
African language school books	174.2%	-48.2%		-15.8%	70.4	193.1	100.0		84.2
English academic textbooks	-35.4%	33.1%		-18.6%	116.3	75.1	100.0		81.4
Afrikaans academic textbooks	-86.2%	250.0%		0.0%	207.2	28.6	100.0		100.0
English professional books	-10.3%	-81.4%		-172.2%	599.3	537.6	100.0		-72.2
Afrikaans professional books	-83.3%	-35.4%		-100.0%	926.9	154.8	100.0		0.0