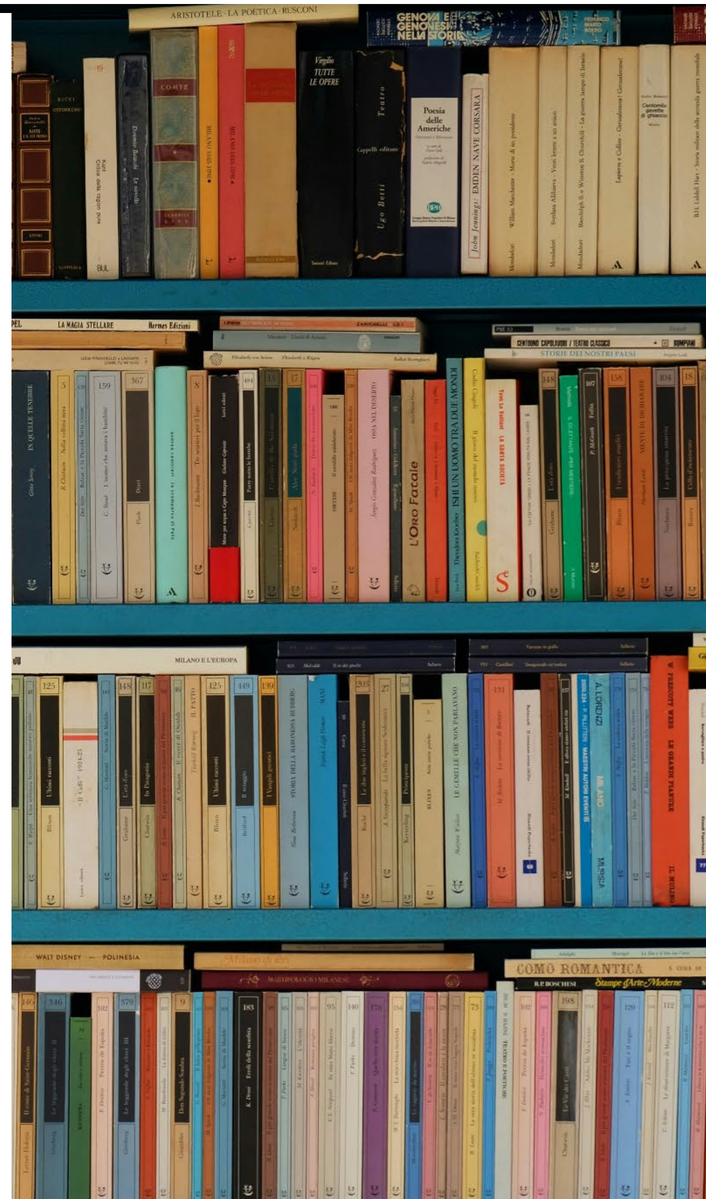

SOUTH AFRICAN BOOK PUBLISHING INDUSTRY SURVEY

2022-23

APRIL 2022 – MARCH 2023

Compiled by: Elizabeth le Roux, Savannah Harvett and Lezli Edgar

PASA
PUBLISHERS' ASSOCIATION OF SOUTH AFRICA

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This research was conducted on behalf of the Publishers' Association of South Africa by the Department of Information Science, University of Pretoria.
Research team: Elizabeth le Roux, Savannah Harvett and Lezli Edgar

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Contents

Introduction

The annual Book Publishing Industry Survey provides information on the growth and development of the South African publishing industry. It is the most comprehensive survey available of the publishing industry in South Africa, providing information for planning and lobbying purposes since 2002. The data collected annually are invaluable for understanding the publishing industry in South Africa, especially as transformational shifts take place across the key publishing sectors.

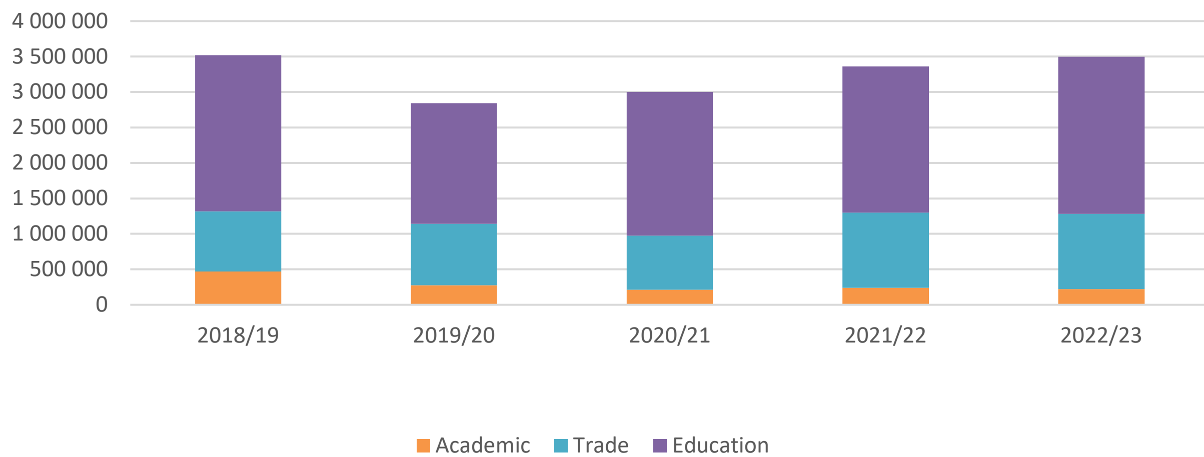
The total number of active publishers in South Africa is unknown, but is thought to be between 150 and 200. The data is collected from a survey of South African publishers, focusing on their turnover and production patterns from the previous financial year, as well as ownership and employment. The scope is limited to publishers operating in South Africa, both PASA and non-PASA members, from micro-enterprises to multinationals, and to books published within South Africa. The industry is heavily dominated by a small group of very large publishers, who together represent more than 80% of all production and revenue. These 15 publishers, who all participated in the survey, represent a large number of imprints and operate in all sectors. This representation is reflected in the participation in this survey. Of the 100 SMME publishers who were invited to participate, only 19 did so. While this is a slight improvement on previous years, the low participation rate means only a few patterns can be pointed out.

This report highlights findings from the data submitted for the 2022/2023 financial year (April to March). The data for previous years are not always precisely comparable, due to changes in participation. As the data are self-reported from the participants, they are also not exactly comparable from year to year.

Overview

In 2022/23, the South African publishing industry generated around **R3.5 billion** in revenue. This means that the total revenue generated within South Africa, from locally produced books, has recovered to pre-pandemic levels.

Figure 1: South African publishing industry revenue, 2018-2023



Unlike many publishing industries globally, where general retail publishing accounts for half of the industry, in South Africa, the Education sector (including schoolbooks and textbooks for vocational training institutions) accounts for around 60% of revenue. The share for academic textbook publishing has declined.

Figure 2: Sectoral representation

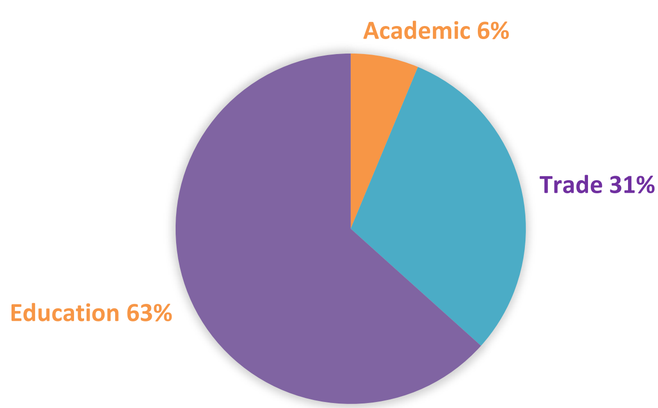


Table 1: Total net publishing industry revenue, 2021 – 2023 (ZAR '000)

Sector	2021/22	2022/23	Change
Academic	238 494	219 294	-8%
Trade	1 061 130	1 061 910	-
Education (including TVET, ABET)	2 061 834	2 215 147	+7%
Total	**3 361 458**	**3 496 351**	**+4%**

Note: All revenue quoted is net, i.e. discounts and VAT have been deducted.

Publisher Profiles

The industry is dominated by a small group of very large publishers, who together represent more than 80% of all production and revenue.

Table 2: Annual book-related net turnover of participants (n = 34)

SMME (Less than 5 mil)	**Between 5mil and R 10mil (EME)**	**Between R 10mil and R 50mil (QSE)**	**Greater than R 50mil (Generic)**
18	1	1	14

The numbers of full-time staff are relatively small, at just over 1 550, but the industry depends on a large pool of freelancers as well. SMMEs typically employ only between one and five staff, with the SMME respondents to this survey adding only approximately 50 additional individuals to the total number of people employed in the sector. Transformation can be seen in the growing number of publishers with a Level 1 B-BBEE rating, and in the rising number of black men and women employed in the industry.

Table 3: B-BBEE level (n = 15)

BBBEE rating	Rated
Level 1 >100% AAA	10
Level 2 85 - 99% AA	0
Level 3 75 – 85% A	3
Level 4 65 – 75% BBB	0
Level5 55 – 65% BB	0
Level 6 45 – 55% B	0
Level 7 40 – 45% C	0
Level 8 30 – 40% D	1
Not compliant <30% E/FF	2

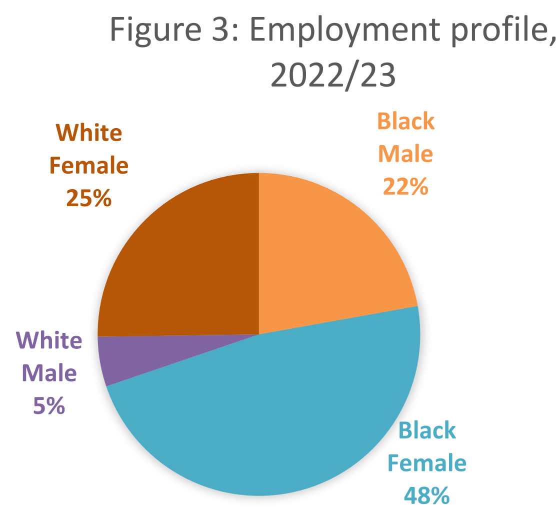


Table 4: Employment profile (as of 31 March 2023)

Job Category	Black Individual		White Individual	
	Male	Female	Male	Female
Chief executive officer	2	1	1	5
Functional heads of department	27	32	2	44
Editorial staff	16	99	3	95
Design and production staff	24	61	4	25
Marketing, promotion and sales	54	166	7	93
Finance staff	19	65	6	19
Human resources	5	21	7	0
Office administration	12	72	8	7
Information technology staff	19	6	9	1
Warehousing and distribution	76	45	10	2
Other support staff	36	59	11	11
Part Time including Freelancers	61	96	11	97
Total	**351**	**723**	**79**	**399**

Revenue streams

Publishers have diversified their revenue streams, beyond traditional book publishing, to include a variety of other functions as well. Participants could select several of the options.

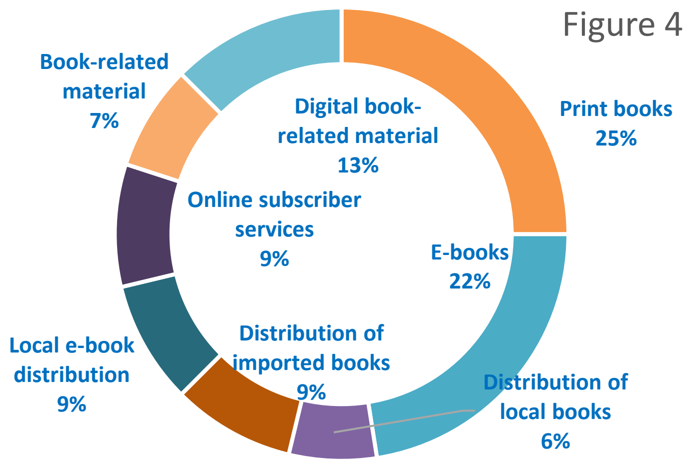


Figure 4: Revenue streams

Production

The current survey report focuses mainly on the value of sales or revenue, mostly from the sales of books, rather than the number of titles published. Figures collected by bodies such as Statistics SA similarly reflect an increase in the value of sales but a downward trend in the physical volumes of manufacturing for the printing, publishing and recorded media sector since 2019. Production refers to local book publishing, and not additional revenue such as rights sales, non-book products and hybrid products.

E-books

The figures show that there has been growth in digital book revenue, although it remains a small percentage compared to print – it has risen over the past year from 4% to almost 5% of the total.

Language

In terms of language, South African publishing remains dominated by English and Afrikaans, although there has been an increase in revenue from books in the other official languages over time, in part from digital sales. The dominant local languages are isiXhosa, isiZulu and Setswana.

Figure 5: Revenue by language, 2022-23

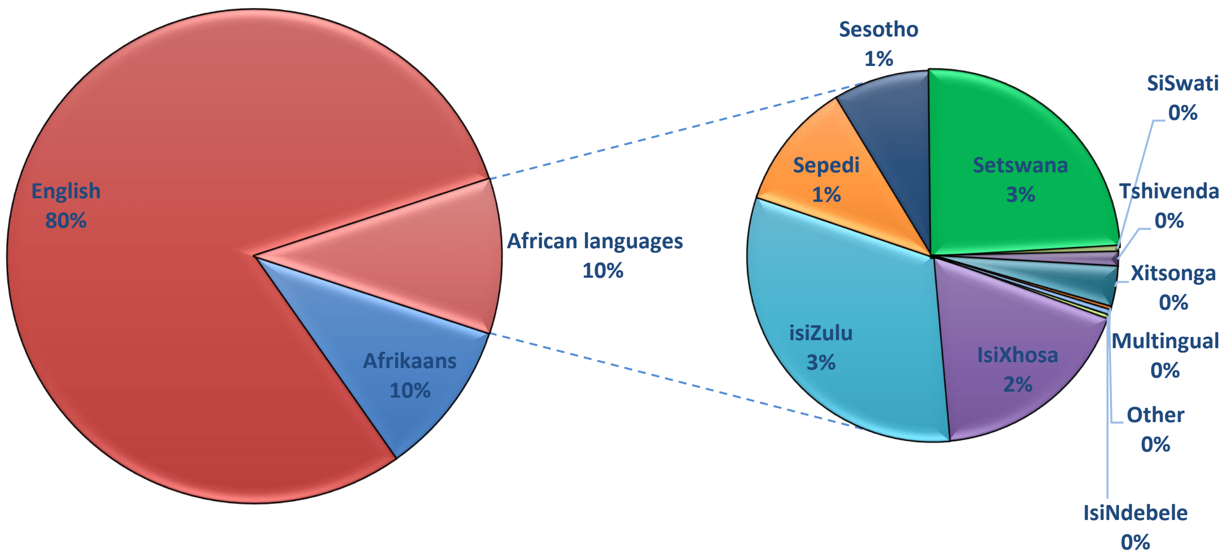


Table 5: Revenue from local titles, by format and language (R '000)

Language	2020/21		2021/22		2022/23	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	215 080	78 830	300 281	13 984	275 589	7 897
English	1 741 892	12 873	2 396 403	259 933	2 053 757	148 999
IsiNdebele	106 079	832	1 378	12	1 210	154
IsiXhosa	40 965	1 020	36 494	1 177	49 495	869
IsiZulu	25 026	347	94 628	1 208	85 254	1 816
Sepedi	19 645	491	28 245	1 858	30 328	796
Sesotho	59 128	411	23 548	571	22 844	729
Setswana	9 594	142	60 347	548	67 070	585
SiSwati	3 034	9	686	2	334	1 209
Tshivenda	2 770	14	3 402	33	3 489	24
Xitsonga	10 989	59	9 117	140	9 033	621
Multilingual	1 939	93	2 200	164	826	7
Other	1 306	181	609	212	1 017	18
Total	**2 237 450**	**95 301**	**2 958 507**	**272 180**	**2 601 246**	**163 722**

Distribution Channels

Publishers distribute their books through a variety of different channels. Since the Education sector is the largest, the most important buyer and distributor of locally produced books is the State and provincial education departments, and schoolbook distributors. Most other books are sold through booksellers, although as the share of e-commerce sales is growing, that of national bookseller chains is declining. Globally, revenue data by sales channel show an increase in the share of online sales, of both print and digital book products.

The data indicate that direct sales have become an increasingly important sales channel, and that export sales are showing an encouraging increase. However, declining sales through libraries reflect the decreased government spending on libraries.

Table 6: Revenue and discount per sales channel

Type of outlet	**Aggregated revenue (R ’000)**			**Average discount %**
	2020/21	**2021/22**	**2022/3**	
National or regional bookseller chains	1 155 410	975 712	504 134	35%
Independent booksellers and other book retailers	214 987	290 224	668 330	27%
Non-book retail outlets	38 732	43 959	55 060	26%
Internet booksellers	74 990	130 584	137 773	28%
Book clubs and direct mail booksellers	27	18 107	38 868	14%
Businesses and corporations (direct sales)	26 533	3 147	16 511	20%
The public (direct sales)	44 654	47 630	52 921	21%
Libraries	10 745	9 050	4 327	28%
State and provincial departments	851 640	803 736	944 774	16%
Schools and educational institutions	133 986	105 399	131 467	26%
School book distributors and tenders	132 049	398 989	304 472	24%
Export sales	19 632	18 692	810 861	17%
Other	68 757	45 136	40 831	23%
Total	**2 793 696**	**2 899 906**	**2 900 279**	

Table 7: Import and export revenue (R ’000)

Channel	2020/21		2021/22		2022/23		Change	
	Local	Imported	Local	Imported	Local	Imported	Local	Imported
Sales of print books	2 635 221	164 273	2 902 520	211 790	3 098 551	182 299	7%	-14%
Sales of digital book products	62 189	36 359	172 880	64 829	104 561	53 087	-40%	-18%
Rights sales	6 072	366	5 680	1 076	7 276	399	28%	-63%
Distribution of locally published books	649	0	365	130	360	192	-1%	48%
Other book-related income	281	230	172	0	249	0	45%	
Total	**2 705 341**	**201 228**	**3 081 618**	**277 826**	**3 210 997**	**235 977**	**4%**	**-15%**

Table 8: Average royalties

Royalties are calculated as an average, because they vary so widely among publishers, even within the same sector.

Product Category	Minimum Percentage	Maximum Percentage	Average Royalty
Trade	5%	17%	11%
Education	6%	20%	13%
Academic	5%	25%	13%
TVET	3%	17%	10%
ABET	0%	16%	8%

Sector Report: Education

The Education sector – the largest and most lucrative in South Africa – produces school textbooks and other Learner and Teacher Support Materials (LTSM) for the Department of Basic Education (DBE), the provincial departments of education, as well as private schools.

The sector is dominated by a few large and medium publishers and a large number of very small publishers focusing on niche subjects and often using partners for distribution. Revenue and production are both highly dependent on the state's education budget, the provincial allocation of funds, and procurement processes. A lack of curriculum revision and catalogue renewal by the DBE has a clear impact on revenues and production, with declines in locally produced books.

In 2022/23, the sector recorded revenue of more than R1.8 billion, with the vast majority of this income coming from sales of local products.

Table 9: Revenue from book-related activities (R '000)

Activity	**2021/22**		**2022/23**		**Change**	
	Local books	**Imports**	**Local books**	**Imports**	**Local books**	**Imports**
Sales of print books	1 703 239	34 396	1 763 745	35 762	34%	4%
Sales of digital book products	40 473	3 375	77 902	844	92%	-75%
Rights sales	370		63		-83%	
Total turnover	**1 744 082**	**38 001**	**1 841 710**	**36 606**	**6%**	**-4%**

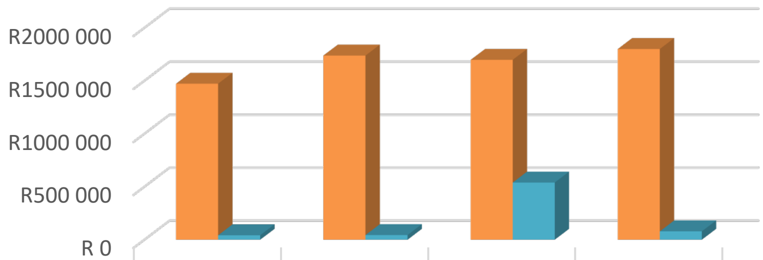
Production

Formats and language

In spite of nearly doubling during the lockdown period, digital book products have declined again and remain a very small proportion of orders from the Department of Basic Education (DBE) – around 4%. The capacity exists to roll out further digital resources, but access, infrastructure, and both teacher and learner preparedness, remain stumbling blocks. Printed materials thus remain a crucial resource.

The following tables provide a summary of titles and revenue from print and digital formats, sub-divided according to the local languages. As can be seen, English dominates the production of textbooks, especially after the Foundation Phase. However, local languages make up an important part of Education publishers' lists.

Figure 6: Revenue by format, Education sector, 2022-23 (in R '000)



	2019/20	2020/21	2021/22	2022/23
Print	R1471 998	R1737 635	R1697 276	R1799 507
Digital	R41 915	R43 868	R539 427	R78 746

Table 10: School textbook production by language and format (number of titles)

Language	2021/22		2022/23	
	Print	**Digital**	**Print**	**Digital**
Afrikaans	21 225	3 777	673	642
English	32 472	5 815	768	1 166
IsiNdebele	29	9	24	9
IsiXhosa	536	89	492	81
IsiZulu	307	29	439	30
Sepedi	6	0	5	2
Sesotho	2	0	179	53
Setswana	254	50	112	88
SiSwati	236	95	121	40
Tshivenda	338	119	11	3
Xitsonga	69	1	19	22
Multilingual	24	23	5	2
Other Languages	110	24	<1	<1
Total	**55 608**	**10 031**	**2 882**	**2 170**

Note: The figures for Afrikaans and English are under-reported for 2022/23.

Figure 7: School textbook revenue, by language (2022-2023)

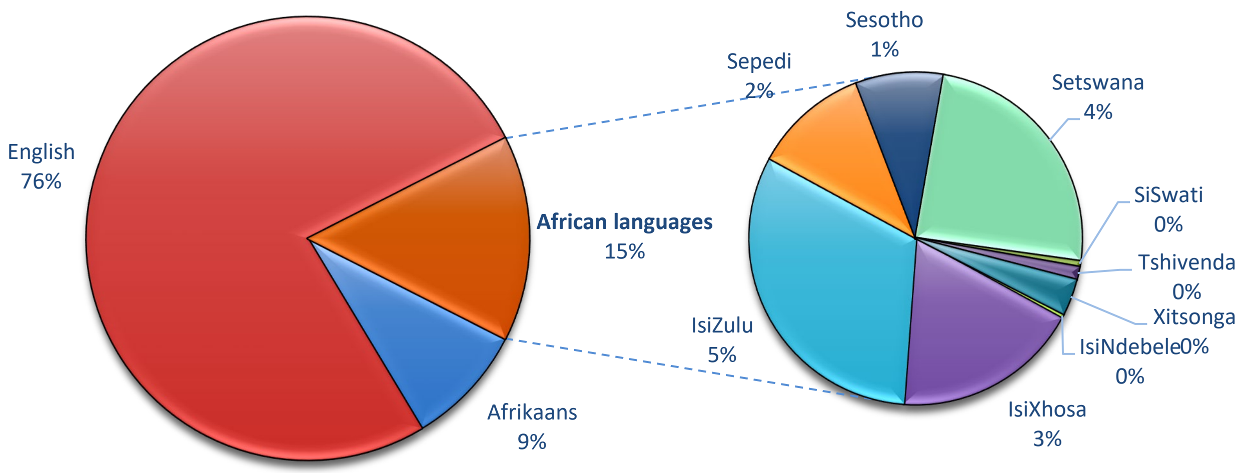


Table 11: Revenue from locally produced school textbooks (R'000)

Language	2020/21		2021/22		2022/23		Change	
	Print	Digital	Print	Digital	Print	Digital	Print	Digital
Afrikaans	115 293	5 904	129 103	6 295	158 736	5 925	23%	-6%
English	1 104 959	31 724	1 307 595	33 739	1 351 528	56 791	3%	68%
IsiNdebele	2 882	4	3 037	9	1 210	154	-60%	1611%
IsiXhosa	29 468	1 436	40 952	1 020	49 459	869	21%	-15%
IsiZulu	89 653	603	105 868	831	86 225	1 816	-19%	119%
Sepedi	11 739	274	25 014	347	30 328	796	21%	129%
Sesotho	6 743	416	19 633	491	22 844	729	16%	48%
Setswana	36 288	344	59 124	411	67 064	585	13%	42%
SiSwati	10 762	1	10 989	58	334	1 209	-97%	1984%
Tshivenda	857	15	2 770	14	3 489	24	26%	71%
Xitsonga	7 105	82	9 594	142	9 033	621	-6%	337%
Multilingual	1 828	91	1 169	68	469	0	60%	-100%
Other	436	0	1 272	181	1 017	17	-20%	-91%
Total	**1 418 011**	**40 895**	**1 716 119**	**43 605**	**1 732 359**	**74 045**	**1%**	**70%**

Distribution channels

While Education publishers are dependent on state and provincial government departments for the vast majority of orders, they also distribute their products through a variety of other sales channels. The revenue from different channels fluctuates, but the main trend for 2022-23 has been a shift from bookseller chains to independent booksellers and online retailers.

Discounts can vary a great deal according to different kinds of suppliers. For the State and Provincial Departments, publishers provide individual prices in response to government tenders. Because publishers are required to provide their absolute lowest prices, no discounts are applicable to those prices.

Table 12: Turnover and average discount per sales channel (R '000)

Type of sales outlet	2020/21	2021/22	2022/23	Average discount %
National or regional bookseller chains	259 548	289 773	39 839	30-45%
Independent booksellers and other book retailers	208 623	259 792	442 817	31%
Non-book retail outlets	22 960	23 461	23 247	26%
Internet booksellers	11 479	12 099	56 396	21%
Businesses and corporations (direct sales)	22†	4 100	13 699	27%
Book clubs and direct mail booksellers	16 618	20 607	27 122	10%
The public (direct sales)	43 194	56 259	42 969	20%
Libraries	435	507	597	17%
State and provincial departments	803 735	794 494	913 509	15%
Schools and educational institutions	11 982	16 484	19 521	22%
School book distributors and tenders	394 766	277 104	275 306	20%
Export sales	1 261	562	275 306	20%
Other	7 333	1029	23 008	18%
Total	**1 781 955**	**1 781 955**	**1 878 253**	**20%**

† *Note: This is an under-reporting on the part of the respondents.*

Revenue

Fluctuating revenue figures from year to year reflect the changing calls for new titles in different provincial departments, and the different ways in which individual provinces allocate funds for LTSM. The figures recorded in this survey match those reported in a separate, internal survey of educational publishers.

Table 13: Total revenue by province (R '000)

Province	2020/21		2021/22		2022/23	
	Local	Imported	Local	Imported	Local	Imported
Eastern Cape	138 850	1 922	57 687	2 369	170 694	1 700
Free State	66 829	415	66 460	1 131	67 373	409
Gauteng	405 127	26 173	430 626	29 804	410 219	35 144
Kwa-Zulu Natal	388 688	6 159	323 199	12 298	333 456	4 062
Limpopo	273 547	506	333 793	12 476	321 939	383
Mpumalanga	90 807	271	22 408	830	19 886	417
Northern Cape	12 395	118	28 123	473	27 182	177
North West	197 717	2 369	190 220	6 688	217 723	1 936
Western Cape	159 979	10 082	208 075	11 942	237 287	12 865
Total	**1 733 939**	**48 015**	**1 660 591**	**78 010**	**1 805 760**	**57 092**

The following tables report on revenue by province, according to the grades and product sub-categories.

Table 14: Eastern Cape: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	**Imported**	**Local**	**Imported**
Grade R	125	41	40	83
Grade 1-3 core	5 964	44	13 883	70
Grade 4-6 core	13 706		49 046	17
Grade 7-9 core	12 479	57	57 699	
Grade 10 core	2 171		10 280	5
Grade 11 core	2 209		12 312	362
Grade 12 core	8 333		12 291	
Grade 10 Prescribed literature	1 008		611	
Grade 11 Prescribed literature	1 189	11	1 131	
Grade 12 Prescribed literature	1 116	332	1 538	
FP Reading schemes	4 207	1 267	6 904	1 072
IP Reading schemes	479	113	774	194
SP Readers (non-core)	352		415	19
Dictionaries (Primary)	450	30	686	29
Dictionaries (Secondary)	360	14	345	15
Atlases (Primary)	124	0	179	
Atlases (Secondary)	108	0	158	
Posters	37	0	99	
Supplementary and Library	995	185	1 337	78
Other	2 275	274	968	117
Total	**57 687**	**2 369**	**170 694**	**1 700**

Table 15: Free State: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	Imported	Local	Imported
Grade R	186	12	185	1
Grade 1-3 core	5 306	1	5 314	3
Grade 4-6 core	20 039		19 347	
Grade 7-9 core	21 085	18	27 522	741
Grade 10 core	3 600		3 493	
Grade 11 core	4 082		3 679	
Grade 12 core	2 966		4 001	
Grade 10 Prescribed literature	74		340	
Grade 11 Prescribed literature	204	175	465	175
Grade 12 Prescribed literature	186	4	231	4
FP Reading schemes	984	296	1 015	77
IP Reading schemes	203	30	299	104
SP Readers (non-core)	104		176	378
Dictionaries (Primary)	159	24	119	28
Dictionaries (Secondary)	111	1	75	215
Atlases (Primary)	118		131	
Atlases (Secondary)	61		70	
Posters	28		152	
Supplementary and Library	334	73	238	16
Other	6 630	497	53	
Total	**66 460**	**1 131**	**67 373**	**409**

Table 16: Gauteng: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	Imported	Local	Imported
Grade R	2 397	763	3 310	144
Grade 1-3 core	20 187	56	21 979	528
Grade 4-6 core	96 172	7	91 476	723
Grade 7-9 core	123 905	251	133 412	3 141
Grade 10 core	29 029		28 481	1 387
Grade 11 core	29 927		27 083	1 770
Grade 12 core	30 559		26 228	3 355
Grade 10 Prescribed literature	3 668	25	3 707	734
Grade 11 Prescribed literature	2 492	257	3 129	0
Grade 12 Prescribed literature	1 869	35	2 583	57
FP Reading schemes	11 714	5 961	14 824	3 193
IP Reading schemes	2 597	621	2 603	1 528
SP Readers (non-core)	2 617	385	1 428	287
Dictionaries (Primary)	8 779	2 588	10 099	3 851
Dictionaries (Secondary)	7 961	165	5 579	210
Atlases (Primary)	2 635	29	2 679	9
Atlases (Secondary)	1 575	49	1 824	8
Posters	198	3	361	3
Supplementary and Library	22 434	4 349	21 794	1 601
Other	29 912	14 261	7 637	12 670
Total	**430 626**	**29 804**	**410 219**	**35 144**

Table 17: KwaZulu-Natal: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	Imported	Local	Imported
Grade R	4 636	1 532	1 054	183
Grade 1-3 core	32 276	122	31 921	233
Grade 4-6 core	84 384	112	89 070	50
Grade 7-9 core	84 170	101	100 945	86
Grade 10 core	22 342		24 184	51
Grade 11 core	22 530		25 302	11
Grade 12 core	22 125		25 432	14
Grade 10 Prescribed literature	2 988		2 781	18
Grade 11 Prescribed literature	4 214	1	3 021	809
Grade 12 Prescribed literature	995	11	585	809
FP Reading schemes	4 061	4 267	9 673	1 046
IP Reading schemes	1 213	261	1 261	492
SP Readers (non-core)	1 584	44	1 601	18
Dictionaries (Primary)	2 866	434	2 988	504
Dictionaries (Secondary)	3 034	1	2 667	70
Atlases (Primary)	1 366	4	1 292	
Atlases (Secondary)	640	690	741	
Posters	281		195	
Supplementary and Library	3 830	352	3 317	424
Other	23 665	4 364	5 424	859
Total	**323 199**	**12 298**	**333 456**	**4 062**

Table 18: Limpopo: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	**Imported**	**Local**	**Imported**
Grade R	1 561	110	468	337
Grade 1-3 core	4 997		6 045	2
Grade 4-6 core	35 415		53 857	
Grade 7-9 core	85 146	1 389	107 381	99
Grade 10 core	27 943		33 021	
Grade 11 core	37 449		54 566	
Grade 12 core	52 538		53 788	
Grade 10 Prescribed literature	2 312	227	2 200	1
Grade 11 Prescribed literature	2 606	3	2 459	
Grade 12 Prescribed literature	1 065		864	
FP Reading schemes	3 548	109	1 891	31
IP Reading schemes	3 480	48	423	39
SP Readers (non-core)	582		263	1
Dictionaries (Primary)	435	65	492	101
Dictionaries (Secondary)	329	6	373	991
Atlases (Primary)	149		163	
Atlases (Secondary)	90		107	
Posters	14		11	
Supplementary and Library	989	39	2 250	111
Other	73 147	10 480	1 316	96
Total	**333 794**	**12 476**	**321 939**	**383**

Table 19: Mpumalanga: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	Imported	Local	Imported
Grade R	209	4	331	30
Grade 1-3 core	1 404		1 521	30
Grade 4-6 core	4 123		3 462	30
Grade 7-9 core	10 370	5	6 356	
Grade 10 core	817		967	33
Grade 11 core	956		1 062	2
Grade 12 core	1 396		3 739	2
Grade 10 Prescribed literature	30		143	982
Grade 11 Prescribed literature	17		35	
Grade 12 Prescribed literature	39		227	
FP Reading schemes	179	242	218	101
IP Reading schemes	93	14	48	32
SP Readers (non-core)	233		20	
Dictionaries (Primary)	390	36	466	41
Dictionaries (Secondary)	315	10	276	15
Atlases (Primary)	222		274	229
Atlases (Secondary)	565		167	
Posters	1		28	480
Supplementary and Library	572	83	307	46
Other	473	436	239	118
Total	**22 408**	**830**	**19 886**	**421**

Table 20: Northern Cape: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	Imported	Local	Imported
Grade R	93	5	108	0
Grade 1-3 core	1 114	2	1 312	0
Grade 4-6 core	8 726		8 457	0
Grade 7-9 core	8 485	8	9 715	0
Grade 10 core	1 289		1 978	1
Grade 11 core	2 040		1 776	0
Grade 12 core	1 891		1 620	0
Grade 10 Prescribed literature	504		81	3
Grade 11 Prescribed literature	518		195	0
Grade 12 Prescribed literature	428		91	0
FP Reading schemes	785	233	1 171	116
IP Reading schemes	287	2	92	9
SP Readers (non-core)	260		77	0
Dictionaries (Primary)	176	46	190	36
Dictionaries (Secondary)	134		65	2
Atlases (Primary)	52		84	0
Atlases (Secondary)	39		41	0
Posters	57		58	0
Supplementary and Library	383	10	297	7
Other	924	165	214	3
Total	**28 183**	**473**	**27 182**	**177**

Table 21: North West: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	**Imported**	**Local**	**Imported**
Grade R	6 772	190	6 853	104
Grade 1-3 core	14 802	111	19 296	185
Grade 4-6 core	48 980		61 765	16
Grade 7-9 core	54 723	104	72 353	16
Grade 10 core	11 734		12 398	2
Grade 11 core	12 167		12 516	2
Grade 12 core	9 749		13 912	2
Grade 10 Prescribed literature	927		1 381	845
Grade 11 Prescribed literature	1 123	8	1 486	
Grade 12 Prescribed literature	744	127	1 044	
FP Reading schemes	4 208	1 082	5 635	454
IP Reading schemes	2 194	171	862	170
SP Readers (non-core)	1 325	3	707	11
Dictionaries (Primary)	2 761	674	1 526	255
Dictionaries (Secondary)	625	172	919	119
Atlases (Primary)	1 718	6	1 183	35
Atlases (Secondary)	2 542	2	540	
Posters	856		764	614
Supplementary and Library	5 837	225	5 080	214
Other	10 450	3 812	1 761	350
Total	**190 220**	**6 688**	**217 723**	**1 936**

Table 22: Western Cape: Revenue by product sub-category

Book Category	2021/22 (R '000)		2022/23 (R '000)	
	Local	Imported	Local	Imported
Grade R	300	24	373	23
Grade 1-3 core	8 452	87	31 469	166
Grade 4-6 core	43 766		35 756	134
Grade 7-9 core	58 642	97	68 672	839
Grade 10 core	14 106		13 316	334
Grade 11 core	12 365		13 187	333
Grade 12 core	14 073		18 239	334
Grade 10 Prescribed literature	1 267	10	2 207	24
Grade 11 Prescribed literature	1 314	33	1 812	149
Grade 12 Prescribed literature	2 341	73	3 064	149
FP Reading schemes	5 193	2 195	4 025	2 240
IP Reading schemes	1 160	320	877	298
SP Readers (non-core)	1 608	182	1 289	170
Dictionaries (Primary)	2 121	678	1 922	828
Dictionaries (Secondary)	2 119	137	1 259	86
Atlases (Primary)	903	1	843	8
Atlases (Secondary)	638	23	689	12
Posters	123	1	215	4
Supplementary and Library	26 414	1 959	33 966	585
Other	11 171	6 121	4 107	6 448
Total	**208 075**	**11 942**	**237 287**	**12 865**

Sector Report: Trade

Trade publishers produce books for the general reader. The sector is characterised by large international and local imprints, as well as several small to medium specialised niche publishers. It is dominated by multinational publishers that use a variety of distributors to import their books for the South African market. Only a small proportion of these imports are captured in this survey, as the focus is on the production of local books.

Production

Production in this sector, as measured by sales revenue, declined from 2019 but is now showing a recovery again.

Table 23: Revenue from book-related activities (R ’000)

Activity	2020/2021		2021/22		2022/23		Change
	Local	Imported	Local	Imported	Local	Imported	Local
Sales of print books	647 647	95 112	828 470	118 083	871 234	120 027	5%
Sales of digital book products	8 055	5 128	9 355	17 562	9 296	9 114	-1%
Rights sales	1 310	259	638	795	1 818	243	185%
Total revenue	**657 012**	**100 498**	**838 463**	**136 441**	**931 724**	**129 384**	**11%**

Table 24: Other revenue (R ’000)

Activity	2020/21	2021/22	2022/23	Change
Distribution of locally published books	649	495	552	12%
Other book-related income	281	172	249	45%
Total other revenue	**930**	**668**	**802**	**20%**

Table 25: Average royalty paid on locally published books

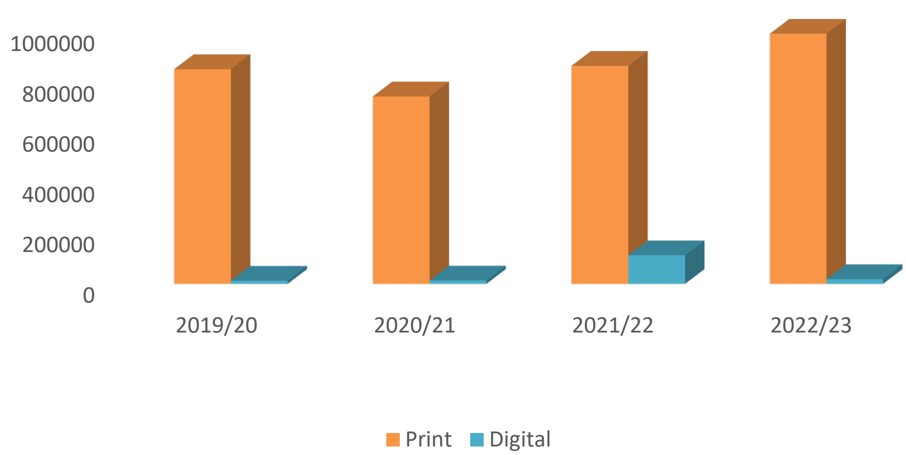
Product Category	Minimum Percentage	Maximum Percentage	Weighted Average
General trade print books	5%	17%	11%
General trade digital books	2%	27%	14.5%

Revenue by format and language

E-books

Print remains the format of preference. Although most forecasts have predicted a sharp rise in the use of digital formats over time, we have instead seen a decline after a sharp uptick that can be related to the pandemic period and lockdown.

Figure 8: Revenue by format, Trade sector, 2021-23



Genre and format

The sector is further divided by genre – non-fiction and fiction, and is aimed at either an adult or children's market. Non-fiction also includes religious books, such as Bibles, and reference works such as manuals and dictionaries. As other surveys have shown, non-fiction tends to sell more than fiction for adult audiences, but for children fiction is more popular.

Figure 9: Revenue by genre, Trade sector, 2022-23

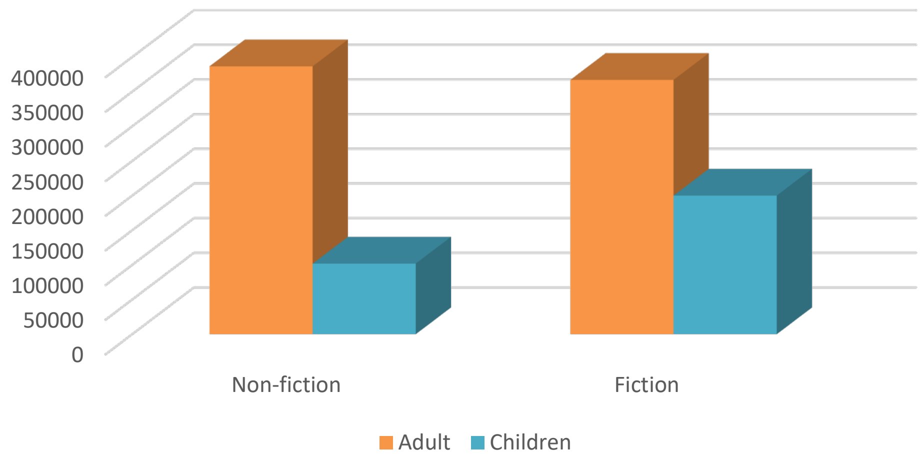


Table 26: Revenue by genre and format (R ’000)

Genre	2020/21		2021/22		2022/23	
	Local	**Imported**	**Local**	**Imported**	**Local**	**Imported**
Adult non-fiction print	272 981	26 286	368 292	44 125	337 586	46 351
Adult non-fiction digital	3 674	1 762	90 882	11 554	327	2 226
Adult fiction print	197 272	28 541	267 551	28 560	334 752	28 402
Adult fiction digital	3 163	3 060	1 354	5 254	414	3 366
Children’s non-fiction print	21 581	12 078	31 651	11 742	85 175	15 738
Children’s non-fiction digital	91	4	868	140	357	568
Children’s fiction print	152 924	28 210	161 216	34 450	166 588	32 684
Children’s fiction digital	1 126	399	574	614	357	374
Total	**656 854**	**100 498**	**922 390**	**136 441**	**929 906**	**129 141**

Language

In terms of language, the Trade sector focuses mostly on the English-language audience, with a small but consistently loyal Afrikaans book-buying public as well. Where other languages are used, publishers often opt for translations of a single book into multiple languages – reflected in the survey figures as 'multilingual' – rather than a range of books in a variety of languages. In the past year, however, publishers have added to the range of languages published, especially in non-fiction.

Figure 10: Revenue by language, Trade sector, 2022-23

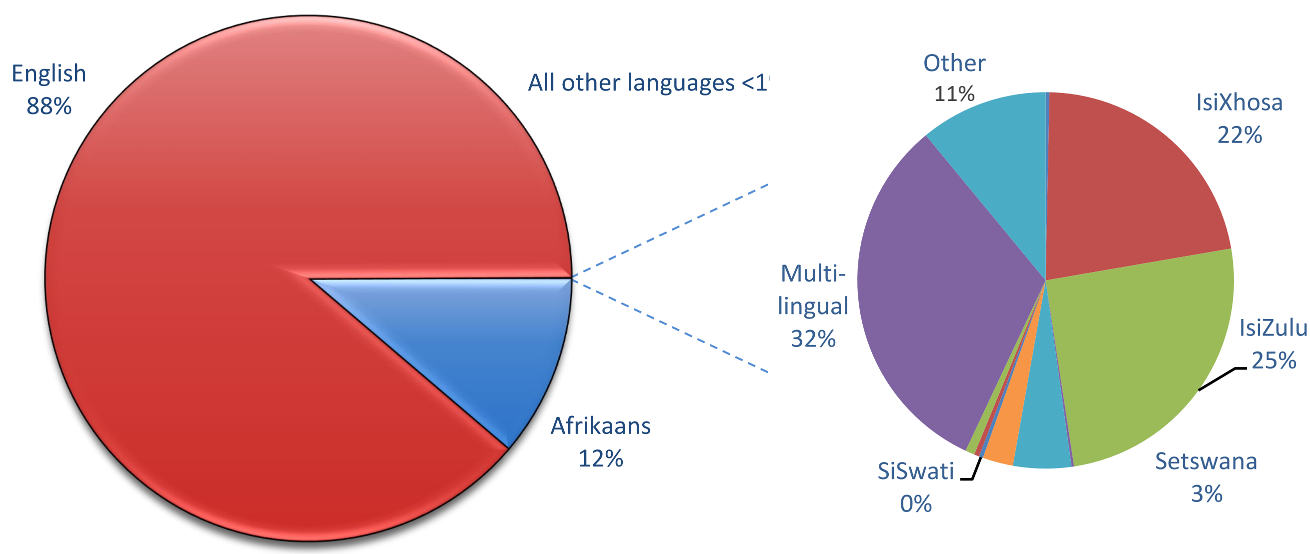


Table 27: Revenue from adult fiction books, by format and language (R ’000)

Language	2020/21		2021/22		2022/23	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	35 150	4 960	40 188	4 988	55 270	1 024
English	65 471	1 666	247 940	4 991	311 946	711
IsiXhosa	3		4		36	
IsiZulu	8		9		29	126
Sesotho	2		0,6			365
Setswana	315	25	432		5	75
SiSwati	100 949	6 651	288 573	10 065		
Multilingual	35 150	4 960	40 188	4 988	357	7
Total	**65 471**	**1 666**	**247 940**	**4 991**	**367 193**	**2 308**

Table 28: Revenue from adult non-fiction books, by format and language (R ’000)

Language	2020/21		2021/22		2022/23	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	16 564	587	20 214	479	26 650	3
English	151 201	4 489	366 133	101 188	340 949	373
IsiNdebele					4	
IsiXhosa	- 1		3		34	82
IsiZulu	103		238		180	
Sesotho					44	
Setswana					17	
SiSwati		1			4	
Tshivenda					5	
Xitsonga					10	
Multilingual	455		33		34	
Other	34				136	
Total	**168 356**	**5 078**	**386 622**	**101 672**	**368 068**	**375**

Table 29: Revenue from children's fiction books, by format and language (R '000)

Language	2020/21		2021/22		2022/23	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	27 354	915	32 244	254	23 548	99
English	47 906	36	123 781	92	160 222	31
IsiXhosa	5		33		117	
IsiZulu	97		118	2	85	
Sepedi	3		21		3	
Sesotho	4				17	
Setswana	2		25		10	
Other	12					
Total	**75 370**	**952**	**156 233**	**349**	**184 002**	**130**

Table 30: Revenue from children's non-fiction books, by format and language (R '000)

Language	2020/21		2021/22		2022/23	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	4 437	69	10 138	982	13 576	<1
English	17 239	26	22 149	25	40 794	<1
IsiXhosa	6		261		86	
IsiZulu	4		14		20	
Sepedi	9					
Sesotho	8					
Total	**21 704**	**95**	**32 562**	**1 008**	**53 495**	**1**

Distribution channels

Table 31: Turnover and average discount per sales channel (R ’000)

Type of sales outlet	2020/21		2021/22		2022/23		Mean discount %
	Local	Imported	Local	Imported	Local	Imported	
National or regional bookseller chains	256 226	280 858	251 823	336 171	295 548	344 638	44%
Independent booksellers and other book retailers	28 606	10 617	29 976	30 842	38 080	36 939	36%
Non-book retail outlets	7 200	13 602	12 921	22 661	26 694	19 388	41%
Supermarkets and department stores	6 964	2 576	15 672	16 515	16 976	18 344	32%
Internet booksellers	48 167	47 369	50 595	59 499	60 388	67 598	42%
Book clubs and direct mail booksellers	1 489		1 738	15	11 569	11	23%
Businesses and corporations (direct sales)	926	1 688	68 530	4 332	2 811	684	24%
The public (direct sales)	3 368		17 343	4 055	7 422	3 945	30%
Libraries	2 887	5 026	4 077	6 135	3 730	6 173	38%
State and provincial departments	1		43 442	6 414	31 265	0,5	17%
Schools and educational institutions	5 729	2 427	10 782	3 897	7 365	197	30%
School book distributors and tenders	89	2 539	21 457	2 870	29 165	3 299	29%
Export sales	9 663	7 111	348	8 963	589	4 034	19%
Other (including rights sales)	7 959	3 246	22 324	4 419	17 823	1 886	35%
Total	**379 273**	**377 058**	**551 172**	**506 789**	**551 915**	**507 137**	

Sector Report: Academic

The Academic sector publishes textbooks and other products for university students, as well as professional products and books for continuing professional development, used by doctors, lawyers and accountants, for instance. This sector is currently facing several challenges, including changes in the allocation of funding through the National Student Financial Aid Scheme (NSFAS), rampant book piracy (especially of digital books), the effects of COVID and hybrid learning, and student enrolment numbers. This has led to a decline in earnings, with the sector now making up a smaller part of the industry's revenue as a whole.

Table 32: Revenue from book-related activities: Academic sector (R '000)

Activity	2020/21		2021/22		2022/23		Change	
	Local	Imported	Local	Imported	Local	Imported	Local	Imported
Sales of print books	136 531	34 766	140 529	34 234	129 893	26 497	-8%	-23%
Sales of digital book products	11 057	27 856	14 229	44 521	14 224	43 129	0%	-3%
Rights sales	4 392	108	4 906	76	5 394	157	10%	107%
Total turnover	**151 980**	**62 729**	**159 663**	**78 831**	**149 512**	**69 784**	**-6%**	**-11%**

Revenue by format and language

Print remains the format of preference, although all of the Academic publishers have invested in new technologies and new digital products. The proportion of digital revenue has grown rapidly in the past three years.

The sector is heavily dominated by the production of English-language books, a trend that mirrors the use of English as the most common language of academia and university education world-wide. These books compete against well-resourced international publishers and textbooks.

Figure 11: Academic revenue by format and language, 2020-23

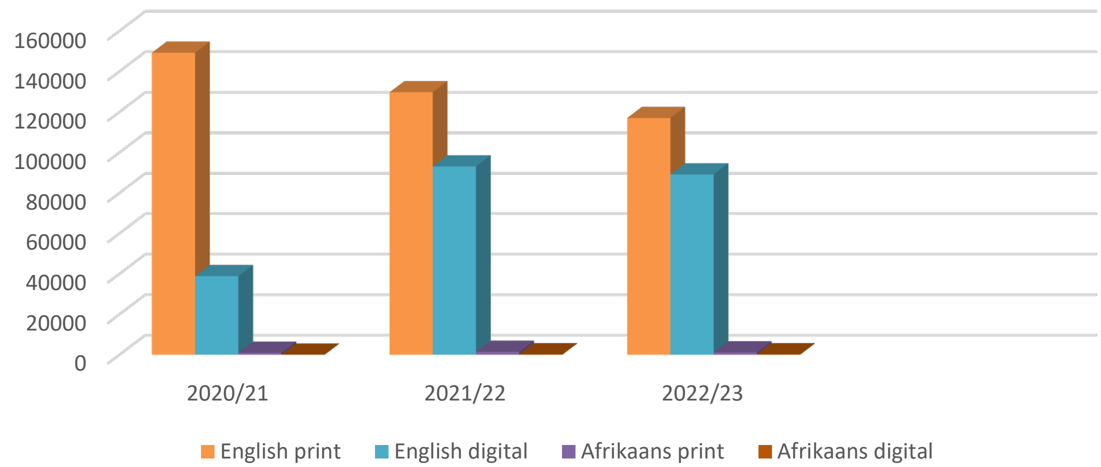


Table 33: Revenue by format and language (R ’000)

Language	2020/21		2021/22		2022/23	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	939	37	1 420	186	1 168	197
English	149 193	38 858	129 664	93 068	117 005	89 110
IsiXhosa					0,5	
Total	**150 131**	**38 895**	**131 084**	**93 255**	**118 174**	**89 307**

Table 34: Average royalty paid on locally published books

Product Category	Minimum Percentage	Maximum Percentage	Weighted Average
Printed textbooks	3%	21%	12%
Digital textbooks	3%	25%	14%

Distribution channels

Academic books are mostly sold through bookseller chains, many of which are located on or near university campuses.

Table 35: Turnover and average discount per sales channel (R ’000)

Type of sales outlet	2020/21	2021/22	2022/23	Mean Discount %
Primary retail outlets (booksellers)	147 598	178 407	128 747	32%
E-commerce (direct publisher sales)	499	227	401	10%
E-commerce (retailer sales)	20 091	18 876	18 706	30%
Other	26 467	37 392	34 911	
Total	**194 655**	**234 902**	**182 765**	

Sector Report: TVET

The Technical and Vocational Education and Training (TVET) sector produces textbooks for students at the TVET colleges in South Africa, which offer technical or vocational training. Although this is a form of tertiary education, the procurement and distribution model is completely different from that of the Academic textbook sector, as the TVET system is more centralised. The two sectors are thus separated for reporting purposes.

The TVET sector produces books – overwhelmingly in print, and almost entirely in English – for two different levels: the National Certificate (Vocational), or NCV, and the National Accredited Technical Diploma (NATED). Public TVET colleges are not badly affected by piracy because there is little financial incentive – colleges receive a textbook budget and students are not expected to purchase any of their own learning materials. Private TVET colleges make up a very small percentage of total TVET sales – this sector reportedly experiences widespread photocopying.

Revenue

Table 36: Revenue by format (R ’000)

Format	2020/21	2021/22	2022/23	Change
Sales of print books	238 117	295 691	333 692	13%
Sales of digital book products	3 347	13 904	3 138	-77%
Total	**241 464**	**309 595**	**336 831**	**9%**

Table 37: Revenue by TVET level (R ’000)

Category	2020/21		2021/22		2022/23		Change	
	NCV	NATED	NCV	NATED	NCV	NATED	NCV	NATED
TVET books print	77 006	99 482	141 328	154 364	156 467	177 212	11%	15%
TVET books digital	653	2 694	9 435	4 469	1 246	1 905	-87%	-57%
Total	**77 659**	**102 176**	**150 764**	**158 832**	**157 714**	**179 177**	**5%**	**13%**

Table 38: Revenue by format and language (R ’000)

Language	2020/21		2021/22		2022/23		Change	
	Print	Digital	Print	Digital	Print	Digital	Print	Digital
English	196 013	2 410	240 322	13 508	273 278	2 387	14%	-82%
Afrikaans	42 209	938	55 369	397	60 415	751	9%	89%
Total	**238 222**	**3 345**	**295 692**	**13 904**	**333 693**	**3 138**	**13%**	**-77%**

Table 39: Average royalty paid on locally published books

Product Category	Minimum Percentage	Maximum Percentage	Average
TVET print books	3%	17%	10%
TVET digital books	3%	14%	8%

Distribution channels

Table 40: Sales channels and discounts (R ’000)

Type of sales outlet	2020/21	2021/22	2022/23	Mean Discount %
National/regional booksellers	29 829	201 495	40 001	30%
Independent booksellers	64 887	14 727	187 432	32%
Non-book retail outlets	198	1	228	10%
Internet booksellers	2 617	1 141	2 283	18%
Book clubs and bulk booksellers			176	10%
The public (direct sales)	643	2 194	2 130	9%
Schools and educational institutions	143 282	90 038	104 580	26%
Total	**241 455**	**274 036**	**336 831**	

SMME Publishers

The following section reports on the findings of a survey of SMME publishers in South Africa. They are asked to fill in a simplified version of the questionnaire, as many publishers have described challenges in collating the detailed information required for the larger survey, due to inadequate systems as well as a lack of staff and time. This survey remains small at the moment, with 19 responses from the 100 questionnaires sent to the potential poll of participants. This participation rate has improved from 10% in 2019/20 and 13% in 2021/22.

The majority of SMME publishers, based on this data, are located in the Western Cape and Gauteng. They typically employ only one to two staff members, with some support from freelancers. Although their earnings are low, most have managed to continue a precarious existence for more than a decade. All of the publishers are familiar with both print and digital formats, and all publish in English. However, all of the official languages are represented by at least one publisher.

SMME publishers report feeling marginalised from the broader publishing industry, and express a need for specialised training as well as funding. As these publishers are an important source of diversity in the publishing industry (in terms of authors and languages), additional support is needed to sustain their role in the broader publishing ecosystem.

Figure 12: Location of SMME publishers

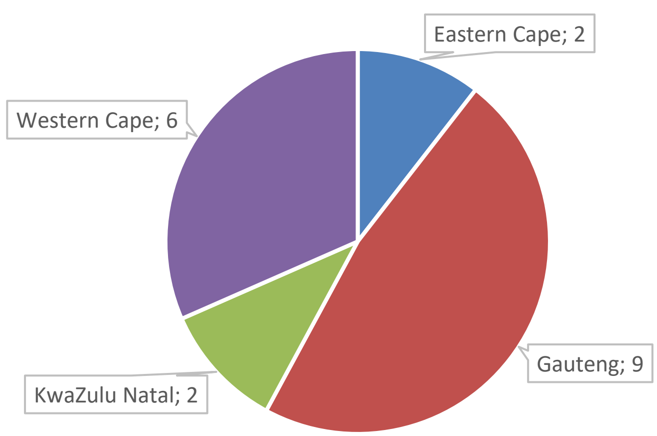


Table 42: Years of operation

Number of years	1-3	4-6	7 or longer
Responses	1	4	14

Table 43: Annual turnover

Turnover category	< R1 m	R1-2 m	R2 – 4 m	> R4 m
Responses	11	3	2	2

Table 44: Production by sector, 2022/23

Sector	Trade	Education	Academic or Scholarly	Self-published	Other
Number of titles	54	119	47	28	3

Table 45: Production by language, 2022/23

Language	Responses
Afrikaans	7
English	19
isiNdebele	1
isiZulu	7
isiXhosa	7
Sepedi	2
Sesotho	5
Setswana	2
Siswati	1
Tshivenda	1
Xitsonga	1
Other	1

Table 46: Distribution channels

Distribution Agents	Online	Direct Sales to Readers	Bookshops	Government / schools / libraries
14	3	12	12	3

Participants in the survey

African Perspectives

Bhiyoza Publishers

BK Publishing

Blackbird Books

Bookstorm

Cambridge University Press SA

Cengage Learning

Chase Education Solutions

Cover 2 Cover Books

Deep South

Dryad Press

Footprint Press

Future Managers

Ilima Publishers

Jonathan Ball Publishers

Juta

Karavan Press

Macmillan

Malherbe Uitgewers

Maskew Miller Learning (formerly Pearson)

Modjaji Books

Mthombothi Studios

NAM

NB Publishers

Oxford University Press SA

Pan Macmillan

Penguin Random House

Shuter and Shooter

Uhlanga

University of Johannesburg Press

Van Schaik

Via Afrika

Vivlia

Wits University Press

Zachen Books