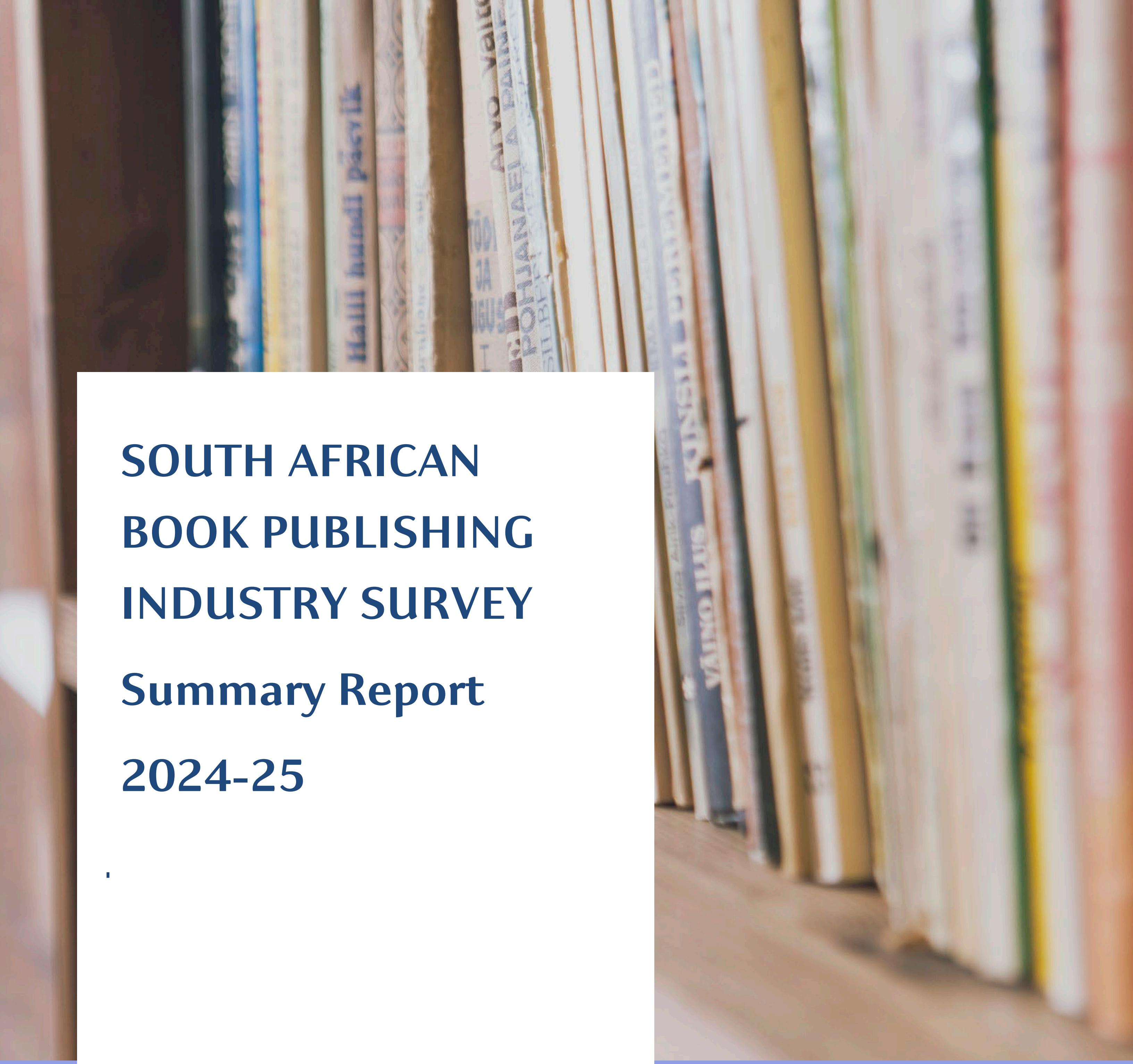

SOUTH AFRICAN BOOK PUBLISHING INDUSTRY SURVEY

Summary Report

2024-25

APRIL 2024 – MARCH 2025

Compiled by: Elizabeth le Roux and Savannah Harvett

PASA
PUBLISHERS' ASSOCIATION OF SOUTH AFRICA

UNIVERSITEIT VAN PRETORIA
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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. If you have any queries or corrections, please email us at booksurvey@up.ac.za.

To quote this report, use the following citation:

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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 estimated to be at least 200. The data are 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 survey targets both PASA and non-PASA members, from micro-enterprises to multinationals. The scope is limited to publishers operating in South Africa, although their main ownership may not be local, and further, to books published within South Africa.

This report highlights findings from the data submitted for the 2024/2025 financial year (April to March). All revenue reported is on net sales or income, i.e. discounts and VAT have been deducted. The figures are also condensed to the last R'000.

This year, 15 large and 131 SMME publishers were invited to participate, and completed questionnaires were received from 13 large and 24 SMME publishers. While the local publishing industry is dominated by larger publishers, there are also many small and micro-enterprises that have emerged. SMME publishers are requested to complete a simplified version of the survey. Of the SMMEs contacted, 13 were no longer active, so the final list of invitations was 118. Responses from 24 reflect a 21% response rate.

The response rates reflect changes in the industry between 2024 and 2026, in particular the consolidation of a number of separate publishers and imprints with mergers and changes in ownership. These changes complicated the participation of various large publishers (with an 87% response rate), and data could not be collected or was provided only in a partial form for some sectors. As a result, the data are presented only in a summary format, and are not comparable to previous years.

The changes in data provided can be attributed to the limitations of a survey based on self-report questionnaires. Every effort was made to ensure accuracy, to include triangulated data from other sources, and to aggregate the figures so no individual publisher's data could be extracted.

Prof. Beth le Roux

Head of the survey team

Overview

In 2024/25, the South African publishing industry generated nearly R3 billion in revenue, from sales of locally produced books, rights sales, and other income streams. The share of publishing revenue according to the major publishing sub-sectors is reflected below. These sub-sectors are:

- Academic: books aimed at a tertiary academic audience, mostly at universities, continuing professional development, and the scholarly community
- Trade: books aimed at a general readership, typically sold in bookshops and by online retailers
- Education: learning and teaching materials produced for schools
- TVET: learning and teaching materials produced for technical and vocational training (TVET) colleges

Figure 1: Revenue by sector

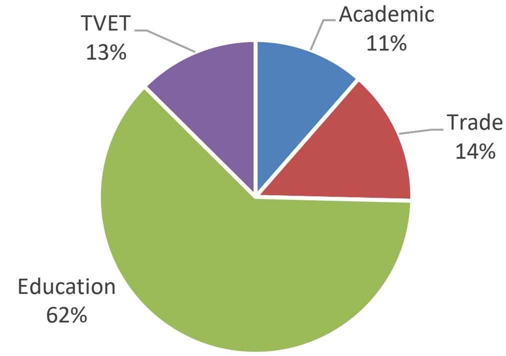


Figure 2: Total publishing revenue, 2022-2025

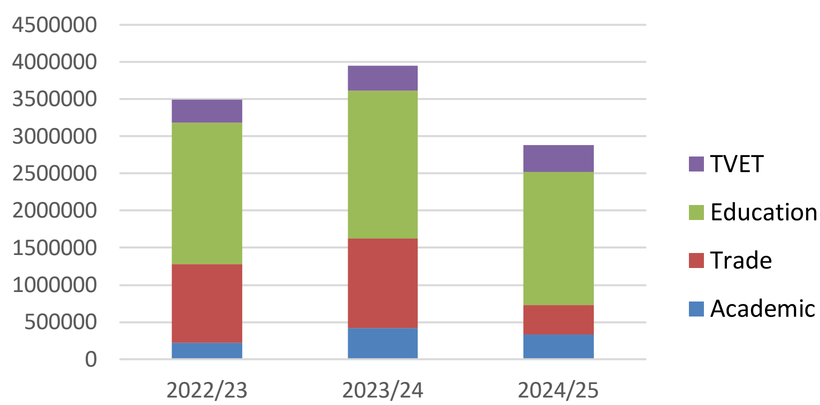
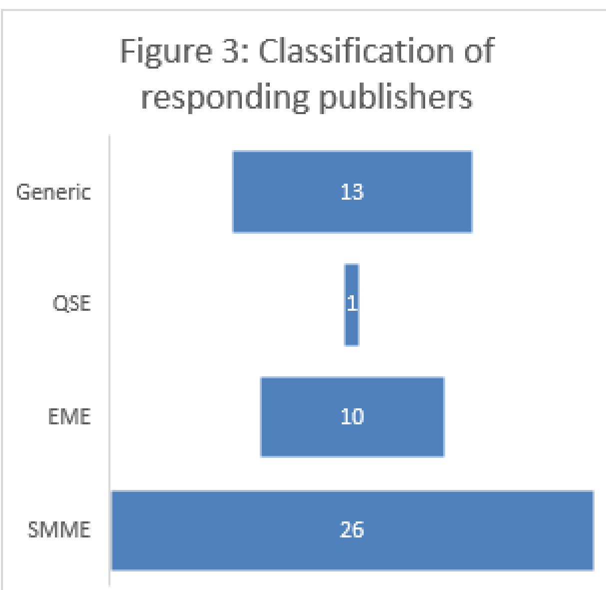


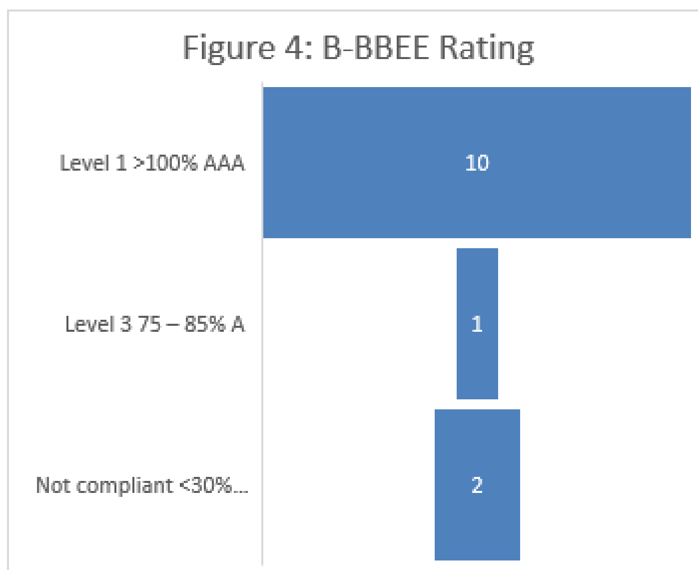
Table 1: Total net publishing industry revenue, 2023/24 – 2024/25 (ZAR ’000)

Sector	2023/24	2024/25	Change
Academic	418 404	329 023	-21%
Trade	1 208 861	401 929	-67%
Education	1 985 016	1 923 995	-3%
TVET	336 831	361 730	+ 7%
SMMEs		80 535	
Total	**3 612 281**	**3 097 212**	**-18%**

Publisher Profiles

The industry is dominated by a small group of very large publishers, who together represent more than 90% of all production and revenue. The classification is based on categories used by the government when determining Broad-Based Black Economic Empowerment (B-BBEEE) status: Generic (with an annual total revenue of more than R50 m); Qualifying Small Enterprise (QSE, with an annual revenue of between R10 m and R50 m); Exempted Micro-Enterprise (EME, with an annual total revenue of R10 m or less), and small, medium and micro-enterprises (SMMEs).





Employment

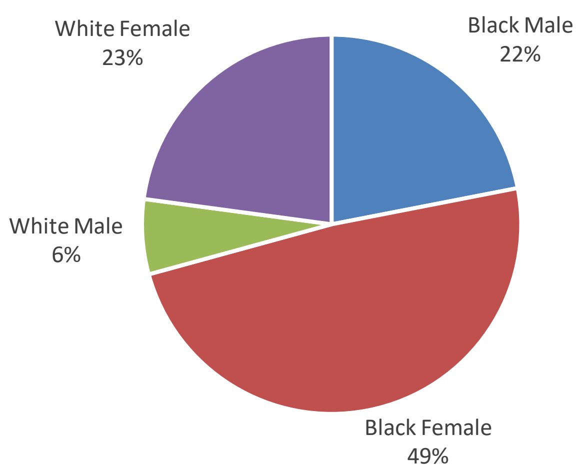
The downward trend previously reported in surveys is now showing signs of stabilising, up from 1 280 in the previous reporting period, to 1 299. If we add the employment figures from SMMEs, another 491 people employed in the industry are added. The total number of employees is thus 1 790. Revenue might be highly skewed towards the largest publishers, but employment shows the importance of the SMMEs to the diversity and growth of the industry. Many of these, however, are part-time or occasional contract workers.

The small changes in employment numbers have not affected the racial make-up of the industry, although the proportion of black women has risen slightly. Black women now make up 75% of administrative staff and 60% of lower-level support staff, but they also make up one quarter of leadership roles, and nearly half of all editorial and design roles.

Table 2: Employment profile (as of 31 March 2025)

Job Category	**Black Individual**		**White Individual**	
	Male	**Female**	**Male**	**Female**
Chief executive officer	2	2	4	5
Functional heads of department	26	32	20	40
Editorial staff	17	121	18	96
Design and production staff	21	48	5	26
Marketing, promotion and sales	59	159	20	83
Finance staff	14	60	3	17
Human resources	2	16	0	1
Office administration	15	76	0	7
Information technology staff	19	5	8	1
Warehousing and distribution	76	57	1	5
Other support staff	29	50	4	10
Part time	5	8	0	6
Total	**285**	**634**	**83**	**297**

Figure 5: Diversity of employment profile, 2024/25

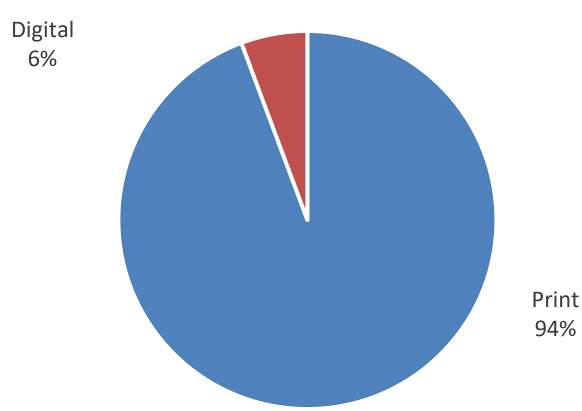


Production

The Production Profile in this survey is focused on revenue, mostly from the sales of books, rather than the number of titles published. Two important indicators that are tracked are the proportion of print to digital sales; and the languages published.

The figures show that there has been no change in digital book revenue, remaining at just 6% of total revenue. However, revenue from imported books shows a different picture, with digital books accounting for 18% of sales.

Figure 6: Print and digital formats



The industry is still dominated by English, but sales of books in the other official written languages are growing: English is down from to 77% of local market share, and African languages up to 12%. In African languages, the highest revenue from digital sales comes from Sepedi, Sesotho, and isiZulu.

Figure 7: Revenue by language, 2024/25

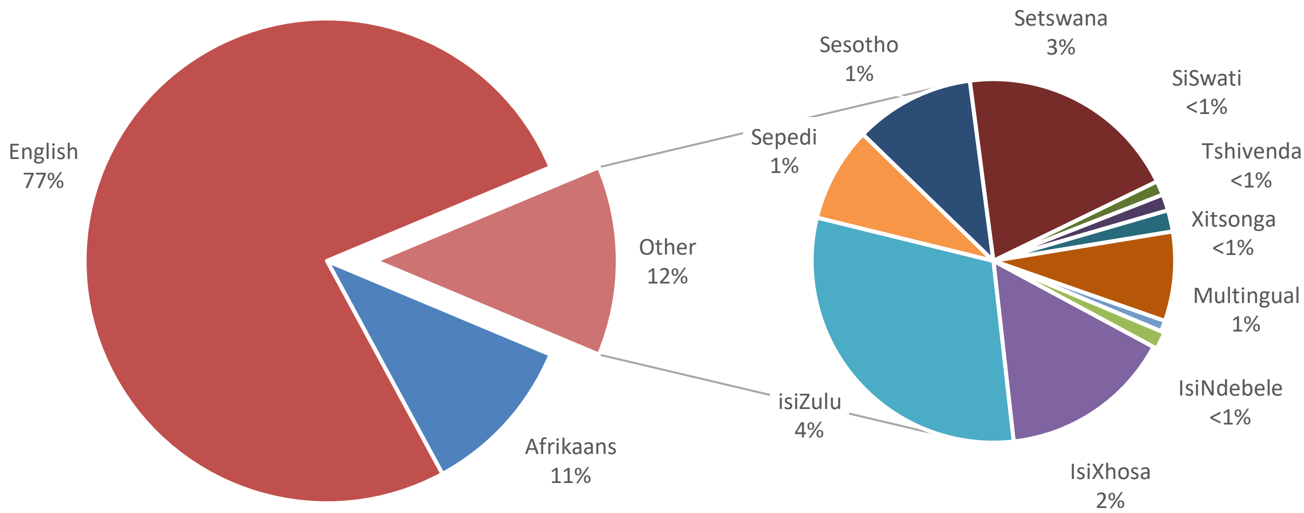


Table 3: Revenue from local titles, by format and language (R '000)

Language	2022/23		2023/24		2024/25	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	275 589	7 897	333 434	15 570	200 624	5 178
English	2 053 757	148 999	2 267 833	139 604	1 372 715	89 712
IsiNdebele	1 210	154	6 475	886	3 118	598
IsiXhosa	49 495	869	55 926	546	36 746	330
IsiZulu	85 254	1 816	76 479	2 984	70 598	3 265
Sepedi	30 328	796	37 241	6 593	16 573	3 753
Sesotho	22 844	729	24 545	4 508	23 282	2 455
Setswana	67 070	585	59 699	1 351	46 688	1 275
SiSwati	334	1 209	5 360	451	2 703	341
Tshivenda	3 489	24	5 762	273	3 176	301
Xitsonga	9 033	621	12 979	1 681	3 450	1 136
Multilingual	826	7	13 191	120	18 238	961
Other	1 017	18	2 058	32	2 221	78
Total	2 601 246	163 722	2 900 982	174 599	**1 800 132**	**109 383**

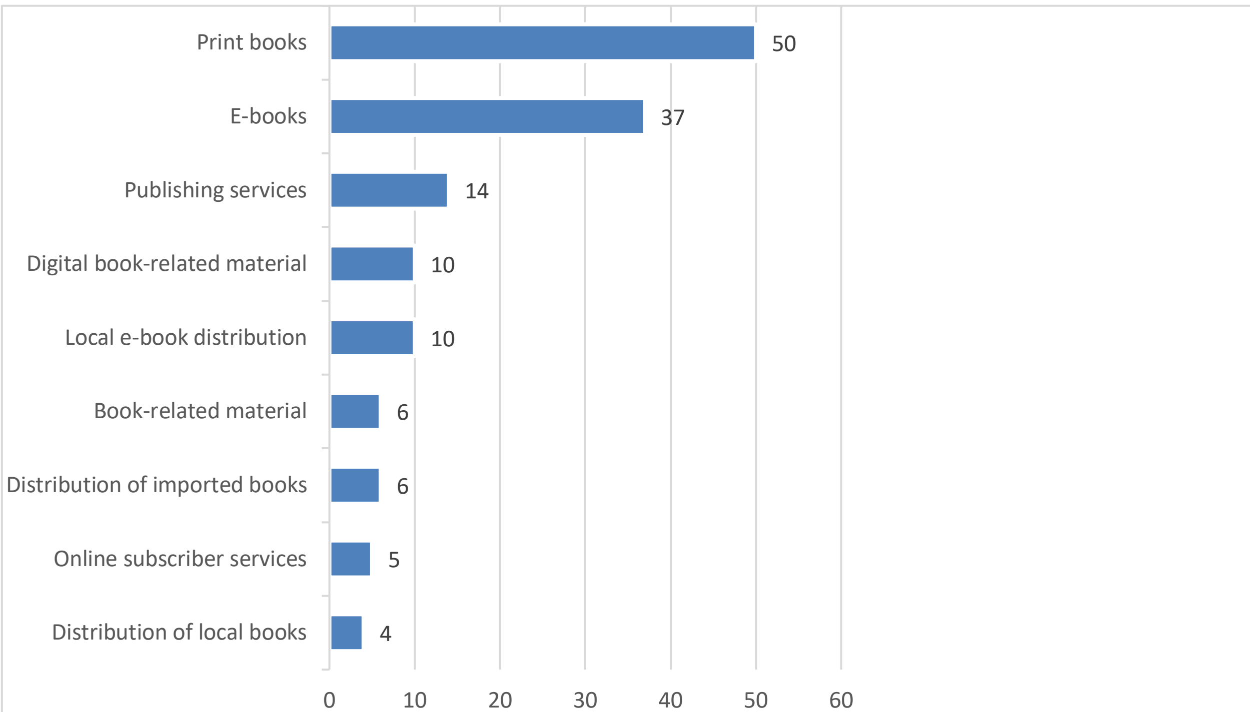
Note: The totals in this Table are not identical to those reflected in Table 1, because this table includes only local book publishing, and not all respondents provided this breakdown.

Revenue streams

All publishers are engaged in print book publishing, with digital production as the second most important source of revenue. Increasing numbers of publishers are offering custom publishing services and services to self-published authors. This is especially important for smaller publishers that cannot survive on income from sales alone.

The figure reflects how many publishers are now employing these revenue streams, keeping in mind that respondents could choose multiple options.

Figure 8: Publishers employing various streams of income



Distribution Channels

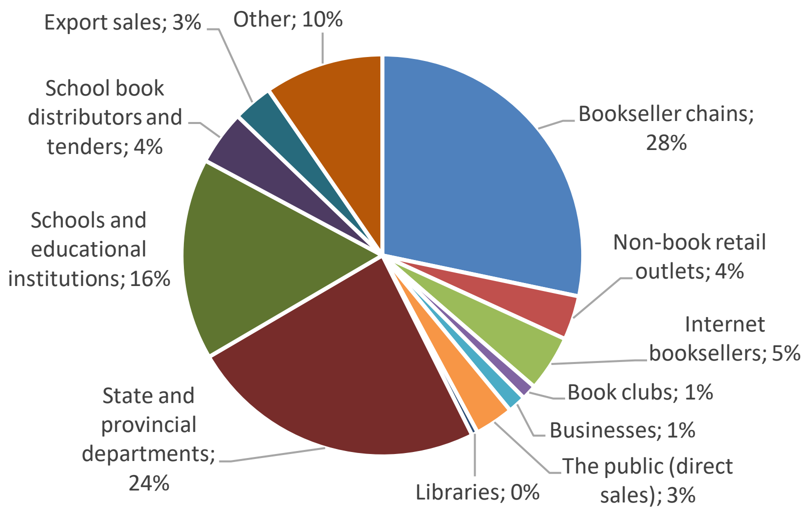
Publishers distribute their books through a variety of different channels. Since the Education sector is the largest, the most important buyer and distributor of locally produced books is the State and provincial education departments, and schoolbook distributors. Most other books are sold through booksellers, 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. The sale or licensing of subsidiary rights is also growing. However, declining sales through libraries reflect the decreased government spending on libraries, and low export figures reveal an inwardly-focused industry.

The data also show that distributors and booksellers are having an effect on publisher income by increasing the discounts they demand.

Note that, due to insufficient data, these figures can only be reported as percentages rather than actual revenue.

Figure 9: Revenue per sales channel



Royalties

While the survey does not directly collect data on authors and how author profiles are changing over time, data on average royalties are collected.

Table 4: Average royalties per sector

Sector	Minimum Percentage	Maximum Percentage	Average Royalty
Academic	3%	25%	12%
Trade	4%	30%	12%
Education	5%	30%	14%
TVET	5%	24%	12%

Sector Report: Education

The Education sector produces school textbooks for the Department of Basic Education (DBE) as well as private schools. The sector is the largest in South Africa, accounting for 62% of total revenue. In 2024/25, the sector recorded revenue of around R1.8 billion, with the vast majority of this income coming from sales of local products.

The sector is dominated by a few large and medium publishers and many very small publishers focusing on niche subjects and often using partners for distribution. This sector is highly dependent on the state's education budgets and procurement processes. Any curriculum revision or change to the national catalogue of approved textbooks has a direct impact on revenues and production.

In contrast to previous surveys, only overall revenue is reported on, without provincial break-downs, due to insufficient data.

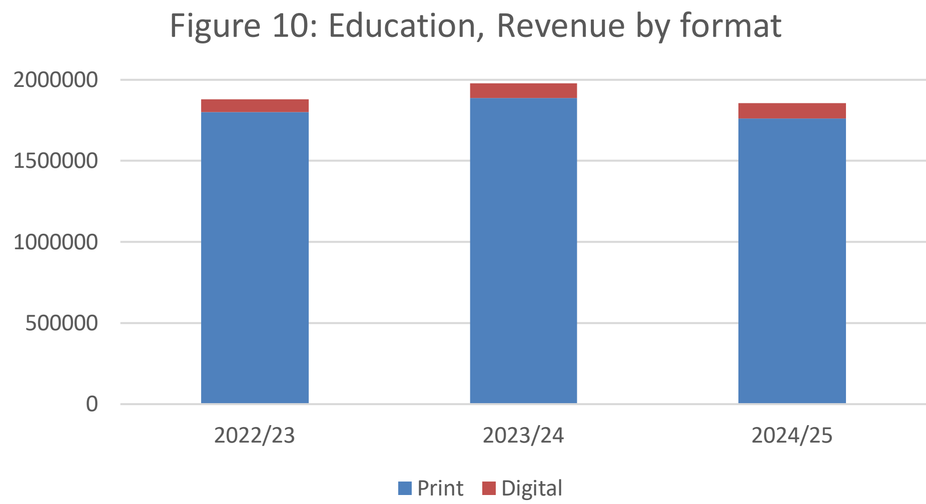
Table 5: Revenue from book-related activities (R '000)

Activity	**2022/23**		**2023/24**		**2024/25**	
	Local books	**Imported books**	**Local books**	**Imported books**	**Local books**	**Imported books**
Sales of print books	1 763 745	35 762	1 830 129	56 218	1 790 215	97 995
Sales of digital book products	77 902	844	89 232	1 109	35 638	147
Rights sales	63		493			
Total turnover	**1 841 710**	**36 606**	**1 919 854**	**57 327**	**1 825 853**	**98 142**

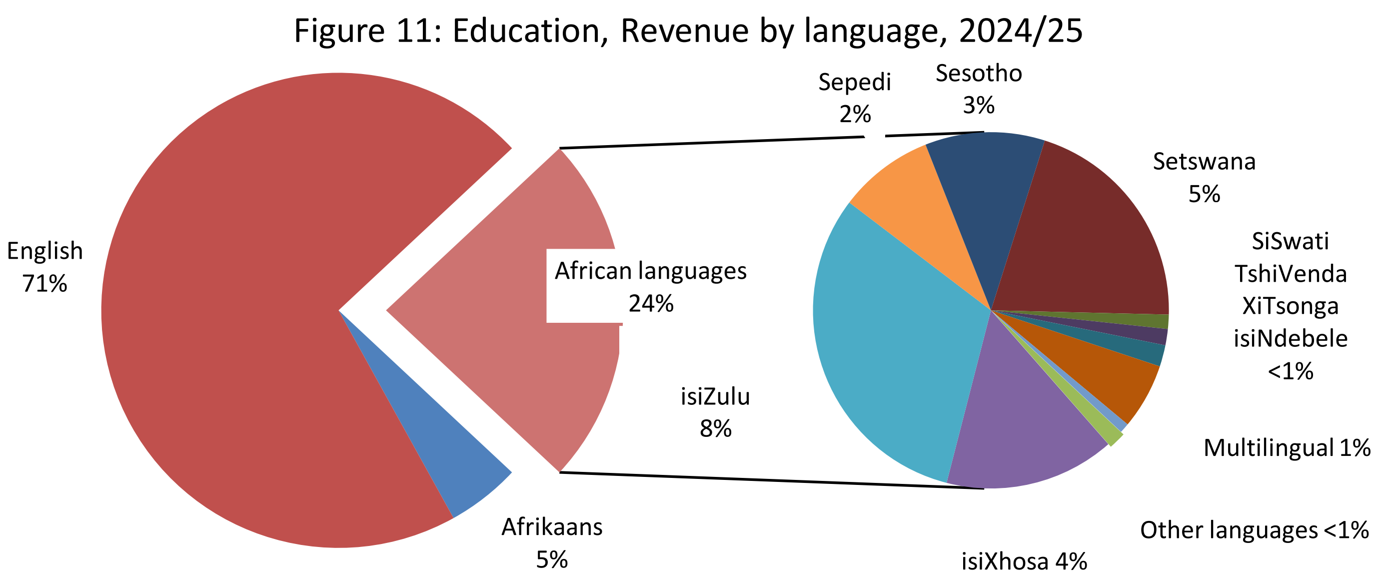
Production

The following tables provide a summary of revenue from both print and digital formats, sub-divided according to the local languages.

Despite growth in the past year, digital book products remain a very small proportion of revenue, at around 5%. This is in spite of government initiatives to introduce digital learning and teaching materials, and the publishers' development of digital content resources. Publishers have the capacity 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.



In terms of language, English dominates the production of textbooks, especially after the Foundation Phase, and has remained steady at around 71%. However, local languages make up an important part of Education publishers' lists. The proportions for African languages have increased from previous years.



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 figure represents the percentage of revenue received from the different sales or distribution channels.

Figure 12: Education, Distribution outlets

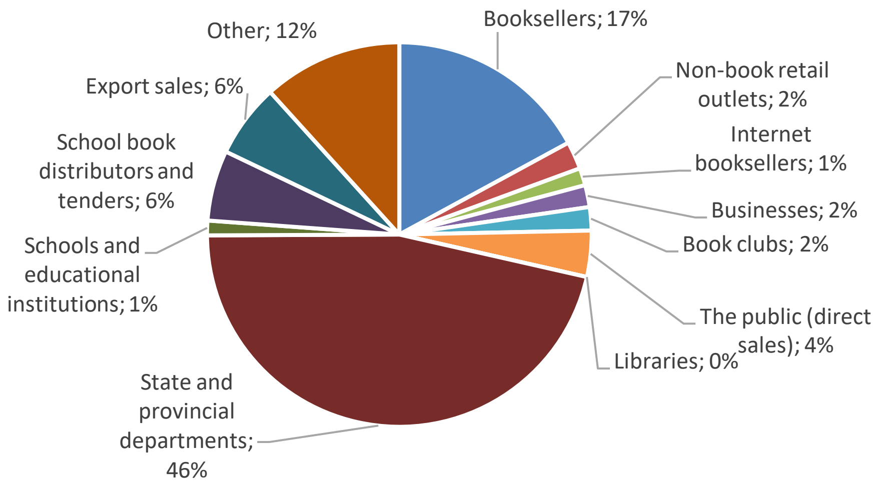


Table 6: Average discounts per sales channel, Education sector

Sales channel	Discount
Booksellers	33%
Non-book retail outlets	26%
Internet booksellers	20%
Businesses and corporations (direct sales)	27%
Book clubs and direct mail booksellers	19%
The public (direct sales)	25%
Libraries	23%
State and provincial departments	20%
Schools and educational institutions	21%
School book distributors and tenders	27%
Export sales	26%
Other	16%

Table 7: Average royalty paid on locally published books

Product Category	Minimum Percentage	Maximum Percentage	Average
School print books	5%	30%	12%
School digital books	4%	30%	12%

Sector Report: Trade

Trade publishers produce books for the general reader. The sector is characterised by large international publishers that maintain local subsidiaries and imprints, as well as several small to medium specialised or niche publishers. Multinational publishers also use a variety of distributors to import their books for the South African market. While the focus of this survey is on the production of local books, some of these distribution figures are included.

The sector is divided by genre – non-fiction and fiction, and aimed at an adult or children's market. Adult non-fiction remains the most profitable genre, as in previous years. However, detailed reports could not be provided for the different genres, due to a lack of sufficient data.

This sector underwent major changes in 2024/25 due to mergers and consolidation of imprints. The figures reported thus do not represent the total actual revenue for the sector.

Production

Table 8: Revenue from book-related activities (R '000)

Activity	2023/24		2024/25	
	Local	Imported	Local	Imported
Sales of print books	503 819	122 352	364 517	23 150
Sales of digital book products	17 629	9 230	5 615	3 460
Rights sales	3 860	627	2 045	110
Distribution of locally published books	552	2 501	2 621	
Other book-related income	249	491		
Total turnover	**526 109**	**135 201**	**374 798**	**26 720**

Revenue by format and language

Print remains the format of preference, although most forecasts have predicted a sharp rise in the use of digital formats over time. Digital sales remain very low, at between 2% and 4% of revenue.

In terms of language, Afrikaans and English dominate. However, the proportion of revenue from titles in English has declined, while Afrikaans showed robust growth.

Figure 13: Revenue by language, Trade sector, 2024/25

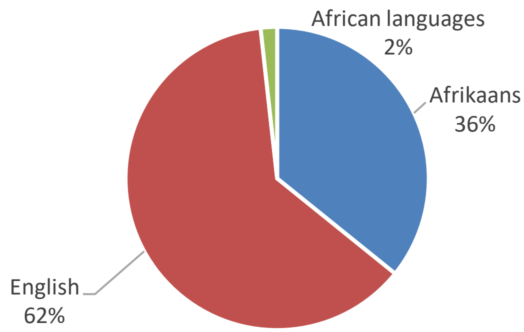
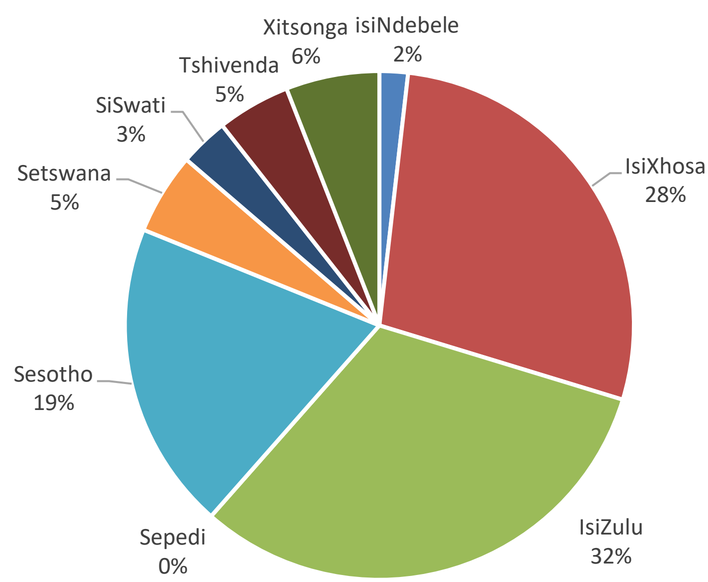


Figure 14: Revenue by African language, Trade sector, 2024/25



Distribution channels

Trade books are available through a wide range of distribution channels, including traditional booksellers and e-commerce retail outlets. The share of revenue from online booksellers continues to grow, as both print and digital books are increasingly ordered through such channels.

Small publishers are often dependent on direct sales to their readers, as they struggle to navigate and afford the ordering and discount structures of mainstream book retailers.

Figure 15: Turnover per sales channel, Trade sector 2024/25

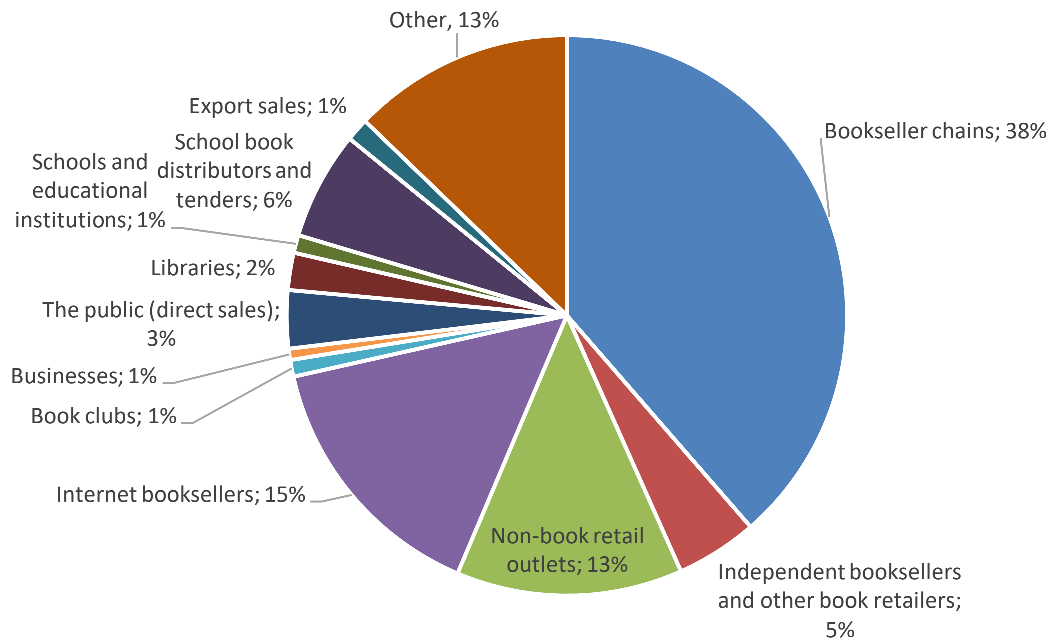


Table 9: Average discounts per sales channel, Trade sector

Sales channel	Discount
National and regional chain booksellers	45%
Independent booksellers	37%
Non-book retail outlets	46%
Internet booksellers	37%
Supermarkets and department stores	28%
Book clubs and direct mail booksellers	19%
Businesses (direct sales)	26%
The public (direct sales)	27%

Libraries	40%
State and provincial departments	12%
Schools and educational institutions	28%
School book distributors and tenders	23%
Export sales	33%
Other	38%

Table 10: Average royalty paid on locally published books

Product Category	**Minimum Percentage**	**Maximum Percentage**	**Weighted Average**
General trade print books	4%	30%	12%
General trade digital books	6%	26%	14%

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 (CPD), as used for example by doctors, lawyers and accountants.

This sector continues to decline due to a variety of challenges, including the lack of ring-fenced book funding for government-supported students, rampant book piracy, the effect of hybrid learning, and student enrolments.

Revenue

Table 11: Revenue from book-related activities, Academic sector (R '000)

Activity	2022/23		2023/24		2024/25	
	Local	Imported	Local	Imported	Local	Imported
Sales of print books	129 893	26 497	120 929	27 201	113 106	28 569
Sales of digital book products	14 224	43 129	14 713	29 803	11 080	28 999
Rights sales	5 394	157	5 405	157	2 495	157
Other book-related income			18 898	2 258		
Total turnover	**149 512**	**69 784**	**159 946**	**59 419**	**126 681**	**57 725**

Revenue by format and language

While this sector is increasingly offering books in both print and digital formats, print is still the most popular. The proportion of digital revenue overall has grown from 19% in 2021/22, to 28% in 2024/25.

The sector is heavily dominated by the production of English-language books (99% of all revenue), a trend that mirrors the use of English as the language of academia and university education.

Table 12: Revenue by format and language (R '000)

Language	2022/23		2023/24		2024/25	
	Print	Digital	Print	Digital	Print	Digital
Afrikaans	1 168	197	1 298	42	1 306	89
English	117 005	89 110	160 772	45 290	140 429	39 986
IsiXhosa	0.5		0.5			
Multilingual					95	4
Total	**118 174**	**89 307**	**162 071**	**45 332**	**141 830**	**40 079**

Distribution channels

Academic textbooks are mostly sold through a limited number of channels, largely bookseller chains, many of which are located on or near university campuses. There is also a vibrant trade in second-hand books, which cannot be captured in this survey. In contrast, professional and scholarly books are often sold directly to businesses and the public, in addition to other sales channels through traditional retail chains. There is a significant secondary market to State and government departments as well as educational institutions.

The list of sales channels reported on has been expanded to include this broader range of sales outlets.

Table 13: Turnover and average discount per sales channel (R '000)

Type of sales outlet	2023/23	2023/24	2024/25	Mean Discount %
Primary Retail Outlets	128 747	163 402	103 008	33%
E-commerce or online sales	18 706	15 206	9 242	25%
Business and corporate sales			8 160	31%
Public and direct sales	401	897	5 080	25%
Public libraries			575	28%
Educational institutions			35347	35%
Other	34 911	34 298	20342	35%
Total	**182 765**	**213 803**	**181 754**	

Table 14: Average royalty paid on locally published books

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

Sector Report: TVET

The Technical and Vocational Education and Training (TVET) sector produces textbooks and course materials in the post-school education and training (PSET) phase. The TVET sector produces books for two different levels: the National Certificate (Vocational), or NCV, and the National Accredited Technical Diploma (NATED), although Occupational Courses are also being introduced. The Quality Assurer for these courses is the Quality Council for Trades and Occupations (QCTO). For the NCV and NATED levels, there is a national catalogue with centralised procurement, but with Occupational Courses, each college or campus will make its own decisions on which materials to purchase.

The tables report only briefly on language, as around 99% of TVET books are produced in English. Books are also usually produced in print format, with digital sales remaining very low.

Revenue

Table 15: Revenue by TVET level (R '000)

Category	2023/24		2024/25	
	NCV	NATED	NCV	NATED
TVET books print	160 312	167 969	164 335	188 652
TVET books digital	7 931	4 365	4 690	4 052
Total	**168 243**	**172 334**	**169 025**	**192 704**

Table 16: Revenue by format (R '000)

Format	2022/23	2023/24	2024/25
Sales of print books	333 692	328 273	352 987
Sales of digital book products	3 138	12 295	8 742
Rights sales		29	
Total	**336 831**	**340 598**	**361 729**

Table 17: Revenue by format and language (R '000)

Language	2023/24		2024/25	
	Print	Digital	Print	Digital
English	328 131	12 296	352 707	8 742
Afrikaans	158		280	<1
Total	**328 289**	**12 296**	**352 987**	**8 742**

Distribution channels

TVET books are largely procured and distributed through government tenders and direct sales to institutions. The list of distribution channels has been expanded to include a broader range of sales outlets compared to previous years.

Table 18: Sales channels and discounts (R '000)

Type of sales outlet	2022/23	2023/24	2024/25	Mean Discount %
Booksellers	227 443	141 179	96 415	31%
Non-book retail outlets	228	347	570	15%
E-commerce	2 283	2 420	5 468	16%
Book clubs and direct mail booksellers	176	38	177	10%
The public (direct sales)	2 130	2 014	3 763	23%
Public colleges	104 580	194 578	253 850	20%
Private colleges			1 487	20%
Total	**336 831**	**340 576**	**361 730**	

Table 19: Sales volume (number of copies)

Language	Print	Digital
Afrikaans	1 081	2
English	1 388 984	61 768
Total	**1 390 065**	**61 770**

Table 20: Production (number of new titles)

Language	Print	Digital
Afrikaans	0	0
English	236	153
Total	**236**	**153**

Table 21: Average royalty paid on locally published books

Product Category	Minimum Percentage	Maximum Percentage	Average
TVET print books	5%	24%	12%
TVET digital books	5%	20%	11%

Sector Report: SMME Publishers

The local book publishing industry is dominated by a small group of large publishers, in terms of both revenue and production. However, the publishing landscape is far more diverse and dynamic if the participation of small and micro-enterprises is taken into account.

The typical profile of an SMME publisher remains consistent with the findings of the 2023/24 survey: a small group of one to four staff members, based in Gauteng or the Western Cape. They publish around 10 books a year, mostly in Trade fiction, and mostly in English. They tend to focus on small, niche areas and on specialised audiences.

While most of the publishers operate in the Trade sector, they produced fewer titles per year than those operating in the Education sector. Most titles are published in English, but the small publishers produce books in every language, and the share of titles produced in the African languages is far greater than that of the larger publishers. However, the unit of analysis is different, as the large publishers report in terms of revenue, and the SMMEs in terms of number of new titles produced. Nonetheless, this is one of the aspects in which SMME publishers contribute to the diversity of the publishing landscape in South Africa.

Publishers are using a variety of distribution channels. One of the challenges they express is the difficulty of accessing mainstream sales outlets such as bookseller chains and libraries.

For the majority of publishers, turnover is less than R5 million a year – often closer to R1 million – and several publishers indicated that they do not turn a profit every year. Some publishers only manage to produce books every second or third year, and rely on other sources of income, often a full-time job in a different sector. Several publishers indicated they were not active during the reporting year for this reason.

The challenges expressed by the SMME publishers relate largely to cash flow, production costs and the small reading market for local books; visibility of their titles due to problems with accessing mainstream distribution channels; and low levels of government support. The publishers expressed frustration with the difficulties in seeking government funding, in spite of programmes for SMME development or for arts and culture. They also require training in various aspects of the publishing value chain and in managing a business more generally.

In spite of many challenges, they are persistent: most have been active for more than seven years.

The SMME publishers were optimistic about their role and argued strongly for the importance of small publishers remain a significant part of the industry, especially in terms of developing a diverse publishing ecosystem in South Africa. They require funding, government support as well as further training to achieve these aims.

Figure 16: Location of SMME publishers

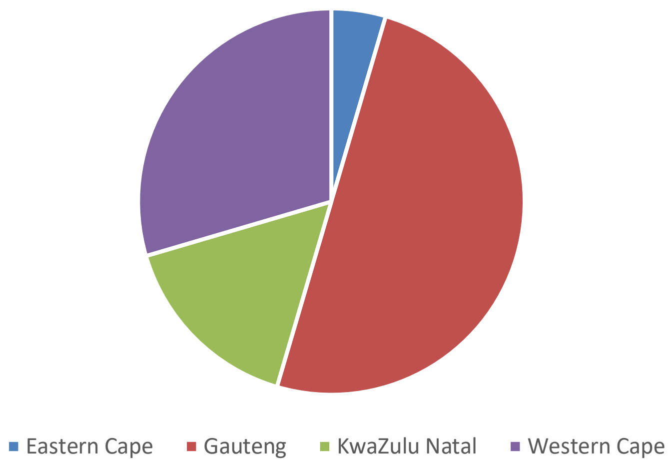


Table 22: Number of staff employed

Staff category	**Number**
Full-time	190
Part-time	40
Freelance	144

Table 23: Years in business

1-3 years	4-6 years	7-10 years	11 years or more
1	3	6	14

Table 24: Annual turnover

Category	**Turnover (R'000)**
Sales of print books	R54 754
Sales of digital books	R1 726
Other income	R4 021
Total	**R80 535**

Table 25: Production by sector (number of new titles)

Sector	Number of titles
Trade	82
Education	164
Academic or Scholarly	162
Self-published titles	32
Other	8
Total	**348**

Table 26: Production by language (number of new titles)

Language	Number of titles
Afrikaans	19
English	189
isiNdebele	1
isiZulu	56
isiXhosa	15
Sepedi	44
Sesotho	45
Setswana	45
Siswati	2
Tshivenda	44
Xitsonga	42
Multilingual	12
Other	4
Total	**348**

Figure 17: Production by language, SMMEs

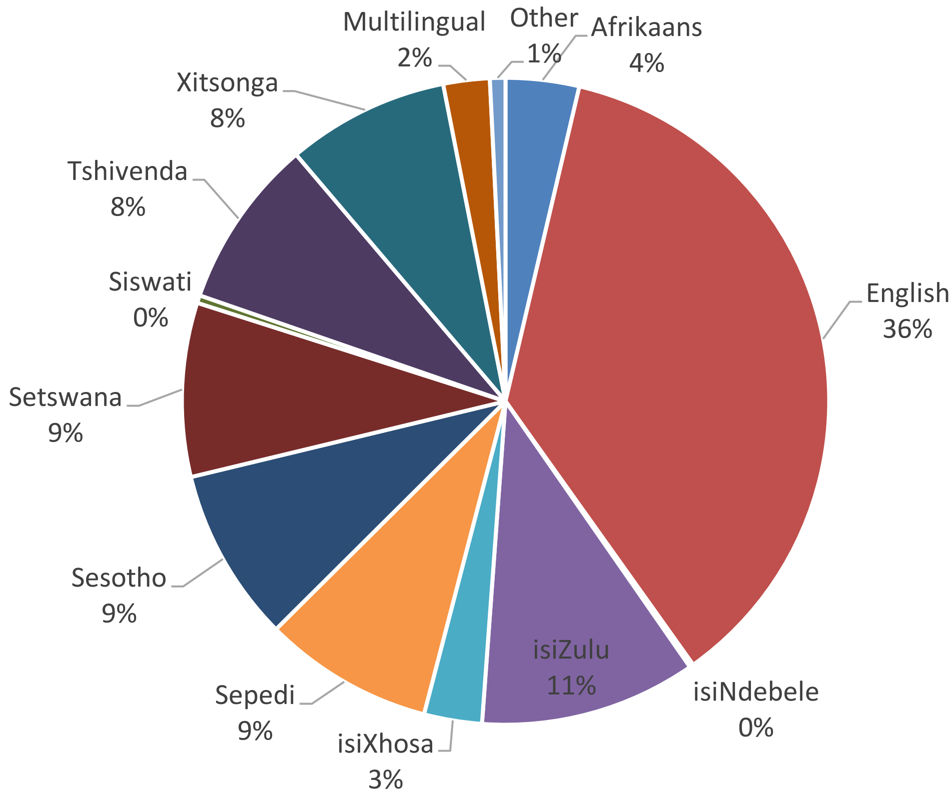


Table 27: Distribution channels

Channel	Number of publishers
Online	9
Direct sales to readers	15
Booksellers	14
Distribution agents	15
School tenders or educational institutions	3
Free online	2
Corporate CSI	1

Note: Respondents could choose multiple options.

List of Respondents

BK Publishing

Cambridge University Press

Copycat Communications

Cover2Cover Books

Deep South

Dryad Press

Footprint Press

Fruitful Horizons Empowerment

Future Managers

HSRC Press

Ithuta Books

Jonathan Ball Publishers (now including NB Publishers; Van Schaik Publishers)

Juta & Company Limited

Karavan Press

Macmillan Education South Africa

MDP Education

Missing Link Education

Modjaji Publishers

Mosala Masedi Publishers

Mthombothi Studios

Oxford University Press Southern Africa

Pan Macmillan SA

Penguin Random House SA

Pluto Publishers

Pretoria University Law Press (PULP)

Reading Matters

Shades Technical Publications

Shuter & Shooter Publishers

Study Opportunities

Sunrise Educational Publishing

Uhlanga

UJ Press

University of KwaZulu-Natal Press

Via Afrika Publishers

Vivlia Publishers & Booksellers

Wits University Press