The U.S. Consumer Book Publishing & Retailing Market

Description: A 98-page study providing current intelligence on the U.S. consumer book publishing and book retailing industry; including numbers, issues, trends and profiles of the principal companies in those businesses.

Key findings include:


- In 2006, combined revenues for the five consumer categories—Trade, Religious, Book Clubs, Mail Order and Mass-Market—were $18.7 billion, up 3.5% from $18.14 billion in 2005.

- Overall trade unit sales barely moved in 2006, up only 0.4%, clearly indicating that the small revenue gain was the result of price increases.

- The biggest gainer categories for the year were the adult hardcovers segment, which rose 6.1% to $3.7 billion from $3.7 billion in 2003, and religious which increased in sales by 4.5% $2.42 billion from $2.29 billion in 2005.

- Among all the consumer categories, none realized double-digit gains in 2006.

- Sales for the combined trade segments showed a 3.3% gain for 2006 to $14.01 billion from $14.46 billion in 2005.

- Adult trade hardcover sales surged by 2.4% in 2006, to $5.49 billion from $5.36 billion for 2005. Adult trade paperback sales increased 6.1% to $3.68 billion compared with $3.47 billion in 2005.

- Children's hardcovers saw a revenue gain of 1.9% in 2006 to $3.33 billion from $3.39 billion in 2005, while juvenile paperbacks registered a gain of 1.4% to $1.72 billion from $1.63 billion in 2005.

- Trade book publishing is a mature business. There are no indicators that would lead to the expectation of topline growth in the near future.

- In 2006, mass market paperback sales were up by 2.7% to $1.88 billion compared to $1.83 billion in 2006.

- Religious books grew 5.6% to $2.29 billion in 2006 from $2.42 billion the year before. While the growth rate was stronger than the overall market, it did not match that of the 2004-2005 period.

- Combined, the 15 bestselling categories of consumer books came to $15.52 billion, or 83% of the $18.67 billion consumer books market.

- The Audio Publishers Association estimates the size of the audiobook market at $871 million in 2005, up 4.7% over the previous year. Open Book Publishing estimates the retail market at about $2 billion.

- In 2006, the Audio Publishers Association (APA) conducted a survey on audiobook sales between January 1 and December 31, 2005. The APA estimated the size of the audiobook market at $871 million, a 4.7% increase over the comparable period for the prior year. Most estimates put the retail size of the market at about $2 billion.

- APA found that in 2005 revenue from CDs made up 74% of format sales, compared with 35% of the revenue in 2002, 45% in 2003 and 63% in 2004.

- Audiobook listeners listen to books an average of 4.9 hours per week.

- While four of the eight publishers surveyed by Subtext for its annual Profitability Index registered double-digit operating margins for FY 2006-07, almost all experienced slimmer percentage gains than for the
- Meanwhile, among the three largest book chains, Books-A-Million registered the largest gain in operating margin at 5.8%.

- General publishing was unusually active in M&A in 2006, with three large deals for a combined value of $2.4 billion going down.


- Thomas Nelson announced it would go private with equity firm InterMedia Partners for $473 million, a 2x multiple of its sales of $238 million in 2006.

- The largest consumer books buy, completed in early 2007, was Reader's Digest Association, which was acquired by the Ripplewood Holdings in November for $2.4 billion.

- For book sales only (excluding music, magazines, gifts, stationery or cafes) we estimate superstores and mall chains represent about 45% of the approximately $12.4 billion book retail market (publishers' net dollars).

- The college used book business is about $2 billion, not including informal student-to-student sales.

- In its annual ranking of the largest book chains in the U.S., Open Book Publishing found that the consolidated revenues of the top six chains advanced in 2006 (or FY 2007) by 2.2% to $9.95 billion over the previous year.

- Both Barnes & Noble and Borders have been decreasing the number of their mall stores since the advent of the more profitable superstores in the late 1980s. This accounts for the steadily decreasing annual revenues for both chains' smaller outlets.

- Barnes & Noble, the largest chain, reported sales of $5.261 billion in the 53 weeks ended February 3, 2007, compared with $5.103 billion in the 52 weeks ended January 28, 2006.

- In October 2007, Borders sold off its 41 superstores in the UK and one in Ireland, along with its 28 Books etc. The buyer was Bookshop Acquisitions Ltd., a company set up and wholly owned by private equity investor group Risk Capital Partners

- Independent Christian book retailers experienced difficult times over the past couple of years, mirroring the plight of their secular counterparts with the rise of the superstores a couple of decades ago.

- The chains in the Christian market remain exceedingly healthy, outperforming their general market counterparts. The largest players are Family Christian Stores, Lifeway, and Christian Book Distributors (CBD) which is dubbed the Christian Amazon.

- Having distributed bestsellers to warehouse clubs and large discount chains for more than 20 years, Advanced Marketing Services filed for Chapter 11 in the last days of 2006, when its bank refused to extend its loan agreement beyond the end of the year.

- Borders' strategy for 2008 includes development of an e-commerce platform. Previously, Amazon.com handled its Internet sales.

Products Mentioned:
- Books
- Audiobooks
- e-books

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