THE SPANISH AND LATIN AMERICAN PUBLISHING MARKETS:

A common language, but different publishing scenarios
COUNTRIES WHERE SPANISH IS THE OFFICIAL LANGUAGE

- 18 countries in Latin America
- 1 country in Europe (Spain)

Total: 19 countries
Publishing markets in Spanish: REGARDING THE MARKET SIZE

1st. SPAIN (2017):
87,262 new titles/year
1,072,285 active titles
€2,320 Mio. Total revenue

2nd. MEXICO, ARGENTINA and COLOMBIA

Mexico (2016): 27,940 new titles/year
$530 Mio. Total revenue

Argentina (2016): 27,704 new titles/year
$563 Mio. Total revenue

Colombia (2016): 17,940 new titles/year
$243.6 Mio. Total revenue

3rd. CHILE, PERÚ, ECUADOR and VENEZUELA

Chile (2017): 8,016 new titles/year

Perú (2016): 6,463 new titles/year

Venezuela (2016): 3,118 new titles/year

4th. OTHERS: Less than 2,000 new titles/year

178,443 new titles/year

Depend on the imports
Print books Exports by countries (2015)

Source: Cerlalc (Regional Center for the Promotion of Books in Latin America and Caribbean)
Publishing markets in Spanish: REGARDING THE MARKET MATURITY

1st. SPAIN
2nd. MEXICO and ARGENTINA
3rd. COLOMBIA, CHILE and PERÚ
4th. OTHERS

“Market maturity”

- Ability of selling books in new formats: digital formats and audiobook
- Ability of adopting new publishing business models (ex. Subscription models)
- Ecommerce development: bookshops online, and the presence of Amazon
- Development and adoption of publishing standards: ISBN, ONIX, Thema, ISNI, IBIC and BISAC

NB IBIC is a precursor to Thema
• Ability for selling books in new formats
  - 83% the publishers are publishing ebooks
  - Local based e-distributors: Bookwire and Libranda
  - Audiobooks: Storytel, Audible, and few local companies

• Ability for adopting new publishing business models
  - Subscription models: 24Symbols, Nubico, Kindle Unlimited
  - POD
  - Dynamic startups dealing with digital book marketing
  - Local self-publishing companies: Bubok, Amazon KDP, Caligrama, Universo de Libros

• E-commerce development
  - Big and medium sized bookshops have shops online
  - Amazon.es was launched in 2011

• Development and adoption of publishing standards: ISBN, ONIX, Thema, ISNI, IBIC
MEXICO

• Ability for selling books in new formats
  - Probably almost half of the publishers are publishing ebooks
  - Local based e-distributors: Bookwire, and Libranda
  - Audiobooks: Storytel, Audible
• Ability for adopting new publishing business models
  - Subscription models are not popular yet: 24Symbols, Kindle Unlimited
  - Few local companies offering digital services for publishers
• E-commerce development
  - Big bookshops have shops online: Gandhi and Porrúa, and share a common ebook platform (Orbile)
    - Amazon.mx was launched in 2015
• Development and adoption of publishing standards: ISBN, BISAC and ONIX
ARGENTINA

• Ability for selling books in new formats
  - Ebooks are mostly published by University presses.
  - Local based e-distributors: Bookwire, and Riverside
  - Audiobooks: Storytel, and Audible

• Ability for adopting new publishing business models
  - Subscription models are not very popular yet: 24Symbols, Kindle Unlimited, Leamos (local company)
  - Crisis is making difficult for publishers to test new business models although they are interested

• E-commerce development
  - Big bookshops have shops online, but a little percentage of sales
  - Amazon.com.ar to be launched in the next two years?

• Development and adoption of publishing standards: ISBN and IBIC
COLOMBIA

• Ability for selling books in new formats
  - Few local publishers are publishing ebooks. Ebooks come from the Spanish publishers divisions
  - No local based e-distributors nor audiobooks platforms
• Ability for adopting new publishing business models
  - Subscription models are popular: 24Symbols is bundled in the offer of a telcom company
  - Local companies offering digital services
• Ecommerce development
  - Ecommerce not developed
  - No Amazon.com.co
• Development and adoption of publishing standards: ISBN, BISAC
Calidad de metadatos
Buenos metadatos venden mejor

ONIX LIBROS	THEMA / IBIC	ISNI	EL PLAN DE CALIDAD DE METADATOS
PUBLISHERS
- Almost all big publishers deal with ONIX
- Only few medium sized publishers send data in ONIX (Onixsuite users)
- As hardly anyone accepts/requests ONIX files, ONIX is not a priority for publishers

PRINT DISTRIBUTORS
- Mostly don’t know the standard ONIX
- Ask publishers only for basic metadata

RETAILERS
- Only the big chains use ONIX, and some only for digital books
- Have their own standard (SINLI)

DIGITAL DISTRIBUTORS
- All use the standard ONIX
- Basic and rich metadata

ONIX suite™

SPAIN: Books metadata flow

PRINT DISTRIBUTORS → PUBLISHERS
ONIX

PUBLISHERS → PRINT DISTRIBUTORS
Excel/csv
Distributor’s interface

PRINT DISTRIBUTORS → DIGITAL DISTRIBUTORS
ONIX

DIGITAL DISTRIBUTORS → PRINT DISTRIBUTORS
Excel/csv
Distributor’s interface

DIGITAL DISTRIBUTORS → RETAILERS
ONIX

RETAILERS → DIGITAL DISTRIBUTORS
SINLI forms
CSL rules

DIGITAL DISTRIBUTORS → RETAILERS
ONIX only

SPAIN: Books metadata flow

ONIX

Dilve’s interface

Dilve’s interface

SINLI forms
For print books

SINLI forms
For print books

Dilve’s interface

Dilve’s interface

CSL rules

CSL rules

Excel/csv

Excel/csv

SINLI forms

SINLI forms

ISBN has been introduced gradually in LatAm countries. First country to adopt it was Spain in 1972, and the last, Rep. Dominicana in 1999.

Two ISBN agencies work with their own software, and the rest with RISBN, which last version is based on ONIX 3.0 and includes Thema codes. Only four countries are using this last version. However, there is a big ignorance of ONIX 3.0 among publishers and the rest of the book supply chain.

The biggest problem of the ISBN agencies is to get the publishers to complete all the fields properly and to update them, even when the metadata required is very limited. Publishers don’t see the benefits of data implementation.

E-commerce is poorly developed, so that metadata requests from the supply chain are minimal.
• Trend: Next development of local platforms for books on sale (like Dilve) in México, Colombia and Perú. In Brasil, Metabooks was launched in 2016.

• Trend: Growth of the interest of University Presses in metadata management tools like Onixsuite, but for the ability of producing quality data, not for the ONIX file generation.

• ISNI: No registering agencies in LatAm, only in Spain (since last March). Players in the book supply chain don’t even know it exists.

• Thema: Although it’s included in the new version of RISBN, players at the book supply chain don’t use/know it
Thanks for your attention

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