



LIVRES CANADA BOOKS®

Selling Canadian Books in Poland

A Guide for Canadian Publishers

Table of Contents

Introduction	1
Overview Of The Book Market	4
Market Size And Characteristics	4
Translated And Imported Books	6
Reading Habits And Consumption.	6
Status Of The Digital Market	7
Publishers	9
Textbook And Higher Education Publishers.	9
Children’s And Ya Publishers.	11
Trade Publishers.	12
Opportunities And Challenges For Canadian Publishers	18
Formats And Pricing	21
Formats	21
Price Of Printed And Digital Books	22
Digital Formats – Ebooks And Audiobooks	23
Distribution	26
Sales Channels	26
Distribution Of International Books	29
Print-On-Demand.	29
Rights Sales and Translation	30
Book Fairs And Events	33
Conclusion	35
Appendix 1: Selected Publishers	36

Introduction

The Polish book market accounts for almost 3% of the European publishing market, while Poland's population accounts for 7.5% of the European Union's total population.

At the end of 2020, in the ISBN database maintained by the country's National Library, there were 22,575 publishers registered in Poland, though no more than 2,000–2,500 of them are active (publishing several books a year). However, the market is highly concentrated. A group of almost 300 entities holds almost 97% of the market. Approximately 600–700 firms publish more than ten books per annum.

According to estimates produced by Biblioteka Analiz, approximately 300 firms achieved a turnover of or above złPLN1 million¹ (USD\$270,000); approximately 120 of them achieved a turnover exceeding złPLN2 million (USD\$540,890) in 2019. Most of the other registered publishers have only issued a limited number of books and do not take part in the publishing market.

Market Share in 2019

	Number in group	Market share (%)
Large publishers (annual income > \$4 million)	36	70.1
Medium-sized publishers (annual income from \$270,000 to 4 million)	256	26.4
Small publishers (annual income < \$270,000, publishing at least two titles per year)	Over 1,600	3.0
Irregular publishers (producing occasional publications)	Over 4,000	0.5

Source: Biblioteka Analiz data.

Another issue for the Polish book market is the level of readership, which tends to remain at about 40% of the population. The book market in Poland is two to three times smaller than it should be because of low readership. Nevertheless, Olga Tokarczuk's 2018 Nobel Prize in Literature has played a significant role in shaping the tastes of readers. A slight increase in readership was recorded in 2019, which the researchers ascribe to the Swedish Academy's decision and led to an increase in the number of publications defined as ambitious literature (narrative fiction, novels, and short stories), including works by contemporary Polish authors.² Interest in reading has also been boosted by screen adaptations, television serials, and computer games, the best example of which is the

¹ PLN refers to the Polish national currency, *Złoty*.

² National Library, "Stan czytelnictwa w Polsce w 2020 roku" (Readership in Poland in 2020), <https://kurier-nakielski.pl/stan-czytelnictwa-w-polsce-2020-roku/>.

Percentage of Income from Book Sales by Category

	2015	2016	2017	2018	2019
Mainstream literature	11.6	12.1	12.8	14.5	18.0
Children's books	7.7	8.4	11.1	13.5	16.0
Required school reading (literary fiction, classics, Polish)	0.5	0.4	1.5	2.0	2.0
School textbooks	29.0	28.0	26.6	27.5	25.0
Academic and professional books	39.2	39.8	37.2	31.2	28.3
Illustrated books	5.0	5.3	5.4	5.6	5.7
Religious books	3.9	3.6	3.4	4.2	3.8
Other (including musical scores and maps)	3.1	2.4	2.0	1.5	1.2

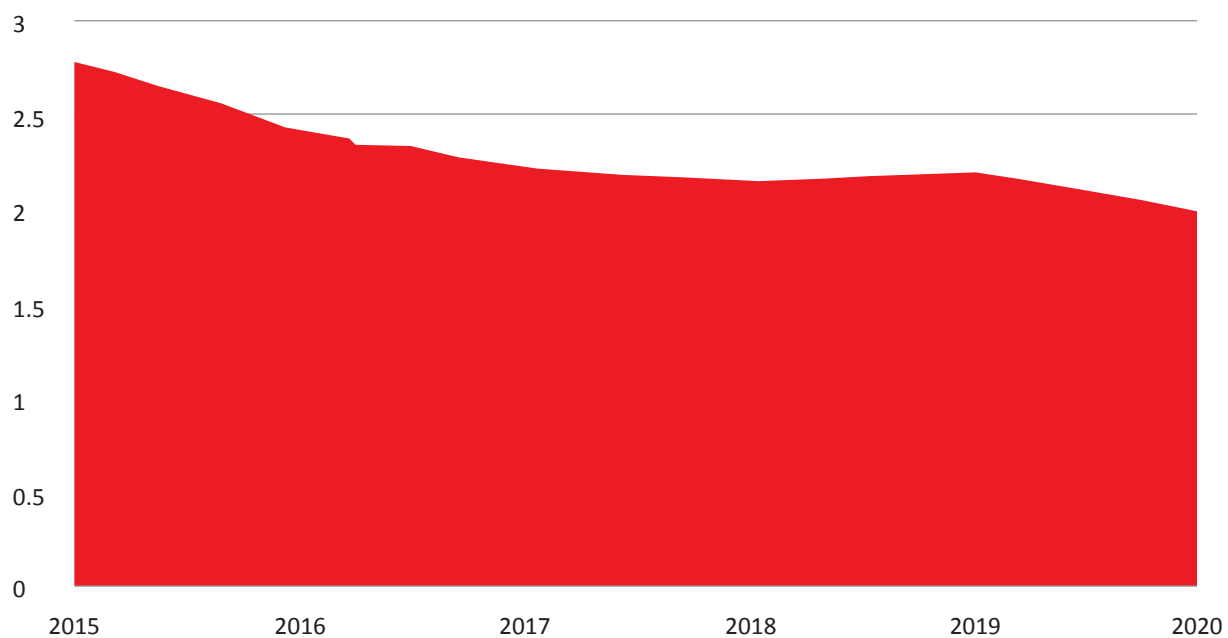
Source: Biblioteka Analiz data.

Number of Copies Sold

	2015	2016	2017	2018	2019
Number of copies sold (millions)	101.7	98.4	92.3	91.0	93.1
Average print run (number of copies)	2,798	2,435	2,234	2,150	2,080

Source: Biblioteka Analiz data.

Average print run of new books



Publishers

The top places among the biggest Polish publishing companies are taken by educational publishers, Nowa Era (owned by the Finnish media company Sanoma), Wydawnictwa Szkolne i Pedagogiczne (owned by Hungarian investing group Central Group), Grupa MAC, and Pearson Central Europe.

Legal publishing companies Wolters Kluwer (a Dutch publishing concern) and C. H. Beck (a branch of one of the oldest German publishing houses) also rank high. The biggest literary publishers are companies with Polish capital: Znak, Grupa Wydawnicza Foksal, Prószyński Media, Albatros, Wydawnictwo Literackie, Grupa Sonia Draga, Wydawnictwo Poznańskie, and Świat Książki.

Publishers on the leading edge of children's books are Wydawnictwo Olesiejuk (Dressler Group), Ammet, Nasza Księgarnia, Greg, Media Rodzina, Dwie Siostry, and Wielka Litera.

Textbook and Higher Education Publishers

Textbooks currently represent 25% of the Polish-book market. At present, the state primarily pays for elementary students' textbooks. Purchases are carried out directly by the schools, which place orders through publishers or distributors. Booksellers have been almost completely eliminated from this system. In contrast, high school textbooks are purchased by parents, primarily through online bookstores.

This textbook reform, started in 2014 by the Ministry of National Education, has had a massive impact on the publishing industry, particularly on the distribution sector. The Polish government frequently introduces changes to educational programs, which offer additional opportunities for educational publishers.

In foreign language education, English is still the leading language, being learned by nearly 90% of students. Two publishing companies, Pearson Education and Oxford University Press, dominate the market. The market is more fragmented in the case of other languages.

With the digitization of education and the emergence of new technologies and new media, traditional educational publishing can no longer meet the needs of current consumers, and "digital publishing" is gradually emerging. Many traditional educational publishing houses have developed diversified businesses through the digitization of educational products.

At the same time, academic and professional books make up 28% of the market. Publications appear from both prestigious trade publishing companies (such as Wydawnictwo Naukowe PWN—Polish Scientific Publishers) and academic publishing houses. Every university and most private academic institutions have their own publishing companies, which collectively publish over 5,000 titles a year.

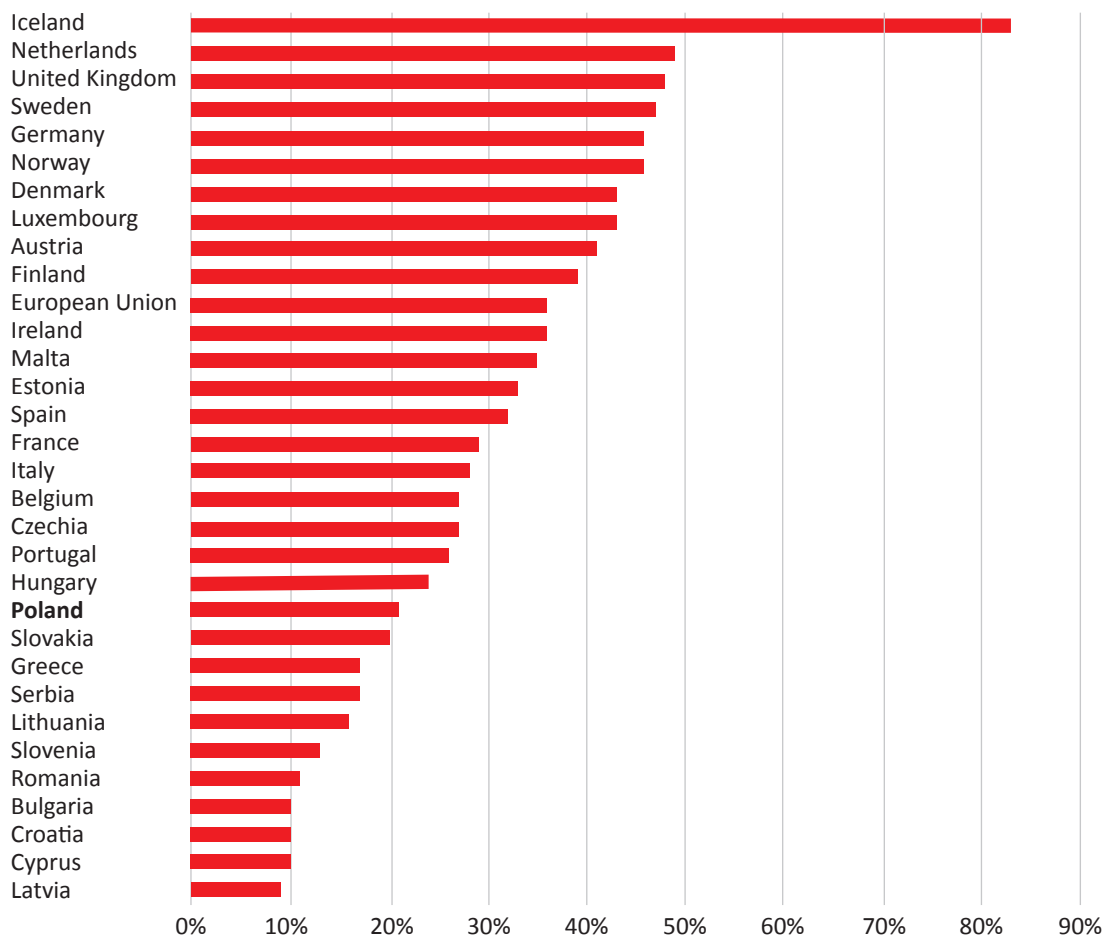
Opportunities and Challenges for Canadian Publishers

- Readership in Poland has been fluctuating at around 40% for years, which places the Polish book market in a tough situation.
- The biggest potential in the market is for publishers of books for children and teenagers, literary fiction, and fantasy novels.
- In a wider perspective, the share of literary fiction in the overall publishing industry is increasing while the share of academic books is decreasing.
- The share of Science and Tech, Economy and Management, and Professional titles is increasing slightly.
- The Polish book market faces problems such as a decreasing number of bookstores and an increasing number of price wars.
- It is a challenge to invest in searching for and developing new sales channels, especially online, to further extend the publishing offer and its attractiveness.
- When looking at Canadian literature in Poland, the most popular genres are literary fiction, romance, science fiction, fantasy, comic books, and handbooks. Young adult and children's are also popular.
- Publishers, particularly those specializing in literary fiction, attentively observe the Canadian publishing market, and seek new literary talents and new publications by global stars.
- The decision to buy rights is influenced by the author's reputation and international awards, adaptations, and translations of particular titles.
- Canadian literature was widely presented in Poland for the first time during the Literature Festival in Sopot (August 2020). Polish readers had an opportunity to meet (virtually) with authors such as Michael Crummey, Madeleine Thien, Patrick deWitt, and lesser-known writers in Poland such as David Szalay and Esi Eduygan.

Canadian literature of the late 20th and 21st centuries is characterized by diversity and thematic richness. Polish readers have been able to learn its true treasures over the past ten years. When considering Canada's social situation, the first word that comes to mind is multiculturalism. Polish readers are particularly eager to reach for Canadian literature because of such icons as Margaret Atwood, Nobel Prize winner Alice Munro, and Yann Martel. Children's books are also popular, primarily thanks to the beloved character known from the small screen, Franklin the turtle. Authors in the Young Adult category, which is gaining a wider audience, are getting better and better. Poles eagerly reach for Canadian fantasy (Sebastien de Castell, Steven Erikson) and sensational crime novels—Joy Fielding is the leader in this group. Comics by Canadian screenwriters and directors such as Guy Delisle, Jeff Lemire, and Adrian Alphona are also gaining an increasing position in the market.

When analyzing the lists of titles submitted to the National Library and various other book databases from 2010 to March 2020, over 450 Canadian books in various categories were published in Poland, written by over 120 Canadian authors. Since 2016, we have seen an upward trend of over 50 new titles on average by Canadian authors appearing every year. Popular fiction comes from Margaret Atwood, Alice Munro, Michael Ondaatje, Yann Martel, Michael Crummey, Madeleine Thien, Alistair MacLeod, Leonard Cohen, Michael D. O'Brien, and Eleanor Catton.

Books, widely available, are at the heart of e-commerce



Online purchases of books/magazines/e-learning materials online as percentage of individuals who ordered goods or services, over the internet, for private use (2019).

*source: EUROSTAT

Source: Federation of European Publishers, FEP report of activities 2019–2020, <https://fep-fee.eu/-Publications->.

One of the major trends typifying retail book sales in Poland is the rapid and progressive migration of customers from the physical sales sector (traditional bookshops) to online bookstores. At the same time, customers whose purchasing decisions continue to be guided above all by price do not show loyalty to any particular e-bookshop but migrate between the various firms, choosing the best offers when they arise based on the cost and conditions of delivery as well as the price of the book. Online sales, via the bookseller's own website, are now run by publishers too, which gives them a source of direct income and an opportunity to sell their backlisted books.

Income from online sales of printed books in 2019 totalled over złPLN1.1 billion. Currently, there are several dozen firms active in the Polish market whose annual sales income exceeds złPLN10 million.

Appendix 1: Selected Publishers

Albatros

(192 published titles)

Founded in 1994 by Andrzej Kuryłowicz, a passionate book enthusiast, this company is known as a “bestseller factory.” It publishes contemporary fiction and non-fiction, with a focus on literature translated from English, French, and Spanish. It mainly publishes foreign bestselling authors like Harlan Coben, Nicolas Sparks, Stephen King, Graham Masterton, Ken Follett, Guillaume Musso, B. A. Paris, Mario Puzo, Frederick Forsyth, Ian McEwan, Marc Levy, Michael Ondaatje, Yann Martel, R. Scott Bakker, and Nobel Prize winners Kazuo Ishiguro, Doris Lessing, and Toni Morrison.

Website: www.wydawnictwoalbatros.com

Contact: Ms. Aleksandra Saługa, a.saluga@wydawnictwoalbatros.com

Amber

(218 published titles)

This publishing house was established in 1989 as one of Poland’s first privately owned firms. It specializes in fiction (both popular and crime), especially in translations from the US and UK. It responds quickly to reading trends, and in recent years has become one of the main publishers of erotic books as well as vampire and dystopia books for young adults. Its authors include Sebastian Fitzek, Sharon Bolton, Clive Cussler, Walter Lucius, Danielle Steel, Jayne Ann Krentz, Isabelle Broom, Kristen Proby, Jodi Ellen Malpas, Julia Quinn, Eloisa James, Veronica Roth, Erich von Däniken, Andrew Collins, William Breuer, and Simon Beckett. For two years now, the Amberek brand has been publishing illustrated books for children aged 3–5.

Website: www.wydawnictwoamber.pl

Contact: Małgorzata Cebo-Foniok, malgorzata.cebofoniok@wydawnictwoamber.pl

Czarne

(104 published titles)

Founded in 1996, Czarne publishes European prose and non-fiction and is a leading reportage and travel writing publisher. Already well known for publishing the work of new Eastern and Central European authors; a wide range of non-fiction, essays, and memoirs; and first-rate fiction, Czarne is now adding history and social science to its range. Its authors include Andrzej Stasiuk, Krzysztof Varga, Yurii Andrukhovych, Herta Müller, Paul Theroux, Jean Hatzfeld, Jacek Hugo-Bader, Wojciech Tochman, Paweł Smoleński, Mariusz Szczygieł, Svetlana Alexievich, Lidia Ostałowska, Liao Yiwu, Colin Thubron, Karl-Markus Gauß, Martin Pollack, and Thomas Bernhard.

Website: www.czarne.com.pl

Contact: Monika Sznajderman, redakcja@czarne.com.pl