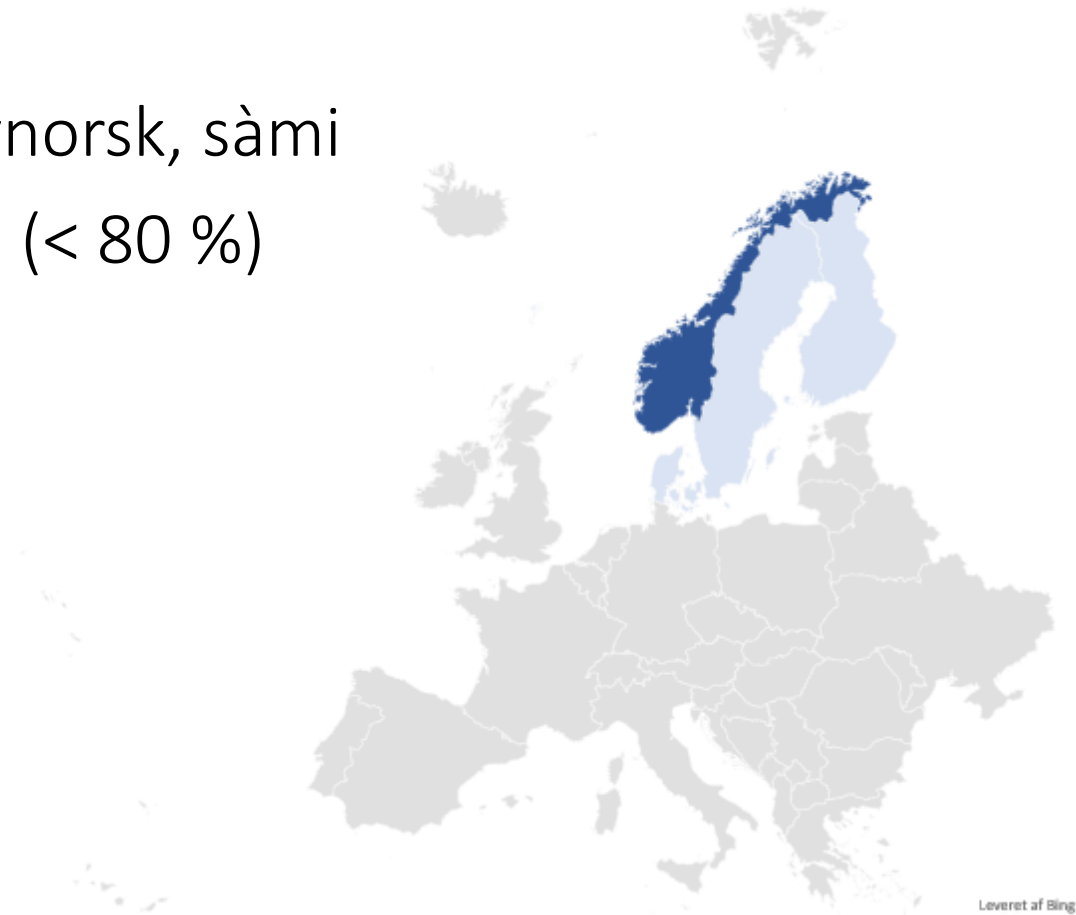


Market Trends & Key Figures

General country information

- 5.3 million inhabitants
- Official languages: Bokmål, nynorsk, sàmi
- First foreign language: English (< 80 %)



The publishing landscape

- About 230 commercial publishing houses
- Largest publishing houses
 - Cappelen Damm AS
 - Gyldendal Norsk Forlag AS,
 - H. Aschehoug & Co (W. Nygaard) AS
 - Vigmostad & Bjørke AS
 - Universitetsforlaget AS
 - Kagge Forlag AS



The retail landscape

- About 550 book shops – one book shop for every 6000 inhabitant
- About 40 are independent book shops
- About 14 internet book shops
- Number of book shops in slow decline
- Largest chains: ARK, Norli, Tanum, Akademika

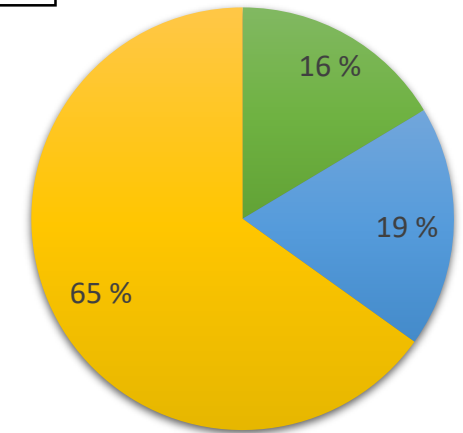
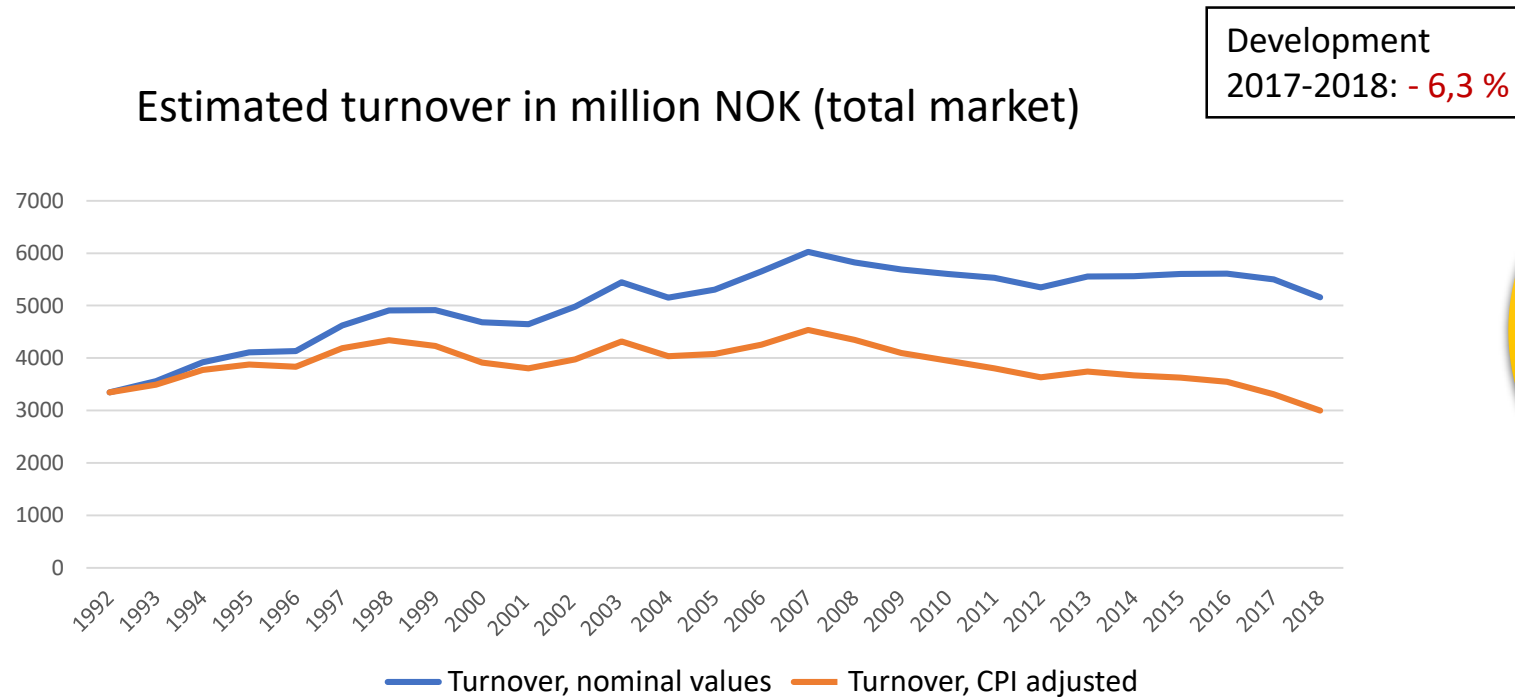


Trends

- Important initiatives on reading for pleasure and on literature exports (Book year 2019, guest of honor in Frankfurt)
- Still going through the digital transformation, digital audio books in increase (especially streaming), stable e-book market
- Important investment in school market, new curriculums in 2020, digital learning materials expected to have an important share
- Book market in slow decline, both in terms of reading and turnover



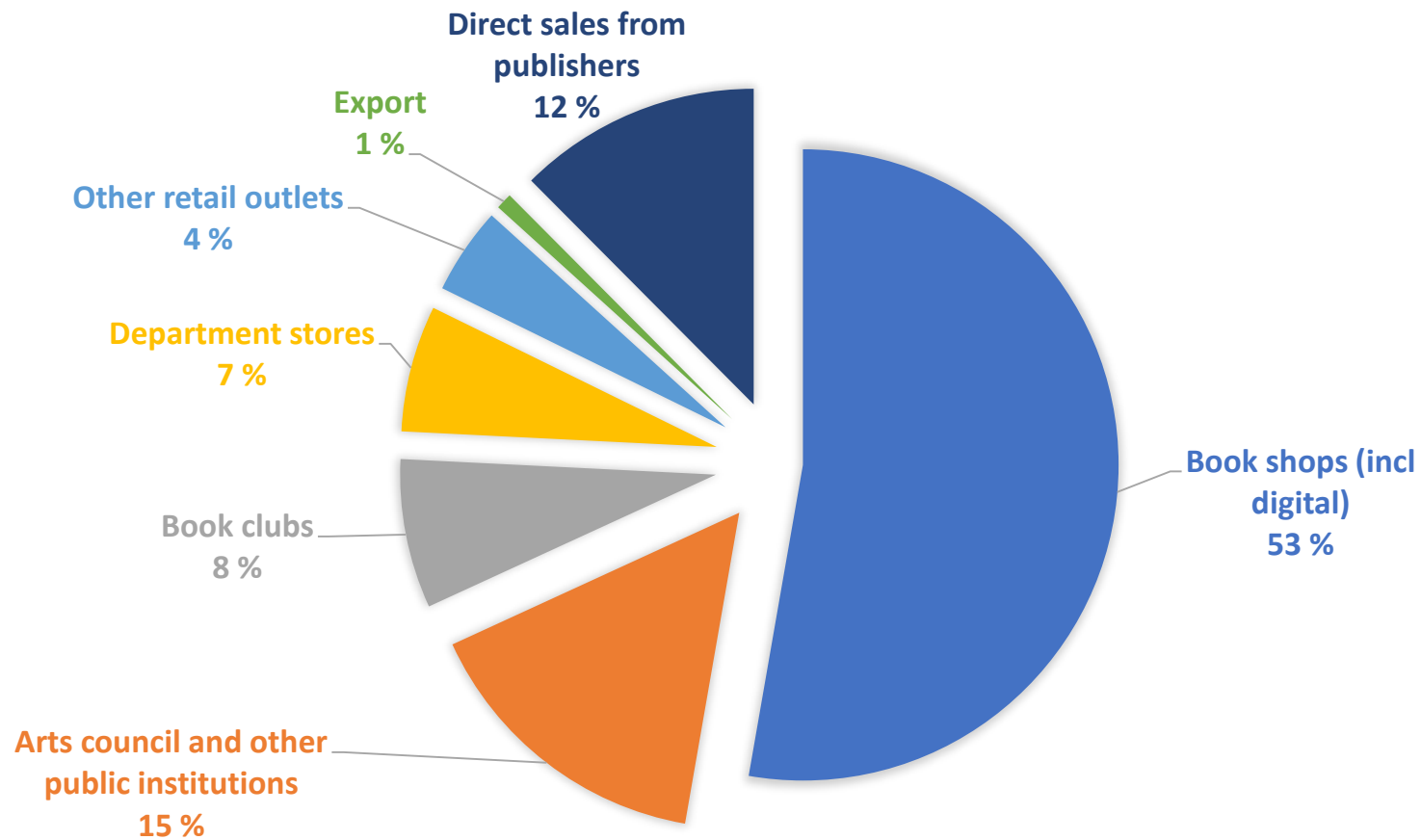
Sector turnover 2009-2018



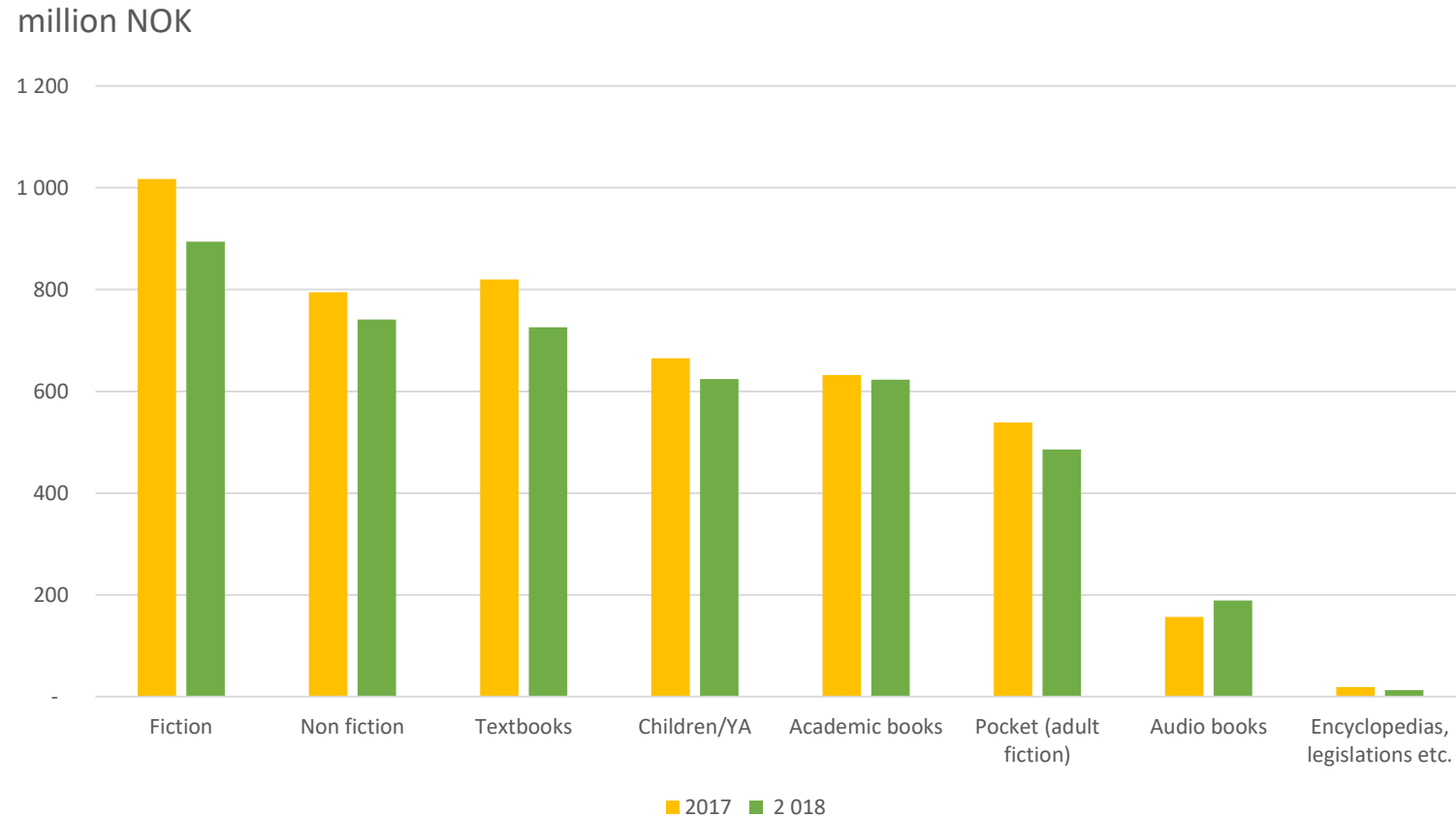
- Textbook market (incl digital)
- Academic market (incl digital)
- Trade market (incl digital)



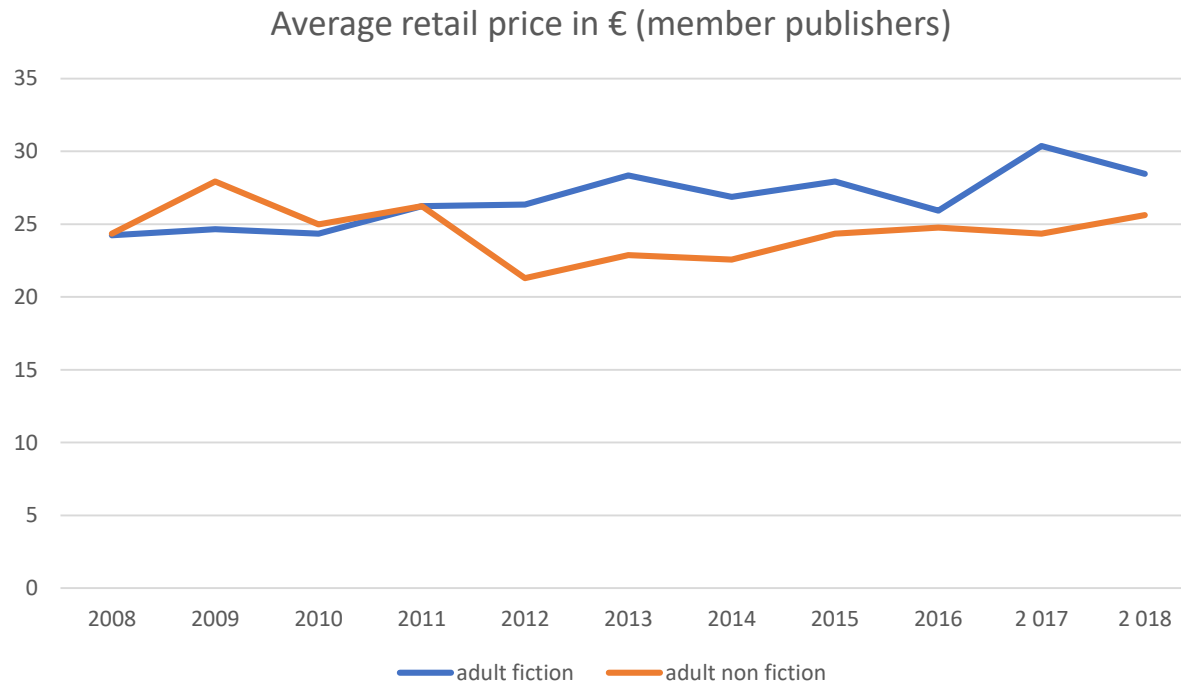
Turnover by distribution channel



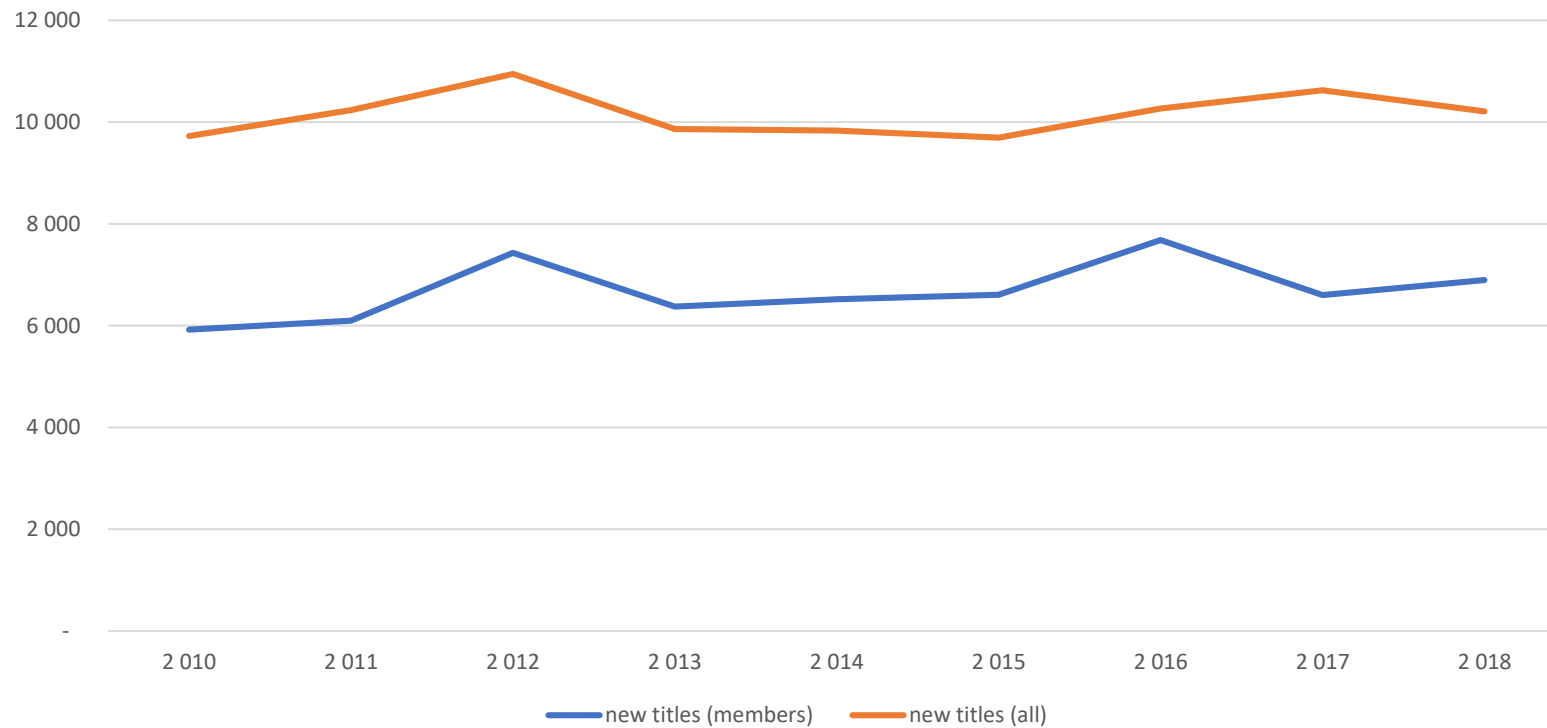
Turnover by product categories



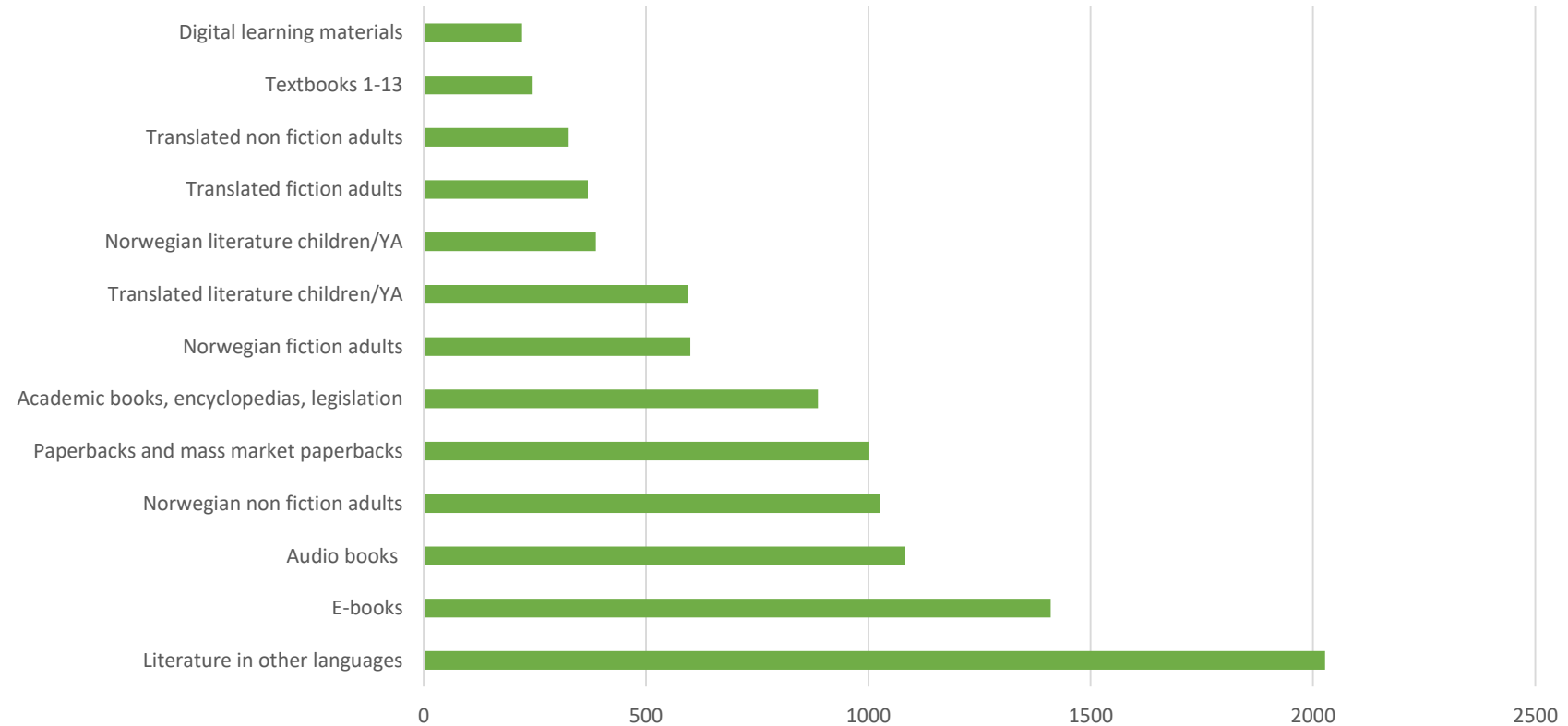
Development of retail prices



New titles 2008-2018



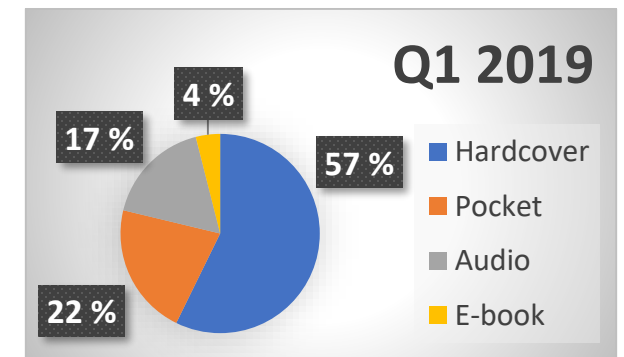
New titles 2018 per category



E-book and audio book market

Trade market turnover by format

	Q1 2018	Q1 2019	Development 2018/2019
Formats	NOK	NOK	
Hardcover	160 881	140 794	-12 %
Pocket	58 895	52 852	-10 %
Audio (incl streaming)	34 301	42 540	24 %
E-book	9 631	9 699	1 %
Total	263 708	245 885	-7 %
Digital share	17 %	21 %	



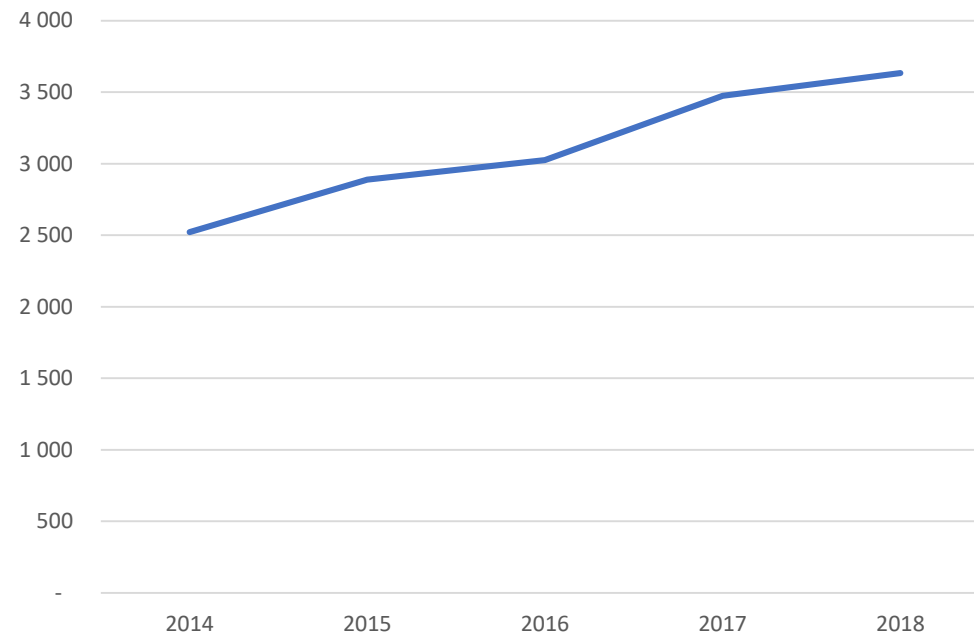
E-book market: Trends

- Common infrastructure established in 2011
- In 2018: 22 % of new releases, 3 % of turnover (trade market, all publishers)
- Slow but steady growth in sales since 2011. Still a tiny market
- Distribution through internet bookstores or streaming (Storytel, Fabel, Ebok.no PLUSS)
- E-books are also accessible in public libraries
- Selection dominated by adult fiction. Almost every adult fiction book is published simultaneously in both paper and e-book formats

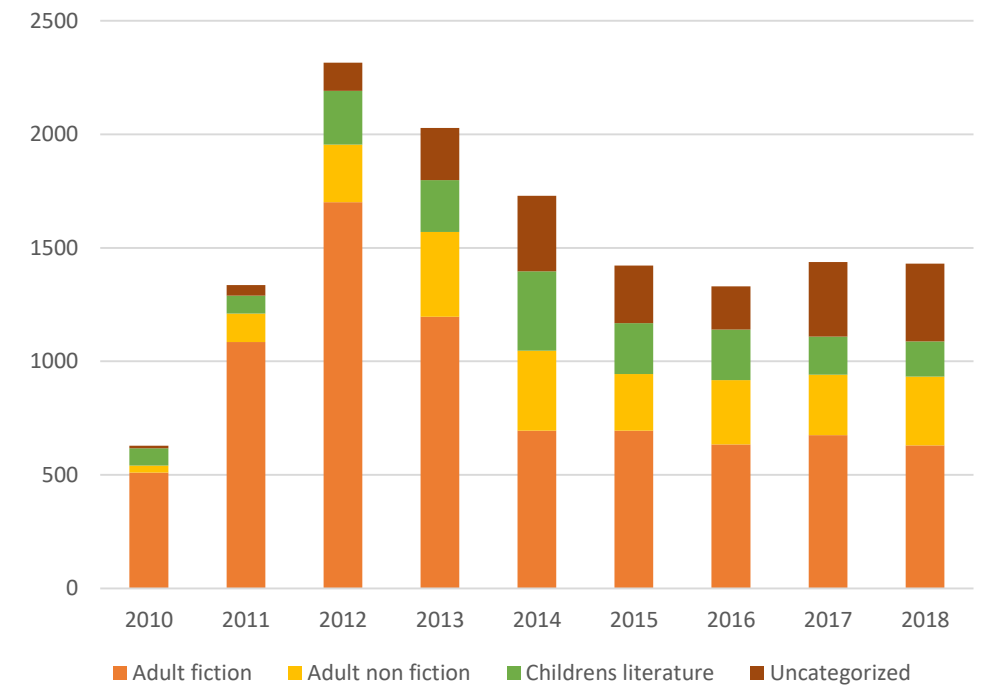


E-book market

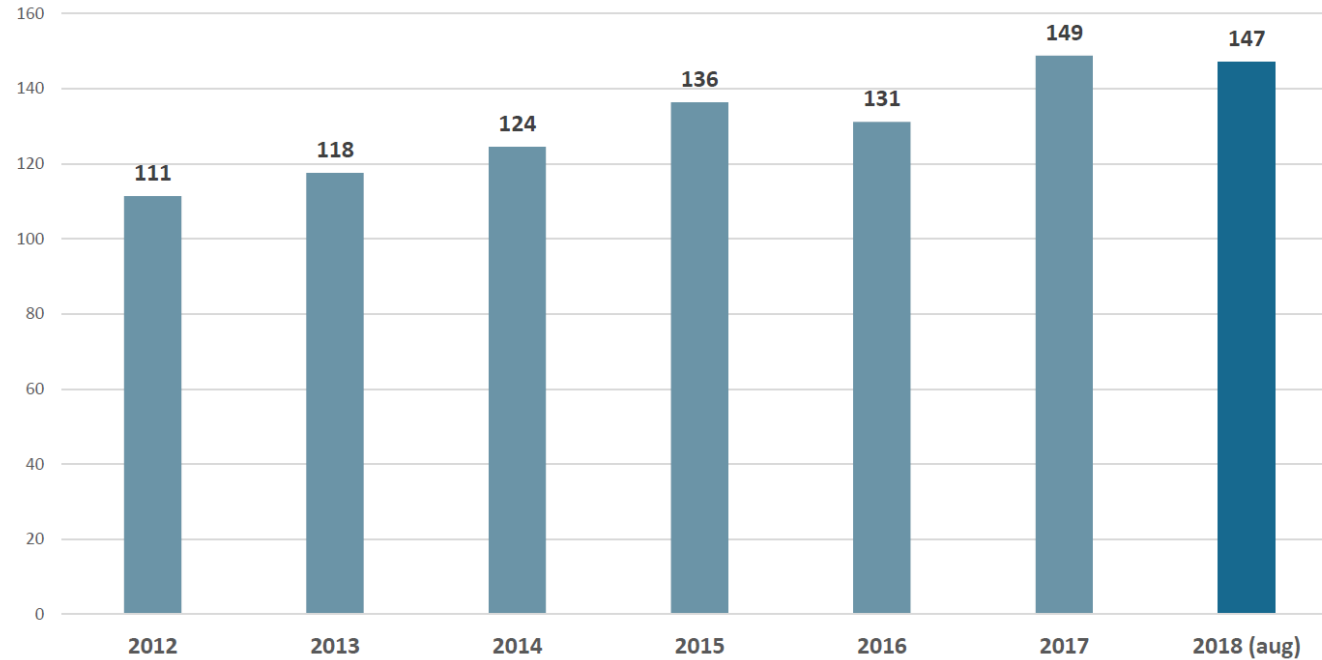
Turnover in thousands € (members)



New releases by category (all publishers)



E-book market: Average price (incl VAT 25 %)



- Utsalgspris inkl mva
- Gjennomsnitt for solgte eksemplarer



E-book market: Titles by language

Bokmål	12 780	92,2 %
Nynorsk	927	6,7 %
English	50	0,4 %
Bi/multilingual	27	0,2 %
Dialects	29	0,2 %
Other	51	0,4 %
	13 864	100 %



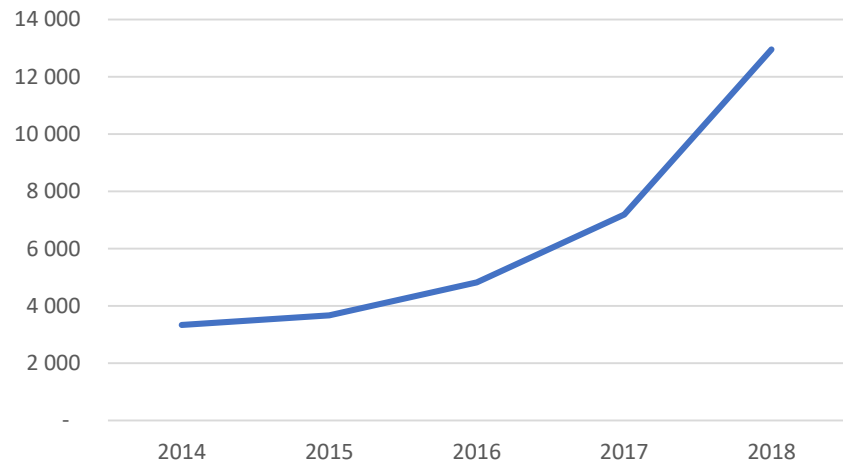
Audio books: Key figures and trends

- 23 % of the population listen to audio books. In average each book reader/listener listens to 2,2 audio books per year
- Digital audio books have had a significant growth the last years, and is now the only growing sub-market
- Streaming is the most important distribution channel. Three services: Storytel, Fabel and EBOK.NO Pluss – all owned by publishing houses
- Digital audio books are also accessible in public libraries
- Selection dominated by fiction for adults, children and young adults



Audio book market: Turnover & New releases

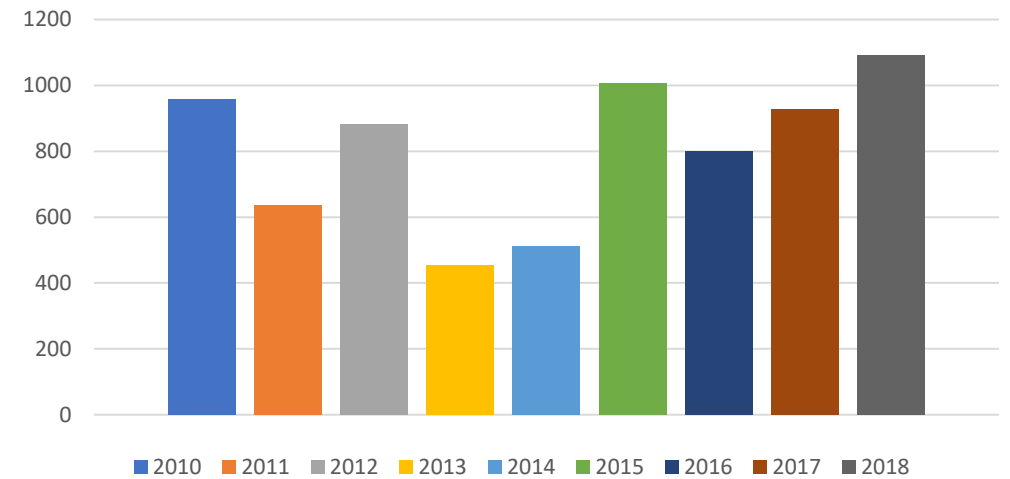
Turnover in thousands € (members)



↑
storytel

↑
FABEL

New releases audio books (all publishers)



THE NORWEGIAN
PUBLISHERS ASSOCIATION

Audio book market: Sales numbers physical/downloads

