

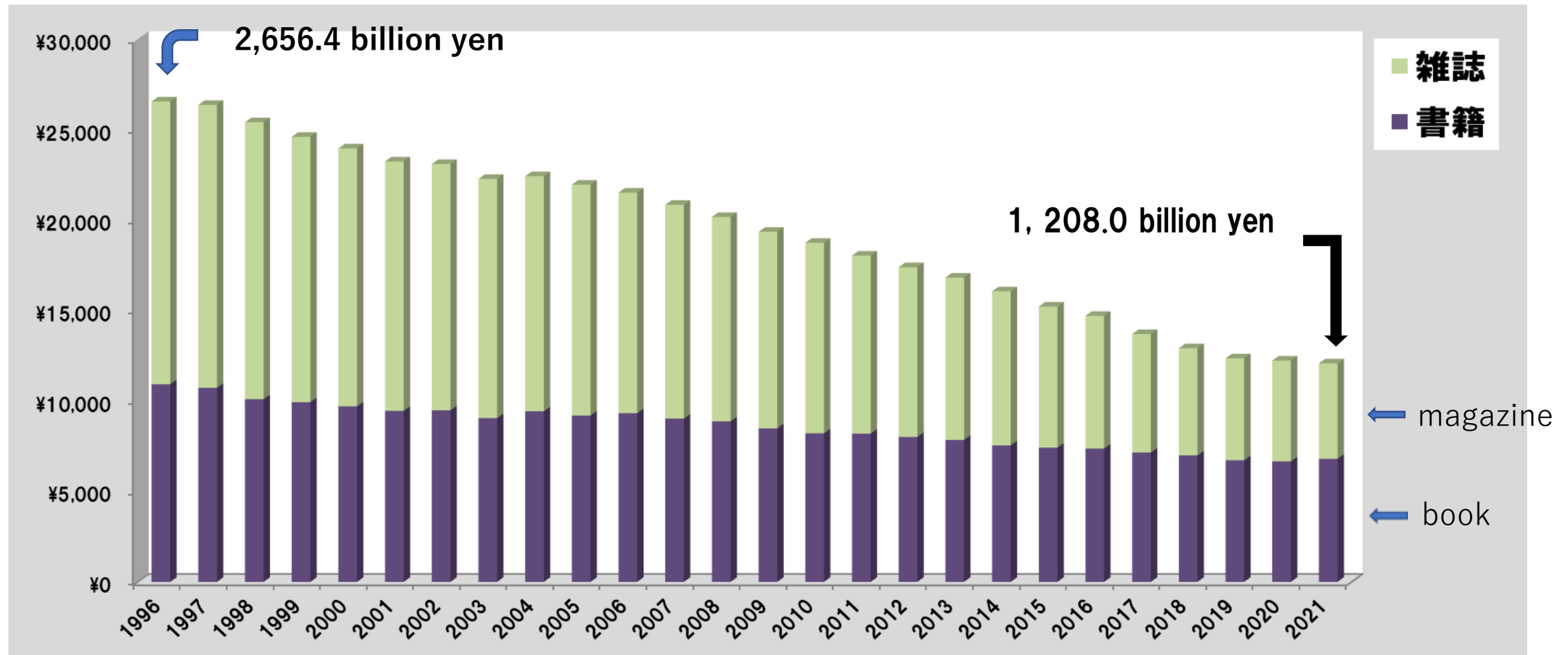
# An Overview of the Japanese Publishing Market and Changes in the Environment Surrounding Publishing

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Publishers Association

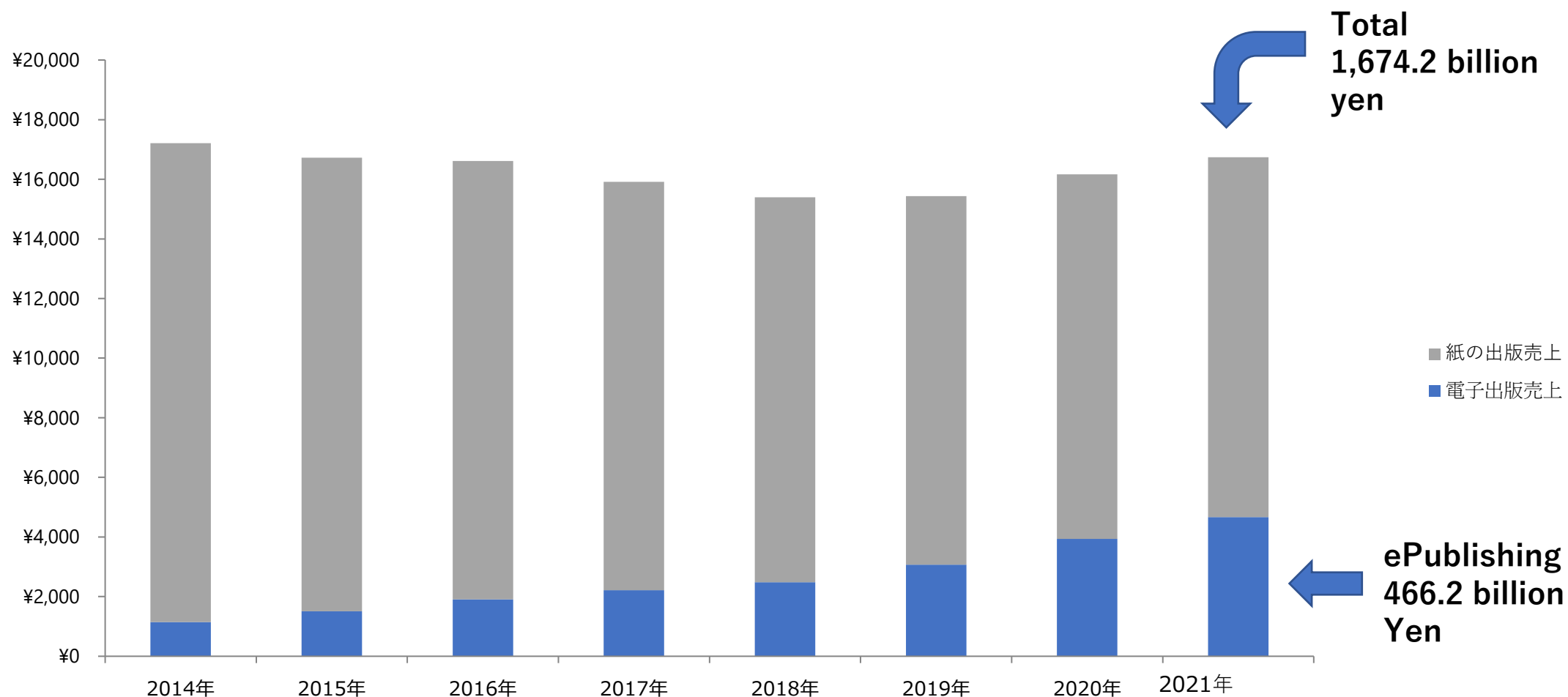
# **1 Overview of the Japanese publishing market**

# 1-1 Restoration of paper



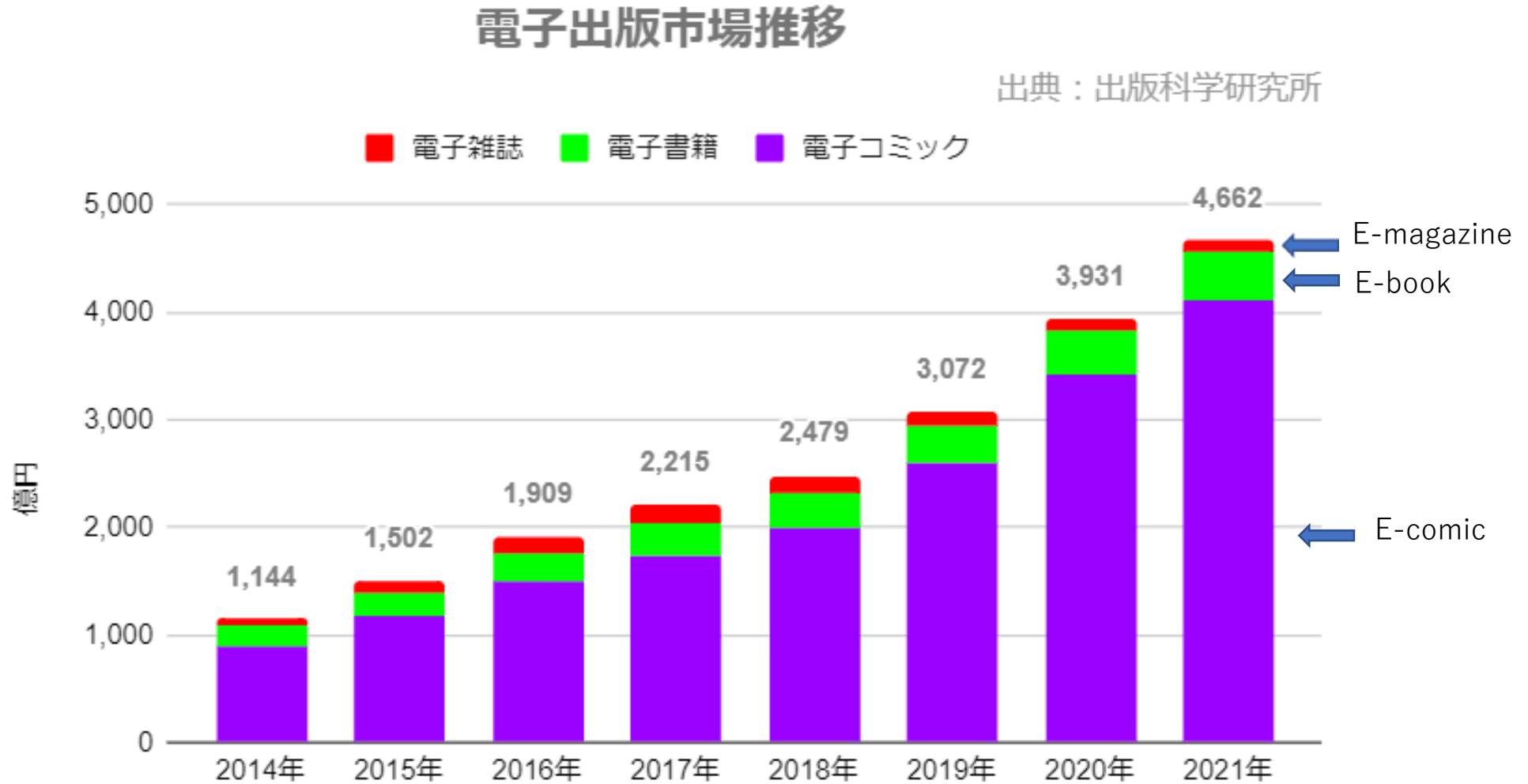
Sales of paper publications (books and magazines total) in 2020 decreased by 1.3% from the previous year.

## 1-2 Spread of electronics



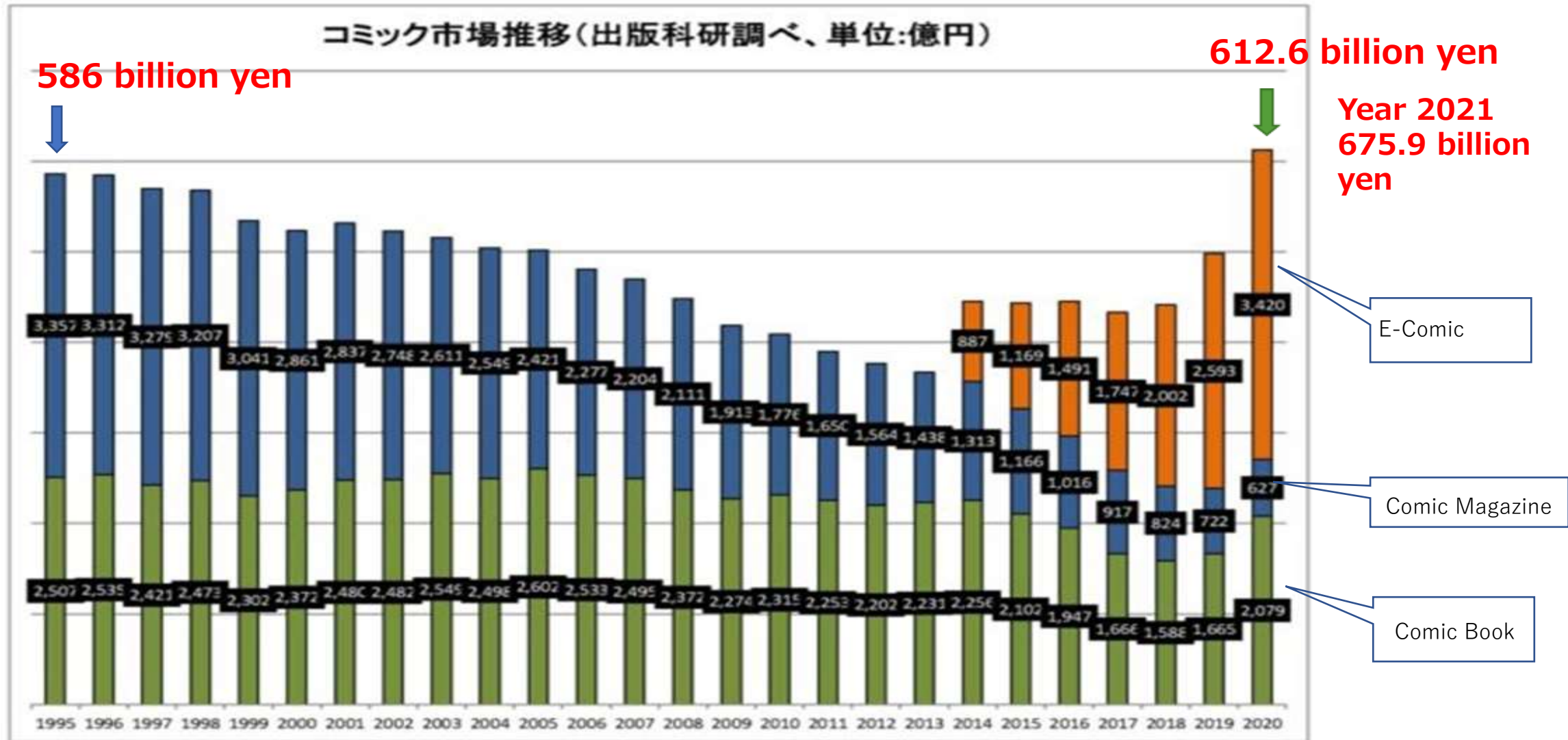
**The combined publishing market for paper and electronics increased by 3.6% year-on-year (up for the third consecutive year)**

# 1-3 Rapid growth of ebooks, especially comics

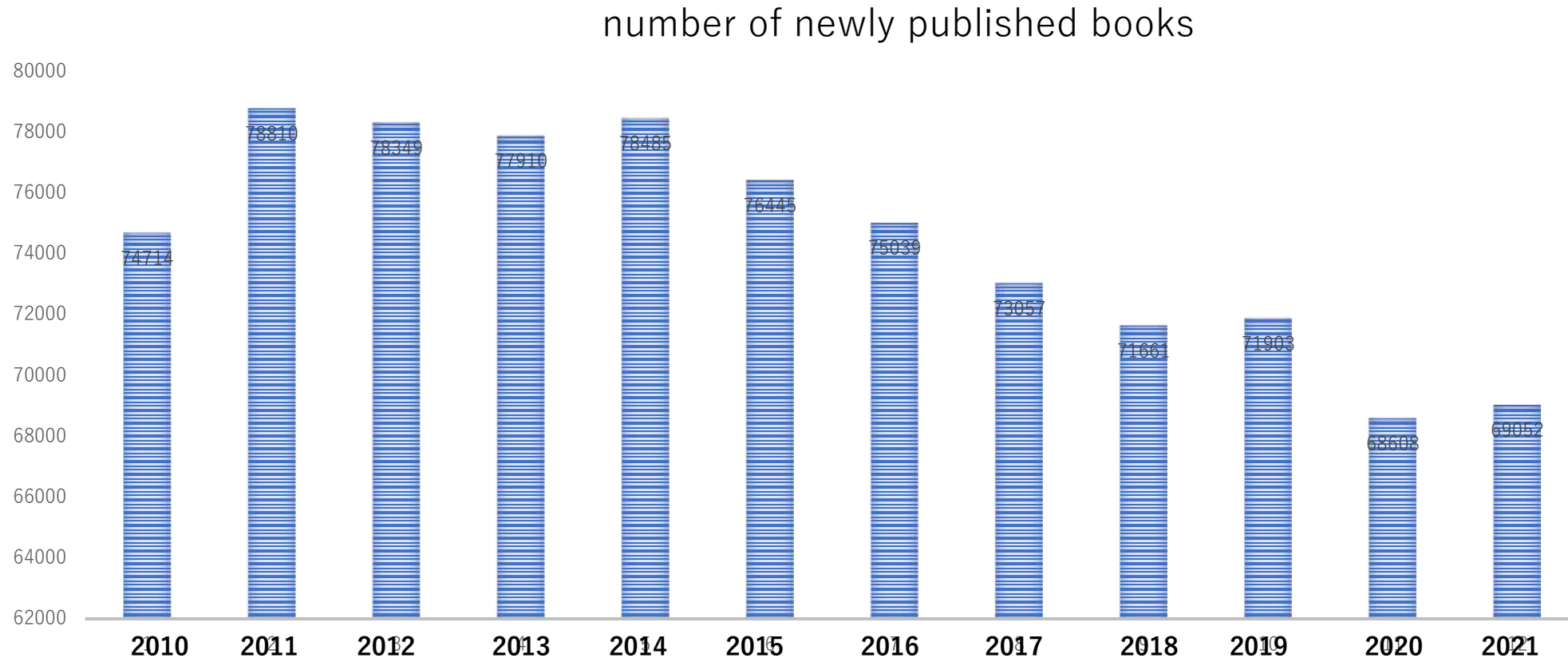


Electronic comics increased significantly by 20.3% year-on-year.

# 1-4 Trends in the comic market

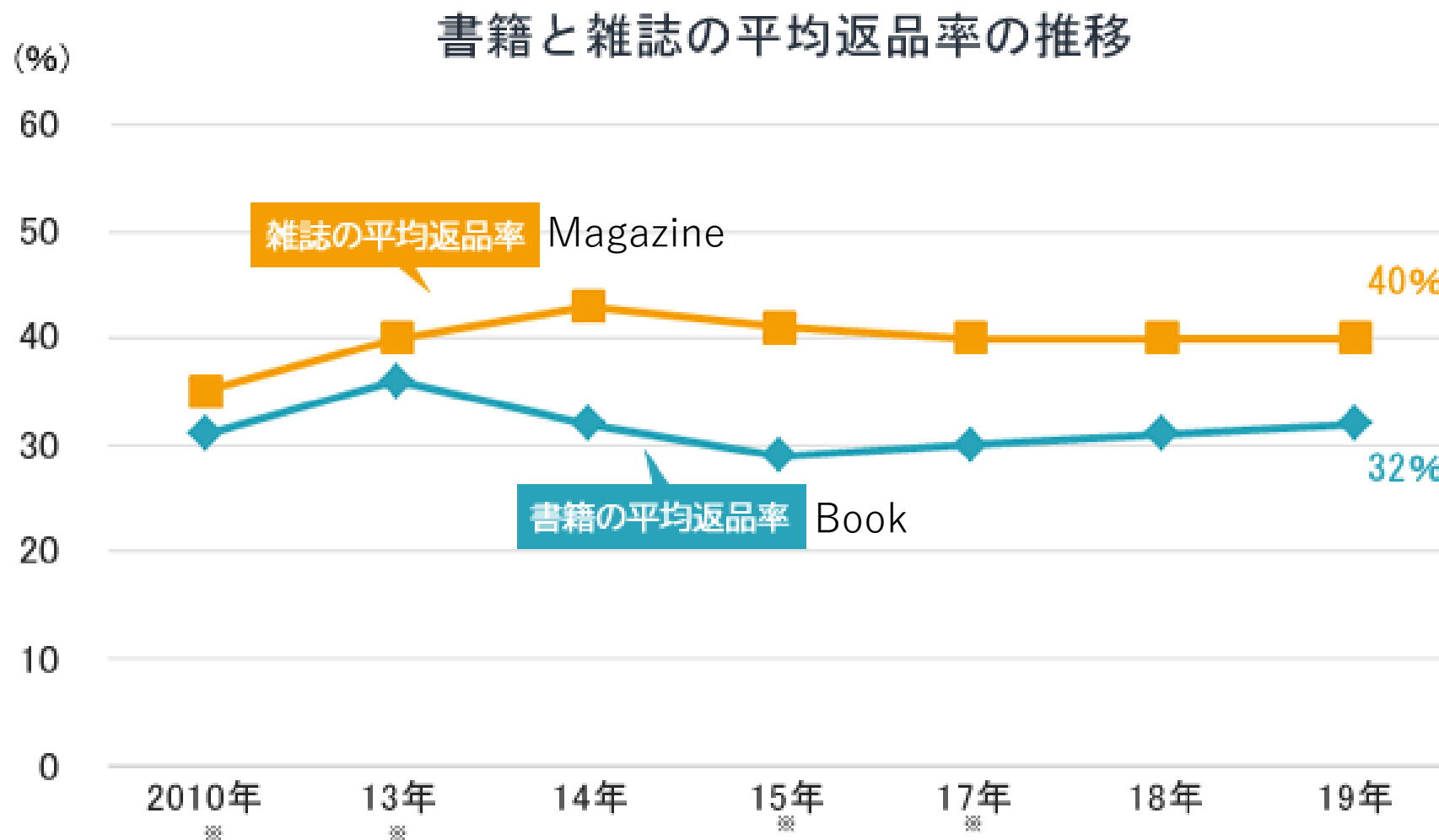


# 1-5 The number of newly published books is gradually decreasing



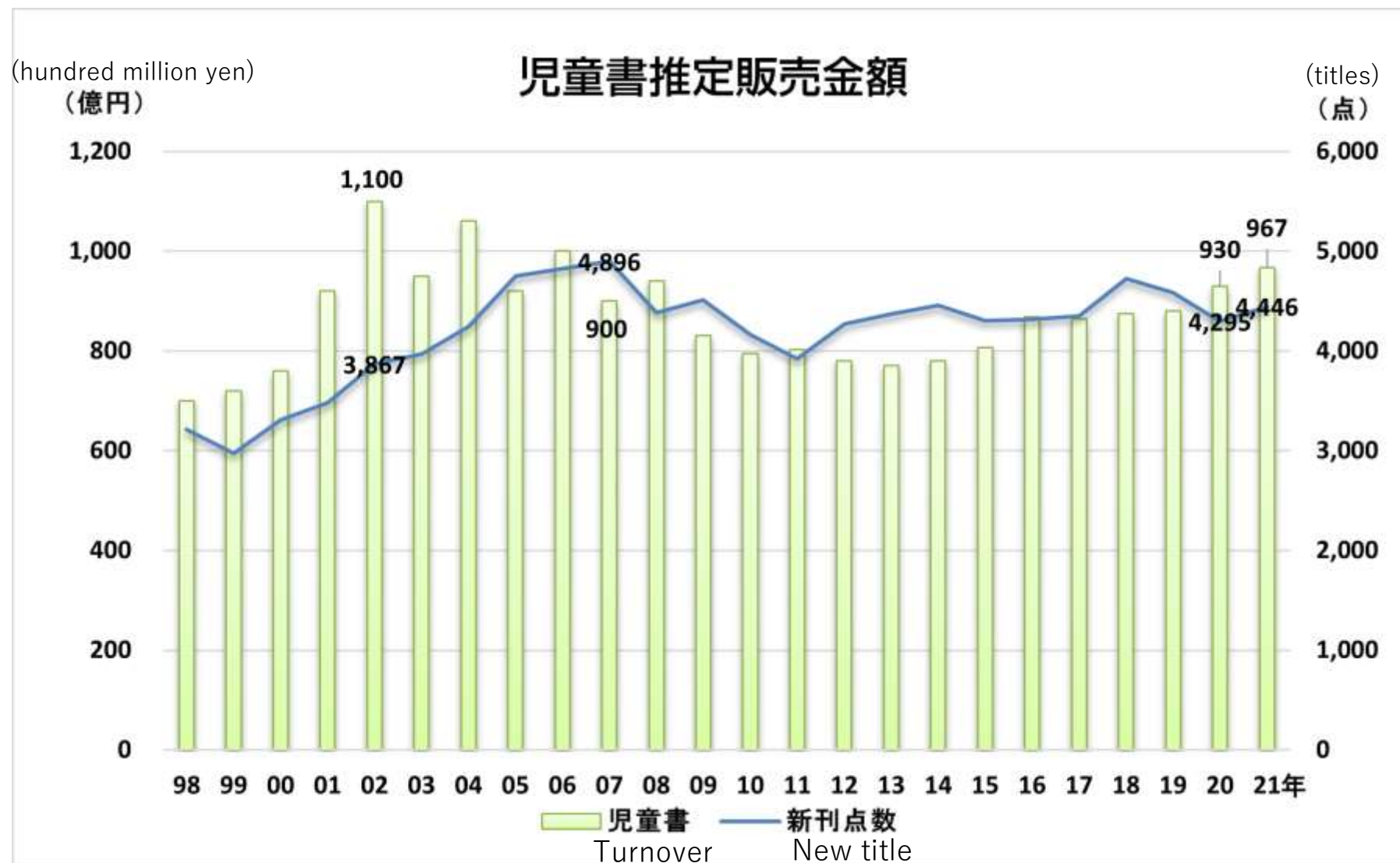
There was a phenomenon in which the decrease in sales was compensated by an increase in the number of new publications, but the number of new publications is gradually declining due to the need to improve distribution efficiency and reduce the return rate.

## 1-6 Trends in book and magazine return rates

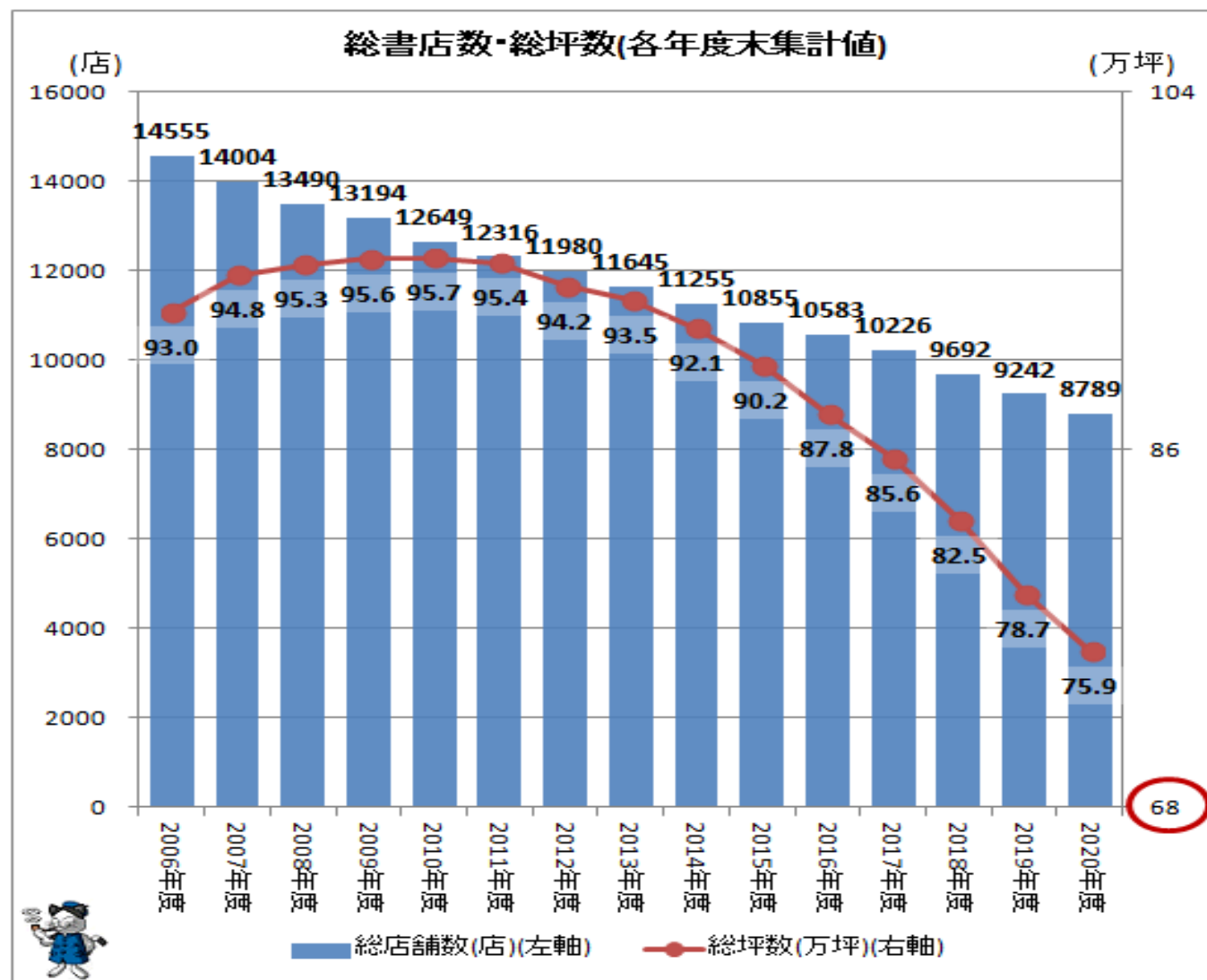




# 1-7 The children's book market is developing steadily



# 1-8 Changes in the number of bookstores



The average floor space per store based on simple averages will increase from 250 m<sup>2</sup> in 2010 to 285m<sup>2</sup> in 2020.

## **2 Publishing industry's response to COVID-19**

## 2-1 2021 Annual Best Sellers

順位	書名	著者	価格	出版社
1	<a href="#">人は話し方が9割</a>	永松茂久	1400円	すばる舎
2	<a href="#">スマホ脳</a>	アンデシュ・ハンセン 久山葉子訳	980円	新潮社
3	<a href="#">推し、燃ゆ</a>	宇佐見りん	1400円	河出書房新社
4	<a href="#">星ひとみの天星術</a>	星ひとみ	1200円	幻冬舎
5	<a href="#">本当の自由を手に入れるお金の大学</a>	両@リベ大学長	1400円	朝日新聞出版
6	<a href="#">52ヘルツのクジラたち</a>	町田そのこ	1600円	中央公論新社
7	<a href="#">鬼滅の刃 塗絵帳-蒼-</a> <a href="#">鬼滅の刃 塗絵帳-紅-</a>	吾峠呼世晴	各800円	集英社
8	<a href="#">秘密の法</a>	大川隆法	2000円	幸福の科学出版
9	<a href="#">よけいなひと言を好かれるセリフに変える 言いかえ図鑑</a>	大野萌子	1400円	サンマーク出版
10	<a href="#">呪術廻戦 逝く夏と還る秋</a>	芥見下々 北國ぼらっど	700円	集英社

(日本出版販売調べ)

## Fiction

順位	書名	著者	価格	出版社
1	<a href="#">推し、燃ゆ</a>	宇佐見りん	1400円	河出書房新社
2	<a href="#">52ヘルツのクジラたち</a>	町田そのこ	1600円	中央公論新社
3	<a href="#">白鳥とコウモリ</a>	東野圭吾	2000円	幻冬舎
4	<a href="#">ブラック・ショーマンと名もなき町の殺人</a>	東野圭吾	1800円	光文社
5	<a href="#">元彼の遺言状</a>	新川帆立	1400円	宝島社
6	<a href="#">変な家</a>	雨穴	1273円	飛鳥新社
7	<a href="#">オルタネート</a>	加藤シゲアキ	1650円	新潮社
8	<a href="#">えんとつ町のプペル</a>	西野亮廣	2000円	幻冬舎
9	<a href="#">転生したらスライムだった件(18)</a>	伏瀬	1000円	マイクロマガジン社
10	<a href="#">透明な螺旋</a>	東野圭吾	1650円	文藝春秋

Prize-winning literary hits  
 Works by celebrities (idol groups, comedians)  
 Strong popularity of famous writers

## Non fiction

順位	書名	著者	価格	出版社
1	<a href="#">秘密の法</a>	大川隆法	2000円	幸福の科学出版
2	<a href="#">老いの福袋</a>	樋口恵子	1400円	中央公論新社
3	<a href="#">私は私のままで生きることにした</a>	キム・スヒョン 吉川南訳	1300円	ワニブックス
4	<a href="#">私が見た未来 完全版</a>	たつき諒	1091円	飛鳥新社
5	<a href="#">九十八歳。戦いやまず日は暮れず</a>	佐藤愛子	1200円	小学館
6	<a href="#">聖域</a>	コムドット やまと	1300円	KADOKAWA
7	<a href="#">20代で得た知見</a>	F	1300円	KADOKAWA
8	<a href="#">ひとりをたのしむ 大人の流儀 (10)</a>	伊集院静	909円	講談社
9	<a href="#">小坂菜緒1st写真集 君は誰？</a>	小坂菜緒	2000円	集英社
10	<a href="#">日向坂46写真集 日向撮 VOL.01</a>	日向坂46	1800円	講談社

Lifestyle book for seniors  
 Essays from South Korea are popular with women  
 psychology, self-help books

## Business

順位	書名	著者	価格	出版社
1	<a href="#">人は話し方が9割</a>	永松茂久	1400円	すばる舎
2	<a href="#">本当の自由を手に入れる お金の大学</a>	両@リベ大学長	1400円	朝日新聞出版
3	<a href="#">よけいなひと言を好かれるセリフに変える 言いかえ図鑑</a>	大野萌子	1400円	サンマーク出版
4	<a href="#">1%の努力</a>	ひろゆき	1500円	ダイヤモンド社
5	<a href="#">「育ちがいい人」だけが知っていること</a>	諏内えみ	1400円	ダイヤモンド社
6	<a href="#">リーダーの仮面</a>	安藤広大	1500円	ダイヤモンド社
7	<a href="#">1日1話、読めば心が熱くなる365人の仕事の教科書</a>	藤尾秀昭	2350円	致知出版社
8	<a href="#">嫌われる勇氣</a>	岸見一郎 古賀史健	1500円	ダイヤモンド社
9	<a href="#">「織細さん」の本</a>	武田友紀	1204円	飛鳥新社
10	<a href="#">世界一やさしい「やりたいこと」の 見つけ方</a>	八木仁平	1400円	KADOKAWA

Conversation commentary book  
Investment/saving/savings/side job  
"Self-Study Encyclopedia" (788 pages)  
exceeded 200,000 copies

## Hobbies & practical books

順位	書名	著者	価格	出版社
1	<a href="#">星ひとみの天星術</a>	星ひとみ	1200円	幻冬舎
2	<a href="#">鬼滅の刃 塗絵帳-蒼-</a> <a href="#">鬼滅の刃 塗絵帳-紅-</a>	吾峠呼世晴	各800円	集英社
3	<a href="#">今さら聞けないお金の超基本</a>	泉美智子 坂本綾子	1200円	朝日新聞出版
4	<a href="#">世界一美味しい手抜きごはん</a>	はらぺこグリズリー	1300円	KADOKAWA
5	<a href="#">眠れなくなるほど面白い 図解 自律神経の話</a>	小林弘幸	850円	日本文芸社
6	<a href="#">幸せ上手さん習慣</a>	星ひとみ	1400円	小学館
7	<a href="#">眼圧リセット</a>	清水ろっかん	1273円	飛鳥新社
8	<a href="#">すごすぎる天気図鑑</a>	荒木健太郎	1250円	KADOKAWA
9	<a href="#">10年かかって地味ごはん。</a>	和田明日香	1300円	主婦の友社
10	<a href="#">10秒で顔が引き上がる 奇跡の頭ほぐし</a>	村木宏衣	1300円	主婦の友社

Health, Diet Orientation, Cooking Related  
Reputation on SNS is the key  
astrology

# **3 Japanese publication distribution system**

## 3-1 Main distribution routes for publications

### ・取次・書店ルート



### ・CVSルート

Approximately 120 billion yen in publication sales at CVS (approximately one-fifth of the peak period)



### ・ネット書店・宅配ルート

The number of publishers dealing directly with Amazon is increasing





## Books

Publisher   Wholesaler   Bookstore



Margin (8%)



Margin (22%)

## Magazines

Publisher   Wholesaler   Bookstore



Margin (8.5%)



Margin (23%)

## 3-2 Resale Price Maintenance System 再販売価格維持制度

Publications were ruled an exception to the 1953 Anti-Monopoly Law, allowing the continuation of the pre-war custom of selling publications at fixed prices.

The Resale Price Maintenance System, under which a publication are sold across the country at a fixed price. For the publishers and bookstores across the country, resale price maintenance enables the distribution of a wide variety of titles in small volumes and makes possible royalty payments for books with a small circulation.

This does not mean that publications must be sold at a fixed price, but only means that the publications are allowed to be sold at a fixed price. In other words, it depends on publishers whether they sell a specific publication at a fixed price or not. The Resale Price Maintenance Agreements themselves are contracts between publisher and wholesaler, or between wholesaler and bookseller on a voluntary basis.

## 3-2-1 Transactions Covered by Resale Price Maintenance Agreements

Transactions between publishers and distributors with resale agreements	yes
Transactions between distributors and bookstores with resale agreement	yes
Sales at retailers without a resale agreement	no
Sales to readers by publishers themselves (whether real or online)	no
Sales of publications not subject to resale agreements	no
Sales of combined products of publications and non-resale products	no
Resale of publications that have been purchased by readers, such as used books	no
In addition, discount sales through flexible operation of resale agreements	yes/no

### 3—3 The consignment system 新刊委託制度

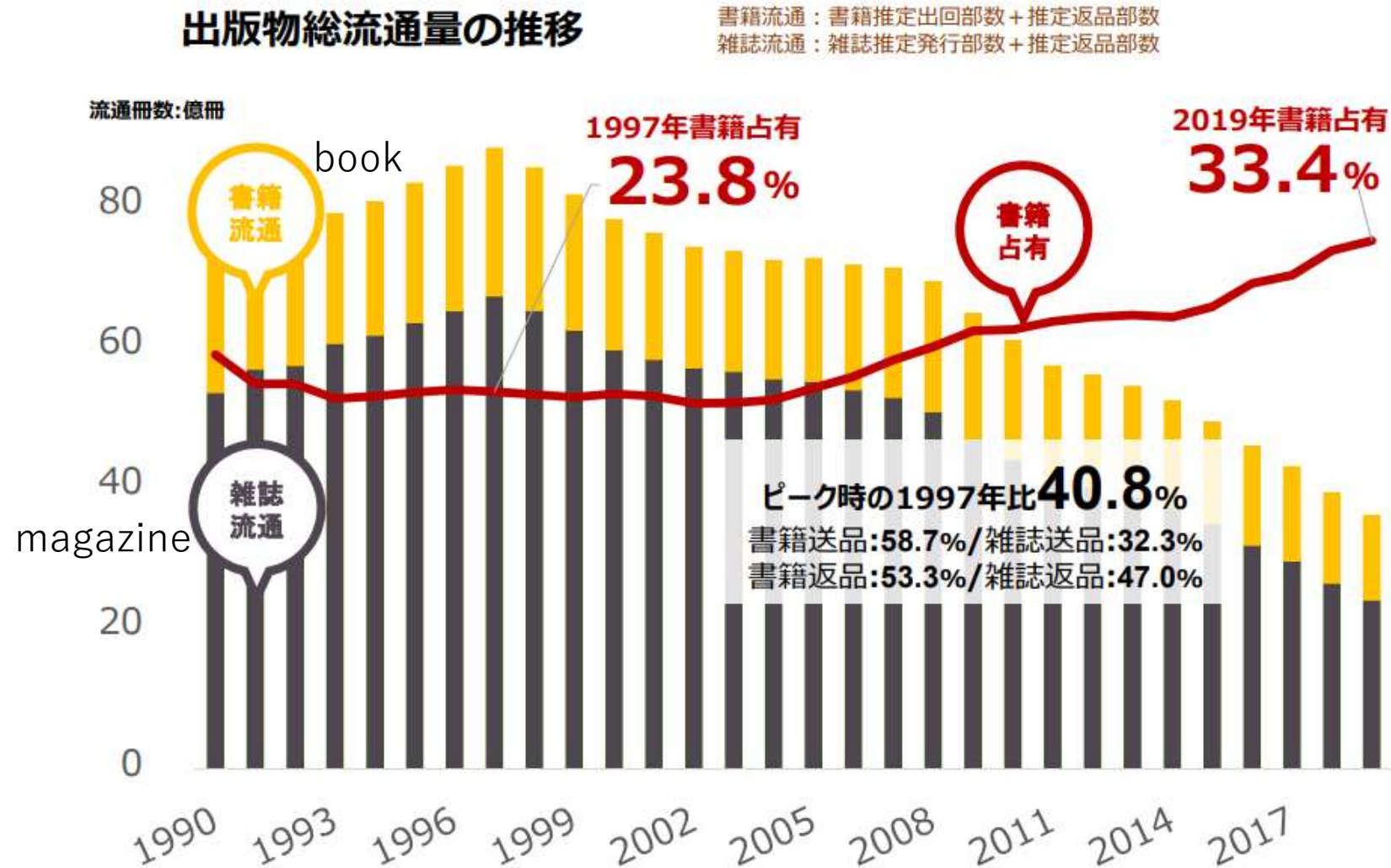
Book stores are able to stock publications without any risk because of the consignment system.

Under the Consignment Sales System, retailers and wholesalers can freely return unsold publications within a set period of time (usually six months for newly released books). So, even small booksellers are able to distribute a large selection of books with no risk, and specialty bookstores can stock titles with small print runs or a slow turnover.

Conversely, the consignment sales system is also effective for mass-market publications aimed at nationwide audiences. The unique system of book consignment serves consumers well because it offers more choice, and it serves booksellers well because it helps them maintain their vitality. However, it can also work to detrimental effect when publishers overproduce and distribute books that do not sell, thus resulting in a large volume of returns. The task of rationalizing the distribution system to avoid this pitfall still needs to be addressed.

Almost publications are distributed on a returnable basis.

### 3-4 Publication Logistics Issues



出典：出科研『出版指標年報』(2020)、返品部数は推定出回数と推定発行部数に金額ベースの返品率をかけて算出した推定部数

### **3—5 2024 problem in logistics**

- From April 1, 2024, the work style reform related law will limit the annual overtime hours for car drivers to 960 hours.

- If an employee works 60 hours of overtime per month, the extra wage rate will be raised from 25% to 50%.



As a result, even in the distribution of publications, there is a need for more efficient management of distributors.

- Progress in collaboration between two major companies

## 3-5 A New Move to Improve Publication Distribution

On March 11, 2022, Kodansha, Shueisha, Shogakukan, and Marubeni, a major general trading company, established a new company PubteX with the aim of reforming publication distribution into a sustainable one by utilizing DX.



(1) Publishing and book distribution optimization solution business that utilizes advanced AI

Publishing and distribution of publications by utilizing various “data” used in the publishing world in a longitudinal, cross-sectional and integrated manner, and by utilizing an “AI model” that fits the different sales characteristics of each title. We aim to reduce the book return rate by providing a service that optimizes the volume.

(2) RFID solution business

By attaching RFID (IC tags) to publications and using the various data recorded, various services can be provided, including management of inventory and sales conditions, improved inventory efficiency, book recommendation services at sales floors, and shoplifting prevention. We will support the solution of publication distribution issues, mainly by improving the operation and management of bookstores. The target is to start the RFID solution business in July 2023.

## 3-6 Maintenance and development of bibliographic database

### Registration status with JPRO (November 2022)

- ☐ Number of registered books 3,623,321
  - paper books 3,119,509
  - paper magazine 21,206
  - e-book 478,742
  - audiobook 3,864
- ☐ Number of registrants 2,540者
- ☐ Registration rate of newly published books 96.0%
- ☐ Number of registered bookstores 2,414

### Registration fee with JPRO

- ☐ Books, Mook, Comics 1,000 yen
- ☐ Magazines 5,000 yen/title/year
- ☐ ebooks 200yen



## **4 Changes in the Legal Environment Surrounding the Publishing World**

- ( 1 ) Responding to the Barrier-Free Reading Law  
Preparation for establishment of Accessible Books Support Center
- ( 2 ) Remuneration system for public transmission for educational purposes
- ( 3 ) Expansion of restrictions on library rights  
Introduction of a compensation system
- ( 4 ) Efforts to eradicate piracy

## 4-1 読書バリアフリー法への対応 Responding to the Barrier-Free Reading Law

Law Concerning Promotion of Improvement of Reading Environment for the Visually Impaired  
(Effective June 28, 2019)

### **Purpose (Article 1)**

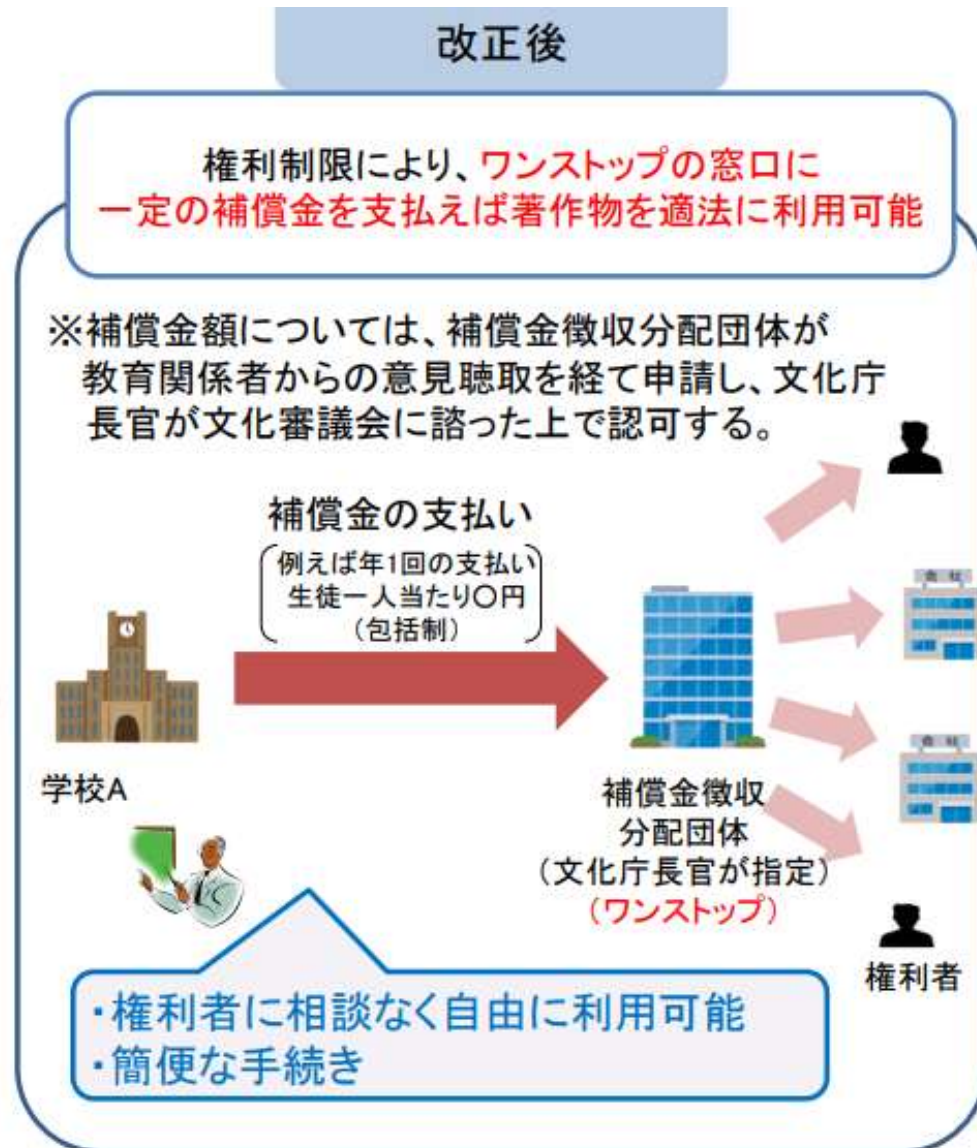
Comprehensively and systematically promote the development of a reading environment for visually impaired people (= people who have difficulty recognizing visual expressions in books due to visual disabilities, developmental disabilities, physical disabilities, etc.)

It is planned to establish an accessible books support center within JPO( Japan Publishing Information Infrastructure Development). In September 2021, the preparatory committee will begin consideration.

- \* One-stop reception of requests for accessible book data from organizations for persons with disabilities and contacting publishers.
- \* Publishers can safely provide text data, etc. in a secure environment.
- \* As an organization for persons with disabilities, we can expect prompt responses by unifying their contact points.

## 4-2 授業目的公衆送信補償金制度

### Administration of Remuneration for Public Transmission for School Lessons



Founded by law revision in May 2018.

In the past, copying of copyrighted works to the extent necessary and appropriate in the course of the lesson and transmission in the remote joint lesson were available free of charge.

In addition to this, it is possible to use it for public transmission for class purposes, provided that the installer of the educational institution using the system pays compensation.

(Excludes use that unreasonably harms the interests of the copyright holder).

# 授業目的公衆送信補償金等管理協会 (founded Jan.2019)

Society for the Administration of Remuneration for Public Transmission for School Lessons (SARTRAS)

<https://sartras.or.jp/outline/>

- \* In April 2020, in response to the simultaneous closure of schools nationwide due to the spread of new virus infections, the compensation was zero and the right to public transmission was restricted ahead of schedule.
- \* From April 2021, the system began operating for a fee. Registration from educational institutions nationwide is underway. (Compensation amount = Elementary school students 120 yen/year/person, junior high school students 180 yen, high school students 420 yen, university students 720 yen)
- \* The estimated amount of compensation collected in FY2021 is approximately 4.8 billion yen.

## 4-3 Transmission of materials from library to individual user

Related to Article 31, Paragraph 4 of the Copyright Act

- \* The National Diet Library can directly send the data of “out-of-print materials” (those that are not available in the market) at the request of the user.
- \* There is no compensation for rights holders.
- \* The service will start in May 2022. There are about 200,000 accesses per month.

＜現行：図書館等へのみ送信可能＞



＜現行：紙での複製・提供のみ可能＞



# Remuneration System for Public Transmission by Libraries or Similar Facilities

Copyright Law article 31, paragraph 2

- \* Libraries in general will be able to transmit portions of works for research purposes at the request of users.
- \* Compensation must be paid to copyright holders and publishers.
- \* Compensation is assumed to be borne by the users themselves.
- \* The system was built on the premise that a compensation amount sufficient to compensate for the loss of right holders is necessary.

**図書館等公衆送信補償金管理協会** (founded Sep.2022)

Society for Administration of Remuneration for Public Transmission by Libraries or Similar Facilities(SARLIB)

- \* On November 2022, 11, it was designated by the Commissioner for Cultural Affairs as the only organization in the country to exercise the right to receive public transmission compensation such as libraries.
- \* We are currently hearing opinions from the library establishment organization regarding the amount of compensation.

## 4-4 Fighting piracy

Total number of visits for the top 10 piracy sites



出典：一般社団法人ABJ ウェブサイト



# Established ABJ to continuously implement anti-piracy measures

- \* Addition of the ABJ mark to distinguish the official version site
- \* Prevents advertisements from being posted on pirated sites
- \* Collaboration with related government agencies and organizations
  - Cooperating with the Agency for Cultural Affairs to implement legal revisions to combat piracy
    - ※The scope of illegal downloads has been expanded to include publications, and the act of downloading pirated copies knowingly is also subject to punishment.
- \* Development of the “STOP! Pirated Edition” Campaign
  - The member publishers have united and, with the cooperation of well-known manga artists, produced works and educational goods using manga characters to eradicate original piracy.
- \* Cooperation with search sites. Campaign banners are displayed when searching for "pirated" or pirated sites

# Attachment of the ABJ mark

- \* The ABJ mark is a registered trademark that indicates that the posted e-book store/e-book distribution service is a regular version distribution service that has obtained content usage permission from the copyright holder.
- \* Established with the aim of providing readers with an environment where they can browse and subscribe with peace of mind, and to promote the development of a sound content market.



※ABJ = Authorized Books of Japan

# **5 New reading promotion movement and the future of books**

# 5-1 求められる、「読者」の再発見

- この15年で人々が1日のうちでメディアに接する時間は120分も増加。

Over the last 15 years, people have increased their time to interact with the media by 120 minutes a day.

- PC、タブレット、スマートフォンの合計で約4時間。

A total of about 4 hours for PCs, tablets and smartphones.

→ この時間の中の一部を本に振り向けるにはどうしたら良いか？

How can I devote some of this time to books?



※メディア総接触時間は、各メディアの接触時間の合計値 各メディアの接触時間は不明を除く有効回答  
※2014年より「パソコンからのインターネット」を「パソコン」に、「携帯電話（スマートフォン含む）からのインターネット」を「携帯電話・スマートフォン」に※タブレット端末は、2014年

## 5-2 Substitutability from paper to electronic is partial

- \* CDs had extremely strong substitutability from records.
- \* Cinema and television have developed together in their own ways.
- \* In the case of publications, although e-books will continue to develop to a certain extent, it is hard to imagine that they will replace all paper publications, at least at present.
- \* Electronics have not fully covered the characteristics of paper books yet?
  - ⇒ The excellence and simplicity of the paper book interface
  - ⇒ Comfort that appeals to the five senses
  - ⇒ Desire to own something tangible

## 5-3 What is the aim of future publishing?

- \* Publishing cannot survive just by selling the product of books

Products  $\Rightarrow$  Process

Possess  $\Rightarrow$  Access

- \* A service that provides the act of "reading a book"
- \* Can we find perspectives beyond platform dominance?  
 $\Rightarrow$  What services can be added to selling products?

## 5-4 Perspective from producer

- Willingness to create great content
- Recognizing that not all good books sell well
- The knowledge (and common sense) of what makes a good book

## 5-5 Perspective from reader

- willingness to read good books
- Mechanisms to arouse that motivation
- Promoting reading from a young age, enriching the library, improving motivation to learn...
- What is it that you can only get from books?

## 5-6 Paper must continue its efforts to survive in competition with electronics

- \* Will 'non-digitized' publications become less available?
- \* Decrease in physical bookstores
  - ⇒ Can we expect new discoveries in e-bookstores?
- \* Academic information that has not been digitized will no longer be the subject of research.
  - ⇒ The number of Japanese researchers decreases due to the delay in the digitization of Japanese academic papers
- \* How can we overcome the handicap of being a physical being?
  - ⇒ Out of stock, inventory, transportation, SDGs...



## 5-7 Does Publishing Have a Future?

★ Yes, The Future of Publishing  
Has Possibilities!

★ But it is not an imitation of the  
past!

Thank you for your attention.

感謝您的關注

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