

Dr. Rüdiger Wischenbart



Content and Consulting

How book translation markets work

Exploring the German book market and the opportunities at the world's leading book fair

An overview with data, case studies and perspectives.

Helsinki, August 2024

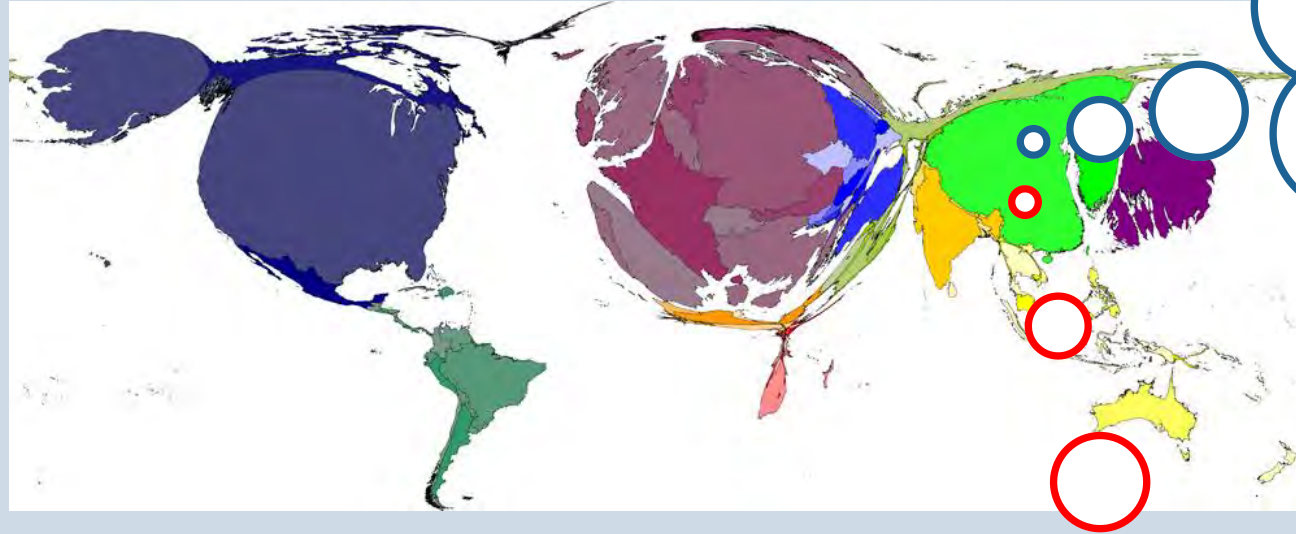
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My topics

- Introduction: Specifics of translation markets
- Some key statistics on the German book market
- Close up on the translation market in Germany (translations into and from German)
- The current bestselling charts, by genre and different types of publishers
- The expanding role of English language imports, especially among you audiences
- The expanding role of audiobooks
- Take also a look at the increasing relevance of 'non-traditional' publishing models (partly self-publishing, partly dedicated imprints aiming at e.g. Young Adult audiences)



Aloitetaan
kiinaksi!

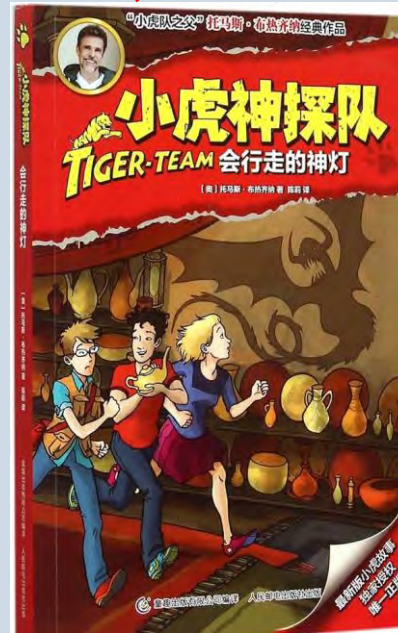
Let us start in Chinese!

让我们从
中文开始!

“In China, his books are more successful than ‘Harry Potter’, he received the ‘National Book Award’ and is called the ‘Master of Adventure’.”



Thomas Brezina



- In 2003, over 1 million books by the austrian Thomas Brezina have been sold in China;
- Novels from his „Tiger Team“ series occupied ranks 1, 4, 5, 8 and 9 in the Chinese bestsller charts
- While the author has become a ‚household name‘ among kids at age 8 to 12 and their parents in Austria, he was hardly known in neighboring Germany.

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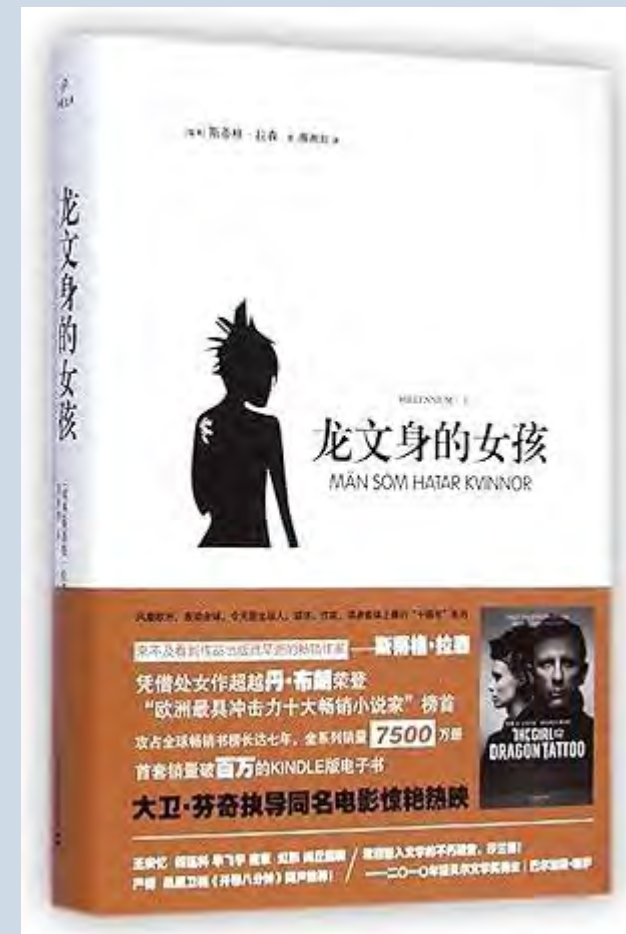
A global success!

How do translations spread?

An exemplary story of global sales

Stieg Larsson « **The Girl With The Dragon Tatoo** »

- Swedish original: 2005
- Chinese translation 2015
- Published in 50 countries
- By 2015, 80 million copies sold worldwide



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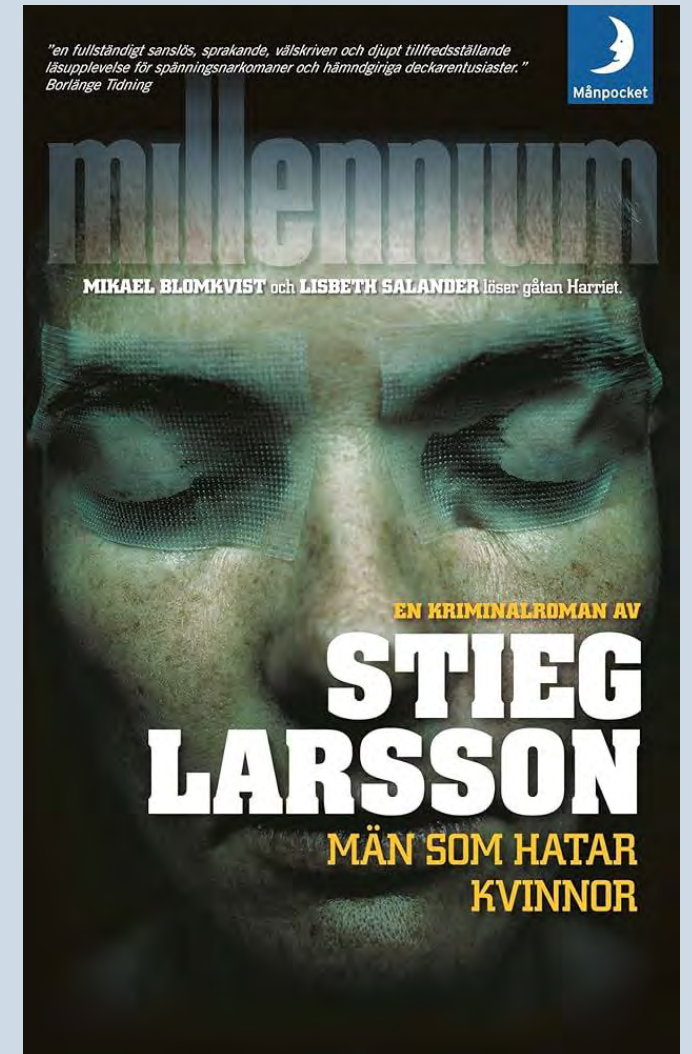


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A global success!

... and a success against all rules!

- Stieg Larsson wrote in **Swedish** – a language, spoken by less than 11 million people;
- A first translation into German failed;
- Outside of Sweden, the books became a first international success in France at independent publisher Actes Sud;
- The English translation was launched by a new small UK publisher freshly launched by Christopher MacLehose.



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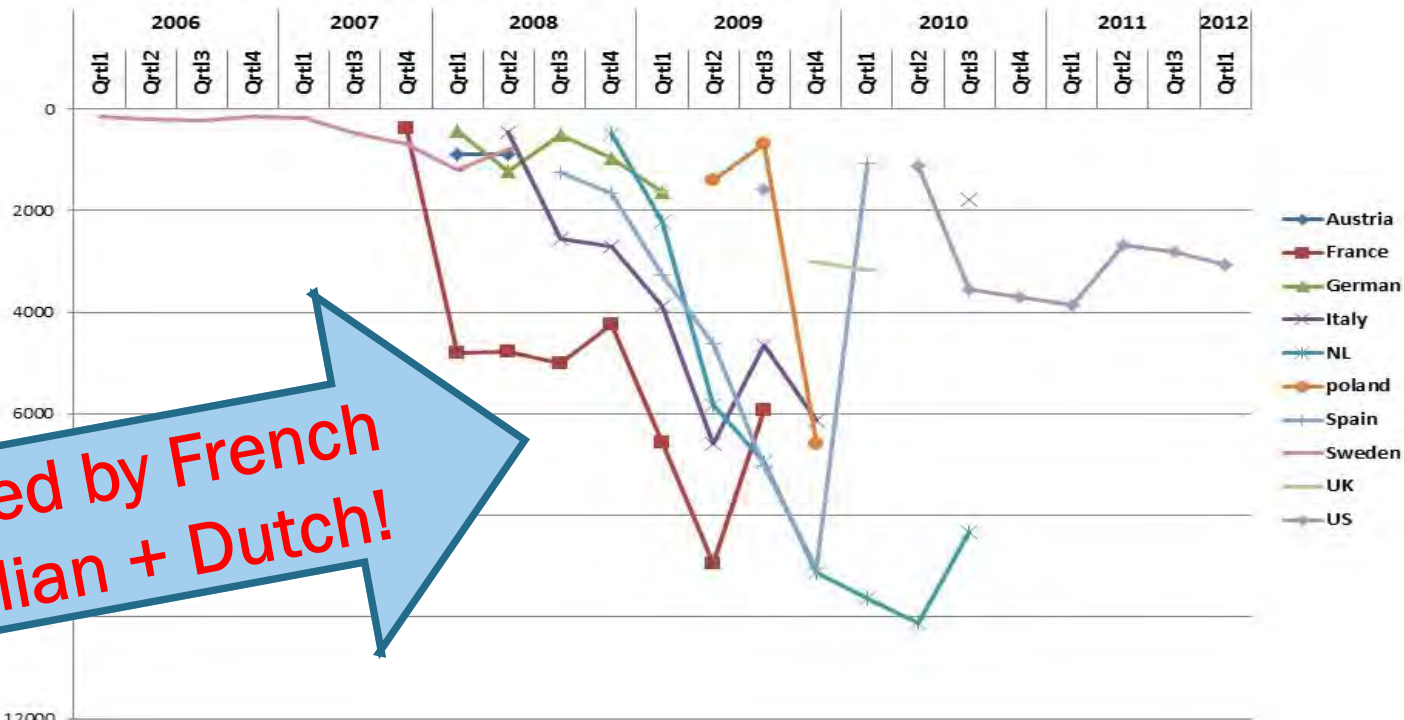


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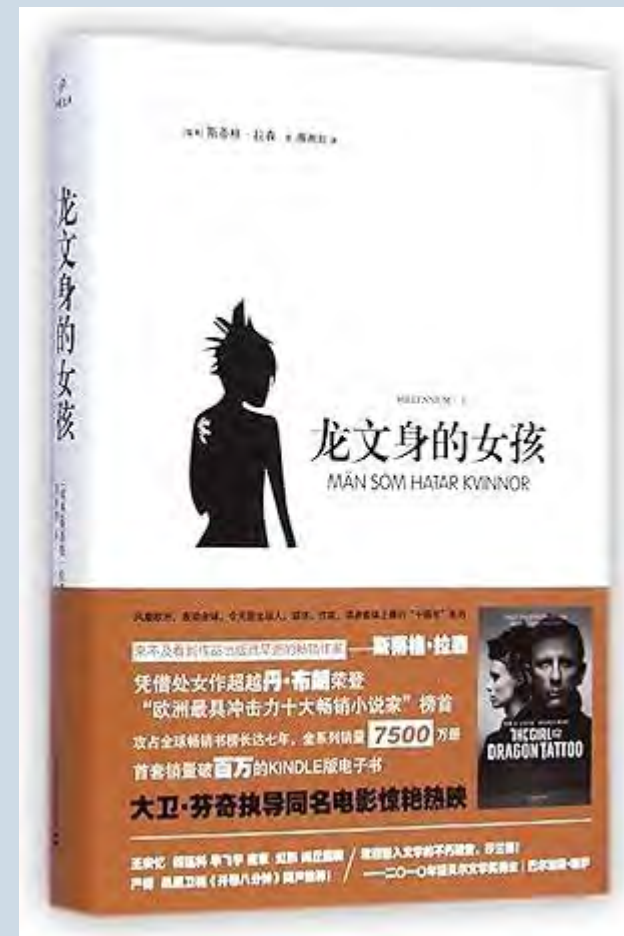
A global success!

... and a success against all rules!

Stieg Larsson: Millennium



Started by French + Italian + Dutch!



A global success!

... across all formats!



Stieg Larsson: Millennium



Sweden

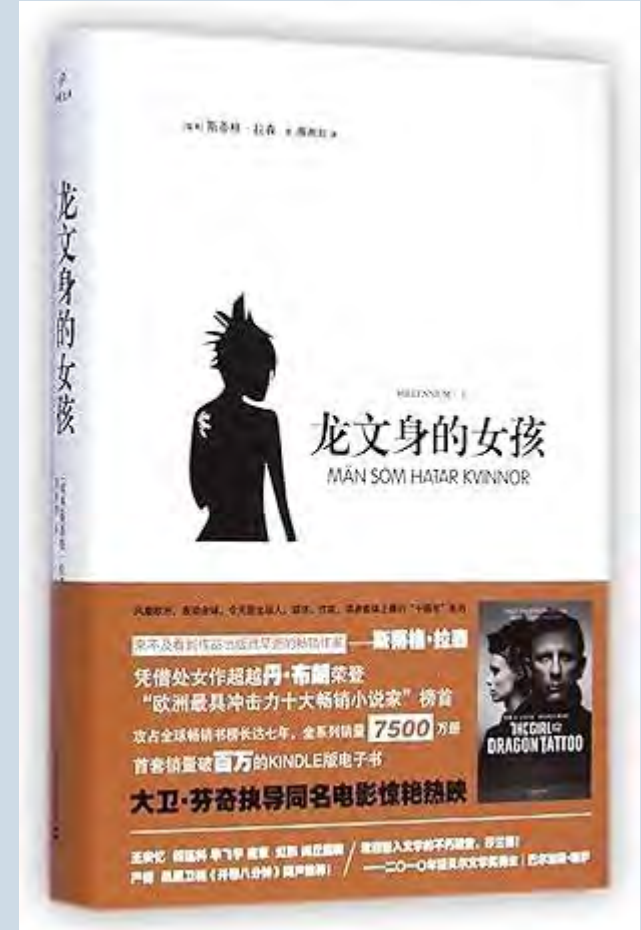


France

Germany



US



The markets for **books in translation** have many **specifics!**

The translation markets for books are shaped by **'informal networks'**

Precise and granular **data** – on specific genres, groups of authors or publishers – are hard to find

The general market environment of book publishing is in full transformation as new, 'non-traditional' publishing models have emerged, like

- Self publishing
- Reading in foreign languages (English)
- Multi-format publishing (audiobooks) and distribution (subscription, streaming)
- New animated story-telling, like Webtoons, Manhwa, or games etc.

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The markets for **books in translation** have many **specifics!**

The translation markets for books are shaped by 'informal networks'

While many translators are using AI supported tools in their work routines, there are also significant concerns with regard to copyright abuses and work loss for human translators

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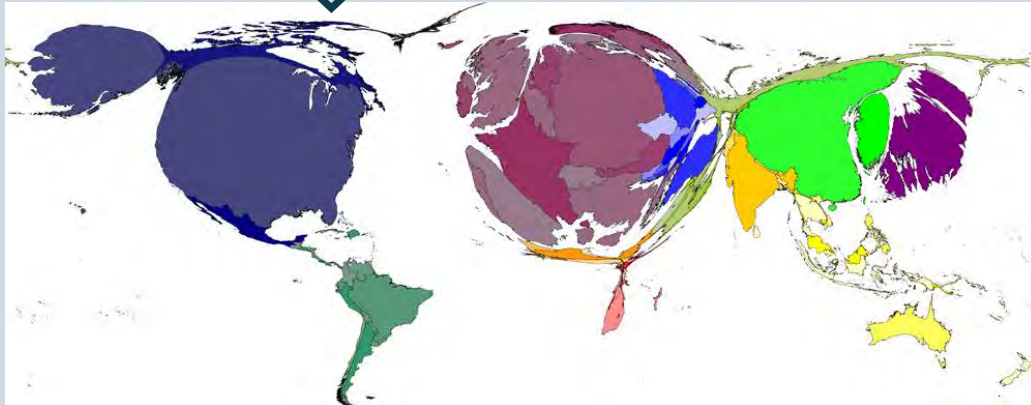
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Deep dive: Germany

Basic data on the book market

The 3 largest book markets worldwide
(at consumer prices, bn€):

1. USA	11.6
2. China	11.6
3. Germany	9.7



- The German book market saw ‚nominal‘ growth From pre-pandemic 2019 (at 9.3 bn €) to 2023 (at 9.7 bn €)
- But in ‚real‘ terms – with inflation included – the **market value declined**
- Most book market data do NOT include revenue from ‚non-traditional‘ publishing models (e.g. self-publishing).

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Critical trends in traditional publishing (02)

			Change in value (YOY)	Inflation	Change in Volume (YOY)
Germany	2023	Total market	2,90%	5,90%	-1,90%
	2023	Book stores	2,80%		
	2019>2023	Total market	1,60%	16,90%	-8,40%
	2019>2023	Book stores	-4,70%		-14,50%
France	2023	Total Market	0,50%	4,90%	-2,90%
Italy	2023	Total market	0,80%	5,40%	-0,70%
	2019>2023	Total market	14,10%	16,30%	12,60%
Spain	2022	Print sales	5,50%	3,56%	2,50%
Sweden	2023	physical bookstores	2,90%	8,63%	-7,10%
	2023	Online bookstores + book clubs			-10,20%

Various data sources, compiled for this report

Deep dive: Germany

The largest general consumer book publishers 01

Corporation	Imprints	Imprints m €	Corporate m€
Penguin Random House			314
Bonnier			246
	Carlsen	108	
	Piper	47	
	Münchner Verlagsgruppe	38	
	Hörbuch Hamburg	20	
	ArsEdition	33	
Holtzbrinck			215
	Rowohlt	62	
	Droemer Knauer	67	
	S. Fischer	58	
	Kiepenheuer & Witsch	28	

- The German consumer book market hosts 3 big international publishing groups:
 - *Penguin Random House*, headquartered in New York, and owned by German media group Bertelsmann;
 - *Bonnier*, headquartered in Sweden, and
 - German *Holtzbrinck*, which also has a major investment in scientific publishing (Springer Nature)

Deep dive: Germany

The largest general consumer book publishers 02 – ,Indies‘

Publisher	m€
C.H. Beck	241
Bastei Lübbe	93
dtv	76
Ravensburger	66
Mair DuMont	60
Gräfe und Unzer	49
Hanser	40
Suhrkamp	35
Oetinger	32
Harper Collins	28
Diogenes	28
Aufbau	20
Egmont	28

- A large number of ,independent‘ publishing houses, mostly privately held by (German) families, account for a wide variety of programmes and title catalogues for the general consumer – including fiction, nonfiction, children, young adult, DIY et al.
- Exceptions are
 - *Bastei Lübbe* (publicly listed)
 - *HarperCollins* (owned by the US corporate parent)
 - *Diogenes* (headquartered in Switzerland)

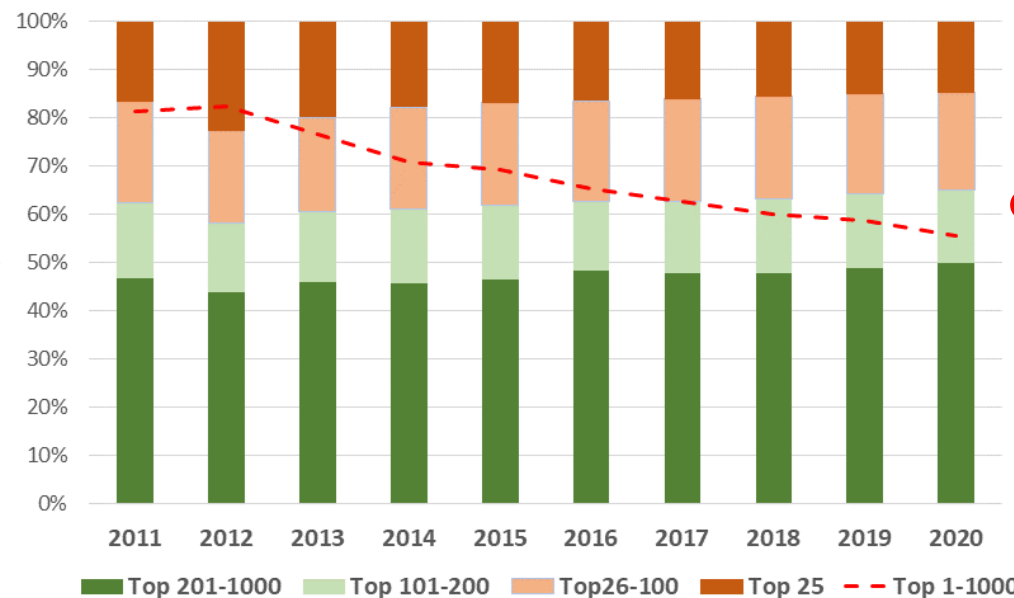
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Critical trends in traditional publishing

German language full year print top 1000 unit sales, fiction, 2011 to 2020 (data courtesy by MediaControl)



Between 2019 and 2023 German brick and mortar **book shops** lost - **14,5%** in revenue!

(MediaControl)

...and why the hell is this important?!

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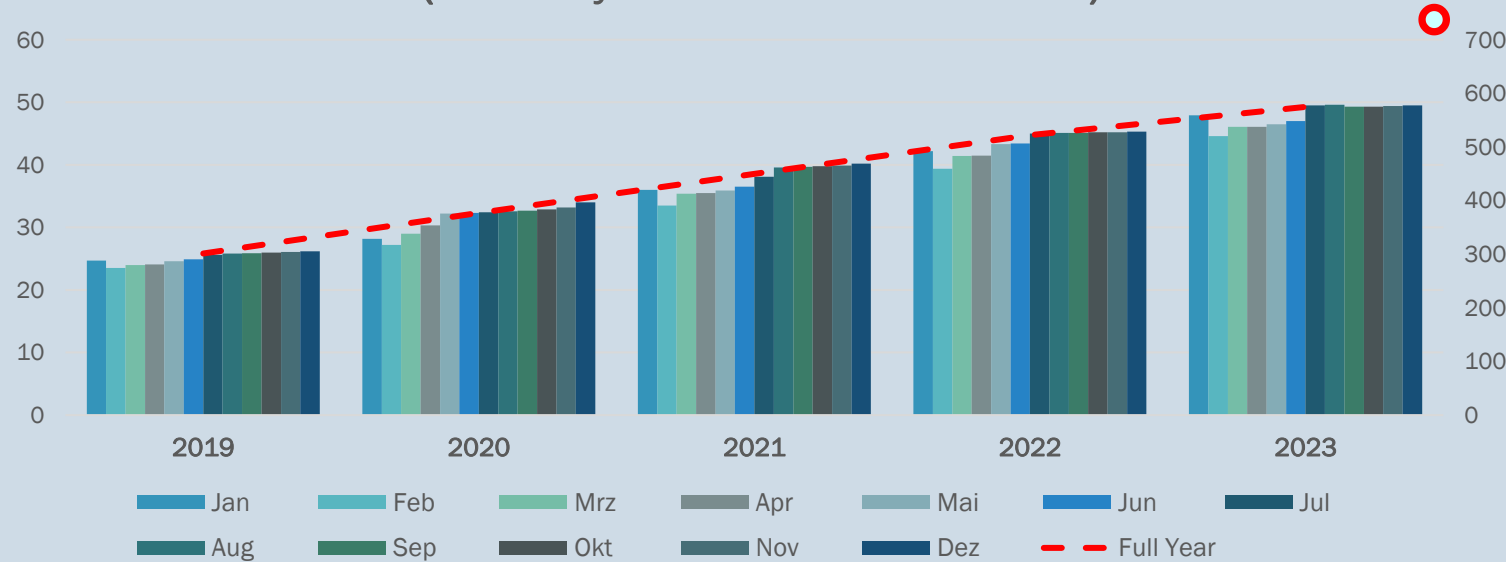


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Self publishing revenue

(Caveat: Only global data available!)

KDP Select payout
to small presses and authors 2019 > 2023
(monthly and annual increase)



...and why
the hell
is this
important?!

ANNUAL ,PAYOUT'
575 M\$ IN 2023
(UP FROM FROM 301 M\$ IN 2019)

VERSUS

US ,TRADE' EBOOK REVENUE
DOWN -6.5% IN 2022,
AND UP JUST 0.6% IN 2023 (AAP
DATA *)

Sources: Amazon and AAP (*AAP numbers do NOT include many small presses or self publishing)

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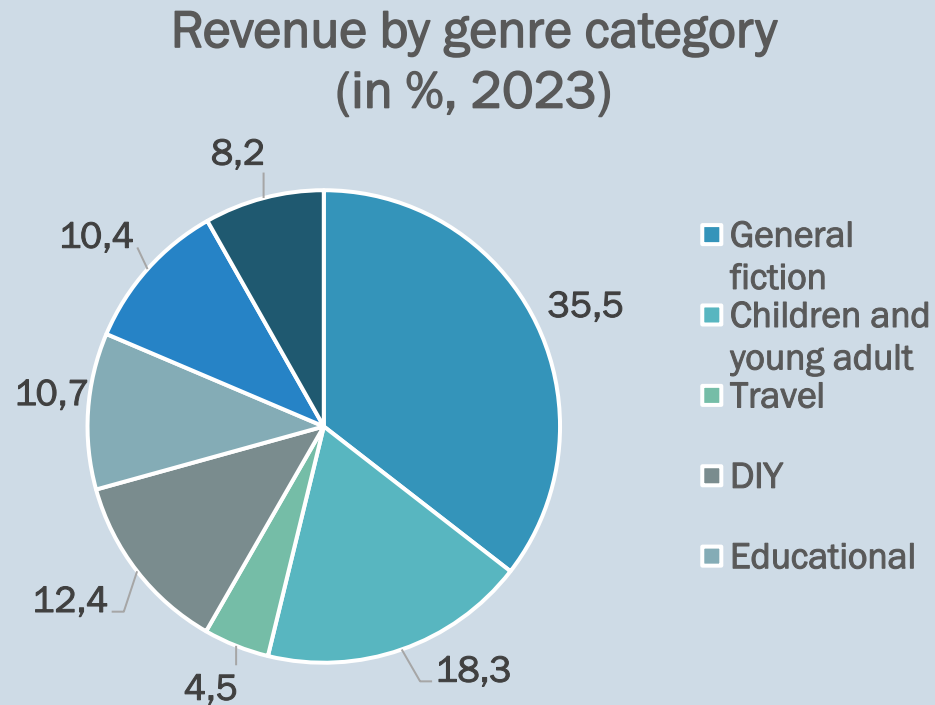
Deep dive into important European markets for translated books: **Germany**

	2013	2022
New titles (total)	81,919	64,278
Translations into German (total)	10,731	8,703
Copyrights sold (total)	6,466	7,777
Copyrights sold to China	998	1,318

- 14.6 % of all new titles in Germany are translations
- But the total number of translations into German has significantly declined
- China is the largest target market for German copyrights
- Particularly strong > Children and young adult titles
- But after a long period of expansion, copyright sales into China have stalled in recent years

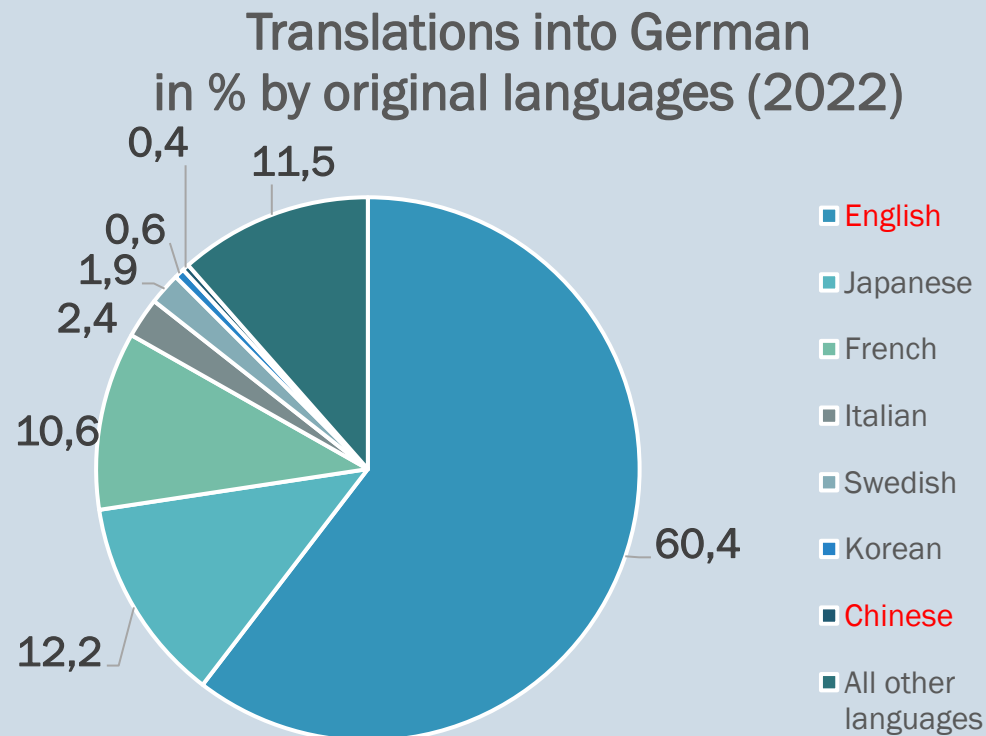
Deep dive: Germany

Structure of trade book market



- General fiction and children and young adult together account for over half of all revenue generated from books.
- Genre categories reflect the structure from the perspective of the book professionals
- **Audiences** are increasingly segmented, too – but data on audiences segments are difficult to get.

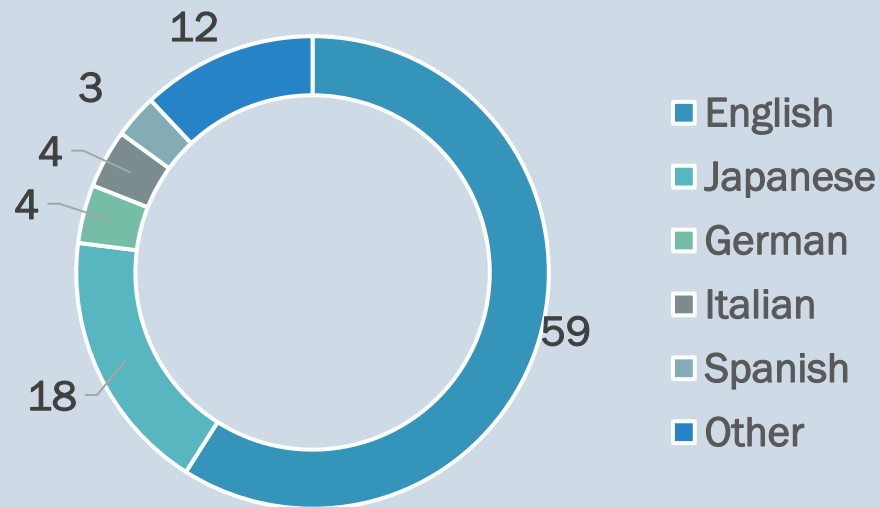
Deep dive into important European markets for translated books: **Germany**



- Almost 2/3 of all translations are from English originals
- Translations from Chinese originals account for only 0.4 %
- Translation from **Japanese** became extremely popular in recent years >> „Manga“
- Translations from Swedish are strong
- Translations from Finnish are just a small niche.

Deep dive into important European markets for translated books: **France**

Translations into French,
in %, 2018 and 2022



- 59% of all translations in France are from English originals
- 18% are from Japanese originals > France has a huge tradition of comix in French, and a very enthusiastic readership of Manga

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Deep dive into important European markets for translated books: **France**

	2022
New titles (total)	38,743
Translations into French (total)	11,185
Share in % of comix copyrights sold	30%
Share in % of young adult copyrights sold	

- Overall declining production of new titles in France
- 15.3 % of all new titles in France are translations – declining slightly in recent years
- Most translated genres are literary novels and romance novels (28%), comix (incl. Manga, 26%) and young adult literature (12%)
- **China** is largest market for French copyrights with 1480 titles in 2022
- Particularly strong > Children and young adult titles followed by comix

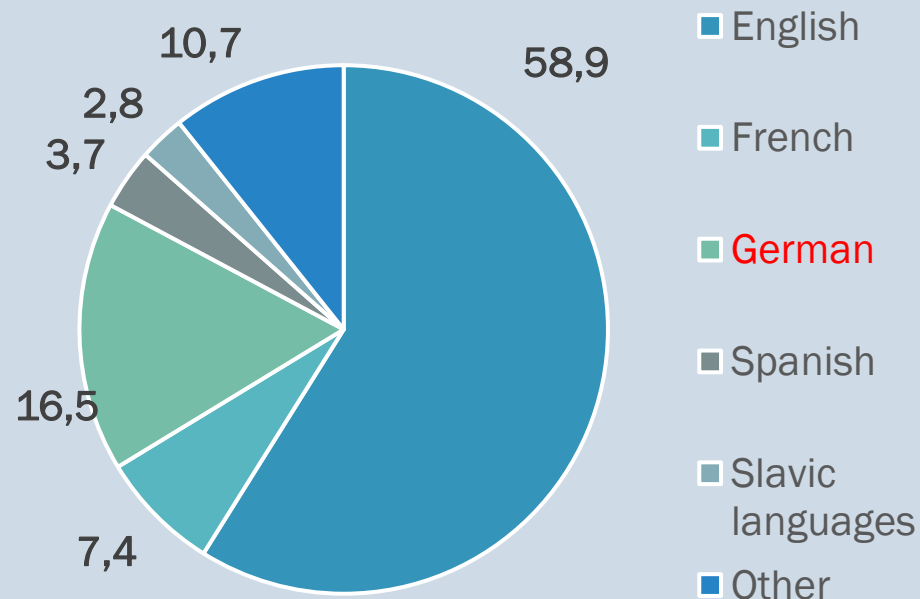
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Deep dive into important European markets for translated books: **Italy**

Share of original languages in translations into Italian (2022)



- The share of Italian authors has significantly increased in recent years
- Translations from German rose to significant popularity in Italy, accounting now for 16.5% (up from just 10% in 2010)
- But also the share in translations from 'other languages' expanded, showing increased curiosity for new discoveries

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Deep dive into important European markets for translated books: **Sweden**

- A **small**, but **thriving** publishing market, which is **different** from most other book markets in Europe or North America
- Strong Swedish companies going international > „**Storytel**“
- Declining ‚traditional‘ book sales – in book shops or online;
- In ‚units‘, **more digital books** are consumed than in print;
- Over 80 % of digital books consumed in ‚**subscription**‘;
- Huge growth in reading **English originals**
 - *Fiction*
 - *Children and Young Adult*

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How do translation markets **work**?

Original language > Transfer language > Many languages

- **Original languages** can be a ‚small‘ language – provided its publishing sector is well connected internationally;
- **Transfer languages** are mostly
 - *German*
 - *French*
 - *(exceptionally) US English*
- Connecting a new translated author with an existing ‚**target audience**‘ in transfer markets;
- Well connected ‚**facilitators**‘ in target markets
 - *Literary agents*
 - *Specialized editors and publishers*
 - *Fans of a specific ‚genre‘.*

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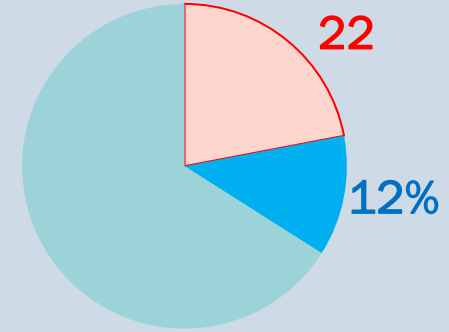
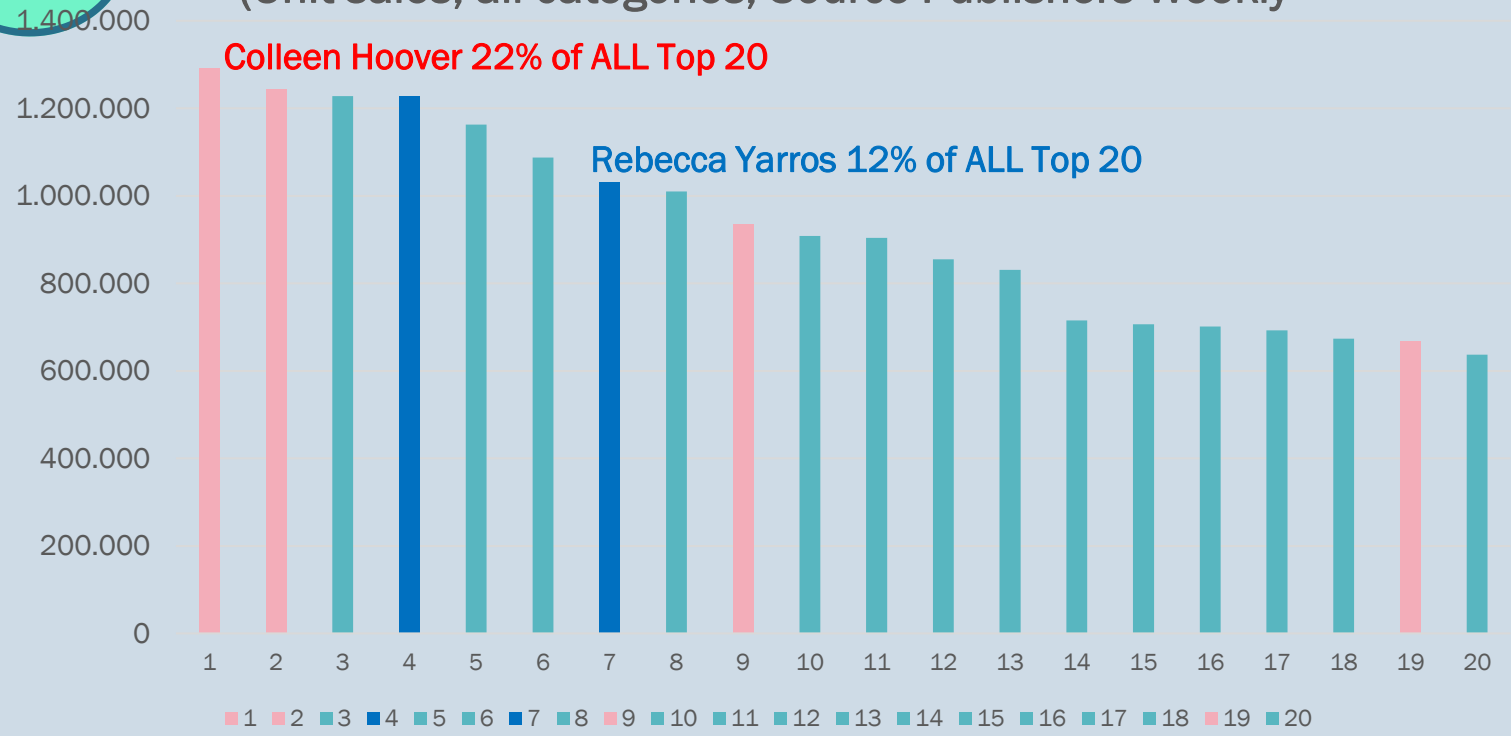
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2 Women Ruled the 2023 Bestseller List

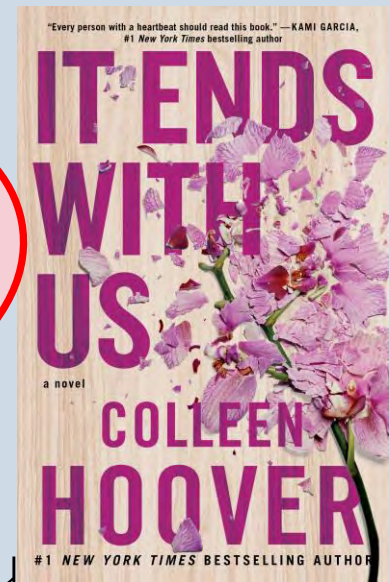
How big are these authors?

US Top 20 titles 2023
(Unit sales, all categories; Source Publishers Weekly)



Top bestsellers for the year 2023
(Publishers Weekly)

Colleen Hoover



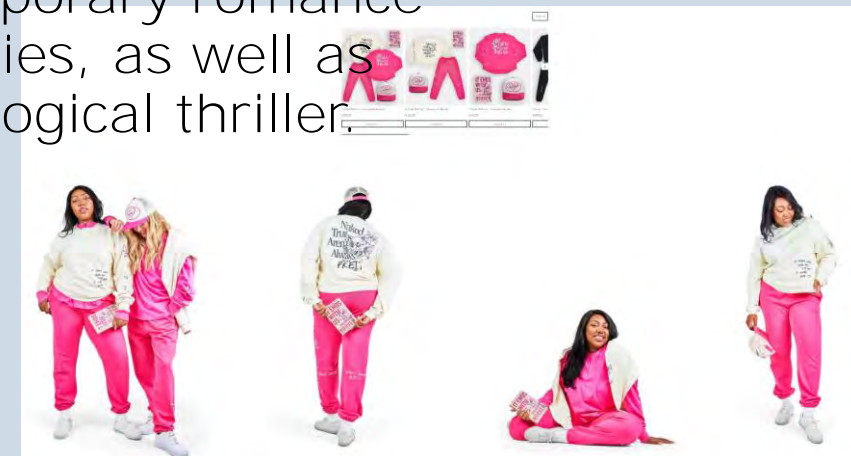
Publishers

- US
 - *Atria* (= Simon and Schuster)
 - *Montlake* (= Amazon Publishing > Romance, Love Story)
- Germany: [dtv](#)
- France [Hugo Publishing](#)

- Colleen Hoover is the #1 New York Times bestselling author of twenty novels and novellas.
- Hoover's novels fall into the New Adult and Young Adult contemporary romance categories, as well as psychological thriller.

Source:
www.colleenhoover.com

You can SHOP here!



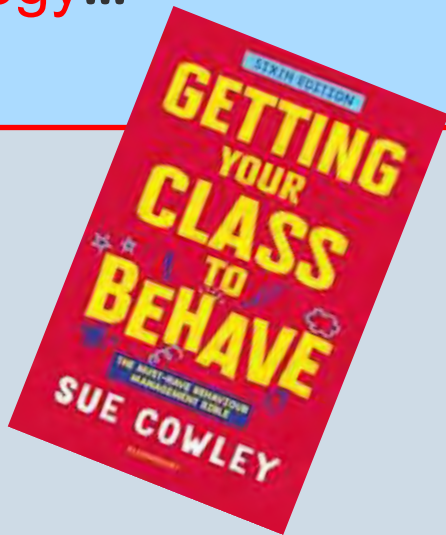
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“Bloomsbury’s revenue up 30% as profit soars to £49m in record year”

„... our entrepreneurial diversification strategy...”

- Even very 'traditional' publishers tell their success stories by pointing to the rather 'non-traditional' career paths of their 'hit authors'.

„... with sales of Sarah J Maas' titles up 161%.”



“Publisher says cover of **House of Earth and Blood** was prepared by in-house designers unaware the stock image chosen was **not human-made**”

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(The Guardian)
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Germany Top Bestselling Fiction 2023

Rank	Author	Title	Publisher	Type of publisher	Original language	Genre
1	Sebastian Fitzek	Die Einladung	Droemer	Corporate	German	Crime
2	Lucinda Riley	Atlas. Die Geschichte von Pa Salt	Goldmann	Corporate	English	Intl' fiction
3	Bonnie Garmus	Eine Frage der Chemie	Piper	Corporate	English	Intl' fiction
4	Robert Seethaler	Das Café ohne Namen	Claasen	Corporate	German	German fiction
5	Martin Suter	Melody	Diogenes	Independent	German	German fiction
6	Juli Zeh	Zwischen Welten	Luchterhand	Corporate	German	German fiction
7	Nele Neuhaus	Monster	Ullstein	Corporate	German	German fiction
8	Ewald Arenz	Die Liebe an miesen Tagen	Dumont	Independent	German	German fiction
9	Rebecca Yarros	Fourth Wing	dtv	Independent	English	Intl' fiction
10	Ken Follett	Die Waffen des Lichts	Lübbe	Independent	English	Intl' fiction

Top bestsellers Germany for the year 2023 (buchreport)

Germany Top Fiction 2023

Only mainstream publishers

Only German + English

Rank	Author	Title	Publisher	Type of publisher	Language	Category
1	Sebastian Fitzek		Droemer	Corporate	German	
2	Lucinda Riley	Die Geschichte von Pa Salt	Goldmann	Corporate	English	
3	Bonnie Garmus	Eine Frage der Chemie	Piper	Corporate	English	Int'l fiction
4	Robert Seethaler	Das Café ohne Namen	Claasen	Corporate	German	German fiction
5	Martin Suter	Melody	Diogenes	Independent	German	German fiction
6	Juli Zeh	Zwischen Welten	Luchterhand	Corporate	German	German fiction
7	Nele Ahlhaus	Monster	Ullstein	Corporate	German	German fiction
8	Fredrickson	Die Liebe an miesen Tagen	Dumont	Independent	German	German fiction
		Fourth Wing	dtv	Independent	English	Int'l fiction
		Die Waffen des Lichts	Lübbe	Independent	English	Int'l fiction

No niche authors

Top bestsellers Germany for the year 2023 (buchreport)



Der VAJONA Shop für Exklusivausgaben

Du möchtest noch mehr Exklusivausgaben, Farbschnittausgaben oder Bookish Merch zu unseren Romanen bestellen? Dann folge dem Button zum exklusiven VAJONA Shop.

VAJONA SHOP



“Whether on the beach, in the outdoor pool or on the balcony at home: there's a lot of talk about the right summer reads on #BookTok. Here are the top 10 #SummerBooks that are currently being celebrated by the #BookTok community.”



TikTok bestsellers, summer 2024 in Börsenblatt

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„**Rebecca Yarros**
tops most
listened audio“
(BöBla, Nov. 2023)

...when looking at
audiobooks or
digital **library** loans

**Specialised
publishing
brands**

OverDrive

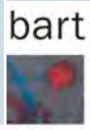
Rank	Title	Author	Publisher
1	Fourth Wing	Rebecca Yarros	Audible (Subscription)
2	Mein Leben in deinem	Jojo Mojes	Audible (Subscription)
3	Westwell	Lena Kiefer	LYX
4	Berühre mich. Nicht.	Laura Kneidl	LYX
5	Verliere mich. Nicht.	Laura Kneidl	LYX

Rank	Title	Author	Publisher
1	Weißer Flieder	Cecilia Sahlström	Saga (Egmont)
2	Zum Bösen verurteilt	Adrian Bednarek	Saga (Egmont)
3	Eine Frage der Chemie	Bonnie Garmus	Piper
4	Der Hausmann	Wlada Kolosowa	Leykam
5	Rehragout Rendez-vous	Rita Falk et al.	dtv

BookBeat

Bestsellers 2023 in audiobooks from
BookBeat

Top library titles 2023 at OverDrive
Austria



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Austria

Most sold fiction on Amazon.de (14 August 2024)

Rank	Author	Title	Publisher	Type of publisher	Original language	Genre
1	Colleen Hoover	Nur noch ein einziges Mal	dtv	Independent	English	Young Adult
2	Sebastian Fitzek	Elternabend	Audible exclusive	Amazon	German	Entertainment
3	Caroline Wahl	22 Bahnen	Dumont	Independent	German	Entertainment
4	Marc-Uwe Kling	Views	Hörbuch Hamburg	Audiobook	German	Crime
5	Saskia Calden	Die falsche Patientin	Edition M	Self-publishing	German	Crime
6	Colleen Hoover	It starts with us - Nur noch einmal	dtv	Independent	English	Young Adult
7	Kristin Hannah	Die Nachtigall	Kindle Unlimited	Amazon	English	Romance
8	Caroline Wahl	Windstärke 17	Dumont	Independent	German	Young Adult
9	Sebastian Fitzek	Tödlicher Schall	Audible exclusive	Amazon	German	Crime
10	Clannon Miller	Heartbroker	Kindle Unlimited	Self-publishing	German	Fantasy

Amazon.de Most sold fiction, 14 August 2024

Most sold fiction on Amazon.de (14 August 2024)

Again only German + English

Variety of authors

Rank	Author	Title	Publisher	Type of publisher	Language	Genre
1		Nur noch ein einziges Mal	dtv	Independent	English	
2		Elternabend	Audible exclusive	Amazon	German	Entertainment
3		22 Bahnen	Dumont Hörbuch	Independent	German	Entertainment
4	Ulrich Kling	Views	Hamburg	Audiobook	German	Crime
5	Saskia Olden	Die falsche Patientin	Edition M	Self-publishing	German	Crime
6	Colleen Hoover	It starts with a fall	dtv	Independent	English	Young Adult
7	Kristin Hannah	Die Nacht	Kindle Unlimited	Amazon	English	Romance
8	Caroline Wahl		Dumont	Independent	German	Young Adult
9	Sebastian Fitzek		Audible exclusive	Amazon	German	Crime
10	Clannon Miller		Kindle Unlimited	Self-publishing	German	Fantasy

Variety of publishers

Most sold fiction, 14 August 2024

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Reading in English

- Between 1/3 and 1/2 of young Germans read books in English originals!

Why so?

- To improve their skills
- In translation, something gets lost.
- To avoid waiting for a translation

Survey „Bock auf Buch“
(2024, GfK + Börsenverein)

“The sales of English books are **skyrocketing** (in Sweden) – so the industry is affected by the new **trend**”



Germany:

- Market share of English language books ca. 5% (sales up 10% in 2023)

Sweden

- Foreign language revenue 1/4 in all streaming

Buchreport + Swedish Publishers' Assoziation)

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The expanding market for audiobooks in Germany:

- Continuous **expansion** of subscription and streaming services since 2020 (kick-started in pandemic)
 - *3.4 m regular consumers for digital audio*
 - *Up 14% in 2023 (+24% in 2022)*
 - *No absolute figures available (no details on generated revenue)*
- Young adult and New adult (e.g. **Rebecca Yarros**)
- Dedicated publishing channels (e.g. Argon Verlag / LYX.audio of Bastei Lübbe / Hörbuch Hamburg / TIDE exklusiv et al.)
- Streaming beats downloads

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- Introduction: Specifics of translation markets
- Some key statistics on the German book market
- The current bestselling charts, by genre and different types of publishers
- Close up on the translation market in Germany (translations into and from German)
- Take also a look at the increasing relevance of 'non-traditional' publishing models (partly self-publishing, partly dedicated imprints aiming at e.g. Young Adult audiences)
- The expanding role of audiobooks
- The expanding role of English language imports, especially among you audiences

How big is this?

“**One in four books** that we sell in English is a self-published title, which means that effectively for us self-publishing is like having a whole other Penguin Random House sitting out in the market that no one sees. It’s like the **dark matter** of publishing.”

Michael Tamblyn (Kobo Rakuten) at the Global 50 CEO Talk in Frankfurt 2022



Credit: photo Rüdiger Wischenbart

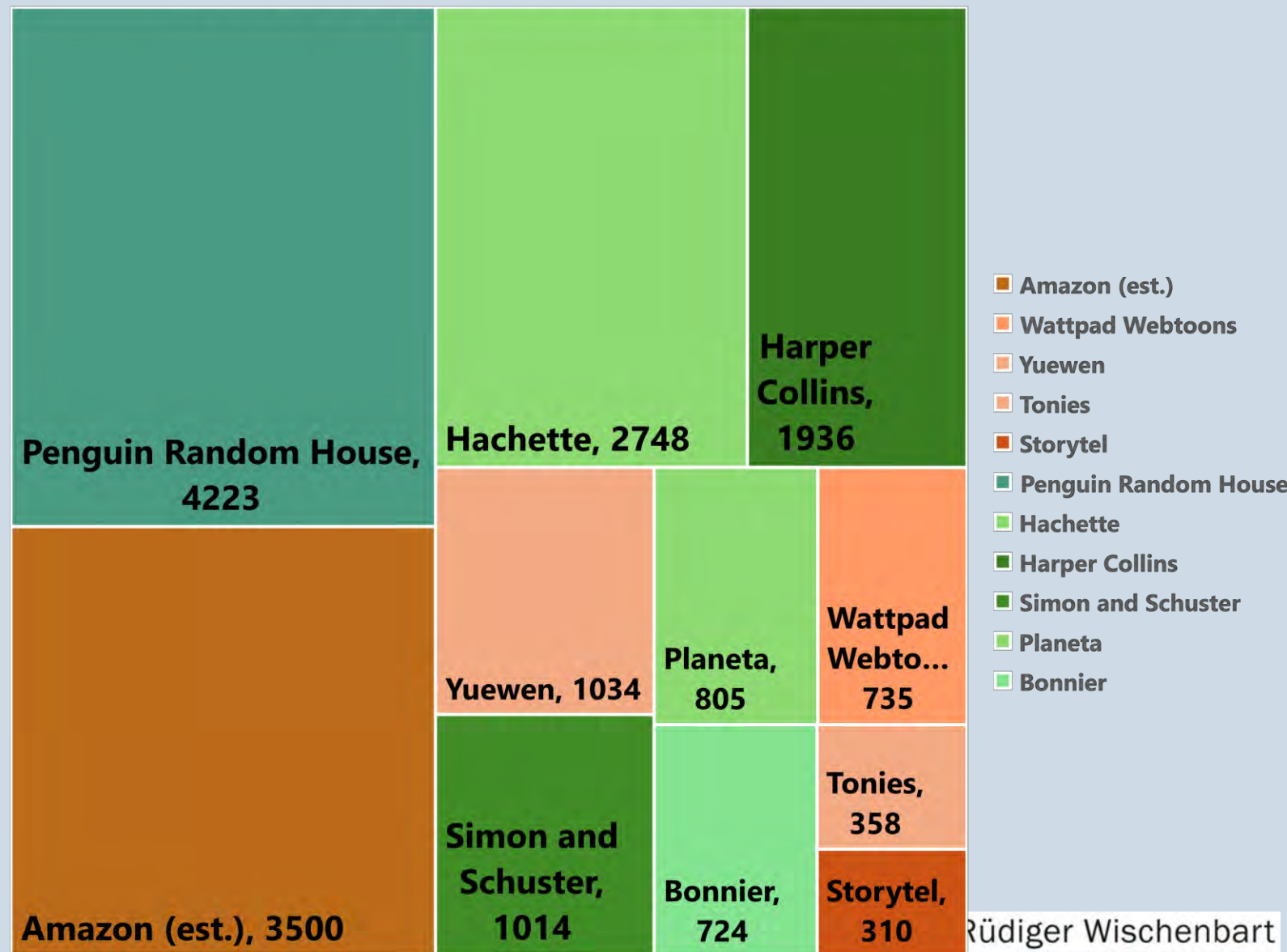
Expanding publishing models ,beyond‘ traditional publishers

While sales for many traditional publishers have stalled, new approaches and models expand dynamically:

- Self-publishing
- Author-driven publishing
- Animated story telling
- Platform driven audience communities

Forthcoming report
 „Publishing Beyond Publishers“ at
www.wischenbart.com/beyond

Revenue from publishing + streaming (in million Euros)



Rüdiger Wischenbart

Some astonishing trends

- Deep shifts in **reading habits** and **audiences**;
- The consumption of books from traditional publishers is declining in many markets;
- We must learn to make a difference between REVENUE and the number of consumed UNITS;
- **New genres** expand;
- The size of **non-traditional publishing** segments is huge

Dr. Rüdiger Wischenbart

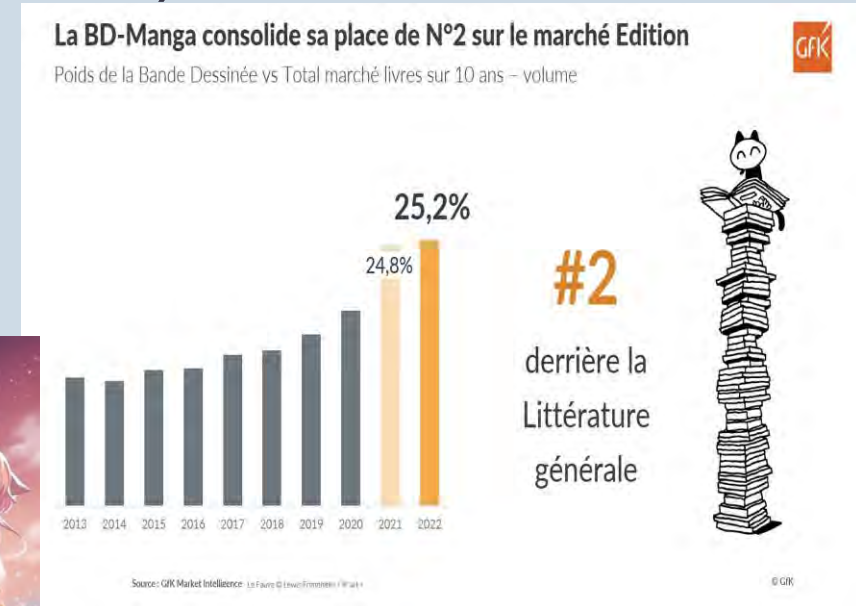


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Exemplary new market trends + languages

> Manhwa + Webtoons (网络漫画)

- 1 out of every 4 books sold in France is a **comic book**.
- With 85 million units, comic books + Manhwa accounted for sales worth almost 1 bnEUR.
- **Webtoons** from Korea is a new format with hugely increasing popularity among young readers, all over Europe.





There are some challenges!

(Of course, at some point, **AI** will be helpful in this.
But perhaps not right now, yet)



Who are
these people?



- Which are markets do we target?
- What exactly are our expectations?
- Are we selling? Or buying?
 - *What do we know about these audiences?*
 - *What do we know about their creations?*
- What is **our perspective** in this?

Dr. Rüdiger Wischenbart

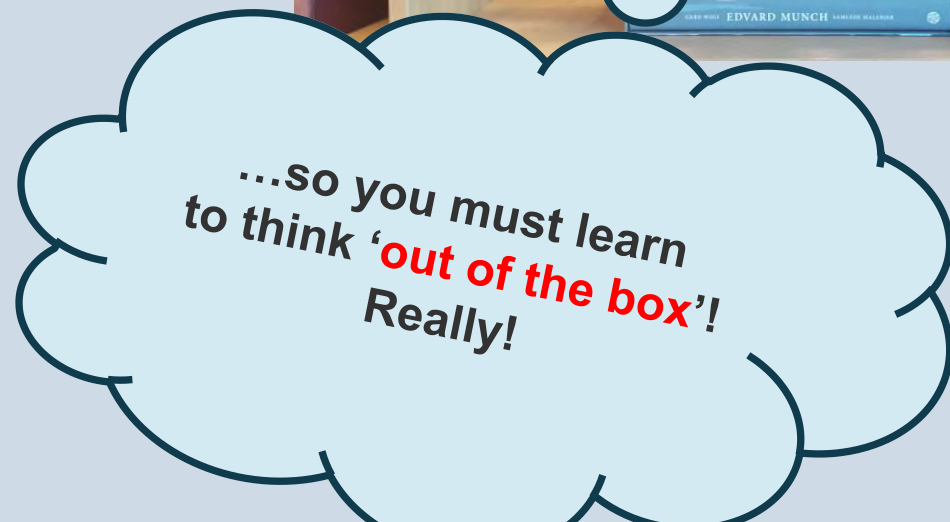


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Now what does this all mean to publishing translations specifically?

Translation markets are

- More specialized and fragmented
- Less well analyzed
- More risky, and loaded with ,extra cost‘
- Based on
 - *Informal networks*
 - *Knowledgable ,facilitators‘*



Ressources

- **Frankfurt Rights Meeting**
www.buchmesse.de/en/rights-licenses/frankfurt-rights-meeting
- Thematic areas and programmes at the **Frankfurt Book Fair**
 - *Audiobook*
 - *Comic*
 - *Translation*
 - *The Arts+*
- **Litrix.de > Translation grants**
www.litrix.de/de/uebersetzungsfoerderung.html
- **Statistics** („Buch und Buchhandel in Zahlen“)
- **Reports** from Rüdiger Wischenbart Content and Consulting:
(www.wischenbart.com)
 - *Diversity report series (on European translation markets)*
 - *Global 50 Publishing Ranking*
 - *Publishing Beyond Publishers*
 - *Digital Consumer Book Report series*
- **Bookwire** reports
(www.bookwire.de/unternehmen/newsroom/)
- **Publishing Without Borders** („PWB“)
->> Global online community of publishing professionals ->> Register via Facebook.

Dr. Rüdiger Wischenbart



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Thank you!

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Publishing Beyond Publishers
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> www.global-ebook.com