Success of the UAE Publishing Market around the World

جمعية الناشرين الإماراتيين

EMIRATES PUBLISHERS ASSOCIATION

Over the past four decades, the UAE publishing industry has grown from a fledgling industry into a regional trade hub

Timeline

Year	Event
1971	UAE gains independence; only 48% of the adult population is literate; 38% literacy among females
1979	Number of books published in the UAE reaches 6
1980	Press and Publications Law introduced
1982	Sharjah International Book Fair held for the first time
1984	UAE Writers Union established
1992	Law on the Protection of Intellectual Works and Copyright introduced
1996	Signatory to the WTO TRIPS Agreement
2004	Signatory to the WIPO Copyright Treaty and the Berne Convention for the Protection of Literary and Artistic Works
2007	Abu Dhabi International Book Fair held for the first time in its new format
2009	Emirates Publishers Association (EPA) is established
2010	Emirates Intellectual Property Association and the UAE Board on Books for Young People established
2012	EPA becomes a full member of the International Publishers Association
2014	Book exports exceed $40 Million
2015	Literacy rate reaches 94% with literacy among females exceeding that of males by 2%
2016	Kalimat becomes first Emirati publishing house to win Bologna Children's Book Fair Award
2018	Sharjah nominated as 2019 World Book Capital

Sources: UNESCO Archives, Staff Analysis

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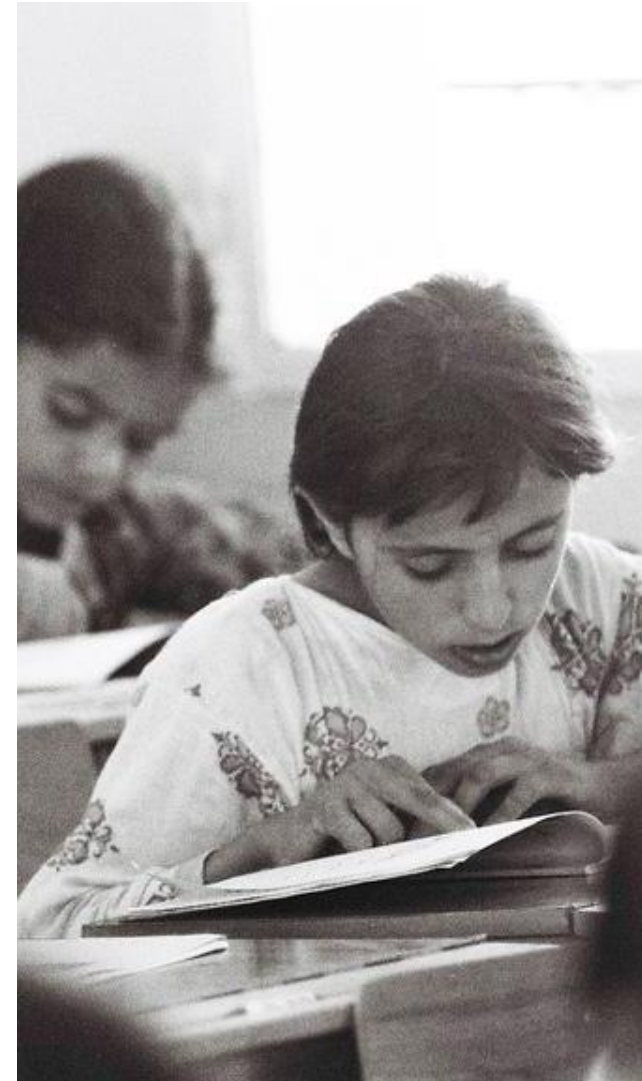
The Emirates Publishers Association is a national organization that was created to support capacity development of the UAE publishing industry

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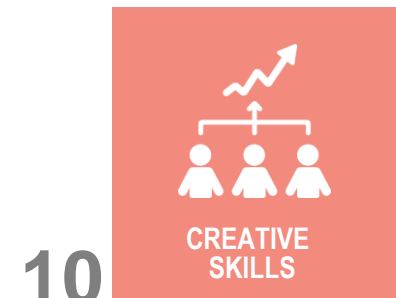
EPA is a leading voice for change …

- The Emirates Publishers Association (EPA) was established in 2009 to increase collaboration among publishing industry stakeholders to address various industry challenges

- Today, it is the industry's most prominent advocate for publishers and among the main advocates for authors, editors, translators and other stakeholders in the industry

- EPA engages with regulators, industry stakeholders, and international publishing organizations to support the industry

- EPA is a member of the Arab Publishers Association and a member of the International Publishers Association (IPA).

- Due to the EPA's advocacy efforts a number of Federal and Emirate-level initiatives and programs have been launched or expanded
  - ✓ Two of the region's largest book fairs
  - ✓ One of the world's richest literary awards
  - ✓ Thematic festivals for children literature and poetry
  - ✓ Author and translator grants
  - ✓ International cooperation programs

… with 10 key priorities that guide its work

1. Aligning key stakeholders
2. Expanding markets
3. Improving copyright and legal framework
4. Expanding consumer choice
5. Enhancing access to Arabic education materials
6. Encouraging reading for pleasure
7. Addressing distribution challenges
8. Modernizing libraries
9. Celebrating heritage
10. Developing creative industry skills

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Source: Emirates Publishers Association, A Vision for Transformative Change in the Publishing Industry (2018), staff analysis

We identified 10 key goals for publishing industry transformation through large scale stakeholder consultations

1 BUILDING PARTNERSHIPS

2 GLOBAL PUBLISHING HUB

3 IMPROVED LEGAL FRAMEWORK

4 QUALITY ARABIC CONTENT

5 EDUCATIONAL PUBLISHING

6 READING FOR PLEASURE

7 DISTRIBUTION AND RETAIL

8 TRANSFORMING LIBRARIES

9 PRIDE AND UNDERSTANDING

10 CREATIVE SKILLS

The Arab World has a population of **370 million**; The publishing industry is rapidly expanding due to the region's digitally connected, youthful population

Arab World Overview

The region has a youthful population	▪ ~ 370 million, 30% population is under 15 years and 20% between 15-24 years old
… that is digitally connected …	▪ Internet penetration projected to be 55% by 2018, 7% higher than the world average
… which is highly literate …	▪ Illiteracy has significantly improved over the last decade –overall regional illiteracy rate of 15%, which is on par with the global average ▪ Youth regional illiteracy rate amongst 15-24 year olds is 6% versus 10% globally
… and wants access to more diverse content	▪ Number of books translated into Arabic per year is little compared to population size ▪ Arabic makes up 1% of online content

Arab World Publishing Industry Overview

|	
Traditional hubs …	▪ Egypt, Syria, Iraq are emerging from conflicts which have severely affected industry growth
… are being complemented by new hubs …	▪ United Arab Emirates has implemented several industry support efforts which have dramatically increased its market size
… but supply of engaging content lags demand …	▪ Exports remain focused on the region while imports have surged from more diverse markets
… and market access remains complex	▪ Fragmented, complicated distribution chain that is increasingly being opened to intl. publishers

Legend:
- Levant and Iraq
- Gulf Cooperation Council
- North Africa and Maghreb
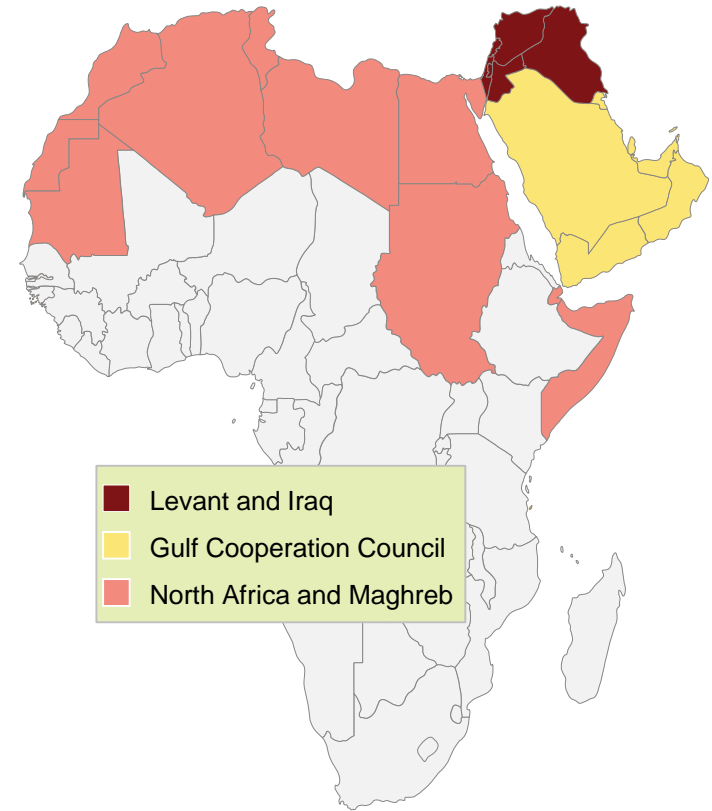
The 22 Arab World countries can be roughly segmented into 3 regional subgroupings: the Gulf Cooperation Council, Levant and Iraq, and North Africa and the Maghreb

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There are **3** main routes to access the UAE and other Arab markets

1

English Export Editions

English-language books translated from original language exported to UAE with rights sold to UAE or Arab publisher or a distribution partnership

2

Arabic Export Editions

Arabic-language books translated from original language exported to UAE with rights sold to UAE or Arab publisher or a distribution partnership
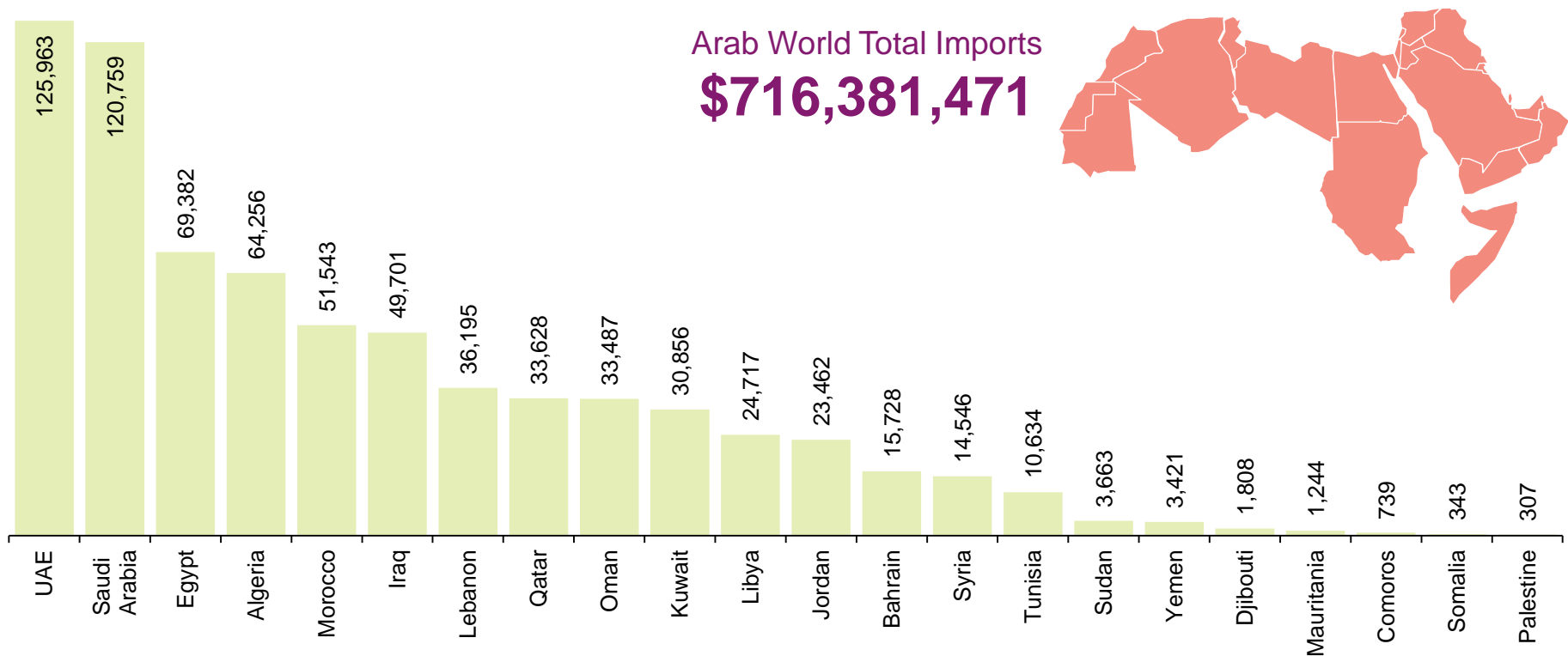
3

Online Direct Sales

Translated or original language editions of international books bought directly via online retailers by UAE and Arab readers

The Arab World's publishing industry trade volume is primarily driven by imports; GCC countries account for about 50% of imports

Arab World imports of books and other printed products

(in US$ '000s)

Arab World Total Imports
$716,381,471

Country	Value
UAE	125,963
Saudi Arabia	120,759
Egypt	69,382
Algeria	64,256
Morocco	51,543
Iraq	49,701
Lebanon	36,195
Qatar	33,628
Oman	33,487
Kuwait	30,856
Libya	24,717
Jordan	23,462
Bahrain	15,728
Syria	14,546
Tunisia	10,634
Sudan	3,663
Yemen	3,421
Djibouti	1,808
Mauritania	1,244
Comoros	739
Somalia	343
Palestine	307

Note: An analysis of the import data reported by Arab countries in comparison to export data reported by main trading partners like the US and European countries revealed significant inconsistencies; Absence of data for some years, use of different product codes, and data coverage are some of the reasons for this inconsistency. For the purpose of this study, mirror data reported by an Arab country's trading partners is shown to compensate for these data deficiencies.

Source: United Nations Commodity Trade Statistics Database

A fifth of the Arab World's publishing trade volume is exports; The UAE accounts for 21% of total exports from the region

Arab World exports of books and other printed products

(in US$ '000s)

Arab World Total Exports
$194,357,836

Country	Value
Lebanon	67,681
UAE	40,307
Egypt	36,576
Saudi Arabia	11,985
Jordan	12,253
Syria	4,269
Qatar	4,181
Bahrain	2,503
Tunisia	2,110
Oman	2,099
Kuwait	2,033
Morocco	1,664
Algeria	306
Sudan	128
Libya	83
Iraq	77
Yemen	45
Mauritania	20
Palestine	17
Djibouti	9
Somalia	8
Comoros	4

Notes:

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- Data shown for year ending 2014 except for Qatar which posted an unusually high value of exports to Algeria in 2014. Additionally, total exports excluding exports to Algeria were significantly lower than in previous years; therefore, average export values in the past four years were used. Export data for the UAE excludes exports to the Philippines, Tanzania and Ethiopia which were deemed to be outliers and likely related to humanitarian aid efforts.

Source: United Nations Commodity Trade Statistics Database

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The United Kingdom and the United States account for almost two thirds of the UAE's publishing trade activity

Size denotes relative size of the trade relationship

- - - - UAE exports to region
- - - UAE imports from the region

Key publishing trade partners
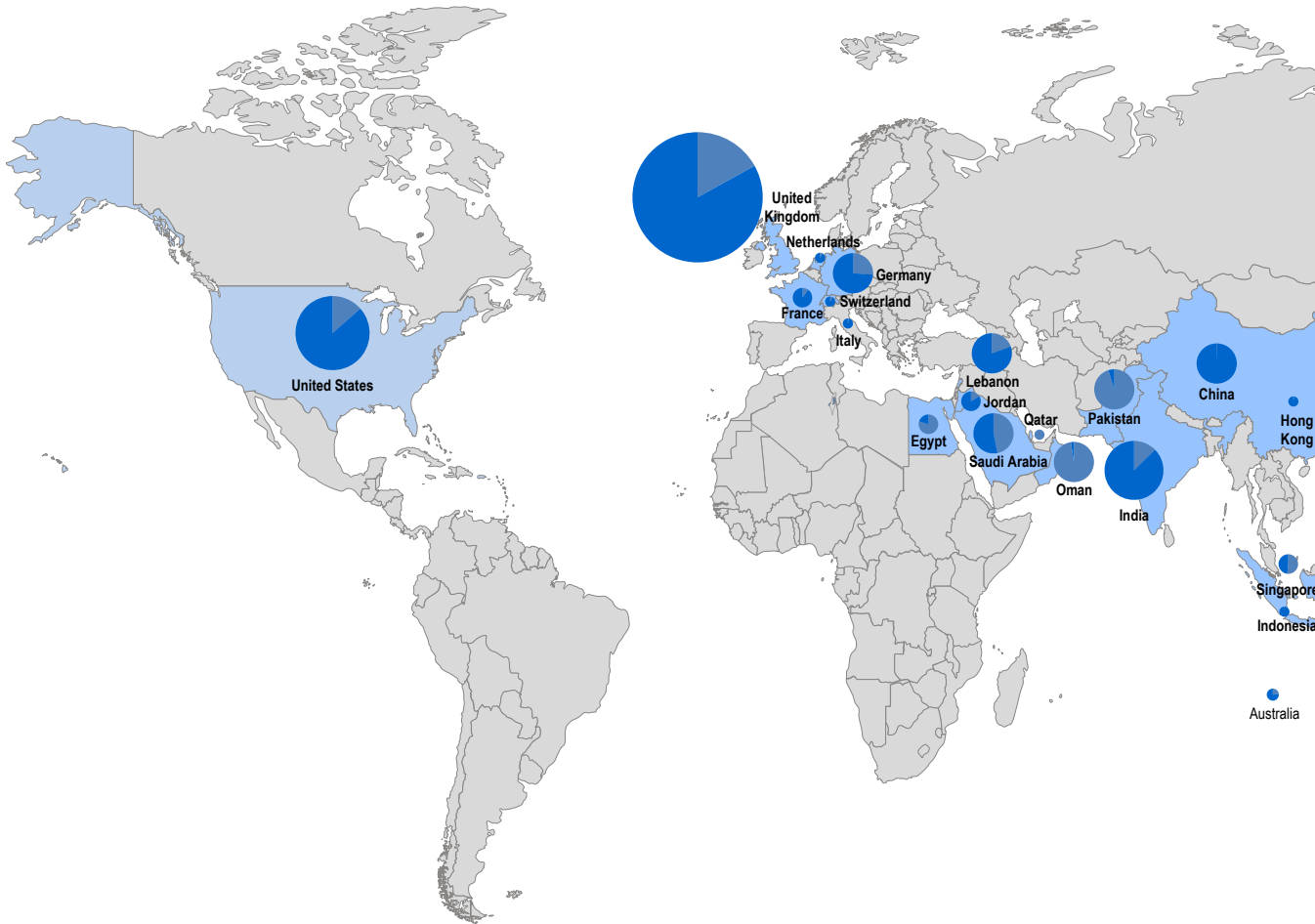
Key Trade Partners	Trade (in US $'000)
UK	67,640
United States	38,301
India	10,528
Lebanon	5,835
Oman	4,226
Saudi Arabia	3,739
China	3,238
Pakistan	2,997
Germany	2,702
Singapore	1,857
France	1,761
Egypt	1,566
Jordan	1,427
Hong Kong	1,260
Netherlands	1,240
Switzerland	1,207
Italy	1,082
Australia	1,030
Indonesia	1,029
Qatar	1,028

Map labels: United States, United Kingdom, Netherlands, Germany, Switzerland, France, Italy, Lebanon, Jordan, Qatar, Egypt, Saudi Arabia, Oman, Pakistan, China, India, Hong Kong, Singapore, Indonesia, Australia

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The UAE's annual domestic retail market is estimated to be **$233 Million**…

(in US$ '000s)

At ≈ $233 million, the UAE's domestic publishing industry is the 34th largest in the world

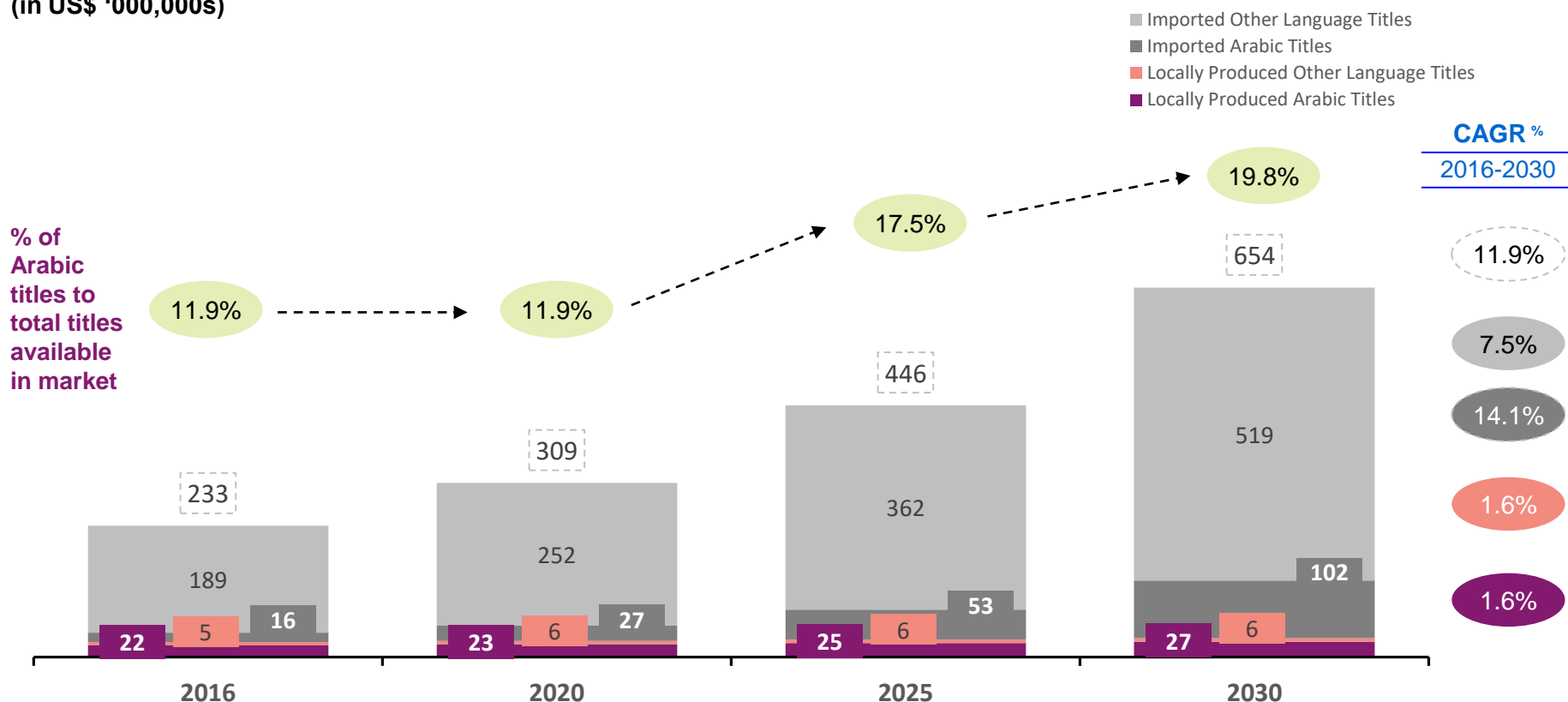| Country	Value
USA	20,373
China	15,977
Germany	9,931
Japan	5,633
France	4,583
United Kingdom	4,035
Italy	3,239
Spain	2,820
Brazil	2,332
Canada	2,187
South Korea	2,095
Turkey	1,825
India	1,750
Russia	1,647
Netherlands	1,490
Australia	1,430
Poland	1,067
Taiwan	890
Switzerland	862
Sweden	815
Austria	792
Norway	774
Mexico	631
Thailand	550
Argentina	497
South Africa	483
Indonesia	432
Czech Republic	342
Malaysia	274
Finland	265
Colombia	265
Denmark	253
Singapore	240
UAE	233
New Zealand	213
Hungary	155
Ukraine	112
Pakistan	93
Slovenia	84
Georgia	19

Notes:
- All data are in 2013 except for Italy, Turkey, Netherlands, Switzerland, Sweden, Mexico, Czech Republic, Malaysia, Colombia, New Zealand and Pakistan (2012); Singapore, Ukraine and Georgia (2011); Thailand and South Africa (2010); and UAE 2016
- Emirates Publishers Association issued a report in 2012 which estimated the retail market size at $260 million. Due to currency fluctuations and inconsistencies in data, more precise estimates of the retail market size are not possible. The difference between this estimate and the 2012 estimate can partially be explained by the UAE's large purchases from the UK in 2012 when the British Pound was trading at a high to the US Dollar. Estimates of the UAE publishing market size are highly dependent on currency exchange rates due to the significance of imports to the market

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With the market expected to almost **triple in size by 2030**

Estimated size of the United Arab Emirates' book market in retail prices to **2030**

(in US$ '000,000s)

Legend:
- ■ Imported Other Language Titles
- ■ Imported Arabic Titles
- ■ Locally Produced Other Language Titles
- ■ Locally Produced Arabic Titles

% of Arabic titles to total titles available in market

11.9% → 11.9% → 17.5% → 19.8%

CAGR %
2016-2030

	2016	2020	2025	2030	CAGR%
Total	233	309	446	654	11.9%
Imported Other Language	189	252	362	519	7.5%
Imported Arabic	16	27	53	102	14.1%
Locally Produced Other Language	5	6	6	6	1.6%
Locally Produced Arabic	22	23	25	27	1.6%

Note: Books imported from the Arab World were assumed to be Arabic titles while imports from other countries were deemed to be other language titles. The average number of books sold per title was estimates to 2,000 copies and the average price per book at $32.

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Source: Staff analysis

With its focus on publishing, Sharjah has emerged as a leading city in realizing the UAE's vision of becoming a global hub for the creative industries
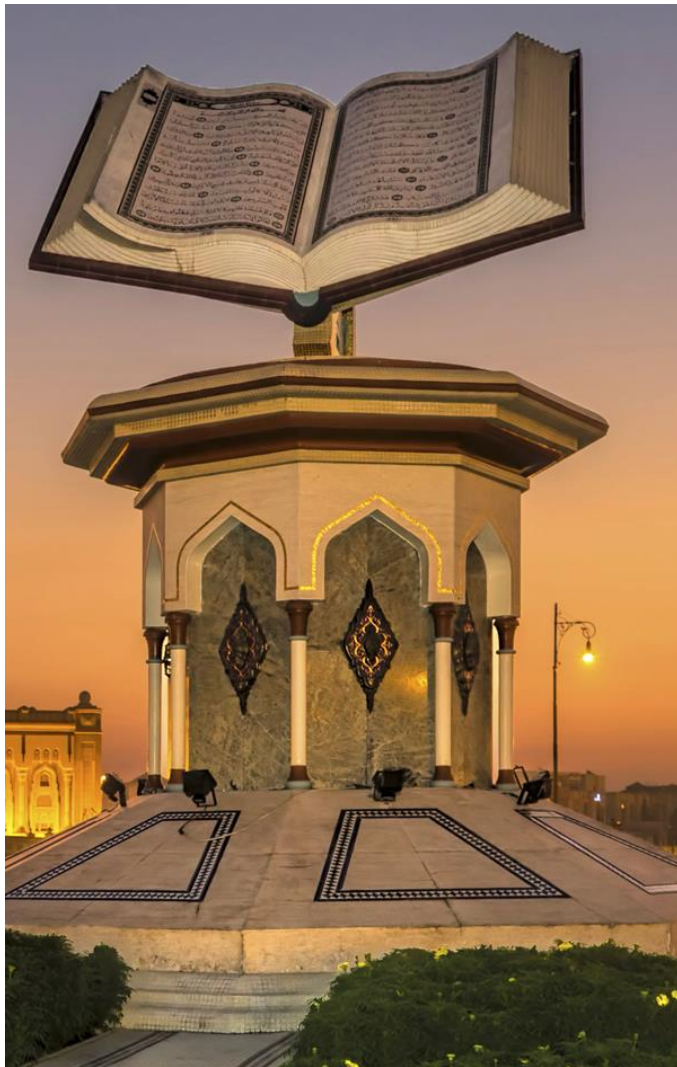
Sharjah has many competitive advantages …

- Traditional strengths as an intellectual, trade, and cultural hub
- Often referred to as the cultural hub of the United Arab Emirates
- Most economically diversified emirate of the seven emirates
- Has a strong history of manufacturing and international trade
- One of Arab region's fastest growing economies
- Home to the Emirates Publishers Association and University City which houses some of the region's finest higher education institutions

… which it plans to leverage through Sharjah Publishing City

- World's first free zone focused on publishing and related activities
- State-of-the-art infrastructure, printing and logistics facilities
- Trade-friendly destination for regional sales and marketing
- Access to the Middle East's largest book distribution company
- Supply chain initiatives to reduce the cost of key publishing inputs
- Support for small publishers in navigating industry challenges
- Publishing value chain strengthening initiatives and capacity development
- Promotion initiatives aimed at attracting private investment

Source: Staff analysis

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The government supports trade promotion and cultural exchange by facilitating the participation of local publishers in international book fairs

UAE has been the guest of honor at several international book fairs

- Bologna Children's Book Fair (2020) Sharjah Guest of Honor
- Turin International Book Fair (2019) Sharjah Guest of Honor
- New Delhi World Book Fair (2019) Sharjah Guest of Honor
- São Paulo International Book Fair (2018) Sharjah Guest of Honor
- Livre Paris (2018) Sharjah Special Guest
- Riyadh International Book Fair (2018)
- Amman International Book Fair (2017)
- Frankfurt Book Fair Featured Market (2016)
- Casablanca Book Fair (2016)
- Beijing International Book Fair (2015)
- Bangkok International Book Fair (2015)
- Khartoum International Book Fair (2011)
- Cairo Book Fair (2008)
- The London Book Fair (2008 – alongside several other Arab countries
- Frankfurt Book Fair (2004 – alongside several other Arab countries)

UAE publishers also regularly participate in the following book fairs

- Alexandrina International Book Fair
- Algiers International Book Fair
- Amman International Book Fair
- Bahrain International Book Fair
- Beijing International Book Fair
- Beirut International Arab Book Fair
- Bologna Children's Book Fair
- Book Expo America
- Cairo Book Fair
- Casablanca Book Fair
- Erbil International Book Fair
- Frankfurt Book Fair
- Hong Kong Book Fair
- Khartoum International Book Fair
- Kuwait International Book Fair
- London Book Fair
- Moscow International Book Fair
- Muscat International Book Fair
- New Delhi World Book Fair
- Paris International Book Fair
- Riyadh International Book Fair
- Seoul International Book Fair
- Tunis International Book Fair
- Turin Book Fair
- Vienna International Book Fair and Reading Festival

The Emirates Publishers Association seeks to coordinate with different stakeholders involved in the publishing industry in the locally and internationally, aims to improve & develop the workforce in this industry and provide a fertile environment for achieving the desired objectives.

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