# SOUTH AFRICAN BOOK PUBLISHING INDUSTRY SURVEY

# 2023-24

APRIL 2023 – MARCH 2024

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PASA PUBLISHERS' ASSOCIATION OF SOUTH AFRICA

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This research was conducted on behalf of the Publishers' Association of South Africa by the Department of Information Science, University of Pretoria. If you have any queries or corrections, please email us at booksurvey@up.ac.za.



To quote this report, use the following citation:

Le Roux, E., Treffry-Goatley, L., Anyang , I. Harvett, S. 2025. *South African Book Publishing Industry Survey, 2023–24.* Cape Town: Publishers' Association of South Africa.

# Contents

# Introduction

The annual Book Publishing Industry Survey provides information on the growth and development of the South African publishing industry. It is the most comprehensive survey available of the publishing industry in South Africa, providing information for planning and lobbying purposes since 2002. The data collected annually are invaluable for understanding the publishing industry in South Africa, especially as transformational shifts take place across the key publishing sectors.

The total number of active publishers in South Africa is estimated to be at least 200. The industry is dominated by a small group of very large publishers, who together represent more than 90% of all production and revenue. This representation is reflected in the participation in this survey.

The data are collected from a survey of South African publishers, focusing on their turnover and production patterns from the previous financial year, as well as ownership and employment. The survey targets both PASA and non-PASA members, from micro-enterprises to multinationals. The scope is limited to publishers operating in South Africa, although their main ownership may not be local, and to books published within South Africa. This year, 16 large and 168 SMME publishers were invited to participate. The responses included 14 large publishers (an 88% response rate) and 36 SMMEs, with a significant increase in participation by SMMEs (from 13% to 21% response rate), for a total sample size of 50 publishers.

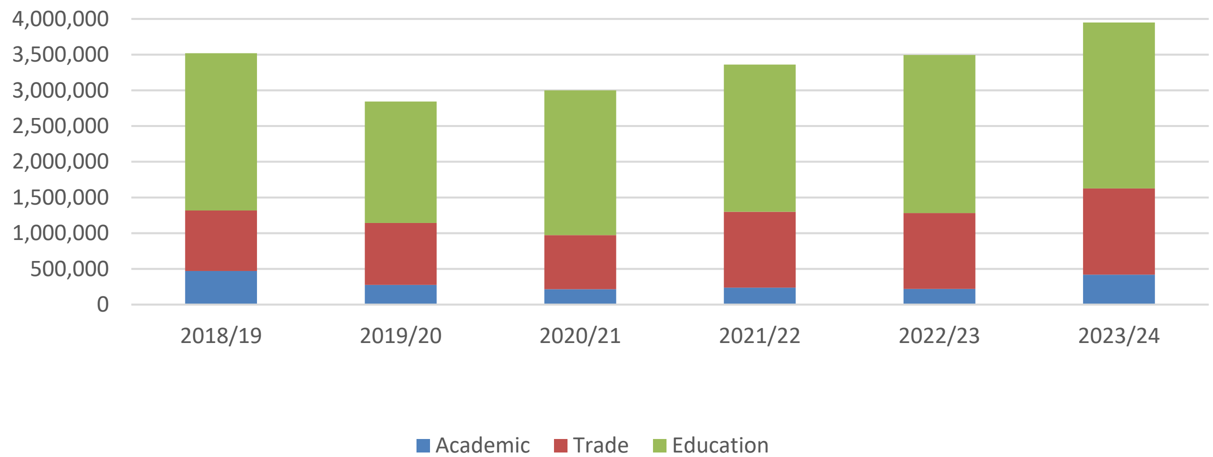
This report highlights findings from the data submitted for the 2023/2024 financial year (April to March). Note that the data for previous years are not always precisely comparable, due to changes in participation.

All revenue reported is on net sales or income, i.e. discounts and VAT have been deducted. The figures are also condensed to the last R’000.

# Overview

In 2023/24, the South African publishing industry generated almost **R4 billion** in revenue, from sales of locally produced books, rights sales, and other income streams. This figure includes a conservative estimate of the income from small and micro publishers, which has helped to boost the figures from previous years. The growth in value is corroborated by the BookScan South Africa 2024 Summary which tracks book sales in retail outlets, although accompanied by a decline in the volume of books sold.

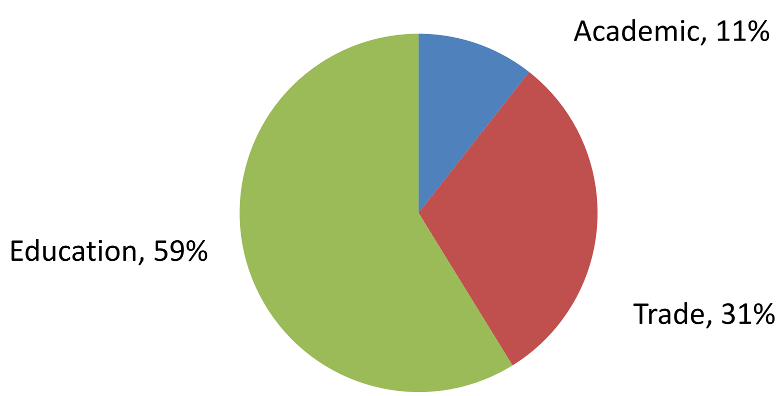
Figure 1: Total publishing revenue, 2018-2024 (R'000)




The share of publishing revenue according to the major publishing sub-sectors is reflected below. These sub-sectors are:

- Academic: books aimed at a tertiary academic audience, mostly at universities, continuing professional development, and the scholarly community
- Trade: books aimed at a general readership, typically sold in bookshops and by online retailers
- Education: learning and teaching materials produced for schools. In these summary tables, the revenue for the technical and vocational training (TVET) colleges is included under Education.

Figure 2: Publishing sectors



### Table 1: Total net publishing industry revenue, 2022 – 2024 (ZAR ’000)

| Sector | 2022/23 | 2023/24 | Change |
|---|---|---|---|
| Academic | 219 294 | 418 404 | 45% |
| Trade | 1 061 910 | 1 208 861 | 12% |
| Education | 2 215 147 | 2 321 847 | 5% |
| **Total** | **3 496 351** | **3 949 112** | **+13%** |

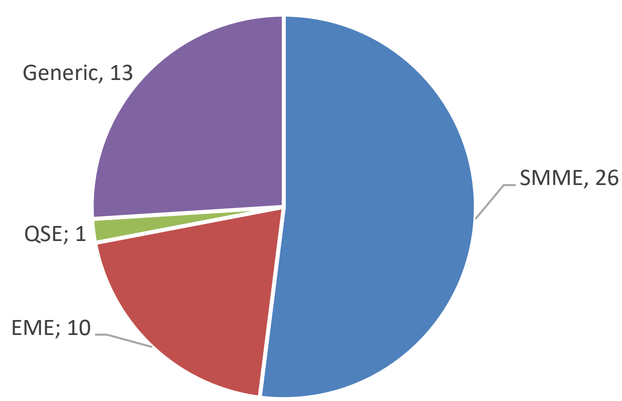
*Note: The figures quoted show fluctuations due to reporting changes, and do not reflect an actual rise of the magnitude suggested by the raw data.*

# Publisher Profiles

## B-BEEE Classification

The industry is dominated by a small group of very large publishers, who together represent more than 90% of all production and revenue. The classification below is based on categories used by the government when determining Broad-Based Black Economic Empowerment (B-BBEEE) status: Generic (with an annual total revenue of more than R50 m); Qualifying Small Enterprise (QSE, with an annual revenue of between R10 m and R50 m); Exempted Micro-Enterprise (EME, with an annual total revenue of R10 m or less), and small, medium and micro-enterprises (SMMEs). The B-BEEE ratings of the qualifying organisations is reported below.

Figure 3: Classification of responding publishers



## Table 2: B-BBEE level (n = 14)

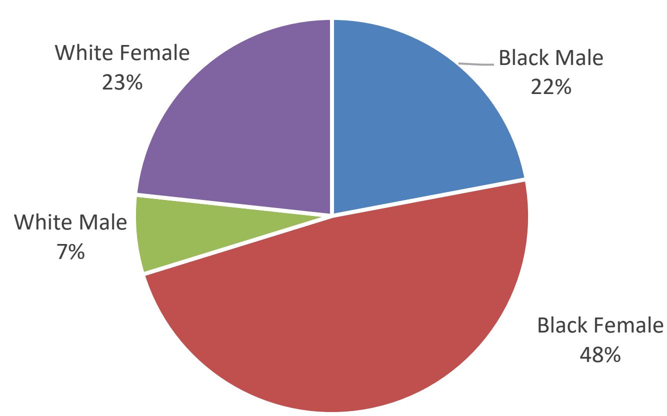
| BBBEE rating | Rated |
|---|---|
| Level 1 >100% AAA | 9 |
| Level 2 85 – 99% AA | |
| Level 3 75 – 85% A | 2 |
| Level 4 65 – 75% BBB | |
| Level5 55 – 65% BB | |
| Level 6 45 – 55% B | |
| Level 7 40 – 45% C | |
| Level 8 30 – 40% D | 1 |
| Not compliant <30% E/FF | 2 |

## Employment

Apart from the B-BEEE ratings, employment and ownership figures are another indicator of transformation. The number of full-time employees is continuing a downward trend, from approximately 1 500 in the previous reporting year to 1 280. The SMMEs surveyed add an estimated 350 more to the figures, but many of these are part-time or occasional contract workers.

The decrease in employment numbers has not affected the racial make-up of the industry, as the overall proportions remain almost unchanged. Black women now make up 75% of administrative staff and 60% of lower-level support staff, but they also make up one quarter of leadership roles, and nearly half of all editorial and design roles.

Figure 4: Diversity of employment profile, 2023/24



## Table 3: Employment profile (as of 31 March 2024)

| Job Category | Black Individual | | White Individual | |
|---|---|---|---|---|
| | **Male** | **Female** | **Male** | **Female** |
| Chief executive officer | 2 | 2 | 4 | 5 |
| Functional heads of department | 26 | 31 | 19 | 48 |
| Editorial staff | 13 | 91 | 14 | 85 |
| Design and production staff | 19 | 57 | 7 | 25 |
| Marketing, promotion and sales | 60 | 157 | 20 | 83 |
| Finance staff | 18 | 60 | 4 | 17 |
| Human resources | 3 | 20 | 0 | 1 |
| Office administration | 15 | 68 | 0 | 8 |
| Information technology staff | 20 | 5 | 6 | 1 |
| Warehousing and distribution | 76 | 47 | 1 | 1 |
| Other support staff | 26 | 70 | 5 | 15 |
| Part time | 4 | 9 | 3 | 9 |
| **Total** | **282** | **617** | **83** | **298** |

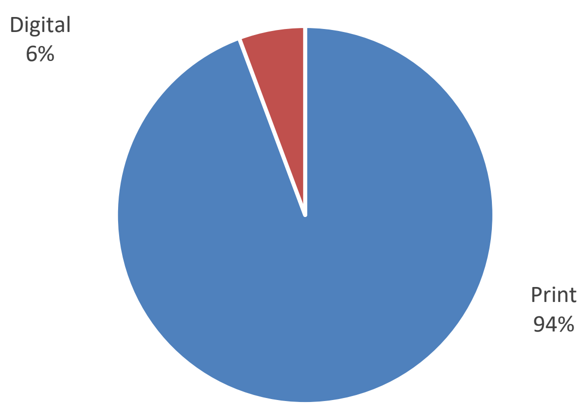
# Production

The Production Profile in this survey is focused on revenue, mostly from the sales of books, rather than the number of titles published. Two important indicators that are tracked are the proportion of print to digital sales; and the languages published.

## Print and digital formats

The figures show that there has been growth in digital book revenue, although it remains a small percentage compared to print – it has risen over the past year from 5% to 6% of the total revenue. English-language titles have seen a decline in digital revenue, while sales of Afrikaans digital publications have been more robust.

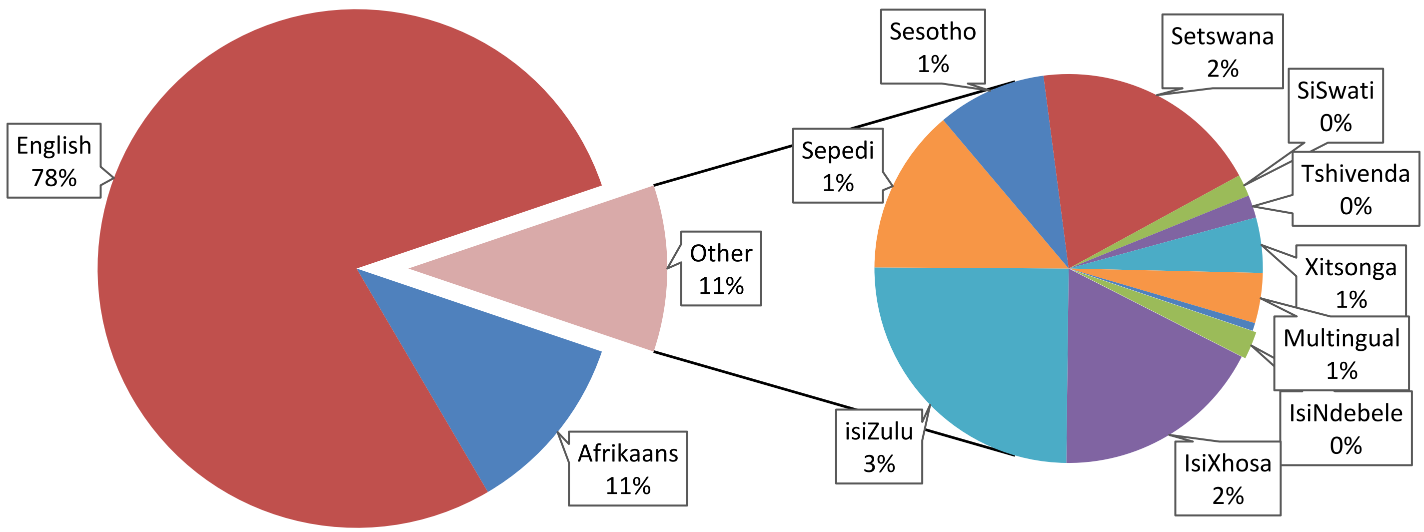
Figure 5: Print and digital formats




## Language

The industry is still dominated by English, but sales of books in the other official written languages are growing: English is down from 80% to 78% of local market share, and African languages up from 8% to 11%. This appears to be driven by a new development: higher sales of trade books in African languages, in addition to the expected sales of school textbooks. It seems that the digital format is finally yielding some (small, slow) opportunities for South African languages other than English, and especially for African languages. In African languages, the highest revenue from digital sales comes from Sepedi, Sesotho, and isiZulu.

Figure 6: Revenue by language, 2023-24




## Table 4: Revenue from local titles, by format and language (R '000)

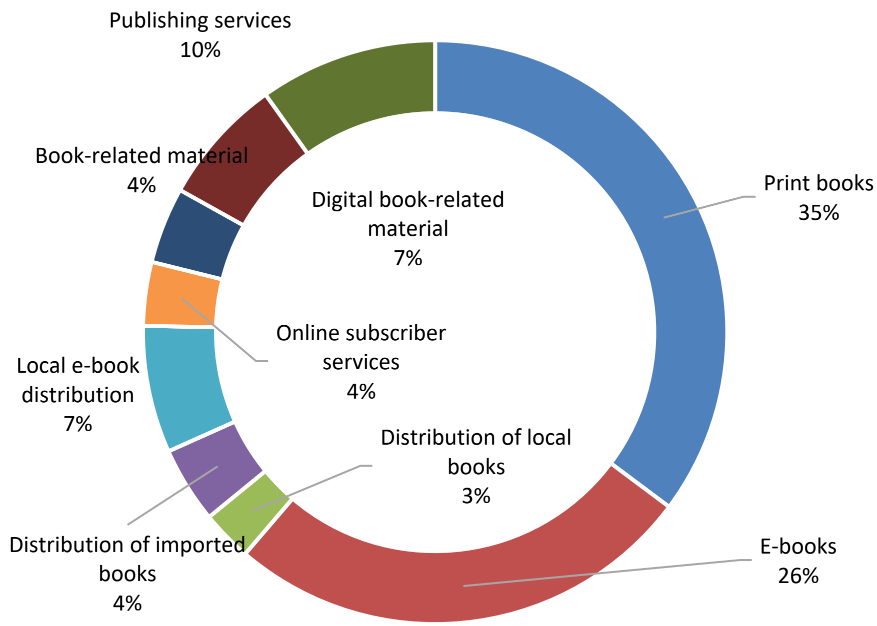
| Language | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital |
| **Afrikaans** | 300 281 | 13 984 | 275 589 | 7 897 | 333 434 | 15 570 |
| **English** | 2 396 403 | 259 933 | 2 053 757 | 148 999 | 2 267 833 | 139 604 |
| **IsiNdebele** | 1 378 | 12 | 1 210 | 154 | 6 475 | 886 |
| **IsiXhosa** | 36 494 | 1 177 | 49 495 | 869 | 55 926 | 546 |
| **IsiZulu** | 94 628 | 1 208 | 85 254 | 1 816 | 76 479 | 2 984 |
| **Sepedi** | 28 245 | 1 858 | 30 328 | 796 | 37 241 | 6 593 |
| **Sesotho** | 23 548 | 571 | 22 844 | 729 | 24 545 | 4 508 |
| **Setswana** | 60 347 | 548 | 67 070 | 585 | 59 699 | 1 351 |
| **SiSwati** | 686 | 2 | 334 | 1 209 | 5 360 | 451 |
| **Tshivenda** | 3 402 | 33 | 3 489 | 24 | 5 762 | 273 |
| **Xitsonga** | 9 117 | 140 | 9 033 | 621 | 12 979 | 1 681 |
| **Multilingual** | 2 200 | 164 | 826 | 7 | 13 191 | 120 |
| **Other** | 609 | 212 | 1 017 | 18 | 2 058 | 32 |
| **Total** | **2 958 507** | **272 180** | **2 601 246** | **163 722** | **2 900 982** | **174 599** |

*Note: The totals in this Table are not identical to those reflected in Table 1, largely because this table includes only local book publishing, and not additional revenue such as rights sales, non-book products and hybrid products.*

## Revenue streams

All publishers are engaged in print book publishing, with digital production as the second most important source of revenue. Increasing numbers of publishers are offering custom publishing services and services to self-published authors. This is especially important for smaller publishers that cannot survive on income from sales alone.

Figure 7: Revenue streams



# Distribution Channels

Publishers distribute their books through a variety of different channels. Since the Education sector is the largest, the most important buyer and distributor of locally produced books is the State and provincial education departments, and schoolbook distributors. Most other books are sold through booksellers, although as the share of e-commerce sales is growing, that of national bookseller chains is declining. Globally, revenue data by sales channel show an increase in the share of online sales (of both print and digital book products).

The data indicate that direct sales have become an increasingly important sales channel. The sale or licensing of subsidiary rights is also growing. However, declining sales through libraries reflect the decreased government spending on libraries, and low export figures reveal an inwardly-focused industry.

The data also show that distributors and booksellers are having an effect on publisher income by increasing the discounts they demand.

## Table 5: Revenue and discount per sales channel (R ’000 and %)

| **Type of outlet** | **2021/22** | **2022/23** | **2023/24** | **Average discount** |
|---|---|---|---|---|
| National or regional bookseller chains | 975 712 | 504 134 | 580 136 | 34% |
| Independent booksellers and other book retailers | 290 224 | 668 330 | 491 853 | 32% |
| Non-book retail outlets | 43 959 | 55 060 | 48 351 | 38% |
| Internet booksellers | 130 584 | 137 773 | 176 248 | 29% |
| Book clubs and direct mail booksellers | 18 107 | 38 868 | 12 218 | 21% |
| Businesses and corporations (direct sales) | 3 147 | 16 511 | 17 784 | 21% |
| The public (direct sales) | 47 630 | 52 921 | 53 307 | 19% |
| Libraries | 9 050 | 4 327 | 5 681 | 31% |
| State and provincial departments | 803 736 | 944 774 | 947 156 | 17% |
| Schools and educational institutions | 105 399 | 131 467 | 214 793 | 27% |
| School book distributors and tenders | 398 989 | 304 472 | 351 341 | 26% |
| Export sales | 18 692 | 810 861 | 6 407 | 25% |
| Other | 45 136 | 40 831 | 73 265 | 35% |
| **Total** | **2 899 906** | **2 900 279** | **2 978 540** | |

### Table 6: Import and export revenue (R ’000)

| Channel | 2022/23 | | 2023/24 | | Change | |
|---|---|---|---|---|---|---|
| | Local | Imported | Local | Imported | Local | Imported |
| Sales of print books | 3 098 551 | 182 299 | 2 705 151 | 205 771 | -15% | 11% |
| Sales of digital book products | 104 561 | 53 087 | 133 871 | 40 143 | 22% | -32% |
| Rights sales | 7 276 | 399 | 9 788 | 784 | 26% | 49% |
| Distribution of locally published books | 360 | 192 | 2 501 | | 86% | |
| Other book-related income | 249 | 0 | 696 311 | | | |
| **Total** | **3 210 997** | **235 977** | **3 547 621** | **246 697** | **9%** | **4%** |

### Table 7: Royalties to authors

While the survey does not directly collect data on authors and how author profiles are changing over time, data on average royalties are collected.

| Product Category | Minimum Percentage | Maximum Percentage | Average Royalty |
|---|---|---|---|
| Academic | 3% | 23% | 13% |
| Trade | 5% | 24% | 15% |
| Education | 4% | 27% | 16% |
| TVET | 7% | 18% | 12% |

# Sector Reports

# Education

The Education sector produces school textbooks for the Department of Basic Education (DBE) as well as private schools. The sector is the largest in South Africa, accounting for 60% of total revenue. In 2023/24, the sector recorded revenue of more than R1.9 billion, with the vast majority of this income coming from sales of local products.

The sector is dominated by a few large and medium publishers and many very small publishers focusing on niche subjects and often using partners for distribution. This sector is highly dependent on the state's education budgets and procurement processes. Any curriculum revision or change to the national catalogue of approved textbooks has a direct impact on revenues and production.

### Table 8: Revenue from book-related activities (R '000)

| Activity | 2022/23 | | 2023/24 | | Change | |
|---|---|---|---|---|---|---|
| | Local books | Imported books | Local books | Imported books | Local books | Imported books |
| Sales of print books | 1 763 745 | 35 762 | 1 830 129 | 56 218 | 4% | 36% |
| Sales of digital book products | 77 902 | 844 | 89 232 | 1 109 | 13% | 24% |
| Rights sales | 63 | | 493 | | 87% | |
| **Total turnover** | **1 841 710** | **36 606** | **1 919 854** | **57 327** | **4%** | **36%** |

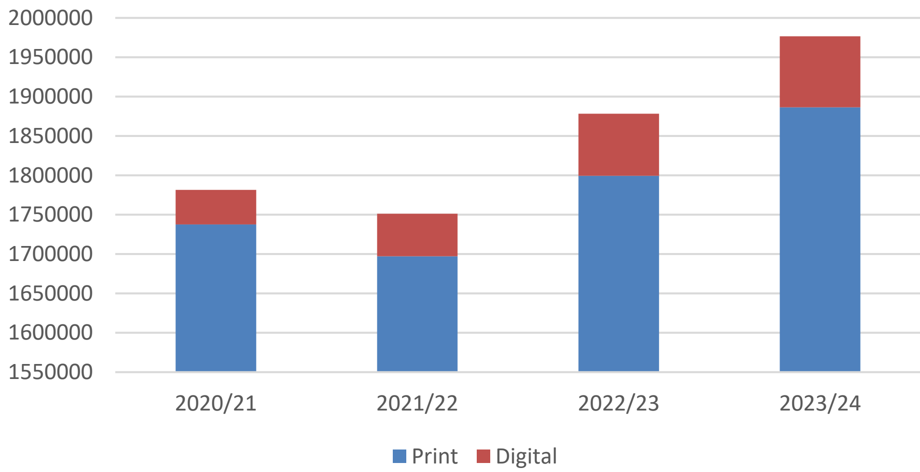
## Production

The following tables provide a summary of revenue from both print and digital formats, sub-divided according to the local languages.

### Print and digital formats

In spite of growth in the past year, digital book products remain a very small proportion of orders and revenue from the Department of Basic Education (DBE) – still around 4%. This is in spite of government initiatives to introduce digital learning and teaching materials, and the publishers' development of digital content resources. Publishers have the capacity to roll out further digital resources, but access, infrastructure, and both teacher and learner preparedness, remain stumbling blocks. Printed materials thus remain a crucial resource.

Figure 8: Education: Revenue by format




As can be seen from the tables that follow, English dominates the production of textbooks, especially after the Foundation Phase. However, local languages make up an important part of Education publishers' lists.

## Table 9: School textbook production by language and format (number of titles)

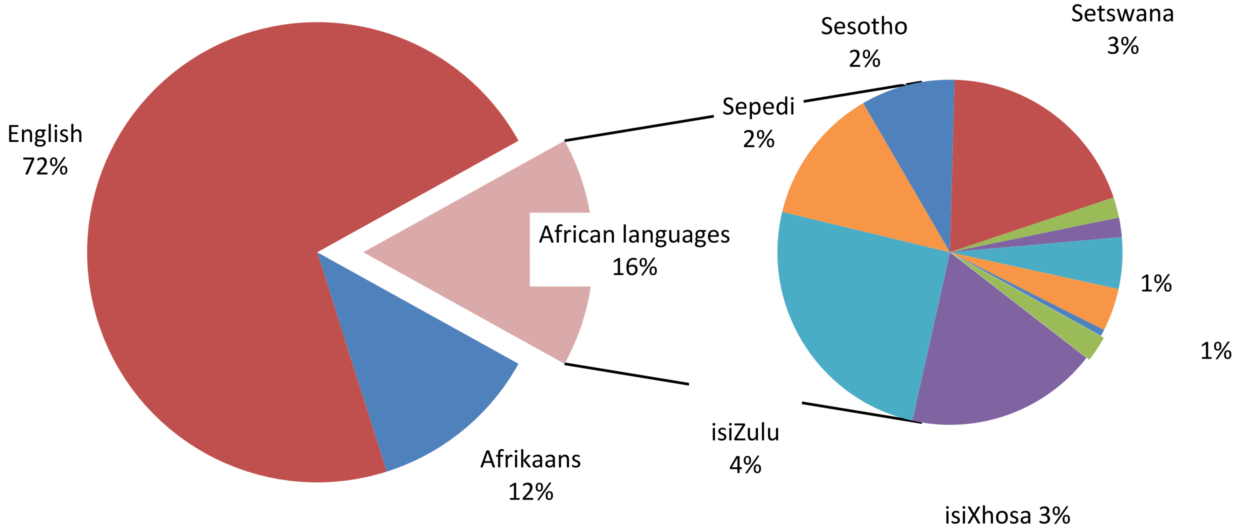
| Language | 2022/23 | | 2023/24 | |
|---|---|---|---|---|
| | Print | Digital | Print | Digital |
| Afrikaans | 673 | 642 | 598 | 608 |
| English | 768 | 1 166 | 1 031 | 1 130 |
| IsiNdebele | 24 | 9 | 39 | 11 |
| IsiXhosa | 492 | 81 | 506 | 91 |
| IsiZulu | 439 | 30 | 382 | 28 |
| Sepedi | 5 | 2 | 149 | 54 |
| Sesotho | 179 | 53 | 44 | 20 |
| Setswana | 112 | 88 | 122 | 35 |
| SiSwati | 121 | 40 | 93 | 5 |
| Tshivenda | 11 | 3 | 19 | 19 |
| Xitsonga | 19 | 22 | 25 | 33 |
| Multilingual | 5 | 2 | 5 | 1 |
| Other Languages | <1 | <1 | <1 | <1 |
| **Total** | **2 882** | **2 170** | **3 013** | **2 035** |

*Note: Table 9 records the production of new editions or titles only. These are not comprehensive figures, as not every publisher provided full details.*

## Language

Sales of English textbooks are down from 76% to 72%. Afrikaans has risen from 9% to 12%, and African languages from 15% to 16%.

Figure 9: Revenue by language (Education), 2023-24




### Table 10: Revenue from locally produced school textbooks (R'000)

| Language | 2021/22 | | 2022/23 | | 2023/24 | | Change | |
|---|---|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital | Print | Digital |
| Afrikaans | 129 103 | 6 295 | 158 736 | 5 925 | 217 615 | 9 456 | 27% | 37% |
| English | 1 307 595 | 33 739 | 1 351 528 | 56 791 | 1 284 124 | 67 325 | -5% | 16% |
| IsiNdebele | 3 037 | 9 | 1 210 | 154 | 6 471 | 886 | 81% | 83% |
| IsiXhosa | 40 952 | 1 020 | 49 459 | 869 | 54 069 | 543 | 9% | -60% |
| IsiZulu | 105 868 | 831 | 86 225 | 1 816 | 74 324 | 2 221 | -16% | 18% |
| Sepedi | 25 014 | 347 | 30 328 | 796 | 35 138 | 3 803 | 14% | 79% |
| Sesotho | 19 633 | 491 | 22 844 | 729 | 24 108 | 2 605 | 5% | 72% |
| Setswana | 59 124 | 411 | 67 064 | 585 | 57 904 | 971 | -16% | 40% |
| SiSwati | 10 989 | 58 | 334 | 1 209 | 5 350 | 450 | 94% | -169% |
| Tshivenda | 2 770 | 14 | 3 489 | 24 | 5 400 | 146 | 35% | 84% |
| Xitsonga | 9 594 | 142 | 9 033 | 621 | 12 933 | 1 681 | 30% | 63% |
| Multilingual | 1 169 | 68 | 469 | 0 | 12 046 | 114 | 96% | 100% |
| Other | 1 272 | 181 | 1 017 | 17 | 1 844 | 21 | 45% | 19% |
| **Total** | **1 716 119** | **43 605** | **1 732 359** | **74 045** | **1 791 325** | **90 222** | **3%** | **18%** |

## Distribution channels

While Education publishers are dependent on State and Provincial government departments for the vast majority of orders, they also distribute their products through a variety of other sales channels.

Discounts can vary a great deal according to different kinds of suppliers. For the State and Provincial Departments, publishers provide individual prices in response to government tenders. Because publishers are required to provide their lowest prices, no discounts are applicable to those prices.

### Table 11: Turnover and average discount per sales channel (R '000)

| Type of sales outlet | 2021/22 | 2022/23 | 2023/24 | Average discount % |
|---|---|---|---|---|
| National or regional bookseller chains | 289 773 | 39 839 | 44 046 | 31% |
| Independent booksellers and other book retailers | 259 792 | 442 817 | 398 673 | 30% |
| Non-book retail outlets | 23 461 | 23 247 | 25 007 | 39% |
| Internet booksellers | 12 099 | 56 396 | 84 526 | 23% |
| Businesses and corporations (direct sales) | 4 100 | 13 699 | 14 868 | 15% |
| Book clubs and direct mail booksellers | 20 607 | 27 122 | 10 376 | 26% |
| The public (direct sales) | 56 259 | 42 969 | 42 671 | 18% |
| Libraries | 507 | 597 | 1 722 | 20% |
| State and provincial departments | 794 494 | 913 509 | 909 698 | 15% |
| Schools and educational institutions | 16 484 | 19 521 | 12 987 | 22% |
| School book distributors and tenders | 277 104 | 275 306 | 316 327 | 23% |
| Export sales | 562 | 275 306 | 4 401 | 22% |
| Other | 1029 | 23 008 | 32 541 | 31% |
| **Total** | **1 781 955** | **1 878 253** | **1 897 843** | **20%** |

### Table 12: Average royalty paid on locally published books

| Product Category | Minimum Percentage | Maximum Percentage | Average |
|---|---|---|---|
| School print books | 4% | 26% | 15% |
| School digital books | 4% | 28% | 16% |

## Revenue by province and product

Revenue by province fluctuates from year to year, depending on new orders, curriculum roll-outs or top-ups required, and provincial allocations of spending on LTSM. Table 13 provides a summary of provincial revenue, while the tables that follow provide a detailed breakdown of revenue for each province separately, divided according to the product sub-categories and education phases.

### Table 13: Total revenue by province (R ’000)

| Province | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | Local | Imported | Local | Imported | Local | Imported |
| Eastern Cape | 57 687 | 2 369 | 170 694 | 1 700 | 195 419 | 2 540 |
| Free State | 66 460 | 1 131 | 67 373 | 409 | 26 906 | 793 |
| Gauteng | 430 626 | 29 804 | 410 219 | 35 144 | 486 672 | 33 677 |
| Kwa-Zulu Natal | 323 199 | 12 298 | 333 456 | 4 062 | 243 231 | 5 198 |
| Limpopo | 333 793 | 12 476 | 321 939 | 383 | 358 757 | 343 |
| Mpumalanga | 22 408 | 830 | 19 886 | 417 | 128 871 | 3 969 |
| Northern Cape | 28 123 | 473 | 27 182 | 177 | 30 358 | 559 |
| North West | 190 220 | 6 688 | 217 723 | 1 936 | 224 272 | 2 291 |
| Western Cape | 208 075 | 11 942 | 237 287 | 12 865 | 204 083 | 13 981 |
| **Total** | **1 660 591** | **78 010** | **1 805 760** | **57 092** | **1 898 568** | **63 352** |

## Revenue by province, according to product sub-category (R ’000)

### Table 14: Eastern Cape

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 40 | 83 | 70 | 95 |
| Grade 1-3 core | 13 883 | 70 | 18 567 | 94 |
| Grade 4-6 core | 49 046 | 17 | 51 997 | 50 |
| Grade 7-9 core | 57 699 | | 65 431 | 4 |
| Grade 10 core | 10 280 | 5 | 14 111 | 7 |
| Grade 11 core | 12 312 | 362 | 12 934 | |
| Grade 12 core | 12 291 | | 14 240 | |
| Grade 10 Prescribed literature | 611 | | 1 042 | |
| Grade 11 Prescribed literature | 1 131 | | 994 | |
| Grade 12 Prescribed literature | 1 538 | | 1 737 | |
| FP Reading schemes | 6 904 | 1 072 | 8 947 | 1 805 |
| IP Reading schemes | 774 | 194 | 979 | 278 |
| SP Readers (non-core) | 415 | 19 | 508 | 33 |
| Dictionaries (Primary) | 686 | 29 | 400 | 6 |
| Dictionaries (Secondary) | 345 | 15 | 304 | 6 |
| Atlases (Primary) | 179 | | 110 | |
| Atlases (Secondary) | 158 | | 788 | |
| Posters | 99 | | 114 | |
| Supplementary and Library | 1 337 | 78 | 1 664 | 76 |
| Other | 968 | 117 | 482 | 86 |
| **Total** | **170 694** | **1 700** | **195 419** | **2 540** |

## Revenue by province, according to product sub-category (R ’000)

### Table 15: Free State

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 185 | 1 | 78 | 4 |
| Grade 1-3 core | 5 314 | 3 | 1 599 | |
| Grade 4-6 core | 19 347 | | 9 018 | 782 |
| Grade 7-9 core | 27 522 | 741 | 8 768 | 5 |
| Grade 10 core | 3 493 | | 2 082 | 48 |
| Grade 11 core | 3 679 | | 931 | |
| Grade 12 core | 4 001 | | 1 525 | 346 |
| Grade 10 Prescribed literature | 340 | | 135 | |
| Grade 11 Prescribed literature | 465 | 175 | 164 | |
| Grade 12 Prescribed literature | 231 | 4 | 94 | |
| FP Reading schemes | 1 015 | 77 | 428 | 35 |
| IP Reading schemes | 299 | 104 | 149 | 3 |
| SP Readers (non-core) | 176 | 378 | 86 | 3 |
| Dictionaries (Primary) | 119 | 28 | 111 | 65 |
| Dictionaries (Secondary) | 75 | 215 | 978 | 3 |
| Atlases (Primary) | 131 | | 242 | |
| Atlases (Secondary) | 70 | | 75 | |
| Posters | 152 | | 12 | |
| Supplementary and Library | 238 | 16 | 321 | 19 |
| Other | 53 | | 110 | 262 |
| **Total** | **67 373** | **409** | **26 906** | **1 575** |

## Revenue by province, according to product sub-category (R ’000)

### Table 16: Gauteng

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 3 310 | 144 | 2 618 | 182 |
| Grade 1-3 core | 21 979 | 528 | 22 429 | 406 |
| Grade 4-6 core | 91 476 | 723 | 89 582 | 675 |
| Grade 7-9 core | 133 412 | 3 141 | 134 692 | 2 024 |
| Grade 10 core | 28 481 | 1 387 | 31 415 | 3 879 |
| Grade 11 core | 27 083 | 1 770 | 25 779 | 590 |
| Grade 12 core | 26 228 | 3 355 | 26 423 | 308 |
| Grade 10 Prescribed literature | 3 707 | 734 | 2 892 | 5 |
| Grade 11 Prescribed literature | 3 129 | | 2 395 | |
| Grade 12 Prescribed literature | 2 583 | 57 | 2 875 | 38 |
| FP Reading schemes | 14 824 | 3 193 | 23 106 | 5 528 |
| IP Reading schemes | 2 603 | 1 528 | 5 136 | 673 |
| SP Readers (non-core) | 1 428 | 287 | 2 124 | 154 |
| Dictionaries (Primary) | 10 099 | 3 851 | 10 521 | 3 223 |
| Dictionaries (Secondary) | 5 579 | 210 | 6 7645 | 17 |
| Atlases (Primary) | 2 679 | 9 | 2 570 | 3 |
| Atlases (Secondary) | 1 824 | 8 | 4 077 | 1 |
| Posters | 361 | 3 | 216 | 4 |
| Supplementary and Library | 21 794 | 1 601 | 26 327 | 1 790 |
| Other | 7 637 | 12 670 | 3 850 | 14 177 |
| **Total** | **410 219** | **35 144** | **486 672** | **33 677** |

## Revenue by province, according to product sub-category (R ’000)

### Table 17: KwaZulu-Natal

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | **Local** | **Imported** | **Local** | **Imported** |
| Grade R | 1 054 | 183 | 171 | 107 |
| Grade 1-3 core | 31 921 | 233 | 22 142 | 85 |
| Grade 4-6 core | 89 070 | 50 | 62 898 | 97 |
| Grade 7-9 core | 100 945 | 86 | 71 974 | 60 |
| Grade 10 core | 24 184 | 51 | 20 046 | 107 |
| Grade 11 core | 25 302 | 11 | 17 272 | 38 |
| Grade 12 core | 25 432 | 14 | 18 092 | 5 |
| Grade 10 Prescribed literature | 2 781 | 18 | 2 466 | 1 |
| Grade 11 Prescribed literature | 3 021 | 809 | 2 113 | |
| Grade 12 Prescribed literature | 585 | 809 | 577 | 9 |
| FP Reading schemes | 9 673 | 1 046 | 7 967 | 751 |
| IP Reading schemes | 1 261 | 492 | 1 678 | 460 |
| SP Readers (non-core) | 1 601 | 18 | 1 497 | 8 |
| Dictionaries (Primary) | 2 988 | 504 | 2 872 | 312 |
| Dictionaries (Secondary) | 2 667 | 70 | 2 808 | 9 |
| Atlases (Primary) | 1 292 | | 1 225 | |
| Atlases (Secondary) | 741 | | 1 384 | |
| Posters | 195 | | 112 | |
| Supplementary and Library | 3 317 | 424 | 3 288 | 441 |
| Other | 5 424 | 859 | 2 650 | 2 708 |
| **Total** | **333 456** | **4 062** | **243 232** | **5 198** |

## Revenue by province, according to product sub-category (R ’000)

### Table 18: Limpopo

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 468 | 337 | 713 | |
| Grade 1-3 core | 6 045 | 2 | 8 827 | 2 |
| Grade 4-6 core | 53 857 | | 60 098 | 11 |
| Grade 7-9 core | 107 381 | 99 | 126 330 | 4 |
| Grade 10 core | 33 021 | | 40 407 | 9 |
| Grade 11 core | 54 566 | | 57 701 | |
| Grade 12 core | 53 788 | | 50 301 | |
| Grade 10 Prescribed literature | 2 200 | 1 | 4 153 | 80 |
| Grade 11 Prescribed literature | 2 459 | | 2 172 | |
| Grade 12 Prescribed literature | 864 | | 1 790 | |
| FP Reading schemes | 1 891 | 31 | 3 660 | 133 |
| IP Reading schemes | 423 | 39 | 404 | 11 |
| SP Readers (non-core) | 263 | 1 | 308 | 1 |
| Dictionaries (Primary) | 492 | 101 | 331 | 46 |
| Dictionaries (Secondary) | 373 | 991 | 392 | 1 |
| Atlases (Primary) | 163 | | 149 | |
| Atlases (Secondary) | 107 | | 105 | |
| Posters | 11 | | 18 | |
| Supplementary and Library | 2 250 | 111 | 691 | 8 |
| Other | 1 316 | 96 | 207 | 37 |
| **Total** | **321 939** | **383** | **358 757** | **353** |

## Revenue by province, according to product sub-category (R ’000)

### Table 19: Mpumalanga

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 331 | 30 | 2 307 | 53 |
| Grade 1-3 core | 1 521 | 30 | 7 868 | 50 |
| Grade 4-6 core | 3 462 | 30 | 32 590 | 2 |
| Grade 7-9 core | 6 356 | | 41 529 | 398 |
| Grade 10 core | 967 | 33 | 14 256 | 6 |
| Grade 11 core | 1 062 | 2 | 10 981 | 18 |
| Grade 12 core | 3 739 | 2 | 5 477 | 1 830 |
| Grade 10 Prescribed literature | 143 | 982 | 160 | |
| Grade 11 Prescribed literature | 35 | | 25 | |
| Grade 12 Prescribed literature | 227 | | 1 487 | |
| FP Reading schemes | 218 | 101 | 5 848 | 119 |
| IP Reading schemes | 48 | 32 | 1 184 | 509 |
| SP Readers (non-core) | 20 | | 154 | |
| Dictionaries (Primary) | 466 | 41 | 708 | 38 |
| Dictionaries (Secondary) | 276 | 15 | 285 | 369 |
| Atlases (Primary) | 274 | 229 | 298 | |
| Atlases (Secondary) | 167 | | 731 | |
| Posters | 28 | 48 | 147 | |
| Supplementary and Library | 307 | 46 | 990 | 450 |
| Other | 239 | 118 | 1 846 | 127 |
| **Total** | **19 886** | **421** | **128 871** | **3 969** |

## Revenue by province, according to product sub-category (R ’000)

### Table 20: Northern Cape

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | **Local** | **Imported** | **Local** | **Imported** |
| Grade R | 108 | 0 | 40 | |
| Grade 1-3 core | 1 312 | | 2 232 | 75 |
| Grade 4-6 core | 8 457 | | 7 586 | 7 |
| Grade 7-9 core | 9 715 | | 11 416 | 6 |
| Grade 10 core | 1 978 | 1 | 2 145 | |
| Grade 11 core | 1 776 | | 2 021 | |
| Grade 12 core | 1 620 | | 1 538 | |
| Grade 10 Prescribed literature | 81 | 3 | 98 | |
| Grade 11 Prescribed literature | 195 | | 229 | |
| Grade 12 Prescribed literature | 91 | | 80 | |
| FP Reading schemes | 1 171 | 116 | 1 973 | 207 |
| IP Reading schemes | 92 | 9 | 152 | 10 |
| SP Readers (non-core) | 77 | | 72 | |
| Dictionaries (Primary) | 190 | 36 | 219 | 23 |
| Dictionaries (Secondary) | 65 | 2 | 66 | |
| Atlases (Primary) | 84 | | 52 | |
| Atlases (Secondary) | 41 | | 34 | |
| Posters | 58 | | 33 | |
| Supplementary and Library | 297 | 7 | 280 | 79 |
| Other | 214 | 3 | 92 | 152 |
| **Total** | **27 182** | **177** | **30 358** | **559** |

## Revenue by province, according to product sub-category (R ’000)

### Table 21: North West

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 6 853 | 104 | 7 663 | 5 |
| Grade 1-3 core | 19 296 | 185 | 16 719 | 9 |
| Grade 4-6 core | 61 765 | 16 | 58 752 | 209 |
| Grade 7-9 core | 72 353 | 16 | 79 966 | 18 |
| Grade 10 core | 12 398 | 2 | 9 294 | 27 |
| Grade 11 core | 12 516 | 2 | 13 608 | |
| Grade 12 core | 13 912 | 2 | 12 822 | |
| Grade 10 Prescribed literature | 1 381 | 845 | 854 | 3 |
| Grade 11 Prescribed literature | 1 486 | | 948 | |
| Grade 12 Prescribed literature | 1 044 | | 1 641 | |
| FP Reading schemes | 5 635 | 454 | 5 963 | 303 |
| IP Reading schemes | 862 | 170 | 2 052 | 309 |
| SP Readers (non-core) | 707 | 11 | 495 | 2 |
| Dictionaries (Primary) | 1 526 | 255 | 1 668 | 269 |
| Dictionaries (Secondary) | 919 | 119 | 844 | 24 |
| Atlases (Primary) | 1 183 | 35 | 1 717 | 40 |
| Atlases (Secondary) | 540 | | 2 993 | |
| Posters | 764 | 614 | 944 | |
| Supplementary and Library | 5 080 | 214 | 4 195 | 338 |
| Other | 1 761 | 350 | 1 133 | 736 |
| **Total** | **217 723** | **1 936** | **224 272** | **2 291** |

## Revenue by province, according to product sub-category (R ’000)

### Table 22: Western Cape

| Book Category | 2022/23 (R ’000) | | 2023/24 (R ’000) | |
|---|---|---|---|---|
| | Local | Imported | Local | Imported |
| Grade R | 373 | 23 | 383 | 1 |
| Grade 1-3 core | 31 469 | 166 | 17 714 | 179 |
| Grade 4-6 core | 35 756 | 134 | 32 442 | 477 |
| Grade 7-9 core | 68 672 | 839 | 55 480 | 878 |
| Grade 10 core | 13 316 | 334 | 12 447 | 1 037 |
| Grade 11 core | 13 187 | 333 | 11 750 | 83 |
| Grade 12 core | 18 239 | 334 | 16 025 | 450 |
| Grade 10 Prescribed literature | 2 207 | 24 | 1 561 | 19 |
| Grade 11 Prescribed literature | 1 812 | 149 | 853 | |
| Grade 12 Prescribed literature | 3 064 | 149 | 3 476 | 421 |
| FP Reading schemes | 4 025 | 2 240 | 2 995 | 2 060 |
| IP Reading schemes | 877 | 298 | 707 | 339 |
| SP Readers (non-core) | 1 289 | 170 | 1 154 | 184 |
| Dictionaries (Primary) | 1 922 | 828 | 2 466 | 442 |
| Dictionaries (Secondary) | 1 259 | 86 | 1 153 | 46 |
| Atlases (Primary) | 843 | 8 | 821 | 15 |
| Atlases (Secondary) | 689 | 12 | 507 | 1 |
| Posters | 215 | 4 | 230 | 1 |
| Supplementary and Library | 33 966 | 585 | 39 002 | 662 |
| Other | 4 107 | 6 448 | 2 917 | 6 686 |
| **Total** | **237 287** | **12 865** | **204 083** | **13 981** |

# Sector Reports

# Trade

Trade publishers produce books for the general reader. The sector is characterised by large international publishers that maintain local subsidiaries and imprints, as well as several small to medium specialised or niche publishers. Multinational publishers also use a variety of distributors to import their books for the South African market. While the focus of this survey is on the production of local books, some of these distribution figures are included.

The sector is divided by genre – non-fiction and fiction, and aimed at an adult or children's market. Non-fiction also includes religious books, such as Bibles. Adult non-fiction is still the most profitable genre.

## Production

The data collected indicate that print sales declined dramatically, but e-book sales have risen at the same time. The decline is mostly in Adult Fiction and Non-Fiction, in English. Revenue from other sources is also rising, perhaps indicating that Trade publishers are seeking to diversify their income streams.

### Table 23: Revenue from book-related activities (R '000)

| Activity | 2022/23 | | 2023/24 | | Change Local |
|---|---|---|---|---|---|
| | Local | Imported | Local | Imported | |
| Sales of print books | 871 234 | 120 027 | 503 819 | 122 352 | -42% |
| Sales of digital book products | 9 296 | 9 114 | 17 629 | 9 230 | 90% |
| Rights sales | 1 818 | 243 | 3 860 | 627 | 53% |
| **Total turnover** | **931 724** | **129 384** | **525 308** | **132 209** | **-44%** |

### Table 24: Other revenue

| Activity | 2020/21 | 2021/22 | 2022/23 | 2023/24 |
|---|---|---|---|---|
| Distribution of locally published books | 649 | 495 | 552 | 2 501 |
| Other book-related income | 281 | 172 | 249 | 491 |
| **Total other turnover** | **930** | **668** | **802** | **2 992** |

## Revenue by format and language

Print remains the format of preference, although most forecasts have predicted a sharp rise in the use of digital formats over time. Digital sales have doubled in the past year, but off a very low base – from 2% to 4% of revenue.

In terms of language, Afrikaans and English dominate. However, the proportion of revenue from titles in English has declined, while Afrikaans and African languages have grown, the latter from less than 1% to 3%. For the first time, sales were recorded for every official language, at least in certain categories.

### Table 25: Revenue by genre and format (R ’000)

| Genre | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | Local | Imported | Local | Imported | Local | Imported |
| Adult non-fiction print | 368 292 | 44 125 | 337 586 | 46 351 | 337 591 | 38 216 |
| Adult non-fiction digital | 90 882 | 11 554 | 327 | 2 226 | 2 591 | 4 664 |
| Adult fiction print | 267 551 | 28 560 | 334 752 | 28 402 | 178 538 | 26 220 |
| Adult fiction digital | 1 354 | 5 254 | 414 | 3 366 | 69 | 403 |
| Children’s non-fiction print | 31 651 | 11 742 | 85 175 | 15 738 | 397 752 | 46 885 |
| Children’s non-fiction digital | 868 | 140 | 357 | 568 | 2 016 | 3 961 |
| Children’s fiction print | 161 216 | 34 450 | 166 588 | 32 684 | 48 883 | 24 662 |
| Children’s fiction digital | 574 | 614 | 357 | 374 | 263 | 38 |
| **Total** | **922 390** | **136 441** | **929 906** | **129 141** | **967 703** | **145 049** |

Figure 10: Revenue by language, Trade, 2023/24

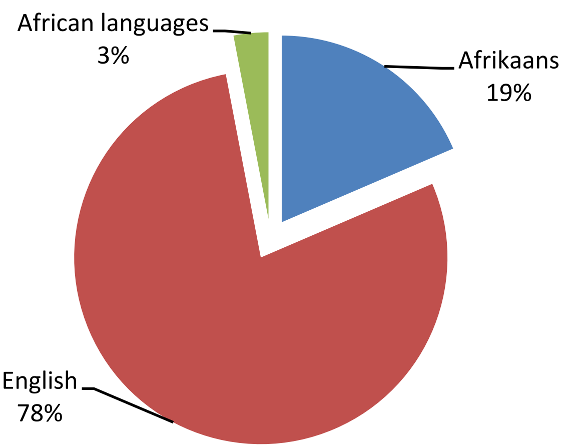
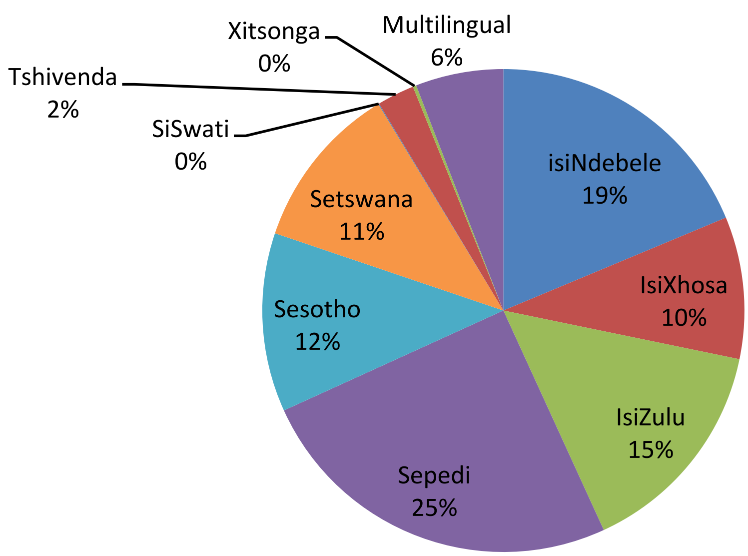



Figure 11: Revenue by African language, Trade, 2023/24



## Table 26: Revenue from adult fiction books, by format and language (R ’000)

| Language | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital |
| Afrikaans | 40 188 | 4 988 | 55 270 | 1 024 | 43 795 | 4 021 |
| English | 247 940 | 4 991 | 311 946 | 711 | 124 466 | 3 508 |
| isiNdebele | | | | | | |
| IsiXhosa | 4 | | 36 | | 29 | 3 |
| IsiZulu | 9 | | 29 | 126 | 3 | |
| Sepedi | | | | | | |
| Sesotho | 0,6 | | | 365 | | |
| Setswana | 432 | | 5 | <1 | 2 | |
| SiSwati | 288 573 | 10 065 | | | | |
| Tshivenda | | | | | | |
| Multilingual | 40 188 | 4 988 | 357 | 7 | 74 | 773 |
| Other | | | | 133 | | |
| **Total** | **247 940** | **4 991** | **367 193** | **1 742** | **168 369** | **8 305** |

## Table 27: Revenue from adult non-fiction books, by format and language (R ’000)

| Language | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital |
| Afrikaans | 20 214 | 479 | 26 650 | 3 | 23 246 | 1 362 |
| English | 366 133 | 101 188 | 340 949 | 373 | 238 294 | 4 636 |
| IsiNdebele | | | 4 | | 4 | |
| IsiXhosa | 3 | | 34 | 82 | 16 | |
| IsiZulu | 238 | | 180 | | 115 | |
| Sepedi | | | | | | |
| Sesotho | | | 44 | | 40 | |
| Setswana | | | 17 | | 25 | |
| SiSwati | | | 4 | | 10 | 1 |
| Tshivenda | | | 5 | | 8 | |
| Xitsonga | | | 10 | | 11 | |
| Multilingual | 33 | | 34 | | 1 145 | 5 |
| Other | | | 136 | | 181 | 11 |
| **Total** | **386 622** | **101 672** | **368 068** | **375** | **263 095** | **6 015** |

## Table 28: Revenue from children's fiction books, by format and language (R '000)

| Language | 2021/22 | | 2022/23 | | 2022/23 | |
|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital |
| Afrikaans | 32 244 | 254 | 23 548 | 99 | 33 117 | 390 |
| English | 123 781 | 92 | 160 222 | 31 | 59 565 | 77 |
| IsiNdebele | | | | | | |
| IsiXhosa | 33 | | 117 | | 308 | 1 |
| IsiZulu | 118 | 2 | 85 | | 233 | 1 |
| Sepedi | 21 | | 3 | | 36 | <1 |
| Sesotho | | | 17 | | 52 | 1 |
| Setswana | 25 | | 10 | | 45 | |
| Siswati | | | | | | |
| Tshivenda | | | | | 9 | |
| Xitsonga | | | | | 34 | |
| Other | | | | | 33 | |
| **Total** | **156 233** | **349** | **184 002** | **130** | **93 432** | **470** |

## Table 29: Revenue from children's non-fiction books, by format and language (R '000)

| Language | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital |
| Afrikaans | 10 138 | 982 | 13 576 | <1 | 14 206 | 298 |
| English | 22 149 | 25 | 40 794 | <1 | 72 482 | 6 471 |
| isiNdebele | | | | | | |
| IsiXhosa | 261 | | 86 | | 1 504 | |
| IsiZulu | 14 | | 20 | | 1804 | 761 |
| Sepedi | | | | | 2 068 | 2 790 |
| Sesotho | | | | | 345 | 1 902 |
| Setswana | | | | | 1 723 | 380 |
| Siswati | | | | | | |
| Tshivenda | | | | | 345 | 127 |
| Xitsonga | | | | | | |
| Other | | | | | | |
| **Total** | **32 562** | **1 008** | **53 495** | **1** | **94 477** | **12 729** |

## Distribution channels

Trade books are available through a wide range of distribution channels, including traditional booksellers and e-commerce retail outlets. The share of revenue from online booksellers continues to grow, as both print and digital books are increasingly ordered through such channels.

Small publishers are often dependent on direct sales to their readers, as they struggle to navigate and afford the ordering and discount structures of mainstream book retailers.

### Table 30: Turnover and average discount per sales channel (R ’000)

| Type of sales outlet | 2021/22 | | 2022/23 | | 2023/24 | | Average discount % |
|---|---|---|---|---|---|---|---|
| | Local | Imported | Local | Imported | Local | Imported | |
| National or regional bookseller chains | 251 823 | 336 171 | 295 548 | 344 638 | 280 852 | 399 100 | 44% |
| Independent booksellers and other book retailers | 29 976 | 30 842 | 38 080 | 36 939 | 43 838 | 34 141 | 36% |
| Non-book retail outlets | 12 921 | 22 661 | 26 694 | 19 388 | 22 997 | 35 437 | 41% |
| Supermarkets and department stores | 15 672 | 16 515 | 16 976 | 18 344 | 16 900 | 21 138 | 33% |
| Internet booksellers | 50 595 | 59 499 | 60 388 | 67 598 | 74 096 | 97 296 | 42% |
| Book clubs and direct mail booksellers | 1 738 | 15 | 11 569 | 11 | 1 804 | 6 | 23% |
| Businesses (direct sales) | 68 530 | 4 332 | 2 811 | 684 | 2 916 | 1 094 | 24% |
| The public (direct sales) | 17 343 | 4 055 | 7 422 | 3 945 | 7 725 | 4 137 | 30% |
| Libraries | 4 077 | 6 135 | 3 730 | 6 173 | 3 958 | 7 784 | 38% |
| State and provincial departments | 43 442 | 6 414 | 31 265 | 0,5 | 37 458 | | 17% |
| Schools and educational institutions | 10 782 | 3 897 | 7 365 | 197 | 7 228 | 3 989 | 30% |
| School book distributors and tenders | 21 457 | 2 870 | 29 165 | 3 299 | 35 014 | 2 637 | 29% |
| Export sales | 348 | 8 963 | 589 | 4 034 | 2 006 | 3 875 | 19% |
| Other (including rights sales) | 22 324 | 4 419 | 17 823 | 1 886 | 6 426 | 4 953 | 35% |
| **Total** | **551 172** | **506 789** | **551 915** | **507 137** | **543 218** | **615 587** | |

## Table 31: Average royalty paid on locally published books

| Product Category | Minimum Percentage | Maximum Percentage | Weighted Average |
|---|---|---|---|
| General trade print books | 4% | 23% | 13% |
| General trade digital books | 6% | 26% | 16% |

# Sector Reports

# Academic

The Academic sector publishes textbooks and other products for university students, as well as professional products and books for continuing professional development (CPD), as used for example by doctors, lawyers and accountants.

This sector has been in decline due to a variety of challenges, including the lack of ring-fenced book funding for government-supported students, rampant book piracy, the effect of hybrid learning, and student enrolments. However, with the addition of reporting on other forms of income, the sector appears to be holding its own with the possibility of additional revenue streams.

## Revenue

### Table 32: Revenue from book-related activities: Academic sector (R '000)

| Activity | 2021/22 | | 2022/23 | | 2023/24 | | Change | |
|---|---|---|---|---|---|---|---|---|
| | Local | Imported | Local | Imported | Local | Imported | Local | Imported |
| Sales of print books | 140 529 | 34 234 | 129 893 | 26 497 | 120 929 | 27 201 | -7% | 3% |
| Sales of digital book products | 14 229 | 44 521 | 14 224 | 43 129 | 14 713 | 29 803 | 3% | -31% |
| Rights sales | 4 906 | 76 | 5 394 | 157 | 5 405 | 157 | - | - |
| Other book-related income* | | | | | 18 898 | 2 258 | | |
| **Total turnover** | **159 663** | **78 831** | **149 512** | **69 784** | **159 946** | **59 419** | **7%** | **-18%** |

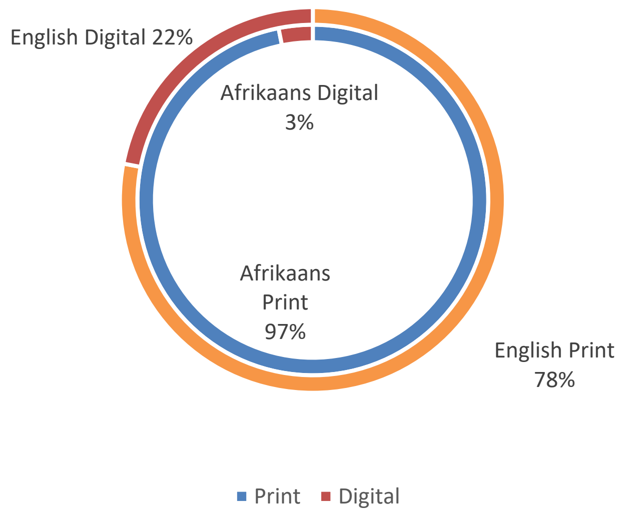
*Note: This category was not reported on consistently in previous years.*

## Revenue by format and language

While this sector has experienced the highest uptake of digital books, print remains the most used format. The proportion of digital revenue overall is growing rapidly – from 19% in 2021/22, to 27% in 2023/24.

The sector is heavily dominated by the production of English-language books (99% of all revenue), a trend that mirrors the use of English as the language of academia and university education.

Figure 12: Revenue by format and language, 2023/24




## Table 33: Revenue by format and language (R ’000)

| Language | 2021/22 | | 2022/23 | | 2023/24 | |
|---|---|---|---|---|---|---|
| | **Print** | **Digital** | **Print** | **Digital** | **Print** | **Digital** |
| Afrikaans | 1 420 | 186 | 1 168 | 197 | 1 298 | 42 |
| English | 129 664 | 93 068 | 117 005 | 89 110 | 160 772 | 45 290 |
| IsiXhosa | | | 0.5 | | 0.5 | |
| **Total** | **131 084** | **93 255** | **118 174** | **89 307** | **162 071** | **45 332** |

## Distribution channels

Academic textbooks are mostly sold through a limited number of channels, largely bookseller chains, many of which are located on or near university campuses. There is also a vibrant trade in second-hand books, which cannot be captured in this survey. In contrast, professional and scholarly books are often sold directly to businesses and the public, in addition to other sales channels through traditional retail chains. There is a significant secondary market to State and government departments as well as educational institutions.

### Table 34: Turnover and average discount per sales channel (R ’000)

| Type of sales outlet | 2021/22 | 2022/23 | 2023/24 | Mean Discount % |
|---|---|---|---|---|
| Primary Retail Outlets | 178 407 | 128 747 | 163 402 | 32% |
| E-commerce (direct publisher sales) | 227 | 401 | 897 | 10% |
| E-commerce (retailer sales) | 18 876 | 18 706 | 15 206 | 30% |
| Other | 37 392 | 34 911 | 34 298 | |
| **Total** | **234 902** | **182 765** | **213 803** | |

### Table 35: Average royalty paid on locally published books

| Product Category | Minimum Percentage | Maximum Percentage | Weighted Average |
|---|---|---|---|
| Print textbooks | 3% | 21% | 12% |
| Digital textbooks | 3% | 25% | 14% |

# Sector Reports

# TVET

The Technical and Vocational Education and Training (TVET) sector produces textbooks for students at the TVET colleges in South Africa, which offer technical or vocational training. Although this is a form of tertiary education, the procurement and distribution model is completely different from that of the Academic textbook sector, as the TVET system is more centralised. The two sectors are thus separated for reporting purposes.

The TVET sector produces books for two different levels: the National Certificate (Vocational), or NCV, and the National Accredited Technical Diploma (NATED). Public TVET colleges are not badly affected by piracy, although this sector reportedly experiences widespread photocopying, because there is little financial incentive – colleges receive a textbook budget and students are not expected to purchase any of their own learning materials. Private TVET colleges make up a very small percentage of total TVET sales.

The tables report only briefly on language, as around 99% of TVET books are produced in English. Books are also usually produced in print format, although digital sales are rising.

## Revenue

### Table 36: Revenue by TVET level (R ’000)

| Category | 2022/23 | | 2023/24 | | Change | |
|---|---|---|---|---|---|---|
| | NCV | NATED | NCV | NATED | NCV | NATED |
| TVET books print | 156 467 | 177 212 | 160 312 | 167 969 | 2% | -5% |
| TVET books digital | 1 246 | 1 905 | 7 931 | 4 365 | 537% | 129% |
| **Total** | **157 714** | **179 177** | **168 243** | **172 334** | **7%** | **-4%** |

### Table 37: Revenue by format (R ’000)

| Format | 2021/22 | 2022/23 | 2023/24 | Change |
|---|---|---|---|---|
| Sales of print books | 295 691 | 333 692 | 328 273 | -2% |
| Sales of digital book products | 13 904 | 3 138 | 12 295 | 292% |
| Rights sales | | | 29 | |
| **Total** | **309 595** | **336 831** | **340 598** | **1%** |

### Table 38: Revenue by format and language (R ’000)

| Language | 2022/23 | | 2023/24 | | Change | |
|---|---|---|---|---|---|---|
| | Print | Digital | Print | Digital | Print | Digital |
| English | 273 278 | 2 387 | 328 131 | 12 296 | 20% | 415% |
| Afrikaans | 60 415 | 751 | 158 | - | -100% | -100% |
| **Total** | **333 693** | **3 138** | **328 289** | **12 296** | **-2%** | **292%** |

## Distribution channels

TVET books are largely procured and distributed through government tenders and direct sales to institutions.

### Table 39: Sales channels and discounts (R ’000)

| Type of sales outlet | 2021/22 | 2022/23 | 2023/24 | Mean Discount % |
|---|---|---|---|---|
| National/regional booksellers | 201 495 | 40 001 | 91 836 | 30% |
| Independent booksellers | 14 727 | 187 432 | 49 343 | 32% |
| Non-book retail outlets | 1 | 228 | 347 | 10% |
| Internet booksellers | 1 141 | 2 283 | 2 420 | 18% |
| Book clubs and bulk booksellers | | 176 | 38 | 10% |
| The public (direct sales) | 2 194 | 2 130 | 2 014 | 9% |
| Schools and educational institutions | 90 038 | 104 580 | 194 578 | 26% |
| **Total** | **274 036** | **336 831** | **340 576** | |

### Table 40: Average royalty paid on locally published books

| Product Category | Minimum Percentage | Maximum Percentage | Average |
|---|---|---|---|
| TVET print books | 6% | 22% | 14% |
| TVET digital books | 8% | 14% | 11% |

# Sector Reports

# SMME Publishers

While the local publishing industry is dominated by larger publishers, there are also many small and micro-enterprises that have emerged. The aim over time is to investigate this sector in more depth and detail, to improve sustainability and ensure diversity in the industry.

Publishers are requested to complete a simplified version of the survey. This section reports on the responses of 36 publishers, or 21% of the 168 contacted. This is a distinct rise from the previous five years.

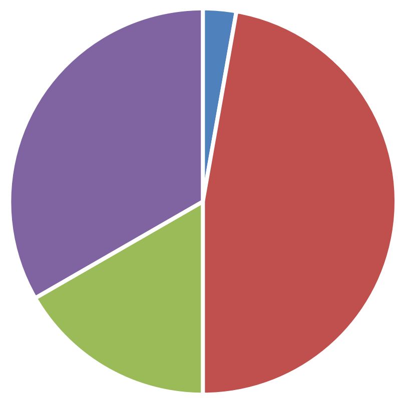
The typical profile of an SMME publisher is a small group of one to four staff members, based in Gauteng or the Western Cape. They publish around 10 books a year, mostly in Trade fiction, and mostly in English. They tend to focus on small, niche areas and to focus on specialised audiences. Their turnover is less than R5 m a year – often closer to R1 m – and they do not turn a profit every year. They regularly rely, in such cases, on personal savings rather than formal bank funding. They tend to distribute their books through direct sales or independent booksellers. In spite of many challenges, they are persistent: most have been active for more than seven years.

However, there are also highly successful SMME publishers. There is a correlation between turnover and sub-sector: while the majority of the publishers produce Trade books and earn less than R1 m a year, those who are able to develop a market in the Education sector are much more successful and are able to employ more staff.

The challenges expressed by the SMME publishers are similar to those expressed in similar publishing markets internationally. The most significant challenge is a lack of cash flow and access to capital, accompanied by delayed payments from government and rapidly increasing production costs. The publishers are concerned about the lack of government support, and argued that government funding for literary projects is often channelled to non-publishers rather than supporting the local book trade sector. As a result, they feel disadvantaged in accessing the educational sector, in competing with larger publishers and international titles, and in maintaining sustainable businesses. They also feel that African language publishing needs further government support, as the commercial book-buying market is not viable. Difficulties with distribution, and especially in accessing mainstream distribution channels such as booksellers and libraries, were regularly mentioned as well.

At the same time, the SMME publishers were optimistic about their role and argued strongly for the importance of small publishers in developing a diverse publishing ecosystem in South Africa. They require funding support as well as further training to achieve these aims.

Figure 13: Location of SMME publishers




## Table 41: Number of staff employed

| | |
|---|---|
| **Full-time** | 157 |
| **Part-time** | 33 |
| **Freelance** | 168 |

## Table 42: How long have you been active as a publisher?

| 1-3 years | 4-6 years | 7 or longer years |
|---|---|---|
| 2 | 5 | 29 |

## Table 43: Annual turnover

| < R1 m | R1-2 m | R2 – 4 m | R4 – 6 m | R6 – 8 m | > R8 m |
|---|---|---|---|---|---|
| 16 | 3 | 5 | 2 | 2 | 8 |

## Table 44: Production and sectors

| Trade | Education | Academic / Scholarly | Self-published titles | Other |
|---|---|---|---|---|
| 468 | 284 | 102 | 29 | 216 |

## Table 45: Distribution

| Distribution Agents | Online | Direct Sales to Readers | Bookshops | Government / schools / libraries | Free online | Corporate |
|---|---|---|---|---|---|---|
| 15 | 26 | 26 | 26 | 7 | 2 | |

## Table 46: Languages

| | |
|---|---|
| **Afrikaans** | 19 |
| **English** | 33 |
| **isiNdebele** | 6 |
| **isiZulu** | 15 |
| **isiXhosa** | 16 |
| **Sepedi** | 7 |
| **Sesotho** | 10 |
| **Setswana** | 8 |
| **Siswati** | 6 |
| **Tshivenda** | 5 |
| **Xitsonga** | 4 |
| **Other** | 10 |

*Note: Respondents could select more than one option.*

# List of Respondents

Bhiyoza Publishers
BK Publishing
Cambridge University Press
Chase Education Solutions
Christian Art
Cover2Cover Books
Deep South
Dryad Press
Fundza Literacy Trust
Future Managers
Galaxy Books
Imaginary House
Ithuta Books
Jacana Media
Jonathan Ball Publishers
Juta & Company Limited
Karavan Press
Kgadi Greenleaf
Lectio Publishers
Macmillan Education South Africa
Malherbe Uitgewers
Maskew Miller Learning
Mindbourne
Modjaji Publishers
Mthombothi Studios
NB Publishers
New Generation Publishers
NISC
Oxford University Press Southern Africa
Pan Macmillan SA
Pelmo Books
Penguin Random House SA
PEZ Publishers
Phambili Agencies
Pretoria University Law Press (PULP)
Pulse Education Services
Qualibooks Publishing
Reading Matters
Shuter & Shooter Publishers
Study Opportunities
Sunrise Educational Publishing
Tanci Publishers
The Answer Educational Publishers
Tracey McDonald Publishers
Uhlanga
UJ Press
University of KwaZulu-Natal Press
Van Schaik Publishers
Via Afrika Publishers
Vivlia Publishers & Booksellers
Wits University Press
Zachen Publishers