

ITALY OF BOOKS. A TALE IN FIGURES

One year after Italy Guest of Honor 2024 at the Frankfurter Buchmesse, we return to Germany with comforting numbers regarding internationalization: the Italian publishing industry last year sold the translation rights of 8,484 titles abroad, an 8 percent increase over 2023. This is the best result ever, after that of 2019, since the Italian Publishers Association started the survey in 2001. Italian books are published everywhere in the world: mainly by our European partners but also, in significant numbers, by Asian and South American publishers. We are leaders in children's and YA's books, but with a strong presence also in fiction and non-fiction, and then religious books, art books, comics. The observation that attention towards us is growing, as these first figures referring to 2024 confirm, prompted us to publish a special issue again this year of *Giornale della Libreria* that would allow all visitors to the Fair to be able to have in a few graphs a map to orient themselves in Italian publishing, the fourth largest in Europe in terms of market size. The numbers come from the Report on the State of Publishing in Italy, the reference text for the analysis of the sector published by the AIE research department. In six paragraphs – market size, production, trade market, internationalization, reading and purchasing habits – we trace an overview that, beyond the excellent data on internationalization, reflects opportunities and risks common to much of the world book industry: publishing continues to play a primary role in our country, supply remains strong and varied, but there are signs of difficulty in the market, mainly due to the absence of demand-support policies that were present in previous years. The data on reading tell us that books are widespread, especially among young people, but at the same time the time devoted to reading is decreasing and attention is becoming more fragmented. Behind these numbers, there are rapidly changing scenarios that must be addressed without hiding the difficulties, but making the most of the opportunities: Frankfurter Buchmesse is as always the greatest opportunity to compare the paths taken by publishers around the world.

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Innocenzo Cipolletta
President of AIE,
the Italian Publishers Association

The size of the market

The fourth biggest publishing industry in Europe for sales value

Italian publishing plays a leading role in the country's cultural industry: books give rise to films, TV series, video games, fuel television debates, enliven cultural festivals, and support the world of education and research. In 2024, the sector recorded sales of €3,234 million, down 1.4% on the previous year, reflecting the lack of public support for demand compared to previous years, in particular funds for libraries and stricter rules about cultural vouchers for young people. Italian publishing is fourth in Europe and sixth in the world in terms of market value, despite its linguistic base being limited to national borders. Sales cover all the cultural needs of citizens and reflect the diversity of the publishing offer: leisure reading, education, training, professional development, research, and more, through printed books, e-books, audiobooks, databases, and online services. The book world in Italy thus employs over 70,000 people. There are 5,375 active publishing houses and about 3,000 bookshops in the country. Trade sales—i.e., fiction and non-fiction sold in physical and online bookshops, large retailers, and other outlets—amount to €1,735 million (printed books, e-books, and audiobooks). School and extracurricular publishing is worth €844 million, professional publishing €557 million, university publishing €155 million.

N.B. Starting this year, trade channels data are expressed in terms of sales value (including discounts to customers) and no longer at cover price, in accordance with the source data provided to AIE by the research company. All historical series have been recalculated. The change is a result of agreements that led to the creation of NielsenIQ BookData, a global combination of NielsenIQ and GfK.

TOTAL VALUE OF THE MARKET

2024
3,234
EUR MILLION

-1.4% COMPARED TO 2023

NUMBER OF ACTIVE PUBLISHERS

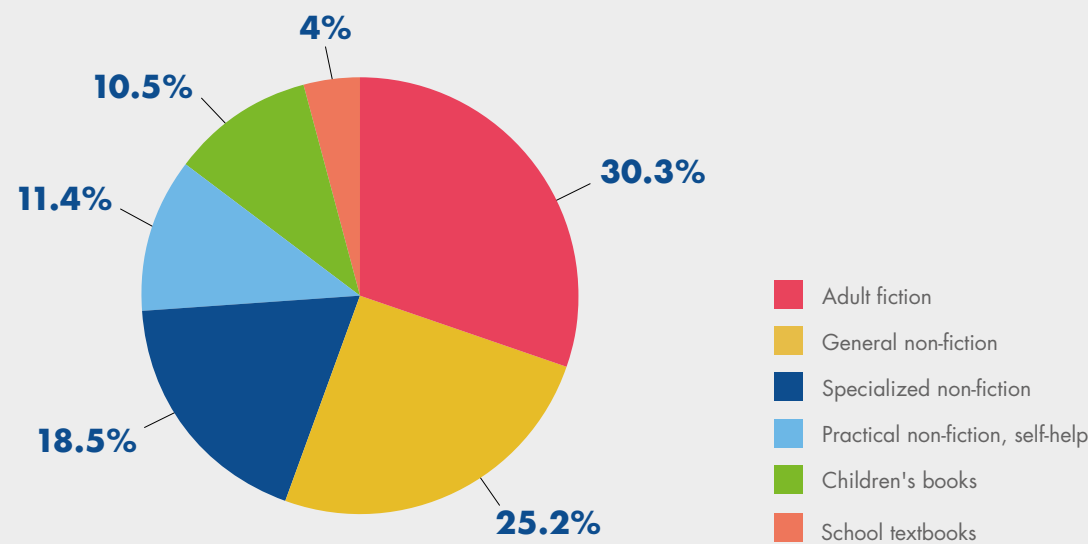
2024
5,375

+1.3% COMPARED TO 2023

THE MARKET IN 2024

	EUR million
Sales in physical and online bookshops, supermarkets	1,517
Sales at trade fairs, festivals and smaller outlets	104
E-books	84
Audiobooks (subscriptions)	30
Total trade	1,735
School textbooks	790
Installment, collectibles, hybrids	209
Databases and Internet services	349
Sales to libraries	63
B2B	36
Export of Italian books abroad	53

PRINTED TITLES PUBLISHED IN 2024: 85,872 (TRADE, SCHOOL TEXTBOOKS, ACADEMIC BOOKS AND PROFESSIONAL)



CATALOGUE OF AVAILABLE TITLES

2024
1.53
MILLION

+5% COMPARED TO 2023

PRINTED TITLES PUBLISHED PER YEAR (TRADE MARKET ONLY)

2024
69,168

+0.5% COMPARED TO 2023
(Selfpublishing titles excluded)

Production

An offering that keeps on growing

The Italian publishing industry has maintained the production levels in the last four years at over 80,000 new printed titles per year. In 2024, this figure grew by 0.8% compared to 2023, reaching 85,872. This figure includes school textbooks, which account for 4% of the total, and self-published books, which account for 16.1% and are growing significantly: in 2010, they accounted for 5.1% of the total, while in 2020 they accounted for 14.8%.

For the first time in 2024 Italian publishing has surpassed a catalogue of 1.5 million available titles, thanks to such a wide range of production and advances in printing and distribution techniques, which have reduced the need for out-of-print titles. Total annual circulation is close to 200 million copies (198 in 2022, latest available figure). The management of such a large volume of books and titles is possible thanks to an offer to the public that is spread across several channels. Chain and independent bookshops, online bookshops and supermarkets form a balanced system that allows for a diversified offering and thus maximise the visibility of the number of offerings to the reader (see *purchasing habits*). The evolution of communication and promotion on the Internet and social networks also makes it possible to reach increasingly specific niches of the public. To these figures digital production must be added: in 2024, 37,659 new titles were published in e-book, down 1.9% on the previous year. Of all these new titles, 36% are self-published works, 62.2% are released along with a print version. E-books thus have a dual function: on the one hand, they are widely used for self-publishing, on the other, they complement print books to reach a wider audience, with different price ranges and consumption habits.

Internationalisation

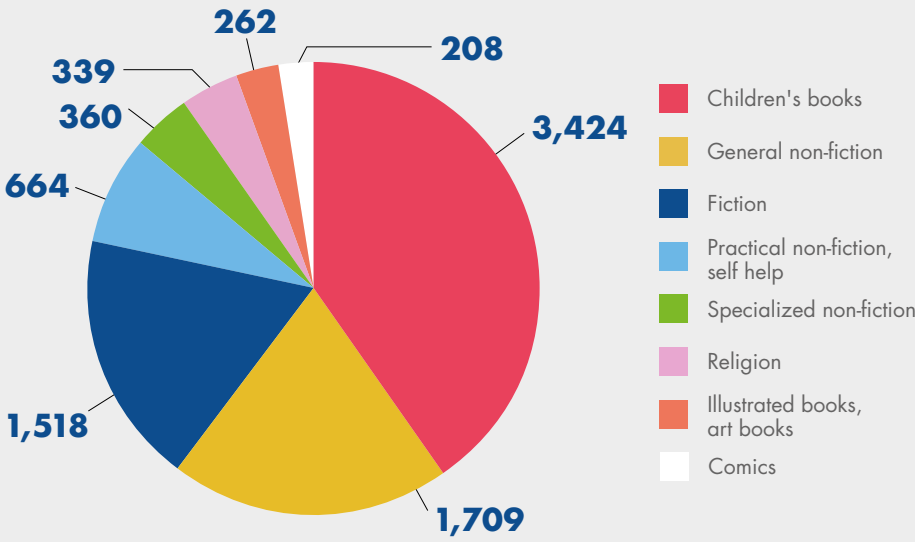
An 8% increase after Buchmesse 24

A leap forward in the sale of translation rights abroad for Italy in 2024: 8,484 contracts were signed, up 8% compared to 2023, according to a survey by AIE in the first half of 2025 based on responses from publishers regarding sales in the previous year (contracts finalized by literary agencies are not included). The figures reflect the initial effects of Italy Guest of Honor at the Frankfurter Buchmesse in 2024: this is the second-best result since the survey began in 2001, after the 8,569 contracts concluded in 2019. Purchases of titles from abroad also grew in 2024, up 5% to 9,810. The gap between sales and purchases is narrowing and in some specific sectors, such as children's books, Italy has been exporting more than it imports for several years now.

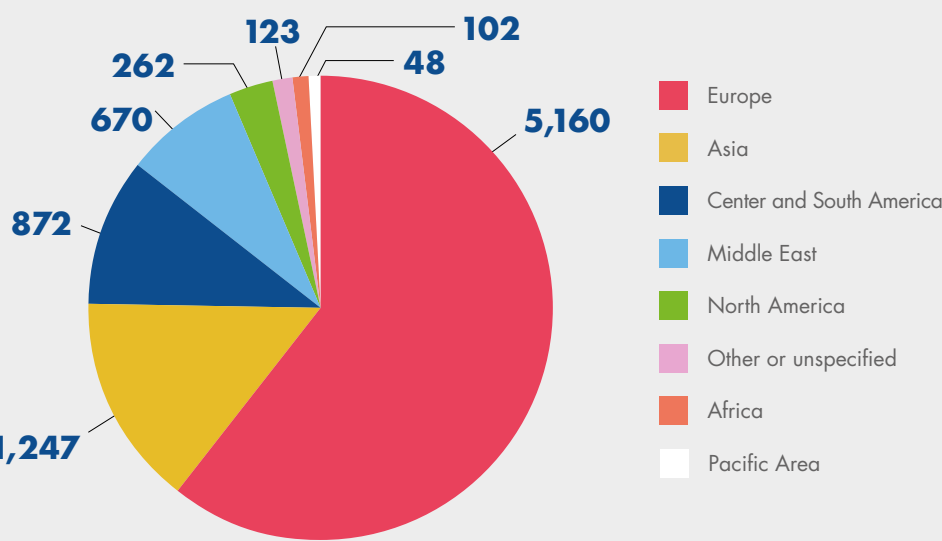
Looking at the long term, compared to the 1,800 contracts signed in 2001, sales have almost quintupled, with an average annual growth rate of 7%. Purchases, which amounted to 5,400 titles in 2001, have almost doubled, with an average annual growth rate of 3%. There were 2,033 co-publications in 2024. Finally, a record was set for titles published directly in foreign languages: there were 4,662, representing 6% of total national production. In 2010, there were 1,611. The Italian publishing industry relies on support for translations from the Ministero degli Affari Esteri e della Cooperazione Internazionale and the Centro per il libro e la lettura amounting to approximately one million euros per year. This is complemented by the activities of SEPS – Segretariato Europeo per le Pubblicazioni Scientifiche.

Visibility abroad is supported through an annual plan developed by Italian Trade Agency, in collaboration with AIE, which includes participation in foreign fairs and incoming actions to the main Italian ones. Further promotional opportunities include participation in international fairs as Guests of Honor: after Frankfurt, in 2025 Italy has been Guest of Honor in Taipei (Taiwan), Thessaloniki (Greece), and Lima (Peru). In 2026, Italy will be Guest of Honor in Guadalajara (Mexico).

TRANSLATION RIGHTS SOLD ABROAD IN 2024 BY GENRE



TRANSLATION RIGHTS SOLD ABROAD IN 2024 PER GEOGRAPHIC AREA



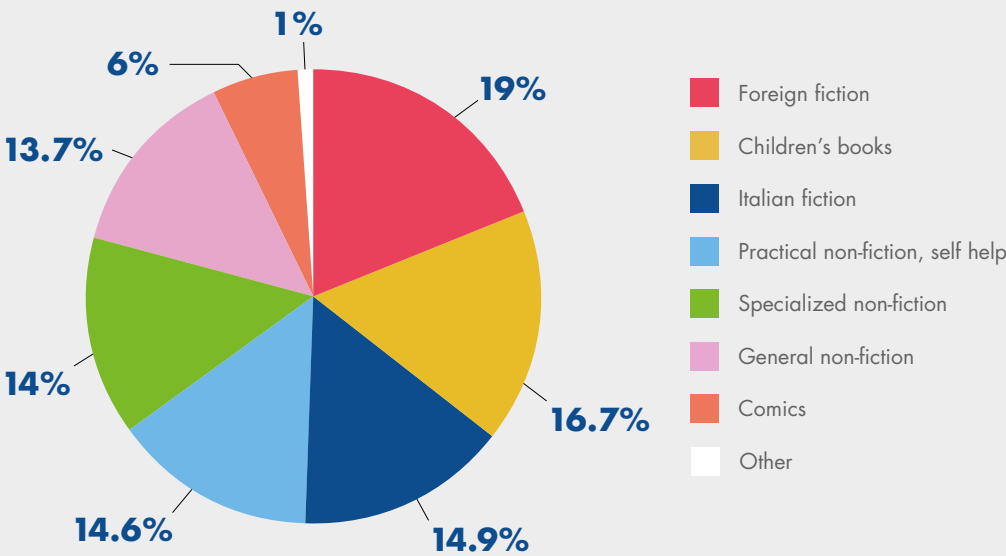
FOREIGN RIGHT SALES: IMPORT

2024
9,810
+5% COMPARED TO 2023

FOREIGN RIGHT SALES: EXPORT

2024
8,484
+8% COMPARED TO 2023

TRADE GENRES OF PRINTED BOOKS (SHARE VALUE) IN 2024



TRADE MARKET VALUE

2024
1,735
EUR MILLION
-1% COMPARED TO 2023

TRADE MARKET: PRINTED COPIES SOLD

2024
103
MILLION
-2.3% COMPARED TO 2023

Trade market

Italian fiction shines in difficult times

Trade publishing, i.e. fiction and non-fiction sold in physical and online bookstore, supermarkets and other point of sales, e-books and audiobooks, is the largest segment of Italian publishing and recorded a slight decline of 1% in 2024 compared to the previous year, with sales of €1,735 million in 2024. The market decline is due to the disappearance of demand incentives that were present in previous years, in particular funds for libraries and stricter rules about cultural vouchers for young people. The decline in 2024 became more pronounced in the first six months of 2025, with sales down 5% compared to the first six months of 2024, amounting to €641.7 million (digital sales excluded). In a difficult scenario once again due to the lack of policies to support demand, Italian fiction bucked the trend, growing by 3.5% in 2024 and 0.5% in the first six months of 2025 compared to the same period of the previous year (digital sales excluded). Trade sales are largely made up of printed books, accounting for 93% of the total market (2024 data). E-books account for 5.2% and audiobooks (subscriptions) 1.8%. The market is divided equally between large groups – Gruppo Feltrinelli, Gruppo Giunti, Gruppo editoriale Mauri Spagnol, Gruppo Mondadori – which hold a total share of 53.6%, and small and medium publishers, which account for 46.4%.

In terms of genres, one third of the market is made up of Italian and foreign fiction (34.0%), another quarter by general and specialized non-fiction (27.7%), 14.6% by manuals and self-help books, 16.7% by children's and young adult books, and 6% by comics (1% other).

Reading

A country moving at different speeds

Three out of four citizens in Italy say they read and today the country faces challenges that are partly similar and partly different from those faced by its European partners in promoting readership. Data on reading frequency and time spent reading show, as elsewhere, a decline in interest in books linked to the increasingly widespread use of smartphones. In terms of national peculiarities, there are still significant regional disparities between the North and South of the country.

There are 32.4 million readers (at least one book read, even partially, in the previous twelve months, including e-books and audiobooks, AIE Reading Observatory) in the 15-74 age group, 73% of the population. The slight decline in 2024 compared to 2023, equal to 1.4%, is due to a combination of factors: the decline in reading of printed books (29.3 million readers, 900,000 fewer than in 2023); the growth in e-book reading (14.2 million readers, 882,000 more than in 2023); the decline in audiobook listening (6.2 million users, 446,000 fewer than in 2023).

The average time spent reading per week, equal to 4 hours and 1 minute, is down by 17 minutes compared to the previous year. In particular, there has been a decline in readers who say they read more than five hours a week: they account for 13% in 2024, compared to 20% in 2023. The percentage of readers who do not read more than three books a year rose to 53% in 2024 (48% in 2023). The percentage of readers of seven or more books a year fell to 22% in 2024 (26% in 2023).

In terms of regional disparities, the national average (73%) is the result of 77% of readers in the Central and Northern regions and 62% in the Southern regions and Islands: the data show a strong correlation with the size of libraries' collections, the number of active bookshops, and the range of cultural events on offer.

READERS (AT LEAST ONE BOOK IN THE PREVIOUS YEAR)

2024
32.4
MILLION

AIE Reading Observatory
on the population 15-74 years old
In 2023 readers were 32.8 million.

A COUNTRY DIVIDED IN READERSHIP

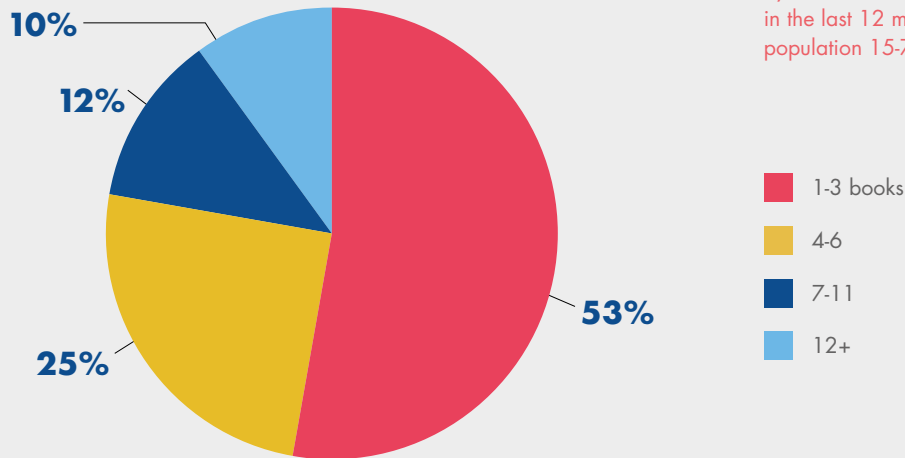
Percentage of readers among population 15-74 years old, at least one book per year

2024

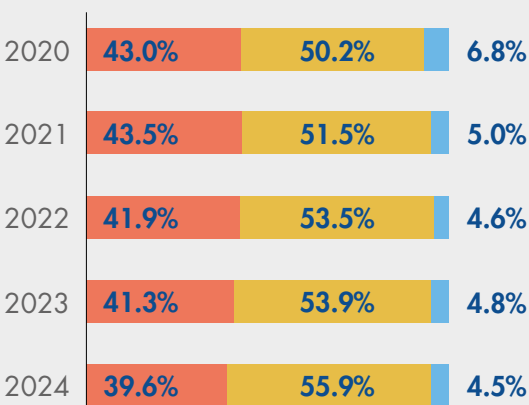


STRONG AND WEAK READERS

Percentage of readers by number of books read in the last 12 months, population 15-74 years old

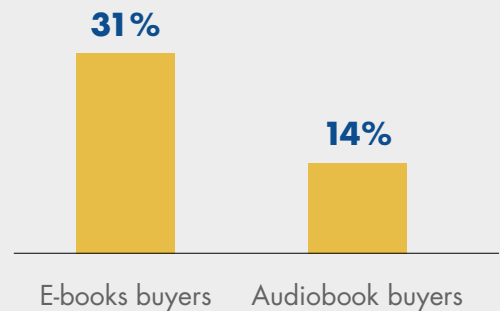


BOOK SALES CHANNELS



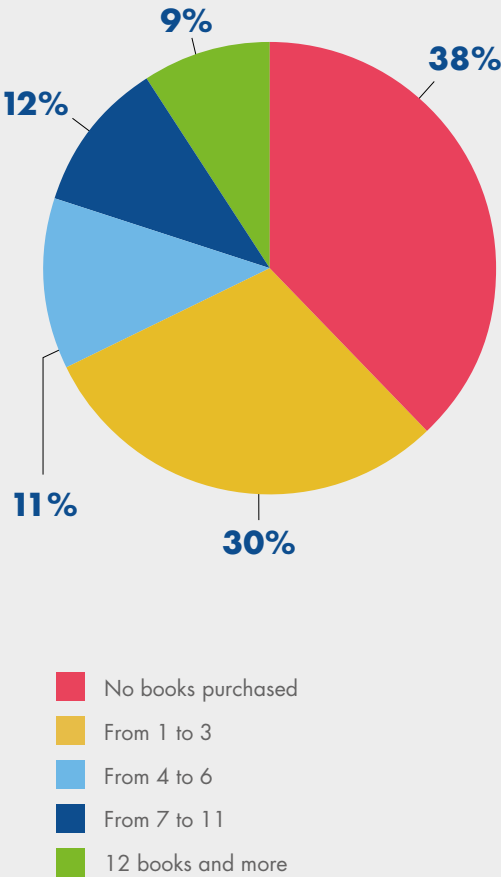
BUYERS OF DIGITAL BOOKS

Values in %. Population 15-74 years old



BUYERS OF PRINTED BOOKS BY NUMBER OF BOOKS PURCHASED

Values in %. Population 15-74 years old



Purchasing habits

Italians prefer bookshops to e-commerce

Chain and independent bookshops are the preferred purchasing channel for Italian readers: this is where the vast majority of printed books are bought each year, 55.9% in 2024. They are followed by online bookstores, which have seen a sharp rise since the pandemic (39.6% in 2024), and then supermarkets (4.5% in 2024).

Since 2021, bookstores have steadily regained ground compared to online sales. This phenomenon can also be linked to a renewed fascination with books as objects, particularly among young people, who are very attentive to the aesthetics and physicality of a book and want to experience it before buying it. In this regard, it is also worth noting that digital formats, e-books and audiobooks, have a market share in Italy of around 6-7%. The percentage of people who say they read only e-books or listen to audiobooks remains around 8-9%.

Sixty-two percent of 15-74 year olds say they bought at least one printed book for themselves or others in 2024. The average number of books purchased is 6.2, slightly down from 2023 (6.6) and more significantly down from 2022 (7.1). The Italian book market continues to be dominated by strong readers. Those who say they read more than 12 books a year generate 47% of copies sold: almost half of the market. This figure rises to 64% if we take into account readers buying at least seven books a year. At the other end of the scale, another 41% of readers – those who read no more than three books a year – generate just over 16% of copies purchased.

ON THE FAIR FLOOR

Unmissable events, places and things to do at Frankfurter Buchmesse 2025

Frankfurt, the place to connect

To help the readers of Giornale della Libreria with their planning, the book fair team has put together a list of highlights and selected events at this year's Frankfurter Buchmesse (15-19 October 2025). Find the entire book fair programme at www.buchmesse.de and in the Frankfurter Buchmesse app.

by **TEAM**
FRANKFURTER BUCHMESSE

THE FUTURE OF PUBLISHING

The Frankfurt Studio (Hall 4.0), the Frankfurt International Stage (Hall 5.1), the Innovation Stage (Hall 4.0), the Asia Stage (Hall 5.1) and the new Centre stage (Hall 4.1) will be the main places in Frankfurt to attend events revolving around the international book business. Here, CEOs and experts from international publishing will share insights and discuss trending topics.

Events not to miss
Executive Talk with Permindar Mann
Wednesday, 15 Oct., 11 am, Frankfurt Studio

7th Publishers and Distributors Meeting
Wednesday, 15 Oct., 11 am, Frankfurt International Stage

CEO Talk with Núria Cabuti and Chantal Restivo-Alessi
Wednesday, 15 Oct., 2 pm, Frankfurt International Stage

Executive Talk with Véronique Cardé
Thursday 16 October, 11.30 am, Frankfurt Studio

Act Now: Joining Forces for a Sustainable Future in Publishing
Thursday, 16 Oct., 2 pm, Frankfurt International Stage

Charleston Conference on Academic Publishing
Friday, 17 Oct., 11 am, Innovation Stage

**FRANKFURT CALLING:
THE FAIR'S CULTURAL-POLITICAL PROGRAMME**

Curated by the book fair in cooperation with partners like the UN, Amnesty International, IPA and PEN, the fair's cultural-political programme "Frankfurt Calling – Perspectives on Culture and Politics" brings together authors, cultural figures, journalists, politicians, scientists and activists to exchange perspectives – beyond national and cultural boundaries.

Events not to miss
Bookselling in Times of War
with Oleksii Erinchak and Mahmoud Muna
Wednesday, 15 Oct., 12 pm, Centre Stage

Language is a Human Right
Friday, 17 Oct., 10 am Centre Stage

Security Policy and Human Rights in Times of War and Crises
with Maria Ressa and Jens Stoltenberg
Friday, 17 Oct., 3 pm, Centre Stage

**THE FUTURE IS FEMALE:
BREAKING THE GLASS CEILING**

It is not just about representation, it is about reshaping systems and rethinking leadership. Numerous events aim to create awareness for diversity and the role of women in the book industry. They will explore how we can elevate and celebrate every contribution that powers the industry forward. In Hall 4.1 the PubliSheer network will set up a lounge with its own programme and mentoring sessions.

Events not to miss
The Invisible Women of Publishing
Panel discussion organised by PubliSheer
Wednesday, 15 Oct., 1 pm, Centre Stage

Focus on Women in Publishing
Event organised by the UN Women Regional Office for Europe and Central Asia
Wednesday, 15 Oct., 2 pm, Centre Stage

Beyond Diversity:
Entering the Belonging & Inclusion Era
organised by Elsevier, IPA and UN Publications
Wednesday, 15 Oct., 3 pm, Centre Stage



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GLOBAL MARKETS: AI, AUDIO AND RIGHTS AND LICENSING

On the Tuesday before the fair, international rights directors and managers will come together at the Frankfurt Rights Meeting. Keynote speaker will be Keith Bennie, Vice President, Public Programming at the Toronto International Film Festival. From Audible to Spotify: the who's who of the international audio-book market will share insights in the Frankfurt Studio on Wednesday and Thursday. And on all trade visitor days, the latest developments in regard to AI in publishing will be discussed on different stages.

Events not to miss

Frankfurt Rights Meeting: Keynote and Networking Reception

Tuesday, 14 Oct., 5 pm, Frankfurt Studio. Tickets: buchmesse.de/fm

Expanding the Way We Think About Audio

Wednesday, 15 Oct., 3 pm, Frankfurt Studio

The Hof live – AI and the Battle for Reality

Thursday, 16 Oct., 12 pm, Centre Stage

A BOOK IS A FILM IS A GAME

With partners such as the international film festivals in Berlin and Cannes, Frankfurter Buchmesse brings together players from the publishing, film, streaming and games industries. During the Book-to-Screen Day (17 October 2025), curated matchmaking sessions, guided tours and panel discussions will take place with participants from Netflix, CTL Scouting, Pragmatic Pictures, and others.

More information: buchmesse.de/en/book-to-screen

THE FUTURE OF CHILDREN'S PUBLISHING

This year's keynote speaker of the trade conference Children's Books in a Fragile World (Wednesday, 15 Oct., 4 pm, Centre Stage) will be the renowned children's books illustrator Axel Scheffler. Further speakers include the CEO of Macmillan Publishers, Jon Yaged, and Ukrainian children's books author and editor Kateryna Mikhalitsyna, who will talk about fighting illiteracy and book censoring. Free admission with a valid exhibitor or trade visitor ticket.

A SPOTLIGHT ON ASIAN BOOK MARKETS

The Philippines will present its literature and culture as the book fair's 2025 Guest of Honour. On the Asia Stage, the Frankfurt International Stage and at the Philippine national stand, the guest country as well as further regions from Asia will share insights into their book markets: from information on supply and demand in children's literature markets to the latest developments in comics and graphic novel markets.

Events not to miss

How Revolutionary is Academic Publishing in Asia?

Wednesday, 15 Oct., 4 pm, Asia Stage

From Bangkok to Manila – Exploring Southeast Asian Children's Book Markets

Thursday, 16 Oct., 4 pm, Asia Stage

Censorship in Asia with Patricia Evangelista and Roby Alampay

Friday, 17 Oct., 3 pm, Asia Stage

MANGAS AND COMICS ON THE RISE

Mangas, comics and webtoons have become a global phenomenon. This year, a webtoon section will be added to the Comics Business Centre in Hall 6.1. Here, and at the stands in Hall 3.0, professionals can find new titles and exchange ideas with industry players.

Events not to miss

Meet the Expert with Webtoon Ambassador Sébastien Célimon

Wednesday, 15 Oct., 11 am, Frankfurt Studio Pop-Up

Guided Comics Tour & Happy Hour for Trade Visitors

Wednesday, 15 Oct., 3 pm, start: Hall 3.0, end: Comics Business Centre

From Screen to Paper to Screen – Webtoon and IP Opportunities

Thursday, 16 Oct., 10 am, Frankfurt International Stage

CELEBRATING THE INDUSTRY: AWARDS

Frankfurt is the place for literary prizes and awards. Take the chance to meet icons of the industry and up and coming publishing talents at these events.

Events not to miss

Digital Publishing Award

Wednesday, 15 Oct., 3 pm, Frankfurt International Stage

Aficionado Award

Thursday, 16 Oct., 11 am, Frankfurt International Stage

Cesare de Michelis International Prize for Publishing

Thursday, 16 Oct., 4 pm, Centre Stage

HAPPY HOURS & NETWORKING: CONNECT WITH INTERNATIONAL EXPERTS

Frankfurt is all about meeting business contacts from all over the world. Extend your network at the numerous networking events on and off the fairgrounds!

Events not to miss

Frankfurter Buchmesse Kickoff Run

5K run meetup for exhibitors and trade visitors. Register via servicecenter@buchmesse.de Sunday, 12 Oct., 5 pm, in front of DFF – Deutsches Film Museum, Frankfurt

Simmering Issues with the Scholarly Kitchen Chefs

Micro-conference with networking breakfast for academic publishers Thursday, 16 Oct., 9 am, Innovation Stage

Reception by the Guest of Honour, the Philippines

Connect with colleagues over drinks and traditional Philippine delicacies Thursday, 16 Oct., 5 pm, Hall 5.1 A95

