

2022

Key Data of Publishing Industry in Taiwan I

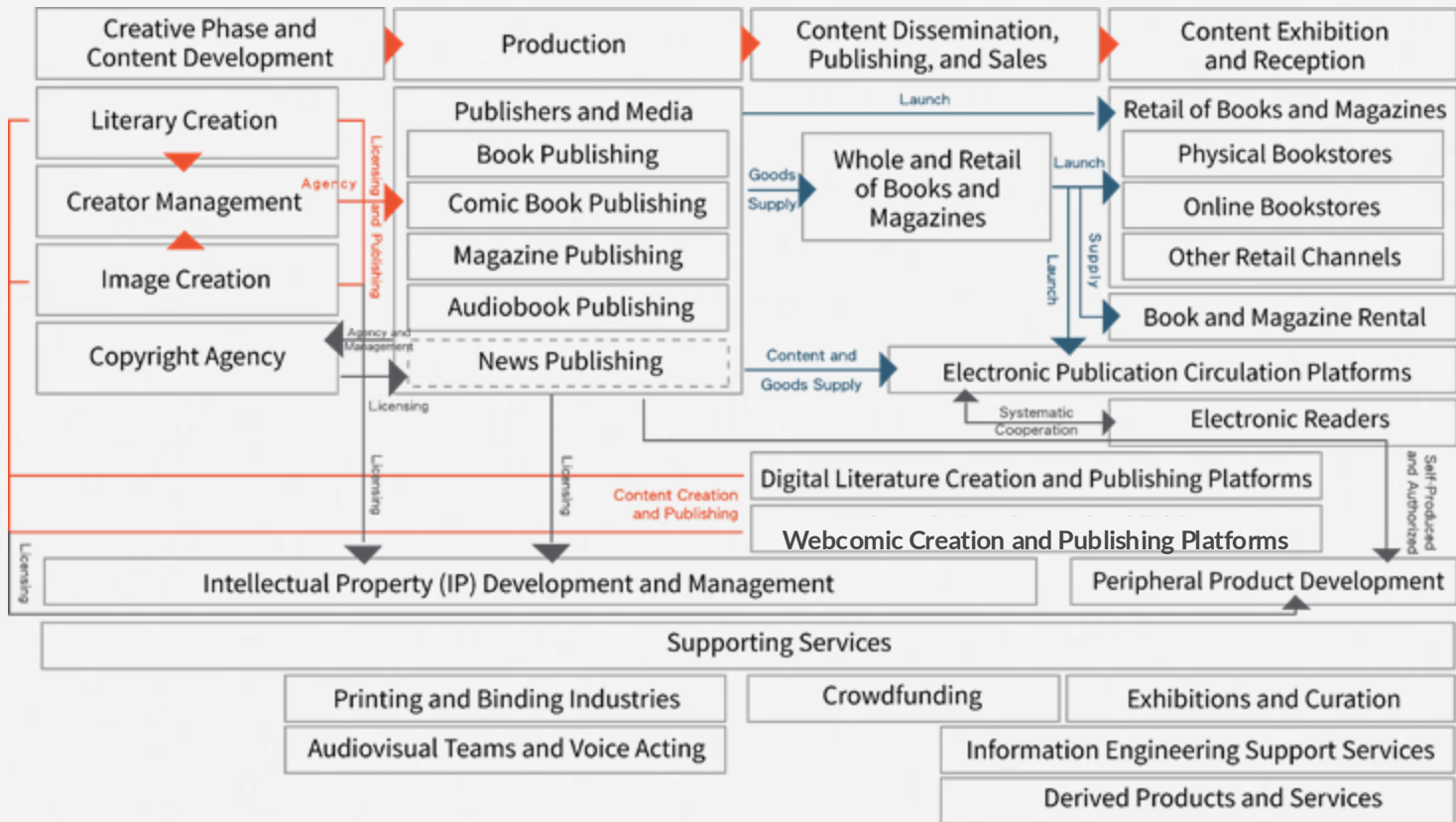
Book, Comic Book, and Magazine Publishing Industries



Key Trends in Book, Comic Book, and Magazine Publishing Industries in 2022

- In 2022, paperback book sales (excluding comic books) continued to show a long-term downward trend, declining 8.22% on the publishing end and 3.25% on the market end compared to the previous year.
- The number of ebooks on the shelves reached 16,569 in 2022, increasing steadily year by year, while the number of new paperback books decreased.
- The price of printed books was largely set at \$380 in 2021 and 2022, but since the consumer price index grew by 2.95% annually in 2022, the actual cost of books has not increased in tandem with the cost of goods; the price of ebooks was approximately 0.66 times the price of paper books.
- The industry actively developed new types of businesses, including training courses, licenses for derivative applications, databases, and digital platform operations. The book publishing industry has continued to grow, with overall revenue growth reaching 7% in 2022 and a nearly 6% increase in export value.
- Taiwanese book and comic book IPs (intellectual properties) grew to include various forms of licensed adaptations in 2022. In addition to dramas and films, "I Work for a Scam Company" was adapted into a board game titled "Killer, Liar, Designer," while "My Influencer Boyfriend" was adapted into a radio drama.

Publishing Industry Map

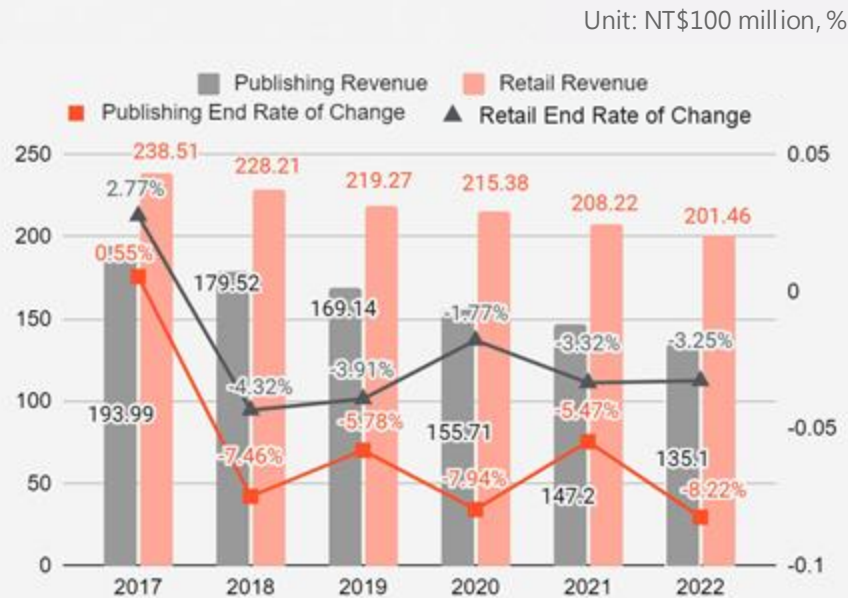


Source: Organized by this survey

Total Revenue from Printed Books (Excluding Comic Books) in 2022

- The overall revenue of both old and new books at the upstream publishing end (excluding comic books) in 2022 was NT\$13.51 billion, a decline of 8.22% from 2021 (NT\$14.72 billion).
- The revenue at the downstream retail end for both old and new books was NT\$20.146 billion, a decrease of 3.25% from 2021 (NT\$20.822 billion).

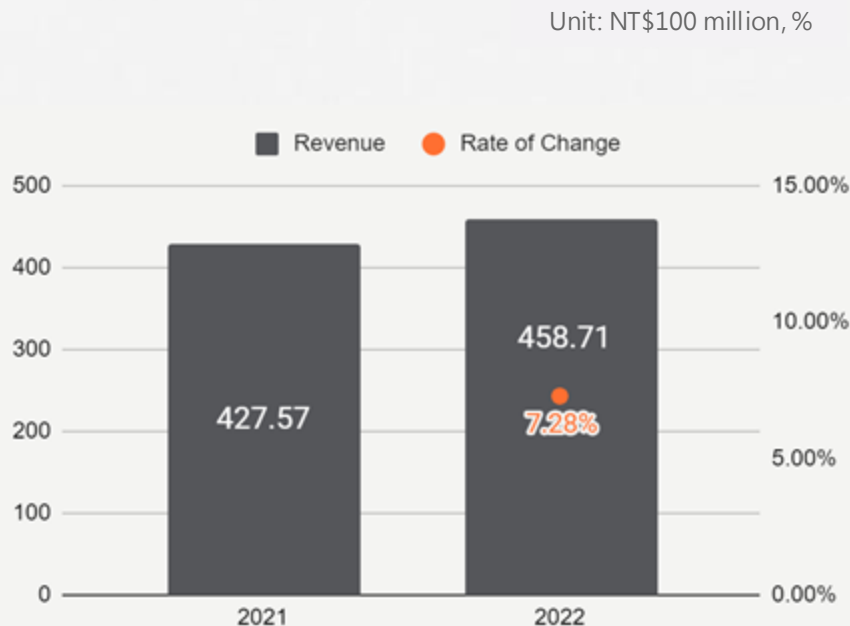
Source: Organized by this survey



Notes: This report presents rounded numbers, and adding individual data points may result in some minor discrepancies. However, this should not influence the interpretation of the general trend.

Total Revenue from Book and Comic Book Publishing Industry in 2022

- This survey includes revenues from both published and unpublished works.
- Many publishers publish both comic books and novels. We calculated the revenues from these publishers together because we cannot divide the revenues from books and comic books separately.
- Several magazine publishers' revenue was primarily generated by book publishing. We adjusted and categorized the revenue for 2021 and 2022 under book publishing revenue, considering the actual operating conditions of these businesses.

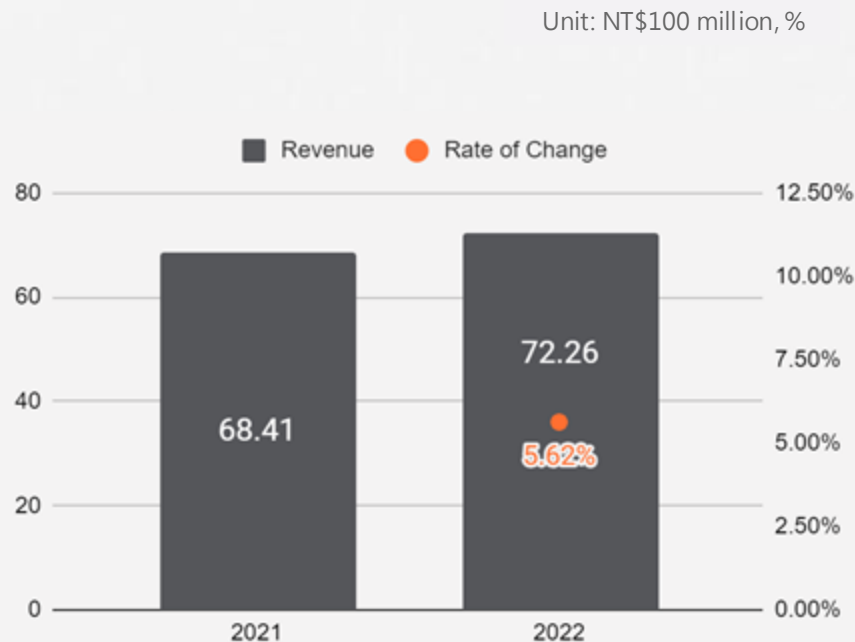


Source: Organized by this survey

Total Revenue from Magazine Publishing Industry in 2022

- This survey includes revenues from both published and unpublished works.
- Several magazine publishers' revenue was primarily generated by book publishing. We adjusted and categorized the revenue for 2021 and 2022 under book publishing revenue, considering the actual operating conditions of these businesses.

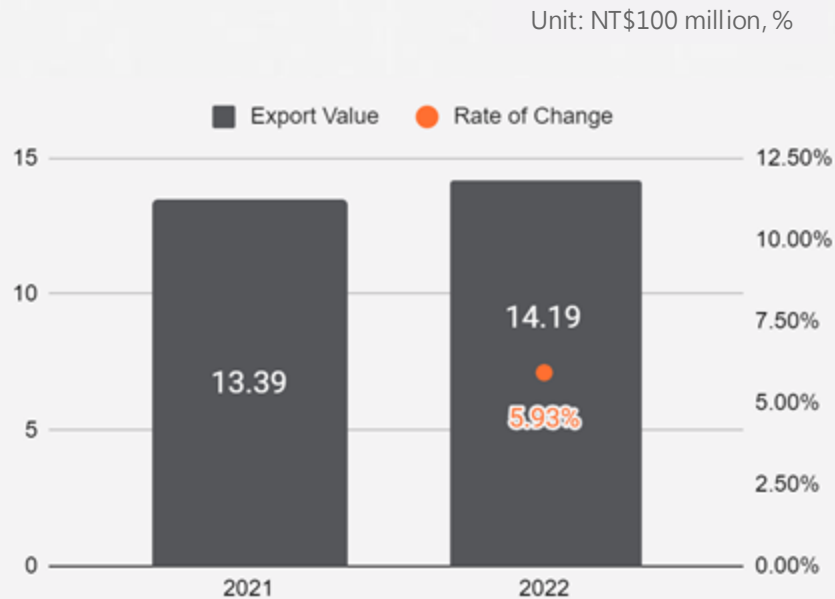
Source: Organized by this survey



Export Value of Book and Comic Book Publishing Industry in 2022

- Several magazine publishers' revenue was primarily generated by book publishing. We adjusted and categorized the revenue for 2021 and 2022 under book publishing revenue, considering the actual operating conditions of these businesses. The export value was also adjusted accordingly.

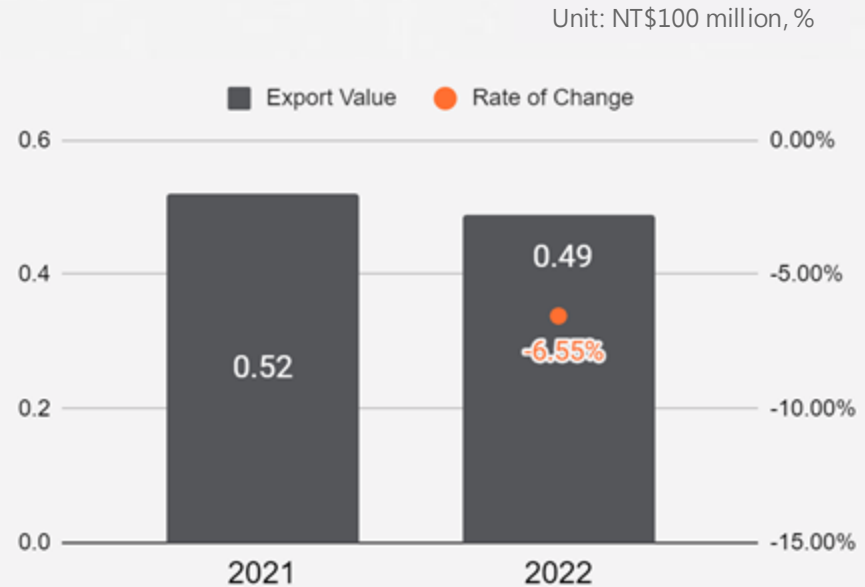
Source: Organized by this survey



Export Value of Magazine Publishing Industry in 2022

- Several magazine publishers had their revenue primarily generated from book publishing. We adjusted and categorized the revenue for 2021 and 2022 under book publishing revenue, taking into account the actual operating conditions of these businesses. The export value was also adjusted accordingly.

Source: Organized by this survey



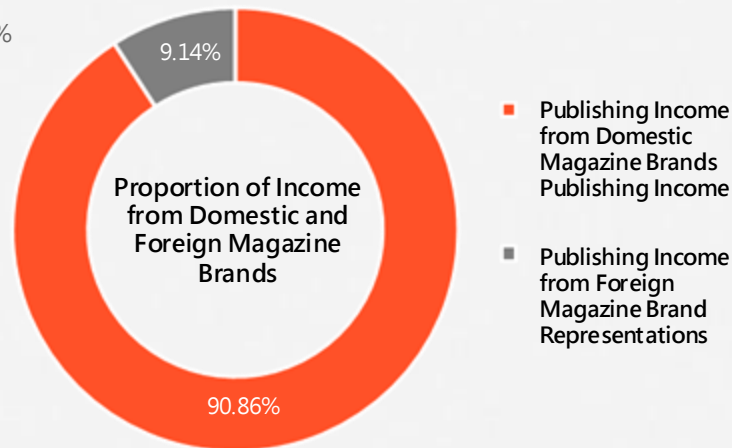
Revenue from Domestic and Foreign Magazine Brands Generated by Taiwan's Magazine Publishers in 2022

- In 2022, foreign magazine brand representations accounted for 9.14% of publishing income for magazine publishers, while publishing domestic magazine brands generated 90.86%.

Source: Organized by this survey

Proportion of Income from Domestic and Foreign Magazine Brands Generated by Taiwan's Magazine Publishers in 2022

Unit: %



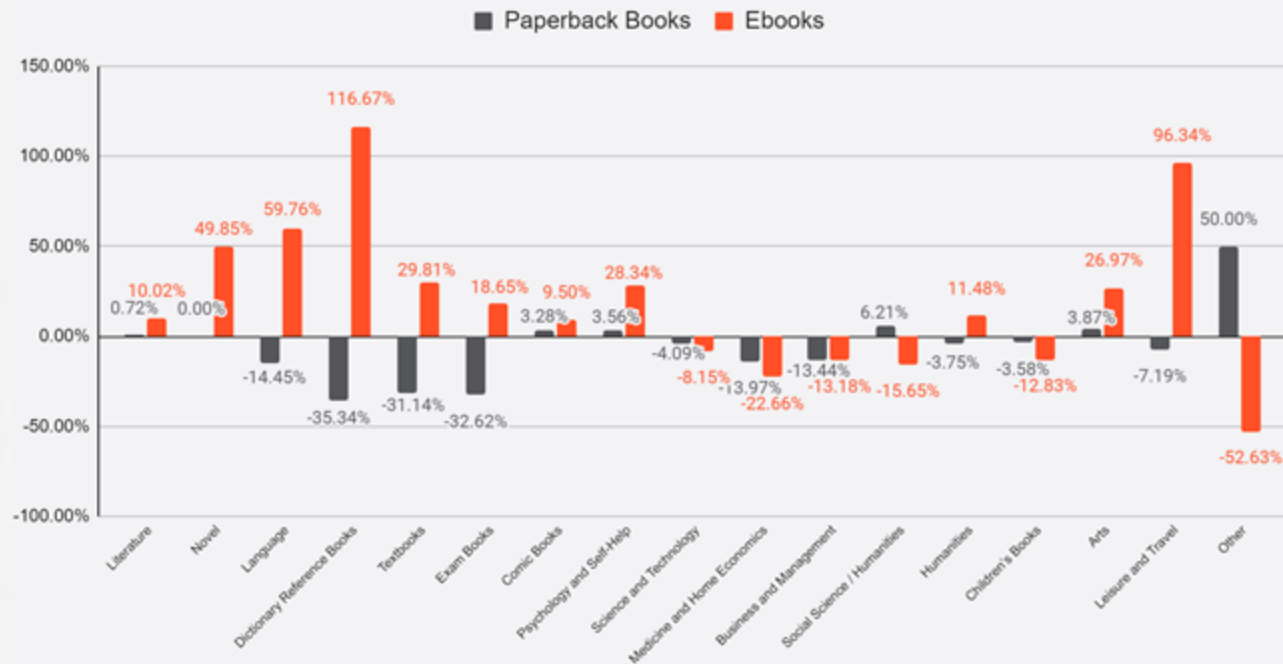
Note: N=35 for 2022.
Source: Organized by this survey.



Changes in Types of Publications by Category in 2022

Unit %

- The number of novels, dictionaries, textbooks, language learning, travel, and other publications in ebook form has grown significantly.
- The demand for books in the "Medicine and Home Economics," "Business and Management," and "Children's Books" categories declined following the easing of the pandemic.



Remarks: The various genres of publications listed in the National Central Library (NCL) were categorized by the book number applicants themselves. The books in the "Other" genre primarily consist of book catalogs, various reports, annual reports, and tables of contents.
 Source: The National Central Library's *Current Status and Trend Analysis of Taiwan's Book Publishing Industry in 2022*.

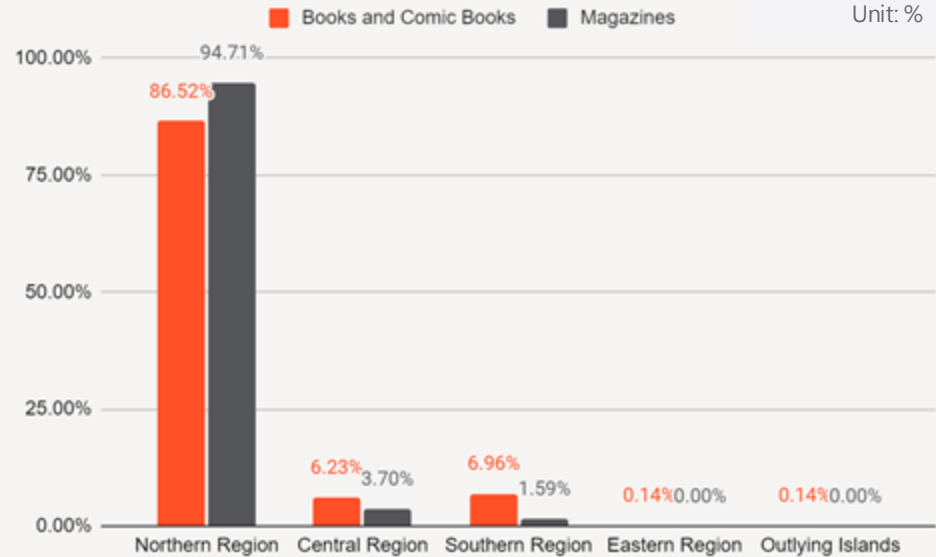


Most Book Publishers are Concentrated in the Northern Region

2021



2022



- The number of book, comic book, and magazine publishers with more than four publications in the year was 973, excluding non-franchised publishers such as government agencies, schools, and individuals, as well as sporadic additions to previous surveys, which amounted to 879.
- Magazine publishers were mainly online bookstores such as Books.com, Kingstone, San Min Bookstore, Eslite, and Momo Shop.

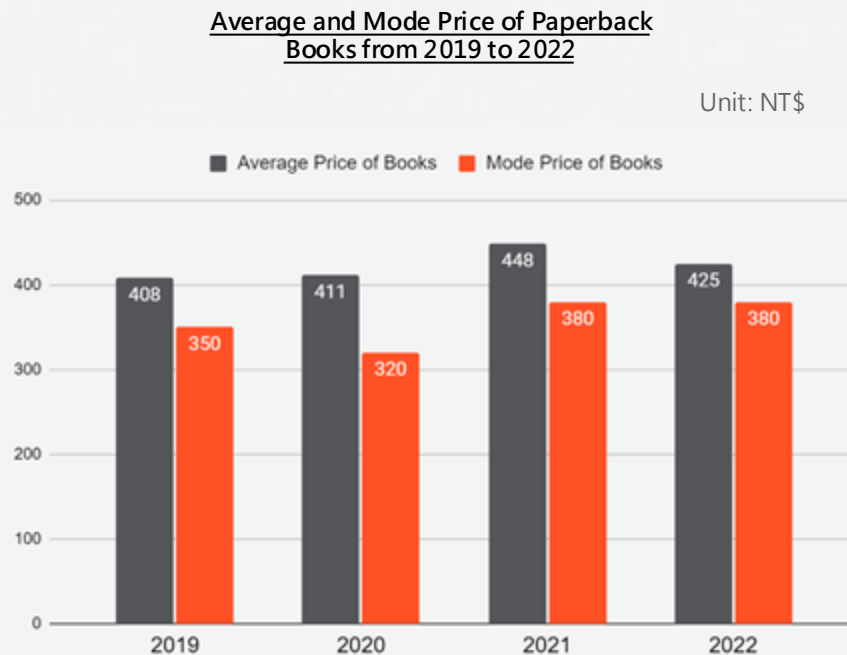
Source: Organized by this survey.



Upward Trend of Overall Pricing for Printed Books from 2019 to 2022

- Due to the combined effects of the pandemic, the increased cost of pulp shipping, rising printing expenses, and the rebate of channel discounts, average book pricing climbed in 2021 and 2022, mostly maintaining at NT\$380.
- Relative to the 2.95% annual increase in the Consumer Price Index (CPI) in 2022, the true cost of books has not risen in line with prices.

Source: Organized by this survey

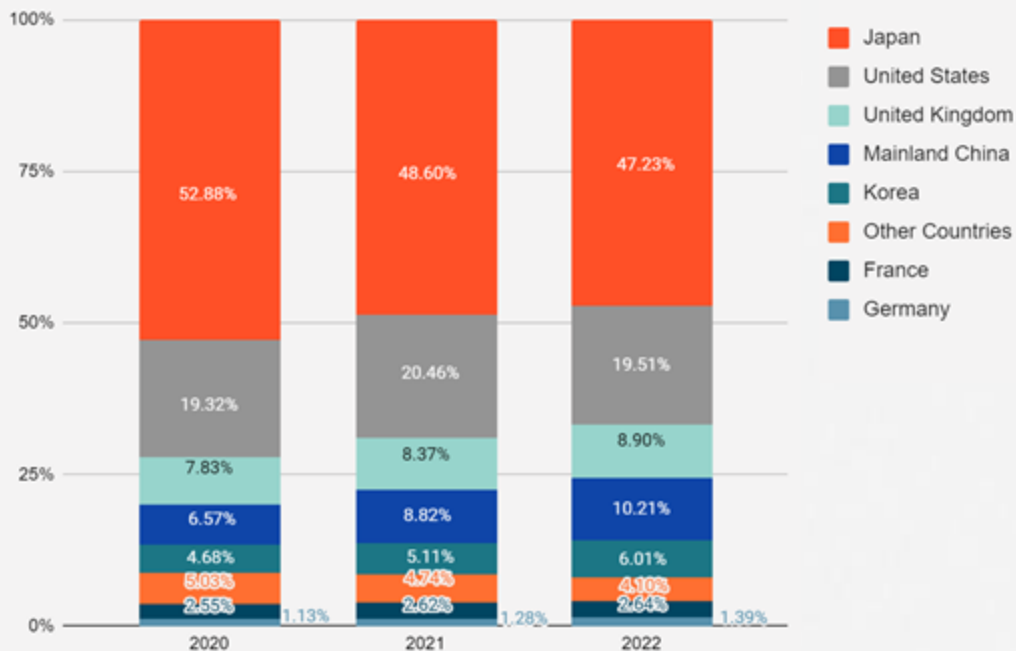


Distribution of Foreign (Translated) Books' Countries of Origin in 2022

- The translated works sold in Taiwan mainly originated from Japan.
- In terms of trade books, Japanese translations topped the list with a total of 4,519 titles, accounting for 47.23% of the total, followed by 1,867 titles from the U.S. (19.51%), and 977 titles from China (10.21%).

Note: The trade books presented in this chart did not include "exams/reference books" and "professional books/textbooks/ government publications" when compared to all books.
Source: Organized by this survey

Distribution of Source Countries of Foreign (Translated) Trade Books from 2020 to 2022



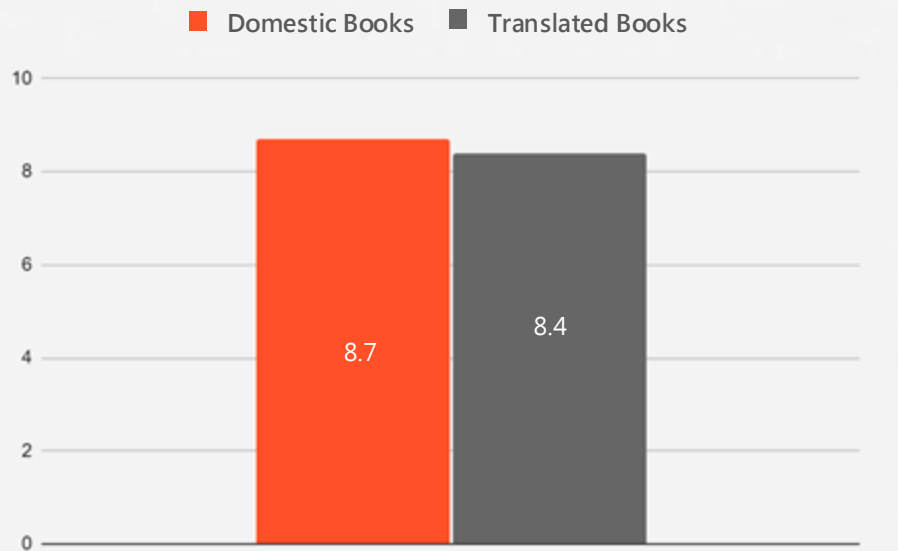
Discounts of Domestic Books and Translated Books in 2022

- Depending on the country of origin, the average discount for translated books in online bookstores was higher (16% off) than for local books (13% off).

Source: Organized by this survey

Comparison of Discounts on Printed Domestic Books and Translated Books from Main Distribution Channels

Unit: Discount Amount



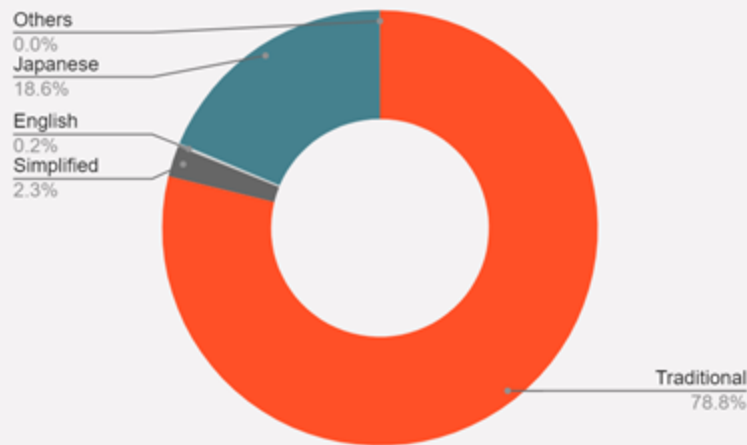
Note: The formula for calculating real selling price = price (NT\$) x discount amount x 0.1. The formula for calculating the percentage discount = 100 - (discount amount x 10). For example, if the discount amount is 8.4, then the percentage of discount will be 100 - (8.4 x 10) = 16% off.

Number of Ebooks Published on Digital Platforms in 2022

- The number of ebook titles that applied for an ISBN in 2022 was 15,984 (excluding cases where the same work was produced in different electronic formats and counted repeatedly).
- The number of ebooks (including new ebooks and old titles that got digitized) across all platforms in 2022 was 16,569 (+20.56%).
- In 2022, 78.83% of ebooks launched were in traditional Chinese, followed by 18.64% of ebooks in Japanese, mostly in the form of photo books.
- The average price was NT\$281 (NT\$413 for computer information books and NT\$162 for light novels), and the price of ebooks was about 0.66 times the price of paper books.
- Publishers have been eager to apply for ebook ISBNs due to sales tax exemptions and the rising culture of digital reading, such as the trend of substituting ebooks for outdated or out-of-print printed books.

Source: Organized by this survey.

Proportion of Languages of Published Ebooks in 2022



Notes:

- The ebooks listed on various platforms in 2022 were works published on major reading platforms during that year, which could include both new ebook titles and digitized old paperback titles.
- This survey presented the price as it appeared on the reading platforms at the time of administration, which excluded any membership perks or other discounts.



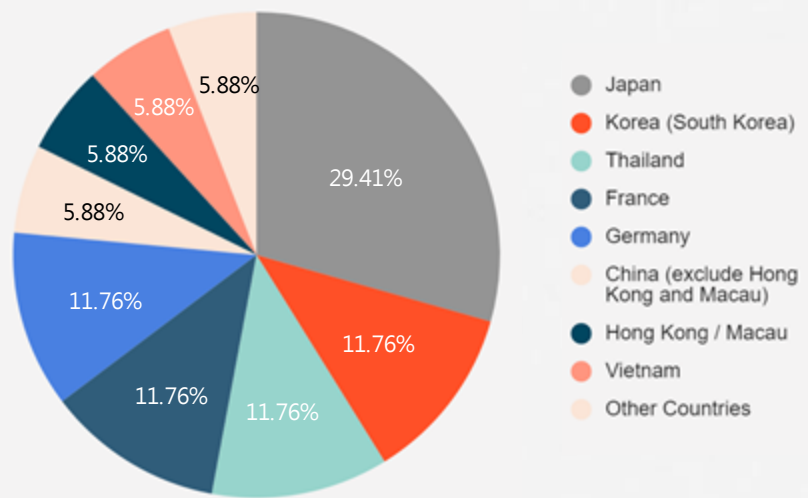
Sales of Comic Book Copyrights Overseas in 2022

- Due to their distinctive historical and cultural themes, Taiwanese comic books have drawn interest from overseas publishers to acquire their copyrights. In addition to neighboring East Asian markets (such as China, Hong Kong, Macau, Japan, and Korea), European markets (such as Germany and France), Southeast Asian markets (such as Vietnam and Thailand), and Middle Eastern countries such as Turkey have also shown interest.
- In terms of foreign income, Japan accounted for the highest proportion (at 29.41%), followed by France, Germany, Korea, and Thailand, all at 11.76%.

Source: Organized by this survey

Proportion of Copyright Income Countries for Taiwanese Comic Book Publishers in 2022

Unit: %



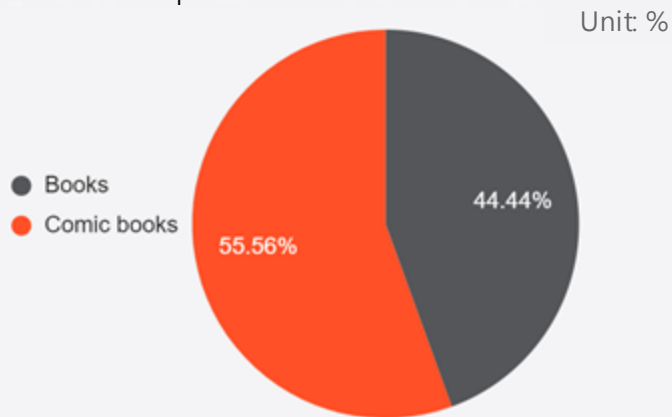
Notes:

- N=6 for 2022.
- Due to the small number of respondents in comic publishing, the above statistical results are for reference only and should not be interpreted decisively.
- Multiple selections were allowed.
- The survey method on the source of copyright revenue in 2022 was changed from the percentage of licensing revenue from each country to a checklist to make it easier for industry players to complete the questionnaire. This will allow for a more cautious interpretation when making year-over-year comparisons.



Taiwanese Book and Comic Book IPs Expanding into Various Content Formats

- Sales of Taiwanese book and comic book IP licenses for adaptations are primarily domestic, mostly in response to local content production needs.



Percentage of Taiwan's Book and Comic IP Adaptation Sources in 2022

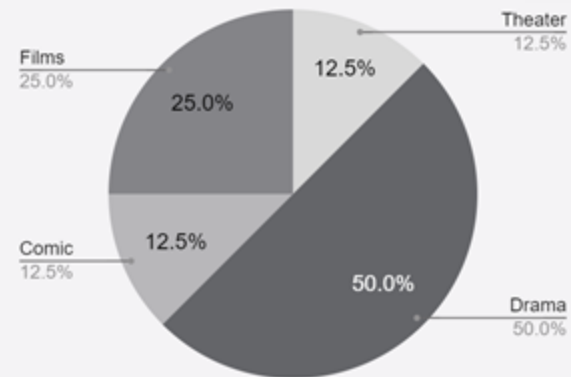
Notes:

- The years in this survey correspond to the years the work's IP was licensed and adapted into other content formats.
- The IP licensing of local books, comic books, and other content media in Taiwan was the basis for this survey; merchandise IP licensing was not included.
- Theater included stage plays, musicals, and Nanguan operas. Drama series included television shows and those aired on streaming platforms, among others.
- When an IP was adapted into multiple content formats, the count was repeated.

Source: Organized by this survey

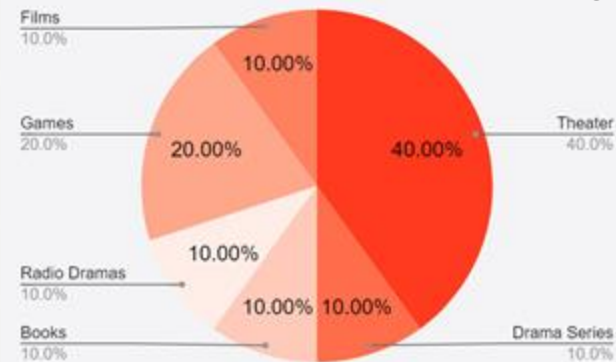
Percentage of Taiwan's **book** IP adaptations to other content forms in 2022

Unit: %



Percentage of Taiwan's **comic book** IP adaptations to other content forms in 2022

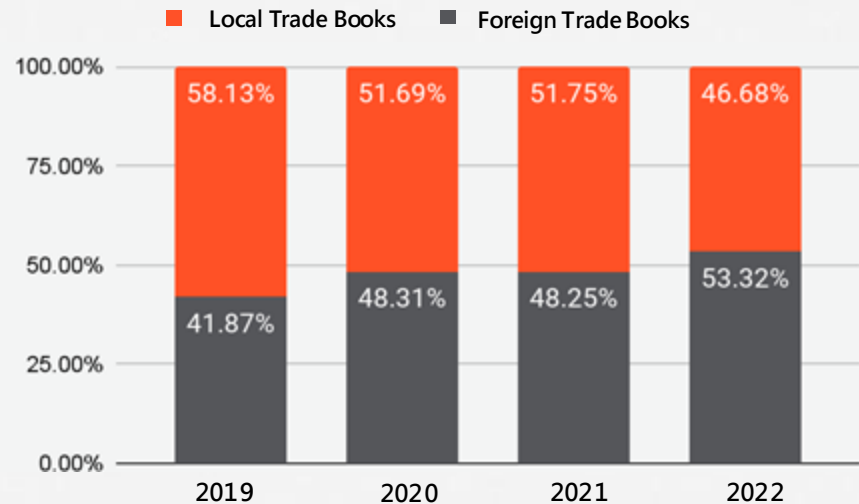
Unit: %



Percentages of Domestic and Foreign (Translated) Books in 2022

- Out of the 17,943 titles of trade books (excluding exam books) available on the five major online bookstores, 8,375 (46.68%) were written by local authors, while 9,568 (53.32%) were written by foreign authors.
- In terms of the total number of translated books sold, trade books accounted for the highest proportion. This indicates that book-selling channels relied on translated works to attract customers and generate revenue.
- The proportion of translated books varies little among the major online channels, with only Momo Shop having a higher proportion of translated books, at nearly 60%.

Percentages of Domestic and Foreign (Translated) Trade Books Published from 2019 to 2022



Notes:

- The chart shows the percentage of paperback trade books and did not include "exams/reference books," as well as "professional books/textbooks/ government publications."
- The five major online bookstores are: Books.com, Eslite, Kingstone, Momo Shop and San Min Bookstore.

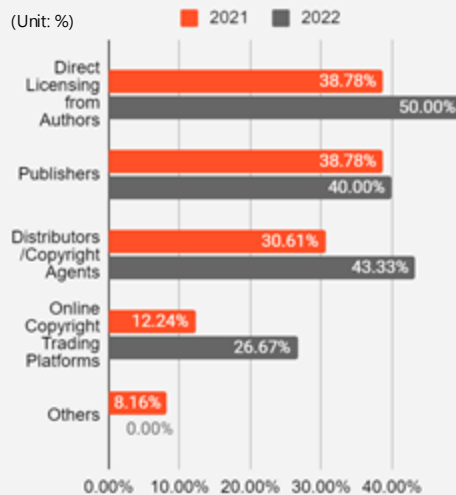
Source: Organized by this survey



Taiwan's Domestic and Foreign Magazine Copyright Licensing and Acquisition Channels in 2022

- In terms of external licensing of domestic magazines, “direct licensing from authors” (50.00%) accounted for the highest percentage of all licensing channels, followed by “distributors/copyright agents” (43.33%), “publishers” (40.00%), and “online copyright trading platforms” (26.67%). The main channel for copyright acquisition of foreign magazine titles was through “distributors/copyright agents” (65.00%), followed by “publishers” (55.00%) and “direct licensing from authors” (50.00%).

External Licensing of Domestic Magazine Titles



Copyright Acquisition of Foreign Magazine Title



Domestic and Foreign Magazine Copyright Licensing and Acquisition Channels in Taiwan from 2021 to 2022

Notes:

- External licensing of domestic magazines: N=49 for 2021 and N=30 for 2022.
- Acquisition of foreign magazine copyright: N=32 for 2021 and N=20 for 2022.

Source: Organized by this survey

The Scope of this Survey

- This survey included statistics from book publishing organizations and businesses that have applied for four or more sets of ISBN numbers, excluding government agencies, schools, and other non-specialized publishing organizations and individuals.
- This survey included statistics from comic book publishing industry' organizations and businesses that have applied for four or more sets of ISBN numbers. Many book publishers also publish comics, and the scope of comic book publishing overlaps with that of book publishing.
- This survey included statistics from specialized magazine publishing organizations and businesses.

