



## Belgium: Book Publishing.

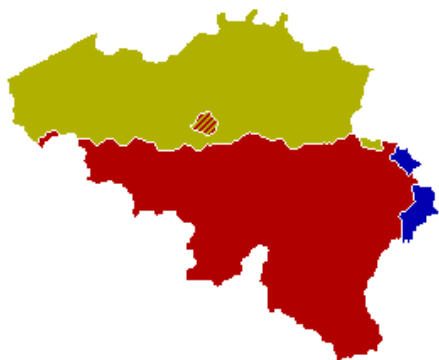
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### Summary

Belgium is a highly industrialized, highly literate country at the heart of Europe. As such, it poses both potential challenges and rewards to foreign companies wishing to take part in its publishing market. This report aims to look at some of the recent trends in the Belgian publishing industry as well as some of the best prospects for U.S. exporters.

With publishing, as with many other Belgian industries, the linguistic divide is a complicating aspect. Belgium is federalized into three regions (Brussels, Flanders and Wallonia). The communities are responsible for education and culture. Each of them has an act on public libraries and is independent for library policy and development. All right issues such as public lending right, copyright and author right are federal<sup>1</sup>.

Around 60% percent of the country's population speaks Dutch. French is the second-most spoken language in Belgium, the official language of the French Community and the Walloon Region, and the dominant language in the Brussels-Capital region (an estimated 85-90% of the inhabitants of Brussels speak French natively). In total, French is spoken by around 40% of the population.



**Red: French**  
**Yellow: Flemish (Dutch)**  
**Hatching: Bilingual Brussels Region**

<sup>1</sup> "World Report: Libraries and Intellectual Freedom." IFLA/FAIFE. 2000.  
<<http://www.ifla.org/faife/report/belgium.htm>>

**Book Publishing Indicators:**

The below table gives data on the book publishing industry.

	Titles produced per million population	Titles in print per million population	National turnover (in million USD)	Turnover as % of GDP
Belgium	680	16505	457,8	0.14

“ Strengthening the Competitiveness of the EU Publishing Sector.” Commission of the European Communities: Commission Staff Working Paper. 7 Oct 2005.

The Belgian Book market, like the book market in other highly literate industrialized countries, is mature but not stagnant. It has experienced normal productivity growth around 0.9% in recent years. It is the second most open publishing market in the EU after Ireland, importing and exporting large amounts of printed materials. The book market, contrary to many alarmist predictions following the increasing use of the internet, has continued to see normal growth in all but a very few niche sectors.

**. Annual productivity growth in publishing over the period 1979-2001**

<b>Country</b>	<b>1979-90</b>	<b>1990-95</b>	<b>1995-01</b>
Belgium	4	6.9	0.9
Denmark	-0.1	-0.8	1
Germany	1.2	2.6	2.3
Greece	1.5	0.7	4.5
Spain	6.1	-1	0.9
France	1.7	0.7	0.7
Ireland	7	4.7	-1.5
Italy	0.9	4.4	0.8
Luxembourg	4	-0.1	-3.2
Netherlands	2.7	3.5	2.7
Austria	5.4	0.8	6.7
Portugal	0	2.2	3.5
Finland	3.8	3.9	2.5
Sweden	0.5	9.8	2.1
United Kingdom	2.4	1.7	0.4
<b>Total EU-15</b>	<b>2.3</b>	<b>2</b>	<b>1.9</b>
US	-1.4	-2.9	-0.5

Source: EU Productivity and competitiveness: An industry perspective, M. O’Mahony and B. Van Ark, 2003

Although rather low on European ratings of publishing sales when viewed in the light of gross sales, Belgium has the second highest rate of sales of books per capita in Europe

(147 Euros), second only to Denmark (154 Euros).<sup>2</sup> This shows that when viewed holistically, the Belgian book market is, relatively speaking, quite robust. Belgians tend to place a high value on education and to view books as a physical manifestation of this value. Belgium is a net exporter of printed materials in general, but a net importer of books, with a 0.96 on the specialization index (with 1 being equal exports and imports).<sup>3</sup> In recent years, domestic production has continued to fall, with more books being imported, especially from Belgium's European neighbors.

### **Economic Figures for Belgian publishing sector:**

The following table shows the general health of the publishing sector.

	Production value (in million dollars)	Value added at factor cost (in million dollars)	Number of enterprises	Number of employees
Belgium	3,481.6	1,006.0	1,119	9,786

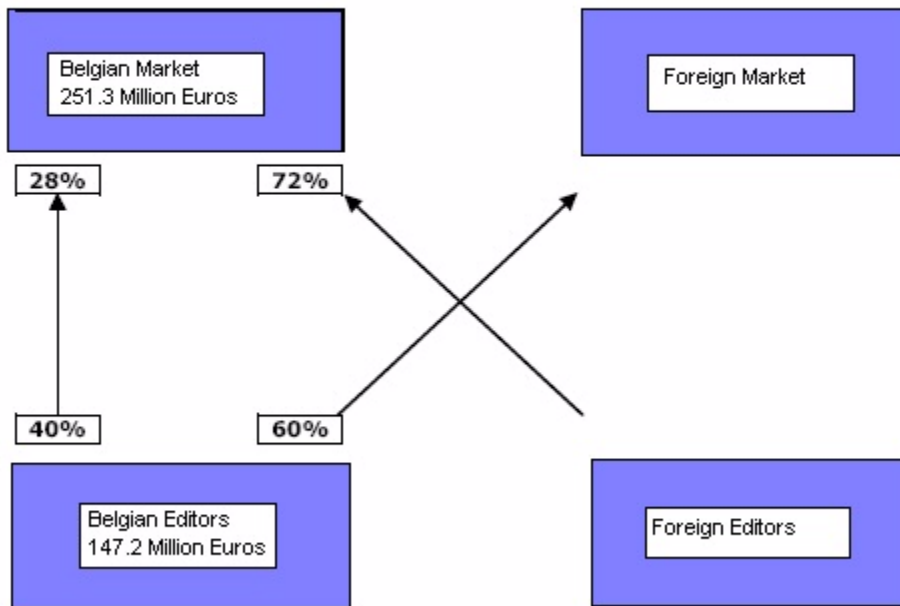
The aforementioned linguistic divide heavily influences this market, with the Francophone and Dutch-speaking communities importing many titles from their linguistic "sister" countries. To illustrate this point, the diagram below demonstrates the flow of books between France and Belgium, with about 72% of books in French being imported from France as opposed to only 28% being produced domestically.

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<sup>2</sup> IPA, national Booksellers' Associations

<sup>3</sup> "Strengthening the Competitiveness of the EU Publishing Sector." Commission of the European Communities: Commission Staff Working Paper. 7 Oct 2005.

## The French-Speaking Book Publishing Sector in Belgium, 2005



Source: LENTIC/T2i and ADEB, Free translation

### **Market Brief**

The strongest local competition in Belgium is mainly among illustrated media, or “Bande Dessinée”, such as comic books and children’s literature. A study by the University of Liège says the following about the book market in Belgium:

“General literature, that is to say fiction, essays, and paperbacks, representing one-third of the market, is unequivocally in the lead. Next comes illustrated media, which constitutes 14% of sales. This is a very singular situation, since this number is significantly smaller in other countries. Children’s literature is an editorial genre that also exhibits a high degree of dynamism. For the last five years, we can observe an annual rate of growth of 8%. Conversely, sales of scientific books have experienced much less favorable growth.”<sup>4</sup> Illustrated media is something of a cultural phenomenon in Belgium, which created such well-known heroes as Tintin, Lucky Luke, and the Smurfs. Accordingly, growth in this particular area is healthier than ever. Although

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<sup>4</sup> “Le marché de l’édition belge: bilan chiffré” Université de Liège - Presse et Communication. Mis en ligne le 4 novembre 2004. Free Translation.

Belgium produces many illustrated comic books domestically, some forms that are different from local comics, such as Japanese “manga” and graphic novels, have proven very successful. In recent years, there has been some decline in niche markets such as scientific texts, encyclopedias, and dictionaries due to electronic sources.

### **English Book Market**

American companies looking to export books to Belgium will be interested to know that estimates place English literacy in Belgium at roughly 25% of the population. This is especially true in the Brussels Capital region, where the presence of the EU Institutions has caused English to become the *de facto* official language in many public dealings. As such, English language books have become a popular method for many educated Belgians to practice and maintain their English skills. Despite the abundance of English language books in major retail outlets (see contacts section), they tend to be quite expensive. If U.S. companies can find a way to bypass the considerable retail markup, they might be able to attain rather attractive margins. See the list of key contacts for the largest book retailers in Belgium and whether or not they deal in English books.

### **Current Market trends**

Another possible advantage of American firms in accessing the publishing market in Belgium is the domestic firm’s difficulty in finding capital to finance new ventures and innovation. The problem with foreign firms breaking into the market, however, is the near market hegemony of a few larger outfits. More direct forms of sales such as book clubs or wholesalers have in recent years been abandoned in favor of large retailers, making it more difficult for small booksellers or previously unknown e-traders and retail websites to enter the market. The Internet, apart from certain specialized sectors such as scientific and reference books, has not yet taken much market share from the large retail outlets. In fact, many well-established retailers have been able to capture much of the Internet sales volume by creating user-friendly websites. Belgian consumers tend to be somewhat reticent with regards to e-commerce in general as an alternative to a well-known retailer with a good track record. As a percentage of revenue, Belgian companies made 2.6% through Internet sales in 2006, compared to the European average of 3% (with leaders Denmark, Norway, and Ireland at 11%, 6%, and 9% respectively).

Accordingly, some best export prospects may be English language novels, atypical illustrated media, travel guides, and books whose main substance cannot be duplicated in electronic sources, such as photography collections or coffee table books.

### **Regulatory Environment**

The regulatory environment with regards to cross-border sales of books in Belgium is extremely favorable. As mentioned earlier, Belgium has the second most open publishing industry in the EU. First of all, Belgium is one of the very few Western

European countries that has chosen not to implement an RPM (retail price maintenance), or government-mandated price setting on books. Although the domestic publishing industry in Belgium has long been lobbying to implement fixed prices, they have until now not succeeded. This may make it easier for foreign publishers to offer their products in Belgium at very competitive prices. This is especially true with Belgium having opted to make books free of import duties and with France “having fixed prices...where wholesalers are marking up prices on books, which has led to a lot of complaints from customers that the bookshops have had to deal with.”<sup>5</sup> There is a 6% VAT (value added tax) on books as compared to 21% VAT on most other products.<sup>6</sup> This has been important for the publishing industry, which tends to have highly elastic demand as a non-essential good.

For those who are familiar with the challenges of cross-border book sales in other European countries, Belgium should not pose a huge challenge. Besides being the second most open publishing market in Europe, it has also rejected protectionary measures for domestic booksellers in favor of increasing international trade in printed goods. The main barrier to trade, as expounded previously, is the consumers’ increasing reliance on large-scale retailers such as FNAC and Filigranes. Distribution, rather than the importation itself, seems to pose the most problems.

## **Conclusion**

It would be fair to say that Belgium poses a few unique challenges for those wishing to export to its publishing sector, but it is also a healthy market with strong international impulses. The regulatory environment in this sector is one of the most open in Europe, and Belgium is an overall importer of books. Despite strong competition from Belgium’s other neighbors, the enthusiasm in Belgium for English language books may provide a good opportunity for U.S. market entry.

## **Key Contacts**

ADEB

Association des Editeurs belges

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Fax: +32-2/216 71 31

Managing Director : Bernard GÉRARD - [adeb@adeb.be](mailto:adeb@adeb.be)

VUV

(Vlaamse Uitgevers Vereniging)

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<sup>5</sup> Stockmann, Doris. “Free or Fixed Prices on Books—Patterns of Book Pricing in Europe.” *The Public*. Vol. 11 (2004), pg. 53

<sup>6</sup> “The Book Trade in Europe” European Booksellers Federation (EBF)

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Foire du Livre de Bruxelles—Brussels Book Fair  
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B - 1050 Bruxelles  
Tel : + 32 (0) 2 290 44 31  
Fax : + 32 (0) 2 290 44 34  
[info@foiredulivredebruxelles.be](mailto:info@foiredulivredebruxelles.be)  
[www.foiredulivredebruxelles.be](http://www.foiredulivredebruxelles.be)

This previous year, the 35<sup>th</sup> edition of this popular book fair attracted 66,000 visitors.

Sterling Books  
Wolvengracht/Fossé aux Loups 38  
B-1000 Brussels  
Tel/FAX 02/223.62.23  
<http://www.sterlingbooks.be>  
Cheapest for English books in Brussels.

Waterstones  
Boulevard A. Max, 71  
B-1000 Brussels  
tel. 02 / 219 27 08  
Largest Anglophone bookshop in Brussels.

FNAC-Bruxelles  
City 2  
Rue Neuve  
B-1000 Bruxelles  
Tél. : 02/275 11 11  
Fax : 02/275 21 00  
[www.fnac.be](http://www.fnac.be)

This is a modern-style media store, selling video games, DVDs, and electronics in addition to books. However, it has quite a large English language section.

Filigranes  
Avenue des Arts 38-40  
B-1040 Bruxelles  
Tel: 02/511 90 15  
[www.filigranes.be](http://www.filigranes.be)

A large retailer, but it does not deal with many English texts

### **For More Information**

The U.S. Commercial Service in Brussels, Belgium; can be contacted via e-mail at [brigitteDestexhe@mail.doc.gov](mailto:brigitteDestexhe@mail.doc.gov); Phone: 32/2/508-2454; Fax: 32/2/512-3644; or visit our website: [www.buyusa.gov/belgium](http://www.buyusa.gov/belgium).

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