



The Publishing Market in Turkey

Summary:

The publishing sector in Turkey has grown 300 percent over the last decade reaching a sales volume of 533 million dollars in 2006. There are market opportunities for U.S. publishers in the imported books segment, which is around 60 million dollars. In addition, many international book titles are translated into Turkish, providing royalty payments to international publishers. It should be pointed out that piracy is the major problem of the Turkish publishing sector; pirated book sales are estimated to reach to 40 percent of the total market size.

Market Overview

The Turkish publishing market is steadily developing thanks to the growth in population, lengthening of compulsory primary education to 8 years, increase in GNP and a variety of books becoming more available with the improved distribution network. Between 1996-2006 there has been a 300 percent increase in the number of published books with around 23,900 different new titles being published in 2006.

The total book sales are estimated at \$533.5 million as of 2006. The market can be divided as educational books (textbooks, supplementary books), cultural publications (novels, hobby books etc), academic books (university publications etc) and imported books (foreign language books). All the market segments are experiencing growth. Below chart shows the market breakdown of the publishing sector in Turkey.

Market Segment	Sales (million \$)	Share of the market (%)
Educational Books	251	47
Textbooks	151	28
Supplementary Books	100	19
Cultural Publications	150	28
Academic Books	75	14
Imported Books	57.5	11
TOTAL	533.5	100

Source: Turkish Publishers Association

The state primary and high school textbooks are distributed free of charge by the Ministry of Education. The Ministry of Education purchases the school books through tenders and price is the major decision criteria. Imported English Language Teaching (ELT) books are also used for English classes at schools and the total market sales figure stands at about \$26.5 million. The private schools purchase their own educational books and many of these include imported titles. All textbooks require the Ministry of Education approval to be included as part of any school program.

In the academic books segment 80% of the books are by local authors and 20% are translations from international titles. Average total book cost per university student per year is about \$130.

Cultural books average retail price is \$10. Many of the best-selling books are translations of international bestseller books. First edition of cultural books is usually printed as 3,000 copies; an international bestseller like Harry Potter can go up to 50,000 copies in its first edition.

Imported books include ELT books, other foreign language training books, academic textbooks, reference books and international bestsellers.

There are currently 1,800 registered publishers, however only 500 of them publish a minimum of 10 books per year. It is estimated that there are about 10,000 bookstores all across Turkey, however large bookstores where bulk of the books are distributed to number about 1,300 and are located in the large cities. The number of book distributors in Turkey is estimated as around 70.

Current Market Trends

Large Turkish holding companies and banks are investing in the publishing business, which supports the professional distribution, marketing and promotion of the books.

In terms of sales points, large bookstore chains such as D&R, Remzi Kitabevi, Kabalci Kitabevi are becoming increasingly popular mostly located at primary retail spots of large cities. Almost all books sold in the street stands are pirated books.

Main Competitors

The main competitors in the imported books segment are listed as below:

Dunya Publishing represents 15 foreign publishing houses including Cambridge University Press, Cideb, Houghton Mifflin, Klett Verlag, Cle International and Hachette. It is the leading supplier of bestseller books. Dunya also has its own distributing network across Turkey.

Dogan Books is part of the largest media group in Turkey, Dogan Media. The group also owns the D&R book and music store chain. Its estimate total market share is 5%.

Zed Yayincilik imports books on a variety of subjects including archeology, philosophy, art, planting and children's books. Some of the publishers it represents in Turkey include Konemann, Thames Hudson, Rockport, Abrams.

Kardes Kitap deals in ELT books, academic and professional books, IT books. Kardes Kitap is the exclusive distributor for McGraw-Hill/Contemporary ELT, Heinle/Thomson, New-Editions, Ladybird and imports books from Penguin, DK (Dorling Kindersley), Scholastic and Wordsworth.

Some foreign publishing houses opt to run their own operations in Turkey, such as Macmillan Education, Oxford University Press and Pearson Education Publishing that owns Longman, Scott Foresman and Prentice Hall publishing houses.

Market Barriers

Piracy is a major problem of the publishing sector in Turkey. Turkish Publishers Association estimates that the market size would be 40 percent larger, if the piracy of books can be controlled.

According to Law No. 5846 on Intellectual and Artistic Works-revised in 2004, piracy is considered as a public offense and not a complaint-based crime that enables lawsuits to be opened directly by prosecutors.

There are large penalties, including prison terms for those who publish, sell or distribute pirated books. The law however is not enforced allowing pirated book sales to increase every year. Turkey is among the countries under the Priority Watch List of the Office of the U.S. Trade Representative (USTR) since 1992.

It can be expected that with the accession process to the EU continuing, the piracy problem will become less of a barrier in the future.

Trade Associations

1- Turkish Publishers Association (Turkiye Yayıncılar Birliği)

Turkish Publishers Association with a total 255 members aims to stop pirate publishing, to lift any barriers on freedom of expression and publishing, to contribute to the development of culture, literature and art, to support social and scientific endeavors and to encourage book reading.

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2- Association of Press and Publishing Turkey (Turkiye Basın Yayın Birliği)

Association of Press and Publishing Turkey was established in 1991. Its main objectives are to further the development of the publishing sector, to find solutions to professional problems of their members, to cooperate with the relevant ministries and all official/non-governmental institutions.

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3- Literary and Scientific Works Owners Business Union (EDISAM- Edebiyat ve İlim Eserleri Sahipleri Meslek Birliği)

In accordance with the Law No. 5846 on Intellectual and Artistic Works, EDISAM was founded to protect the rights of its members that create and distribute books and periodicals.

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Upcoming Trade Events:

**27th Istanbul Book Fair
November 1-9 2008, Istanbul**

Subject: This is the largest and only international book fair in Turkey, organized in cooperation with the Turkish Publishers Association. Over 500 publishers participate in the fair and 35 countries are represented. A number of cultural and literary events take place in conjunction with the fair visited by 350,000 people.

Venue: Tüyap Beylikdüzü Exhibition and Congress Center, Istanbul-Turkey

Organizer: TUYAP Exhibition Group
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