

PUBLISHING SECTORS IN ARGENTINA, COLOMBIA, MEXICO, PERU

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EXECUTIVE SUMMARY

This report was commissioned by the British Council's Literature Programme with the intention of obtaining an overview of the publishing industry in four specific countries in Latin America: Argentina, Colombia, Mexico and Peru. The final aim is to count with sound information to evaluate the possibility of launching a new chapter of the International Publishing Fellowship in Latin America. The survey was carried out between December 2020 and March 2021. Methodologically, it involved accessing, selecting and analyzing statistical information and specialized publications, as well as a series of in-depth conversations with key industry professionals of all four countries, representing a wide array of publishing areas, business models and company sizes. Due to limitations in mobility imposed by COVID-19, all interviews were held via Zoom or similar platforms.

The survey describes the publishing system of the region as an interconnected ecosystem, while paying attention to each country's particular traits. It gathers relevant information about key areas such as independent publishing houses, bookstores, bookfairs & festivals, government agencies and professional associations. It includes a section to comment on past experiences of international publishing fellowships, as well as up-to-date information on COVID-19 effects on the industry, with the variety of problems and opportunities it set into motion.

KEY FINDINGS

All four countries share common traits, coloured differently according to each one's historical development and current socio-economic situation. Reliable figures are not always at hand, but there seems to be an agreement among experienced professionals that Mexico is the biggest publishing market, followed by Argentina and Colombia, and with Peru at a considerable distance.

Latin America is characterized by a well-developed though unstable publishing system. Common problems affecting all countries are:

- Economic instability
- Social inequality
- Inadequate coordination among key players
- A fragile distribution system

At the same time, the region's system is extremely vital and resilient. This is due to:

- The healthy coexistence of differently sized publishing houses
- Very good and diverse catalogues
- Highly qualified professionals in most areas of book production
- Creativity and ingenuity in adapting to a fluid environment

This permanently changing scenario is, as well, good breeding ground for new opportunities. Some areas that have been mapped out in the report are:

- **Audience building:** Although literacy levels are high in all surveyed countries, access to books is far from universal and much can still be done in this regard. From reading-habit encouragement to updated marketing and social-media strategies, any experience in the area of audience-building will be welcome. New dynamics are developing around native languages, still unrelated to the publishing-industry but interesting to watch.

- **Technology:** COVID-19 has hit the region hard because it compounded an already strong economic crisis. But it also brought about an acceleration of technological change in areas like e-commerce, e-publishing and the use of technological tools for daily work. This allows for the imagination of new and creative solutions for the region's main problems, like historical difficulties to work in a more co-ordinated manner.

- **Global vision:** One of the region's main problem is its vastness and fragmentation. Professionals leveraging a broader view and international networks may discover interesting cross-regional opportunities. Latin American publishers still need to be included more widely in the global publishing conversation; doing this jointly with colleagues from the UK could present an outstanding opportunity.

Building a strong, up-to-date network of professionals from the UK and Latin America can be highly promising. If sustained in time and supported by a range of recommendations as those commented on throughout the report, such an encounter can lead to the development of new ideas and concrete actions.

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INTRODUCTION

This report was commissioned by the British Council's Literature Programme at the end of 2020, with the intention of obtaining an overall view of four specific countries in Latin America: Argentina, Colombia, Mexico and Peru. In order to evaluate the best way to continue with its newly launched IPF - International Publishing Fellowship (itself a continuation of the very successful IYPE – International Young Publishing Entrepreneurs), the Council looks to refresh organizational knowledge of these markets. The survey's result is expected to describe the region's publishing system's general traits, as well as to identify opportunities and challenges for publishers working on a more international way, specifically with the UK. The focus is set on trade publishing, excluding educational and technical books.

As for the report's object, the four chosen countries are of course separated entities, but they're also part of a closely knitted region with many common aspects. Therefore, this report will alternate its scope, going from a wide-angle view of the whole subcontinent (sometimes even reaching out to include Spain and the Spanish-speaking US) to a more narrow take on each country's particular situation. It is certainly not an easy task to summarize the complexities of the publishing and literature sectors in such an extended area and in four nations with their very own historical convolutions. The intention, thus, is to offer a broad, general overview; an outlook clear enough to identify basic information as well as important trends that may be relevant for international programmes.

Methodologically, four main strategies were used: a thorough analysis of available statistics, the review of a host of specialized publications, brief e-mail questionnaires to different professionals of interest and in-depth interviews with almost thirty key-players distributed evenly in the four countries and abroad. Regarding the first point, it has to be said that data is very scarce and unreliable in almost the whole region (the institutions responsible for statistical information tend to be each country's Book Chambers and, very erratically, government areas like the Ministries of Culture). Even when there's available information, each country measures its industry with different parameters, thus making it very difficult to undertake meaningful comparisons. In this sense, the most important source is CERLALC (Centro Regional para el Fomento del Libro en América y el Caribe), an UNESCO sponsored inter-government agency dedicated to the promotion of book-related policies in Latin America. CERLALC centralizes information of all the region's countries' ISBN agencies and elaborates the most complete and long-ranging statistics in the

sector¹. The problem is that sometimes the information tends to be too general and standardized, allowing for some major confusions and misunderstandings. In this report we've balanced the different sources and qualified them according to the extensive collective experience of the interviewed professionals, trying to reach conclusions that may not be exact in their final figures but do conform best to real, everyday experience in the field.

It's also important to note that commercial figures in Latin America tend to be modest compared to those in Europe or the US, therefore any minor change may produce important effects in general figures; this explains the sizable variability of many statistics, which we've also tried to qualify wherever needed. Thus, the extended conversations with industry experts of all kinds –heads of international corporations as well as young publishers just starting a new venture, translators as well as academics researching the industry, booksellers as well as specialized journalists– turned out to be extremely insightful and helpful. They were very generous in sharing their experience, thoughts, worries and projections for the future. Of course, there are contradictions, and official versions tend to be very different to those given by private players, which again diverge when the speaker belongs to a large house or a small start-up, but all together they draw a very complete and balanced scene. This report is the result of trying to gather, ponder and systematize most of these views.

¹ All figures published until now by CERLALC, except their COVID-Report (CERLALC 2020), draw on ISBN statistics prior to the irruption of the pandemic. Sadly, it is quite certain that today's indicators will be considerably worse.

AN OVERVIEW OF THE REGION

All four countries we're focusing on are part of Latin America, a complex construct that encompasses both the geographical areas known as Central and South America and those nations with at least one national language with Latin roots (Spanish, Portuguese² and, to a minimal extent, French). They're all young countries if compared to Europe (having just celebrated their 200 years of independence) and are marked by a history of political turmoil, upheavals and dictatorships well up to the end of the 20th century. Economies have been far from stable, beset mostly by recurring cycles of inflation and devaluations which keep stalling growth. Today, all four countries can be considered stable, open-market democracies, albeit marked by social as well as economic tensions and disparities.

In this context, the publishing industry faces many challenges. One of them is the complex relationship with Spain: inequality is both cause and effect of a dynamic in which the European country produces and sells more books than all twenty-one Latin American countries combined. Although the Spanish industry was hit hard by the 2008 worldwide crisis, it is on a path of recovery, while countries like Argentina have travelled the opposite path. If you compare the figures of one of the biggest publishing companies for the 2011-2020 period for both countries, you can see a reduction of 11% in revenues for the Spanish market and approximately 40% for Argentina³.

According to CERLALC, Spain is "the organizing centre of Spanish-language publishing, followed distantly by Mexico and Argentina" (CERLALC 2019). However, Latin America has a strong and lively cultural life; along the last century, the two mentioned countries have developed a rich tradition of publishing and translating. Historically, their capital cities can be considered the centres of both intellectual and publishing activities in the region. Today, Spanish publishing houses may buy the most striking (and expensive) best-sellers, but the many companies based in Mexico City and Buenos Aires take care of translating a much more diverse range of books and authors. During the last ten years, this scene has been broadened and enriched by new publishing houses that emerged in Bogotá and Santiago de Chile too. The competition between Spanish and

² Portuguese is spoken mainly in Brazil. The country has been intentionally left out of this report, since it's not part of the study's focus. The Brazilian market is huge and moves with dynamics very different to those of its Spanish-speaking neighbor, hence comparisons are complex. But statistics change heavily when Brazilian figures are included.

³ This information was confirmed in conversation with executives of two other international publishing houses. In their informed opinion, Latin America's publishing industry is undergoing its fifth consecutive year of crisis, with a decline both in printed books and in turnover. On top, the strong devaluations of local currencies have reduced the markets even further. In Spain, the market contracted dramatically after 2008, thus there's still 11% of decline to report although figures had been rising steadily since 2014.

American publishing centres and the fact that Spanish-speaking readers are distributed throughout such a vast territory is also cause for an ongoing debate about language and the relative importance of the different variants spoken in every country. The overall feeling is that because of its economic power, Spain gets to impose the peninsular version all over the world while refusing to accept, for example, translations done in Latin America (even worse, there are Latin American writers who adopt “Spanish from Spain” because they hope that by doing so they’ll be able to make it in Spain).

The historical entanglements of the relationship between Spain and the countries with which it shares the language is big enough to merit a separate report and will come up again along this report whenever necessary. For now, let’s focus on the four selected countries. It’s not easy to make comparisons without falling into a superficial competition⁴. In a ranking pertaining to the publishing industry, the most efficient way to place each country would be according to their turnover. Sadly, as stated in the Introduction, there are no reliable official numbers for this indicator. However, there is an agreement between seasoned industry professionals that Mexico is the strongest market, followed closely by Argentina and Colombia, with Peru occupying a small segment similar to that of Uruguay; Chile is growing and may be worth to keep an eye on⁵. As for average print runs, although smaller runs are a worldwide trend, the effect is amplified in the region due to economic instability: they have declined as much as 42% since 2014. Argentina is the most affected country, while Mexico and Colombia remained relatively stable. As for reprints, another variable considered to measure an industry's stability, Argentina and Peru have shown high volatility while Mexico and Colombia are a bit better off, with 10% of their yearly published titles being reprints (CERLALC 2019).

Regarding the ecosystem of publishing houses, the region is made up mainly of small to medium-sized companies. Proof of this is the fact that 70% of all houses acquired less than 10 ISBN numbers each in 2018 and only 3,5% acquired 100 or more (CERLALC 2019). By far the two biggest players in the region are the internationally based Penguin Random House and the Spanish giant Grupo Planeta. Both have been buying iconic local companies throughout Latin America and signing up most of the successful authors; together they account for roughly half of the subcontinent’s sales. While PRH has offices in all four reviewed countries, Planeta runs its business in Peru from its seat in Colombia. However, as it will be shown later, this doesn't mean

⁴ There are of course no “better” or “worse” countries, especially if one considers the complex historical conditions that shaped each nation. The classifications used in this report are simplifications that serve to a general, first-approach understanding.

⁵ The same international publisher mentioned above sells 10% of their books in Mexico, 7% in Argentina, 4% in Colombia and 1,5% in Peru.

that there's no life outside these companies, on the contrary. The overall landscape is that of two very big publishing houses surrounded by a circle of medium-sized and smaller businesses, completed with a host of one-man shops and free-lance workers related to the industry. Again, data is very unreliable in this area, though experience seems to support the idea that Mexico has the largest work force, while Colombia and Argentina manage to do the same work with less people.

Another reality shared by all countries is a very high geographical concentration. Again, though available data may be confusing, all interviewed professionals coincide that 80% or more of business is done in the main urban areas (meaning production as well as sales). Local-level governments like provinces and municipalities have almost no programs fostering local publishing industries. This is particularly worrying if you take into account the fact that most Latin American countries occupy very extended territories: it means that vast areas are left unattended, without bookstores and without the possibility for its inhabitants to take part in the cultural life provided by a good bookstore's or publishing house's environment.

A last issue that influences the whole region is the role of the U.S. and its own Spanish-speaking market. Since the dramatic growth of Latinx population in that country, much has been talked about potentials for the publishing industry and many companies developed strategies to enter U.S. retailers. Reality has shown otherwise: immigrants want to assimilate quickly and second generations choose to learn and read in English, so the market stays rather small and specific. One blatant case of failure was the attempt to organize a Spanish-speaking book fair in Los Angeles, by no less than the organizers of the extremely successful FIL Guadalajara. "Even they failed, that says it all", commented a senior publisher with extensive international experience.

So, the big question remains: what is the potential for growth in Latin America? On one hand, there seems to be a huge number of potential readers unified by a common language and a developed albeit somehow unstable publishing system. On the other, the difficulties caused by economic ups & downs and the vastness of the territory –divided into more than twenty-one different countries, each with its own currency, regulations and habits– can't be overlooked. The irruption of technology-driven tools as well as the extreme disruption caused by COVID-19 in the social fabric –in these countries just like everywhere else– may offer new challenges and opportunities.

INTRODUCTION TO THE FOUR SELECTED COUNTRIES

ARGENTINA

With its first publishing experiences going back to the work of Jesuit priests in the 17th Century, Argentina has a rich and solid tradition that was strengthened by one of the most advanced education systems in the continent and the immigration of European intellectuals during the Second World War. A succession of military dictatorships and economic crisis in the second half of the 20th Century put a break on that development; nevertheless, in the last 20 years a variety of very good independent publishing houses have injected energy and diversity to the whole Spanish-speaking literary scene. It has been said that Buenos Aires is the city with more bookstores per capita around the globe and that you can go to one book presentation every day year-round. The Buenos Aires Book Fair, the FILBA Literature Festival, high standard universities, a strong library system, a never-ending variety of writing workshops, alternative fairs and events revolving around books turn the country –or at least its capital– into a beacon in the literary landscape, despite the many difficulties that politics and economy pose to those venturing into the publishing business.

The last years have been very hard for Argentina, with constant depreciation of its currency (from December 2016 to December 2019, the Argentinean peso suffered a devaluation of 650%). There are no exact figures regarding overall turnover (the only official number, published by the Ministry of Culture, includes the value of all goods and services related to the sector, thus reaching the unrealistically high amount of over U\$ 9000 million). Seasoned professionals estimate that the actual annual turnover of the commercial sector must be closer to U\$ 400 million. As for distribution, the country is also highly centralized, with roughly 70% of sales done in Buenos Aires, followed by two other big cities, Córdoba and Rosario. According to CERLALC, in 2018 the six biggest publishers printed more than half of all the books (CERLALC 2019)

COLOMBIA

A very different development characterizes Colombia, whose first publishers appeared at the end of the 19th century and slowly grew from there on. In the 1990's, a strategic decision was made to strengthen the printing industry; strong investments in machinery resulted in a graphic boom, with books being sent there to be printed and then reexported to all over the subcontinent. At the same time, the country suffered the dumping of the Spanish industry: leftover books were shipped from Europe at derisory prices, strongly affecting both the quantity and quality of the Colombian reading market⁶. At the same time, this circumstance, accompanied by the emergence of outstanding Latin American illustrators and designers, proved to be an opportunity for a specialty: children's books. Colombia has since established itself as provider of beautifully manufactured album books.

Furthermore, for the last 20 years Colombia has implemented solid, wide-reaching policies for the promotion of reading habits. As almost an exception to the rule in the region, the work between different areas of government and the private sector (represented by the Book Chamber) is well coordinated and has been going on for a relatively long time. However, as one publisher summarized, "we're moving in the right direction, but we started too late, this is too slow". Hindered by problems common to the region like centralization, unsatisfactory distribution systems and low median income, most commercial publishing houses and the production line itself are fragile. However, Bogotá is home to some beautiful bookstores, the annual bookfair FILBO has been growing strongly, many regional fairs and festivals are being supported by the state and the library system keeps expanding. Independent publishers have been sprouting and working together in creative ways, and academic publishing has grown steadily over the last years, making it the most relevant player of its kind in the region.

MEXICO

Mexico is arguably the most complex of the four researched countries, with a far-reaching history, a privileged geopolitical location, the biggest economy and the largest population. As one publisher put it, "Mexico is a continent in itself". The publishing industry is not only defined by issues of sheer size, but by another particular trait, the extended participation of the state. Historically, government entities have been in charge of both commissioning and buying books,

⁶ Although this dumping happened all over the Spanish-speaking market, other countries were better off thanks to import regulations or sheer luck with the competitive prices caused by local devaluation.

as well as heavily subsidizing all kind of activities related to the area. This has had very positive results, like the existence of one of the few publishing houses big enough to be present all-over Latin America and compete with the international giants (FCE - Fondo de Cultura Económica), but also generated a very distorted market where it's difficult to assess the real market situation. CONALITEG, the office responsible for schoolbook purchases, administers a huge budget and has made the schoolbook business very profitable.

However, since the national government changed in 2018, the situation is undergoing drastic change. In an untidy, makeshift way, the state has closed many programs and reduced financial support, generating uncertainty all over the industry, from individual writers to large endeavours like FCE or UNAM, the public university. A transition is going on in private-public articulation and it's not clear where it's heading to. Even so, Mexico's industry remains powerful. According to an experienced Argentinean publisher, it is "the country with the most potential", in part due to the large number of young readers, the relatively accessible price of books and the energizing presence of the Guadalajara Book Fair. Even though centralization is strong (like Argentina, around 70% of sales are done in the country's capital, followed by the cities of Guadalajara and Monterrey) and informality and book piracy are difficult to eradicate, the turnover is of almost 600 million U.S. dollars (CANIEM 2019). More important, the quality of Mexico's writers, translators and academics, the creativity of its independent publishers and the rich international contacts produced every year in Guadalajara ensure that the country keeps its foremost post in the Spanish-speaking industry.

PERU

Peru showed very positive figures before the COVID-19 pandemic and is usually included among the bigger countries of Latin America. When consulted, most publishing executives are weary of counting it as part of their prime markets; they explain that growth was measured against a low base and, as one of them put it, "it hasn't been structural, it's volatile and tied to very specific commodities". The main problem they see in Peru's publishing industry is an entrenched informality and high incidence of pirate publishing.

It is only a decade ago that international publishing houses decided to participate in the Peruvian market (Santillana, now part of PRH, opened a branch in 2008). Some of them –like PRH or Grupo Océano– organized local offices, while others –like Grupo Planeta– keep managing their business from abroad. At first, they only imported books from sister houses, but slowly they

started to publish local material. All of them work with very small local teams. During that same period, Crisol, a local bookstore chain, experienced an important growth, taking up almost 50% of the market and opening retail stores even outside of Lima, giving sales a boost. This would explain the remarkable raise in revenues between 2003 y 2018 which, according to official information, reached as much as 80% (INEI). In this period, some independent publishers started to turn up, in turn pushing the visibility of new writers. On the state's side, the Ministry of Culture has launched a series of plans and programs which have still a long way to go. As the responsible officer says, "Peru is a small scene, with room to grow". Population in Peru is diverse, well connected to the Andean region, with close ties to Chile and an amazing diversity of native languages still very much in use.

THE INDUSTRY: WHO'S WHO

INDEPENDENT PUBLISHING HOUSES

The general structure of the publishing ecosystem has already been mentioned in the introduction to the region. The behaviour of big companies is quite similar to that in other areas of the world, with concentration and consolidation of the production chain, comparable catalogues and transnational authors. More interesting for this report is a description of independent publishers, small houses that have burst into the scene in the last twenty years. Personal interests and passions went hand in hand with a business purpose, the quest for professionalization with a good dose of romantic investment. As a result, as CERLALC explains it very well, even though circumstances are far from ideal, new ventures keep turning up while, of course, many others have to shut down. This sort of “natural selection” leaves standing a number of small but lively companies that contribute to the diversity of authors, take up the complicated task of translating and develop creative solutions for the region’s specific characteristics.

Argentina’s and Mexico’s independents are the oldest and most solid ones. Houses like De la flor in Buenos Aires and Era in Mexico City were founded in the ‘60s and played important cultural roles, especially during politically turbulent times. At the turn of the century, when entry costs to the industry had lowered noticeably, many new, creative and well-thought-out companies joined in. They didn’t only choose their contents carefully, they also invested in good design, better production quality, international presence and new ways of reaching the public. They also tried to find new ways to work in cooperation, but that’s not always easy and the result is that every featured country has several different groups and associations. Though more unstable, they are often a culturally more engaging alternative to the traditional chambers. Some examples of these efforts are:

Argentina: The first association was EDINAR, but companies join in a more informal way whenever they feel it's necessary. Different groups got together to rent an exhibition stand at the Buenos Aires Book Fair; some of them, like Los siete locos, have become a main attraction for serious readers. But the most comprehensive list is possibly that offered by the FED, an alternative book fair which has grown steadily and had more than 250 registered exhibitors in its last version.

<https://feriadeeditores.com.ar/editoriales/>

Colombia: Independents have a special chapter inside the traditional Book Chamber. From there they launched an online sales platform with aggregated information of more than 60 houses and 3000 titles. They also organize Noviembre independiente, a small festival that was held virtually during 2020 (Publishing News).

<https://leoindependiente.co/>

<https://ladiligencialibros.com/categoria-de-producto/editoriales-independientes-colombianas/>

Mexico: The oldest association is AEMI (16 years, 20 members). They set up their own bookstore and organize a yearly Independent Book Fair. LEI is a younger association, more mixed in its composition. There are other ad hoc associations, like Pasillo de las Independientes (11 publishing houses and 13 bookstores who started working together at the Guadalajara Book Fair) or a smaller group of three publishers that launched a crowdfunding campaign during the pandemic (Dependientes de lectores).

<https://www.feriadelibroindependiente.mx/directorio/mobile.html>

<https://es.calameo.com/read/00502935117aa2d2a22d8>

<https://www.dependientesdelectores.mx/editoriales/>

Peru: EIP (Editoriales Independientes del Peru) was founded in 2014 with 14 publishing houses. In 2020, the Book Chamber opened its own chapter dedicated to independents, also with 14 (not identical) houses.

https://issuu.com/medaliereyeslinan/docs/cat_logo_eip_2016

<https://infolibros.cpl.org.pe/wp-content/uploads/2020/08/Cat%C3%A1logo-Editoriales-independientes-CPL.pdf>

Many publishing professionals see these movements as mere “well intentioned schemes”, more effective in their communicational power than in their business acumen. There are, again, no statistics to measure the incidence of independent publishers in the market, but the feeling is that slowly and tenaciously these companies are not only gaining share of existing readerships but creating new audiences. The example of the FED in Buenos Aires, which in its last non-virtual edition in 2019 gathered 14,000 visitors in only three days, gives credit to this affirmation. Since audience development is probably one of the biggest challenges for publishers, any effort done in this direction will benefit the whole industry.

Independent publishers also invest time in other issues, like studies about bibliodiversity, cooperative projects, fair regulations and issues related to copyright. Many of these efforts can be seen in the webpage of the worldwide organization Alliance Internationale des Editeurs Independants (<http://alliance-lab.org/category/enquetes-et-analyses/?lang=fr>).

BOOKSTORES

The biggest difficulty for all publishers alike has been and still is distribution (and collections). Except for Mexico, where state purchases account for the largest share, the main part of the circuit is set up by a frail system of bookstores (they account for 33 to 36% of sales; there is no data for Peru, but all seems to show that the percentage there may be bigger). Although Argentina is famous for its beautiful bookstores and Mexico also boasts some amazing librerías, communities tend to be underserved and, at the same time, the stores' financial outcomes are modest. There are some local bookstore chains, but they never developed a strength comparable to those in Europe or the U.S. In general, bookstores suffer from lack of infrastructure, long-time financing problems, absence of state support and the general precariousness of the industry. Even so, they manage to resist and many of them, at least in the big cities, function as energizing cultural centres.

This part of the publishing value chain is probably one of the most impacted by changing trends. The new ways in which readers discover and access books has been gaining momentum in our countries too, and the pandemic 2020 has only pushed things further. The places where people search for information or entertainment, two areas in which books used to be central, are now different and competition keeps getting wider. At the same time, social media is making direct communication with clients much easier and publishers as well as bookstores have been learning how to use them. At the moment, Instagram has been reported as the preferred media used by bookstores, followed by Facebook and Whatsapp. The potential of these tools to increase audiences is enormous and should be further developed.

In Argentina, the e-retailer MercadoLibre has been gaining strength in the last five years and many bookstores that struggled to organize their own e-sales seized the opportunity to get on that platform (with the mixed feelings predictably generated by a player that is growing to occupy a seemingly monopolistic position). Colombia has Buscalibre, a Chilean platform dedicated primarily to book sales, which had been growing steadily and got a boost of 300% during the pandemic-induced quarantine (according to an interview given to El Tiempo newspaper, they sold

800.000 books in 2020). In Mexico, the only country where Amazon is present, the company duplicated its book sales during last year and accounted for as much as 20% of the total of PRH's sales. Although these impressive numbers are due to the particularities associated with 2020, most professionals think that they are here to stay: readers have learned to use these platforms, found them easy to access and safe, and –with some combinations and adaptations– are prone to continue using them.

This development is obviously creating some tensions, not only between traditional bookstores and e-aggregators but between small bookstores and big publishing houses. Grupo Planeta in Argentina and PRH in Mexico announced that they would start selling books directly through their webpages, a decision that was received as “high treason” by booksellers. While results have still to be measured, some analysts wonder how these changes in distribution will alter the publishing process, prompting new ways of deciding print runs or managing warehouses. Booksellers, on their sides, are partnering to gain strength and offer alternatives, like the platform launched by the Mexican store El Sótano⁷, which promises to share revenues with other independents. All these experiments are still small (Sótano's platform received 32.000 visits in six months yet reports only 600 sales; see El Economista) but are vital for the long-term sustainability of the sector. Much is being learned during the process: for example, that publishers need to seriously improve their metadata in order to make this kind of online projects really useful.

For directories of bookstores see:

ARGENTINA: <https://feriadeeditores.com.ar/catalogo/>

COLOMBIA: <https://aclilibrerosindependientes.com/>

MEXICO: https://sic.cultura.gob.mx/lista.php?table=libreria&disciplina=&estado_id=

BOOK FAIRS & FESTIVALS

The role of fairs and festivals is quite different in Latin America than in Europe. Most important, fairs are not industry-oriented encounters like London or Frankfurt, but more like big selling platforms where publishers and bookstores exhibit cheek by jowl and sell directly to considerable crowds of public. This is closely connected to the serious distribution problems we've already commented on: fairs turn up in all sorts of varieties –national, regional, specialized, public,

⁷ <https://libreriasindependientes.com.mx/>

private, you name it– to fill the gaps and bring books and readers together, at least on special occasions. As CERLALC states, in Latin America fairs have been “an important instrument for the development of publics and for the dynamization of commercial and cultural links between regions” (CERLALC 2019).

Each country has its own FIL (Feria Internacional del Libro or International Book Fair), which is then followed by the city’s name; the “I” accounts for the presence of international writers invited to the cultural program, although some fairs also count with the participation of international publishers, agents and other book professionals. FIL Lima, for example, had approximately 500,000 visitors in its last non-virtual encounter and showcased authors from several Latin American countries. FIL Buenos Aires, the longest standing fair, is a huge event with almost one million visitors, 500 exhibitors and innumerable activities. Together with FIL Bogotá, they have made a sustained effort to develop their Professional Sessions too (the fact that they take place at almost the same time, in part also overlapping with the London Bookfair, hasn’t helped). But the region’s star is undoubtedly FIL Guadalajara, partly due to its geographical location: much closer to the US and Europe, it has become the meeting point for everyone doing business with books in Spanish. At the same time, like its colleague fairs, it caters extensively to local population and is highly committed to the development of local readership.

Next to these FIL, there are hosts of smaller fairs. In Colombia and Peru, the government has been supporting encounters across the country (both through direct subsidies and special training). Thus, both countries offer important fairs in almost all their counties. Argentina, with its busy scene of independent publishers, has developed the highly successful FED (Feria de Editores), which grew precisely because it was very focused on keeping a simple structure, low costs and not many other distractions around an impressive and varied list of participants. The regional network created by independent houses of all four countries is indeed very lively and promising, and independent fairs are relevant hubs in this web. Beyond that, both Argentina and Mexico have big fairs devoted exclusively to children's literature, and there are also important meetings revolving around academic books (for a small list with the most relevant fairs, see the Directory of Key Players).

Being so relevant and all-present, book fairs also kindle ambivalent feelings among those involved. For many, current fairs are too long (in Buenos Aires it lasts a whole month), too expensive for smaller exhibitors or too old fashioned in some of their internal structures and rules. Many publishers have the feeling that they invest too much in them, but at the same time they don’t dare to cancel their participation, it’s too “established” and “you have to be there”. For

some, 2020 was a great opportunity to see what it would be like without the fairs, since it was impossible to accomplish any in-person meeting. Most fairs offered some sort of virtual program, but there was no way sales could keep up. Although a few of the “rebels” say that they didn't notice the difference, most publishers complain heavily about the loss of the fairs triple effect: sales volume, bigger margins (since the publishing sale directly, skipping bookstores' commissions) and the publicity or shopping-window effect. Many special buyers who travel to the larger fairs, like international librarians, were missed. In the end, publishers have informed that fairs can account for up to 30% of their annual turnover.

Bookfairs are also relevant for regional communications. Countries like Peru have made a point of participating actively in their neighbour's encounters, like FIL Santiago and FIL Bogotá (and hopefully Guadalajara in 2021, all supported by the Ministry of Culture). In a region deeply affected by its lack of fluid communication, this is a very vital role. Of course, the traditional international fairs are also important and those who can afford it travel to Frankfurt, London and Liber in Spain. But it's difficult to account for the huge expense and if there are no subsidies from government agencies, travel to these fairs gets harder and harder to sustain.

Pure festivals in the European sense, not mainly associated with sales, are few and far between. Hay Festival has established itself strongly, with a main meeting in Cartagena and branches in Arequipa, Queretaro and Medellín. With less budget but strong programming and growing recognition, there is the FILBA festival in Argentina and Medellín's Poetry Festival in Colombia.

THE ROLE OF GOVERNMENT AGENCIES

As it can be seen in the Directory of Key Players, the government agencies that are relevant for the publishing industry are those in charge of Culture and Education, usually organized in the way of Ministries. Two levels are of importance: the national one and the municipal in charge of the capital city. In Argentina, the unusual situation exists in which the Minister of Culture of the City of Buenos Aires manages a bigger budget than his national counterpart, showing once again how centralized our countries are. Some Foreign Affairs Ministries have programs related to the internationalization of culture, thus supporting translations or the presence in international fairs. Few and far, an area dedicated to Production & Industry will launch some short-lived assistance specially for books. There are no comprehensive cultural institutions like the British Council in the UK, the Goethe Institut in Germany or the Instituto Cervantes in Spain (which is not present in Latin America, since its aim is to promote Spanish language in non-Spanish-speaking countries).

Policies and programs tend to be unreliable. The strongest support (and the one most demanded by publishers) is given through the book-buying programs for schools and libraries, but this action is also unpredictable, thus limiting its positive effect. As already said, Mexico is the country with the most solid presence of the state, although this has been changing since 2018. Colombia's strategy is perceived by publishers as more reliable; above all, the communication among all involved institutions is fluent and cooperative. Peru's Ministry of Culture (through its Direction for Cultural Industries and Art) has been very active in the last years. Argentina has implemented some very good plans, but the problem is often to sustain them in time (an exception is the Programa Sur, translation subsidies given by the Foreign Affairs Ministry, which has been in place since 2010).

We won't give special room to libraries in this report, but it's necessary to state that they play important roles in Latin America. Argentina has a system that goes back to 1870, the CONABIP or Comisión Nacional de Bibliotecas, which tries to counteract the country's pervasive centralism by making it possible for libraries to be opened all over the country (currently there are 2000 libraries run by 30.000 volunteers). In Colombia, the Red Nacional de Bibliotecas is considered the biggest cultural infrastructure in the country, accountable also for the design of reading plans, surveys, etc. 2021 has been declared the "Iberoamerican Year of Libraries", which should provide some extra support for these important networks.

What is important to keep in mind, then, is that although collaboration with state-run offices maybe necessary and sometimes helpful, it is a complicated task.

PROFESSIONAL ASSOCIATIONS

As for clusters that bring professionals together, there are plenty of them, with varying range of formality and effectiveness. Different bodies are founded every year, often by a faction that leaves an older association because of some disagreement. Some of them are active and renew the scene, others just linger behind new names. Thus, the Directory of Key Players lists only those associations with a longer history and proved influence. The most traditional organizations everywhere are the *cámaras* or chambers: associations that vary slightly in their conformation, with the main goal of lobbying for the book industry. Argentina is the only country with two *cámaras*: the bigger and internationally based houses gather at CAP (Cámara Argentina de Publicaciones), while the nationally owned join forces through CAL (Cámara Argentina del Libro). Though CAP is an important player due to the size of its members, CAL is in fact more inclusive

and visible. Colombia, Mexico and Peru have one chamber each, all of them created around the 1950's. Their tasks usually include administration of ISBN, elaboration of specialized statistics and traditional lobby for sectorial laws and regulations. They also play important roles in the organization of local bookfairs and national participations abroad, and they offer a different range of professional training.

As with bookfairs, industry professionals tend to have an ambivalent relationship with the book chambers: they need them and acknowledge their usefulness, but they also complain about what they consider unnecessary bureaucracy, slow reaction, old-fashion mindsets and sometimes petty internal politicking. In the last ten years, most countries have seen the appearance of alternative associations of independent publishers, which first rebelled against the "seniors" but now are working more or less co-ordinately. Other groups, like associations of specialized editors (children's books or academic publishing, to name those who are most relevant) do important work, but they struggle with permanent lack of resources which hinders any long-term planning. Here, too, more communication and better coordination of the work done by different actors would make a huge difference.

LANGUAGE, LITERATURE, TRANSLATION

CONTENTS & AUTHORS: WHAT'S GOING ON

Of course it is impossible to summarize in just a few lines the literary production of four countries as diverse as the ones we're reviewing, but I did ask the question and answers were, I believe, useful to a certain degree. There is general agreement over the fact that women writers are leading the scene: Mariana Enriquez, Samanta Schweblin, Ariana Harwicz, Gabriela Cabezón Cámara (Argentina), Valeria Luiselli, Fernanda Melchor (Mexico), Emma Reyes (Colombia) and Katya Adauí (Peru) are just a few names. Although some of them are linked to genre-literature like horror or gothic, they managed to transcend classifications and are being read with interest by a qualified audience worldwide (many of them have been translated and were well included in the circuits of international festivals before the COVID-19 lockdowns). This comes hand in hand with a strong feminist movement across the continent, with *Ni una menos* being the Latin counterpart of the #MeToo movement in the northern hemisphere. As one consulted academic put it, "much is going on there, a tremendous energy that is already changing and re-shaping the culture of our countries". Issues about gender as well as a heated debate around a more inclusive Spanish (which is a much more gendered language than English) are part of the forces at play, too.

Literature dealing with violence in different forms (the remains of last century's dictatorships, drug trafficking or just plain poverty and social injustice) occupies a prominent place, but the risk of "for-export-publishing" and exoticization have to be kept under control. Newer narratives that include questions about nature, environment and climate crisis are probably on the rise.

Another fact to keep in mind is that non-fiction accounts for an important part of publications in Latin America. Contrary to the idea heralded by the authors of the boom (García Márquez, Vargas Llosa, et al.), there's a rich and long-standing tradition of journalistic writing, reflective essays and academic work. According to CERLALC, in 2017 30% of all published books were Social Sciences, followed closely by Literature (the rest being mainly schoolbooks, religious texts, and other specializations like Philosophy or Geography; children's books are unmarked in this analysis; see CERLALC 2019). In a parallel move, university presses have become more important and widened their scope: today many of them are branching out to series that are non-academic and organizing their own sales and marketing channels, like the FILUNI (Feria del Libro Universitario) in Mexico.

International trends like big bestsellers, historical novels, romance and new age are of course present in our markets. But there is little local production in these categories, with most books being translations from Anglo-American catalogues. This portion of the market is almost totally controlled by the big international houses, while independents play a key role in fostering the lively, animated scene depicted above.

BOOKS FOR CHILDREN AND YA

This area has been growing steadily since the '80, fuelled by strong local authors and illustrators as well as specialized publishing houses, and closely linked to state purchases. Although there is obviously a difference between textbooks and "normal" literature, publishing houses of the latter have traditionally moved in both private and public networks, selling books to general readers but also material complementario –books that complement course curricula– to Education Ministries and library systems. This has generated big profits for some businesses, but has also made them very dependent from government changes in policies.

Companies like Fondo de Cultura Económica in Mexico, Norma in Colombia and Sudamericana in Argentina developed best-selling catalogues that eventually led to a renovation in design and production and the appearance of countless houses doing a beautiful job in the area. Today, all sorts of formats, subjects and styles can be found (although there are always interesting particularities: while foul language is a no-go for Mexican teachers and a useful tool for Argentinean ones, it goes the other way around with a matter like talking about death; sexuality has been a latecomer, but it's slowly being accepted, also thanks to public discussions around sex education). The publisher's scene tends to replicate what happens on a general level: big international firms coexist with small, vocational houses, which have become more and more professional over time (making it possible that very small companies like Pequeño Editor and Limonero, both from Argentina, win the prestigious Bologna Book Fair Prize for best children book publishers, to name just one case).

Mexico is by far the biggest market, largely due to the important participation of the state (both as a buyer and as a producer of children's books). Argentina has historically been the second market in volume, although value measured in strong currency is volatile, as we discussed regarding general production. Colombia comes in third and Peru is the smallest market, albeit state-fuelled buys for schools play an increasingly important role. According to Fundación SM, there are 40 publishers specialized in children and YA in Colombia and 35 in Mexico; no data for

Argentina and Peru. As for bookstores, general outlets tend to have very well stocked and outfitted sections for smaller readers, and in the last year some children-exclusive bookstores have appeared. In 2018, Colombia counted with 17 such stores, and there are some interesting online start-ups to follow, like *Donde viven los libros* in Argentina or *Piopío Piopá* in Colombia. In Peru, three-year-old *Lupas* bookstore is proudly representing the area.

It's interesting to note that although both Mexico and Argentina are big publishers of contents for children, Mexico buys from all over while Argentinean readers tend to prefer their own authors and texts. Colombia and Peru rely mainly on the content production from abroad. As for print quality, Colombia has won the hand, with high graphic quality and competitive prices. Production costs tend to be cheaper there and in Mexico.

Each country has its own section of IBBY (International Board for Books for Young People), thus participating in international debates and standards. The most relevant specialized bookfairs have already been mentioned, and there is a thriving exchange of writers, illustrators and reading-specialists across the region. Promotion of literature, though mainly for schools and children, is an important issue, with well-known specialists like Yolanda Reyes and María Osorio in Colombia.

NATIVE LANGUAGES

Although Latin America is strongly identified with one major language, Spanish, the fact is that today more than 900 tongues are spoken along the subcontinent. Largely ignored by the publishing industry and, for decades, actively fought by “civilizing” governments, they are slowly reclaiming attention. During most of the 19th and 20th centuries, the aim of linguistic policies implemented by most governments was to make indigenous languages disappear; today, those same states are the ones becoming aware of their responsibility in sustaining and supporting this rich cultural heritage. Including these languages (many of them oral) in the publishing ecosystem is a major challenge. For now, commercial publishing houses don't seem very interested in investing in this area, while public offices are timidly starting to take care.

After Brazil, Mexico is the most linguistically diverse country of the region: 67 tongues are spoken by 7 million people. Two public institutions (Instituto Nacional de Pueblos Originarios and Instituto Nacional de Lenguas Indígenas) are in charge, the latter specifically dedicated to language issues. Universities also play an important role, training translators and organizing meetings like the Indigenous Poetry Festival in 2018. Although by far too little yet, the Mexican

Book Chamber at least made a formal declaration of interest. In the first Congress for the Promotion of Reading in Indigenous Languages in 2018, the president of CANIEM stated the responsibility of the publishers, while naming a long list of companies who supposedly do publish in languages that are not Spanish (many of them subsidized by the state, like Artes de Mexico, FCE, CONAFE, etc.).

Peru is home to 48 languages, with Quechua standing out as the most widely spread. Here too, there have been changes in laws and regulations, an acknowledgment of the importance of those tongues, and an institutional turn towards bilingualism: the Ministry of Culture is training translators, webpages are made in both languages and school curricula are slowly being developed to include several native tongues. Publishing, as everywhere, lags behind, with work done more by state departments or academic institutions. Cuzco has emerged as a hub, with interesting work done by the Centro Bartolomé de las Casas and the publishing house Regesa. In 2020, the Ministry of Culture added the category *Lenguas Originarias* to its traditional National Literature Award, thus fostering the work of native-language writers and hopefully, if sustained in time, the interest of publishers.

According to ONIC (the National Organization for Native People of Colombia) there are 65 original languages in the country, spoken by more than 400.000 people. Since 2010, a national law endorses linguistic diversity and bilingual education, but again, this is far from reaching the area of influence of commercial publishers. The National Library has been publishing multilingual books for children and academic centres like the Instituto Caro y Cuervo publish some select collections, but this isn't a common practice.

In Argentina almost one million people consider themselves as belonging to or descending from original inhabitants. There are at least five very present original languages (with Guaraní and Mapuche being the most extended). In its webpage, the INAI (National Institute for Indigenous Matters) publishes material translated to these five languages, and the country's main university, UBA, offers language courses in three of them.

Besides governments and universities, artists of different backgrounds have also been working creatively with native languages. Many writers and visual artists are paying attention to the rich meaning they carry and looking for ways of working together, even if they don't belong to any particular ethnic group. Linguistic activism is finding room online. Individual actions –like a publisher developing a special typography for Mixe texts or an author organizing workshop around the country to have her books translated into several indigenous tongues (both in Mexico)– are getting more attention and may serve as starting points. These processes are slow

and laborious, but at least direction has changed and hopefully publishers will be showing more interest sooner or later.

TRANSLATIONS (IN & OUT)

Buying and selling rights internationally is a different game that publishers have started to pay attention to in the last decades. It involves the building of a network, knowing about contracts and working with literary agencies. At a first level, since distribution across Latin America is so difficult, there's the negotiation of different licensing and co-editions contracts among regional companies in the same language (Spanish). Often that's done directly between the publishing houses, especially when editors know each other. In recent years, however, Spanish literature agencies have set foot in the business. Contradictory as it may seem, sometimes a person sitting in Barcelona can have a better overview and network to do business in Latin America than her peers in, say, Bogotá.

On a second level are the translations rights, the possibility of both buying or selling books from or to other languages. In the last decade, since Spain's serious economic crisis, the market contracted around 30% and never recovered. Significant advance payments disappeared for Spanish-language rights; deals turned more moderate. Agencies, nonetheless, continue to be the key players and most of the deals are done by Anglo-American companies. According to experienced publishers, English-speaking agents retain a panoramic view of world publishing and keep the widest network, thus being the most relevant partners, especially when buying rights. But there are some very important agencies in Spain⁸ and some others which, although based elsewhere, do specialize in Latin American literature and have developed great expertise.

According to CERLALC, 11% of the 172.000 titles registered in Latin America in 2017 were translations. This is significantly less than in 2014 and 2015, when translations reached a historical maximum of 25%. Translations to Spanish in the region are done mainly from the English (58% in Argentina) followed by French (16%). Much behind come other European languages like German, Italian or Portuguese. Interviewed publishers and translators believe that most translations are done by independent publishing houses (which is explained partly by the fact that the big international companies do their translations in Spain and export either the

⁸ The Colombian independent publisher Laguna tells that after closing an agreement with the Spanish agency Casanovas & Lynch, one of their books could be negotiated for 17 geographical areas and 15 languages, an outstanding feat.

finished books or the contents to be locally adapted and printed). Academic presses translate surprisingly little (only 3% according to CERALC), except in Colombia, where they're one of the most important right-buyers. Information provided by the local Book Chambers, which is difficult to compare since each one uses different methodologies, state that 7% of all published books in Colombia are translations, while this is true for 5% in Argentina; there's no data for Peru or Mexico, although translators and publishers believe that Mexico is probably the country with most translation altogether. Translators in Latin America are in a precarious situation: wages are low, contracts are a relatively new feature (and not a given everywhere) and there are no prizes or other kind of rewards (both material or symbolic). At the same time, especially Mexico and Argentina, have managed to produce outstanding translators, refined and versatile.

As for the other way around –translation of Latin American authors into non-Spanish languages– there's even less data. Argentina is one exemption, thanks to the statistics provided by Programa Sur (the agency that grants subsidies to foreign publishers interested in publishing Argentinean authors). Since 2010, they gave out 150 grants per year; from the 1,472 translated books, 8% were translated into English. Italy is the country that did more translations, while the U.S. occupies the 6th place and the UK, the 8th. Other countries have translation programs too, but none is as organized and solid as Programa Sur. Colombia launched Reading Colombia, which granted 10 to 12 subsidies yearly through a very complex procedure; the program has been stalled. Mexico had a fully developed system that helped paying for translations as well as rights, use of images and production costs, but it's unclear if and how it will be continued. Beyond monetary assistance, selling rights for Latin American authors is a tough job. As one seasoned agent tells, she needs to do a lot of explaining when speaking about Latin American literature and authors from this region need to pass more tests than those of other countries. Another problem she points out is the lack of material in English, like catalogues, newsletters or translation proofs that could be easier to share with international publishers.

BUSINESS STRATEGIES

INTERNATIONAL COMMERCE

When speaking about international trade for the Spanish-language market, it's necessary to go back to the role of Spain and, as CERLALC calls it, that country's "exporting vocation". Spain exports far more books to Latin American countries than the other way around; from all the books exported from Iberoamerica (Spain, Portugal and Latin America including Brazil), 65% were produced in Spain and only 32% in all Latin American countries together (for details about the region, see the charts under Exports & Imports in the Appendix). While Spanish overall exports stayed relatively stable between 2010 and 2017, this was not the reverse case: exports from Latin America decreased from U\$460 million to U\$300 million (CERLALC 2019). The inequity grows stronger if you consider that most of these countries' exports are not destined to Spain but to other Latin American markets.

As for imports to the region, in 2017 Mexico was the biggest buyer (36%), followed by Argentina (15%), Peru (7%) and Colombia (6%). The U.S. was the biggest supplier, followed closely by Spain and then China. The U.S. exports were destined mainly to Mexico and Brazil, followed by Colombia, while exports from China were composed basically by packaged books and other material printed in Asia but edited and designed elsewhere. Imports from the UK are small but stable, staying around 5% (a yearly average of U\$ 45 million between 2013 and 2017). The figure is slightly smaller than that for exports to Spain (roughly U\$ 47,6 million), but it is possible that Spanish buyers could in turn be reselling books to Latin America. According to information provided by the British Council, the UK 's Publishing Association is keeping track of digital books sales, noting that U\$3,2 million (£4 million) revenues were generated from sales to Spain and almost U\$800,000 (£1 million) to Mexico. No information is available for this category in Latin America, but the product has definitely room for growth since readers are more willing to try e-books for material that's hard to find, like books in foreign languages. It should be kept in mind that we're talking about books in English, a minor market in Spanish-speaking Latin America, and that the overall picture should also include rights sales and royalties.

Going back to Latin America, there's a general feeling that despite sharing a language and thus forming a potentially huge market, it has been historically very difficult for regional publishers to trade among themselves. Publishers at all levels complain about long distances, obsolete infrastructure, complicated national regulations, volatile currencies and overall lack of

communication and cooperation. There's of course the relevant fact that readers in each country have their own tastes, interests and behavioural patterns, even if they share a language (which on top is far from homogenous). Markets, then, are not only relatively small but very fragmented. Here, too, good intentions stumble over lack of strategy and constant improvisation. Few small publishers develop foreign-trade strategies that account for all aspects of internationalization, from, say, special catalogues to tax advisors. At the same time, facts show that Latin American countries export half of their production to other nations in the region. The biggest overall exporter is Mexico, followed by Colombia, Argentina and then Peru. Though the numbers are general, it seems safe to infer that similar proportions apply when it comes to intra-regional sales. (CERLALC 2019)

WHICH WAY TO GO: CREATIVITY & RESILIENCE

Many local publishers –in big, international houses as well as in small, alternative ones– follow the industry's developments in other countries in search for successful strategies. In the last decades, the most spectacular changes have obviously emerged in the online world. A survey of 400 publishing houses done by Dosdoce and Bookwire in 2019 states that e-book sales in Spanish language had been growing 50% yearly. Almost half of these sales were done outside Spain; Mexico was the biggest buyer, with 15%, and all the other Latin American countries together accounted for 20%. The average price for an e-book in the region was a little bit higher than in Spain, at almost U\$ 9 (taxes included).

Beyond e-books, other projects are underway, and we've already named some of them: sales platforms like Mercadolibre or Buscalibre, e-books included in almost all catalogues across the region and the recent onrush of virtual meetings to solve everything, from discussing particular work details to making whole book fairs available. A company worth commenting on is Bajalibros, linked to the media group InfoBAE, with offices in Buenos Aires, Bogotá and Mexico City. Bajalibros sells e-books and has also launched its own e-publisher, Indie Libros (referring to itself as "Digital publishing innovation"). They offer digital services for self-published authors while developing its own, curated catalogue. Most interesting, they organize workshops and training programs for different audiences (like teachers) with the manifest intention of developing new audiences for e-books. The project is very professional and well-funded, but results are slow to appear. No official numbers are available, but no book has yet surpassed a couple of hundreds in sales, even though some have had considerable echo in the press (and their authors were quickly signed in by traditional publishing houses). On the other hand, the boutique agency Proyecto451,

based in Buenos Aires, produces a weekly newsletter with an eye set on e-publishing, with information from all over the world and special focus on the Spanish-speaking area. It's plain when following its issues that no e-initiative in itself has yet become big enough as to play a major role or actively change the current market's balance.

Thus, when asked about digital innovation, most interviewed professionals were sceptical. Although they value the use of e-tools along the publishing process, they're reluctant to see them as providers of ground-breaking solutions. Above all, they're weary of "big" plans that involve important structures and expensive funding. As one of them put it: "we need to put stability before growth". This means finding new, creative ways of working on several fronts: management of print runs, alternative distribution systems, development of new audiences, use of communication tools, joined effort with other cultural institutions like museums, etc. Many of such efforts are underway, on a "trial & error" basis, offering an array of examples to follow. To name just a few:

- **Grano de Sal** in Mexico DF only publishes books in co-edition with funding partners, without neglecting its curatorial work.
- **Impronta** in Guadalajara built its publishing project around a vintage craft press, adding a bookstore and an art gallery to cross-pollinize audiences.
- In Buenos Aires, the bookstore **Eterna Cadencia** did an important work in audience development through a news blog with subscribers all over the world and close work with the FILBA Literature Festival. It then launched its own publishing house, nowadays one of the most solid independent publishers in the region.
- **La Coop**, also in Buenos Aires, started as a group of small, vocational publishers joining efforts to distribute their books together. Today they are present in most points of sale, participate in many local bookfairs and own a bookstore where they also sell books by other companies and imported material.
- In Bogotá, **Espantapájaros** joins in one place a kindergarten, a workshop for adults and a bookstore, all revolving around top-of-the-art children's literature. The project has won several international prizes and offers its pedagogical and editorial knowledge to interested people all over Latin America.
- In Lima, **BookVivant** sells books and wine in a creative manner, organizes events and offers a newsletter, as a way of gaining access to a different public.
- Already mentioned, the self-managed **FED (Feria de Editores)** started as a small meeting in the lobby of an independent radio station and grew to occupy the trendy Centro Cultural

Konex, boasting more than 250 exhibitors, 14,000 visitors and 34,000 sold books in just three days.

- A new development in marketing is the emergence of “clubes de lectura” (Book Clubs), strong social media communities developed around one or two “influencers”. Many have opted for the subscription model, with monthly dispatches, while others concentrate in serving as mediators and send possible clients to partnering bookstores.

As for international commerce, some of the solutions found by smaller houses to bridge the huge distances, complicated bureaucracies and volatile exchange rates are, again, based on cooperation with similar companies. Co-editions (making it possible to share the costs of rights and translation by two or more publishers in different countries) and local POD (no longer shipping massive paper bulks but arranging for a local partner to print and distribute) are the favourite models. This way, the complications of physical transport are cleared, and energy and financial resources can be used for public relations and communication (Editorial Laguna in Colombia or Godot in Argentina have successfully implemented this system). On a different line, the already mentioned Eterna Cadencia opened a sister bookstore in Montevideo, Uruguay, as a way of mutually strengthening sales in both cities. The last step in this steady development for the bookstore’s owner was to find a partner with whom to create a distributing company specialized in quality books that will be present all-over Latin America (the company, Big Sur, is currently representing over 100 imprints).

Still more advantage could be taken from marketing authors rights, not only for translation into other languages but for adaptations outside the book industry (mainly to audio-visual companies). The unstoppable success of TV-series and companies like Netflix has its echoes in the region, where many regional productions based on local books are a new feature. But again, the market is small and the possibility of really transforming a text into a movie move between to extremes: the power of big publishers to actively offer their contents and be present in the places where decisions are made or some degree of luck and chance, of friendships and shared interest that shows up in random encounters.

Audiobooks are the newest trend, also in the opinion of Proyecto451’s newsletter. According to one of its latest issues (February 2021), Amazon Audible and Storytell have hundreds of thousands of members in Spain and Latin America, consumption has doubled during 2020 and there’s not enough contents to fulfil this demand. The already mentioned Bookwire report was very optimistic about this development, based on the fact that in 2017 there was an overall production of 6,000 titles in Spanish and two years later they expected to reach 10,000. The

biggest market share belonged to Spain, followed by Mexico, then Spanish-speaking U.S. and finally the rest of Latin America. Big houses like PRH seem to agree, since they developed their own recording studios in several subsidiary offices. But according to one consulted executive, production is expensive, and the market still needs to be developed. For smaller publishers without such strong backbones, entering the audiobook market is still a far throw.

PROFESSIONAL TRAINING

One of the most repeated complaints of Latin American publishers about their own publishing industry is that it “lacks professionalization”. During the 20th Century, training to become an editor or publisher was done hands-on while working in a publishing house. In the last twenty years, some professional associations like the Book Chambers and Book Fairs or, in some cases, state agencies, started to organize specific courses, workshops and publishing conferences to complement this education. Then, some universities began to offer more comprehensive training and today there are a few where it’s possible to earn a bachelor’s or a master’s degree (see Directory of Key Players).

These professional courses tend to be connected to Humanities more than Business Departments. Thus, they are very good in everything related to contents management and editing, but fall short in many important areas related to market inclusion. In the opinion of surveyed professionals, they should pay more attention to areas like book distribution, imports & exports, marketing, finance and business administration. As one of them said, future publishers need “the ground wire”. Another very important area to work on is audience development, where efforts could be joined with departments working on Literacy and Reading Habits.

Professional trainings are important also for the networks they help to create, both on local, regional and international level. Directors of different programs in Argentina, Colombia and Mexico are in touch, exchange knowledge and try to work together, thus helping to overcome the difficulties in Latin America’s intra-regional communication. There is a lot of interest for working with European partners, although joint efforts with Spain haven’t prospered until now (the opinion of local professionals is that Spanish organizations tend to view Latin America as a market and are reluctant to develop real partnerships). The move to virtuality pushed on by COVID-19 should also be an interesting addition for professional trainings, since it allows both for students to participate remotely and for a much simpler way of including international speakers in any program.

Since fellowship programs are often considered as important training opportunities by their participants, here is a list of subjects that have been mentioned as most interesting to pursue:

Contents & editing:

- New formats, technologies and devices (from fanzines to audiobooks)
- Complex digital contents (specially that related to teaching, academia, MOOC's, etc)
- Proper metadata management

Marketing & audience formation:

- Audience reports and analysis
- Online marketing: strategic planning, social media, online book discoverability
- Subscription systems
- How to collaborate with reading agencies
- How to work with libraries or other same-interest partners

International commerce:

- A map or overview of international agencies, institutions and relevant players
- International marketing (catalogues, newsletters, pitching, pricing, etc.)
- Laws, regulations, financing
- Successful export strategies
- Tools for selling rights

COVID: WHAT HAPPENED, WHAT CHANGED, WHAT WILL STAY THE SAME

The pandemic that assaulted the world at the beginning of 2020 hit Latin America fully in March. Sooner or later, lockdowns were imposed, schools and universities had to shut their doors, bookstores closed. One after another, cultural events were cancelled, no book fairs or festivals could take place in the whole year. The effect on the general economy was very hard, with all activities contracting strongly, and the book industry was no exception. Latin America was already struggling with a delicate situation, so COVID-19 affected these countries much more than those in the Northern hemisphere. While Europe reports an overall loss of 2 to 5% in book sales during 2020 (4% in Spain), the decrease in Latin America was closer to 30% (Publishing Perspectives, El Mundo, Economía, Forbes). And local publishers agree that the real effect is yet to come, since there is a significant lag in the collections chain.

Countries have kept track of information in uneven ways. Argentina's CAL was very active, issuing a series of reports and demanding support from the government. They inform that production went down 60% and that the cancellation of the Buenos Aires Book Fair implied a loss of US\$6,5 million. The state bought books for roughly the same amount and offered a series of subsidies to be used in payrolls, but that was not enough to counter the general decline in sales. The good side to the crisis is that e-commerce got a boost of 50% and a big share of these sales were done by small bookstores who either opened their own web stores or used Mercadolibre (La Nación).

Colombia is where least official information is available. According to the newspapers, sales went down 30% (Infobae). The National Library made an important purchase, aimed primarily at independent publishers, and is running a survey to have more data about the pandemic's effect in the book-world. The academic publishing and bookstore system, very important in that country, was hit hardly by the lockdown, affecting commercial publishers too.

Mexico counts with reports by Nielsen, who has been following sales the whole year. They reported a decrease of 20% in overall revenues, while RELI (the association of independent bookstores) says they were as big as 70% in smaller stores. Differently to what happened in Argentina and Colombia, the state didn't increase its spending in books, on the contrary: public programs kept decreasing their budgets or have been cancelled. In 2019, government purchases accounted for almost half of sales (it's important to note that the textbook acquisition program was not altered during 2020). (El Economista)

Finally, the most pessimistic evaluations for Peru say the decrease may have been 50%, taking the industry's situation back ten years. The Lima Book Fair had to be held virtually and although some sales were achieved, they amounted to 10% of those done in the "real" fair of 2019. Bookstore owners estimate that 20% of independent stores closed down, but the rest are coping well and have quickly adapted to alternative ways of reaching customers, like e-sales or WhatsApp. For many, there has been a "forced migration to the digital world", although this doesn't seem to include e-books. The Ministry of Culture has been very active, commissioning an in-depth survey, reducing costs of ISBN registration and, most important, allowing for an extra budget to be used specifically in the publishing industry and the support of reading campaigns (El Comercio).

In Latin America, then, 2020 is felt like a divide. Everything is being reconfigured: new consumer dynamics, different ways of reaching the public, doubts about the future of the most traditional massive meetings, spectacular growth of selling platforms, hope in the future of independent bookstores, changes in the distribution chain, adapted working habits, loss of some jobs and creation of new ones, uncertainty about e-books and audiobooks and yet more financial unsteadiness. As one professional put it, "there's a lot of dust in the air, we'll see what's really there once it settles". Here are some main areas to watch:

- **E-commerce is referred to as the "lifesaver"**. With all retail stores closed for weeks or even months according to each country's policies, even those individuals most unwilling to do online shopping up to then had to resort to the channel. On the other side, both publishers and bookstores were quick to react, strengthening their webpages, paying more attention to bigger e-commerce platforms, getting very active on social media and building up their public. At least in Mexico and Argentina, there was a strong movement to support local bookstores, with people actively posting comments of support or encouragement and lively communication going on, especially on Instagram. Many independent booksellers started their own online recommendation chats and WhatsApp became a major working tool. Facebook fan pages and book presentations via Youtube channels turned into commonly used features. At the same time, different trust-building systems were put in place regarding transaction safety and return policies. One of the most significant shortages of online shopping in the region until then, delivery, was suddenly taken seriously and aptly fulfilled using regular postal service, a booming network of "scooter-deliverers" or even door-to-door service by the owners themselves. As soon as stores re-opened, clients could pick-up their purchases if they wanted to visit the place, but online traffic didn't go down. Trust in the system seems to be here to stay.

Publishers also bettered their online buying options and launched publicity campaigns that generated protest by booksellers, but they're far from reaching final clients properly. In 2020, backlist books have done better than new titles, but that's mostly due to the fact that there were much less releases than usual and that, when purchasing online, people tend to buy products they already know or have heard of. It'll be interesting to see how this trend develops in the near future.

- **E-books also got a boost**, especially during the first months of lockdown. In Argentina, medium sized companies like Siglo XXI dared to launch their books in e-format before their traditional paper versions were available, a bold movement for a rather traditional market. E-book productions more than doubled in May and according to both large and smaller publishers, e-book sales tripled during the worst months of confinement. But the number of transactions quickly went back to its pre-Pandemic figures (3-5% of overall sales, far beyond Brazil's 10% or U.S. 30%; TN Tecno). One growing independent publisher in Buenos Aires is satisfied, however, with the fact that the context "definitely accelerated digital production": more e-books are being produced and are available to customers, competitive pricing is being discussed, the need for devices is on the table.
- **The acceleration in technology adoption** and transformation is visible in other areas too. As in other businesses, home-office became the rule and video devices are here to stay as ways of keeping in touch. This is reducing the need for large offices and replacing a lot of travel, both regional and international. Meetings with authors, retailers, partners and agents can be done via Zoom or the like in a much more efficient way. This cultural change would have been extremely slow in a region prone to personal contact like Latin America, but benefits became obvious very quickly: not only is there an important reduction in costs, but also a welcome "democratization" effect. As far as minimum connectivity is provided, access to meetings, conferences and trainings is the same for individuals living in the main capitals or farther away. Of course, as soon as widespread travel and bigger meetings are possible again, many old habits will be back, but probably in a hybrid manner, allowing to maintain these positive features.
- **Perceived by many as a "time of exceptions"**, those who were lucky enough not to suffer any of COVID-19 most terrible effects (in health or financial stability) could use 2020 as an experimentation field. The cancellation of all important bookfairs in the region gave those who protested against them the opportunity to check whether they need to continue being part of them or not. Many think positively about the chance they had to get creative and look for other ways of promoting authors and finding sale outlets. One Mexican publisher

even says that the locked-in months gave her the time she needed to finish her editorial project and launch her new imprint precisely in 2020. But while writing this I'm conscious that these small advantages are incomparable to the traumatic losses that keep happening elsewhere.

- **As for translation rights**, the outlook is difficult to assess. Most publishers said they didn't make any difference between translated books or Spanish-language books when considering cuts in their catalogues. But the fact is that even before the pandemic most publishing houses had been strongly reducing the number of translations, because they'd become very expensive in local currencies. Seen from the other side, the answer is similar but with a slightly more positive tinge: Latin American books have always been a niche for international publishers, they're not expensive and therefore a very flexible product. So sometimes small is, at least, a little bit more stable. Besides, foreign rights trade is highly affected by the impossibility of travel and meeting at fairs; those who had strong real-life networks managed with virtual meetings during 2020 and have also invested in new webpages, better newsletters and other ways of e-contact. But on the long run, agents say, they will need to meet again in person.

As a first conclusion of 2020's effect on the industry, then, it's safe to say that COVID-19 tremendously damaged Latin America's social fabric but also produced a series of learnings and new opportunities. There is hope that things will slowly get better. As one publishing executive expressed: "I believe that 2021 will be a very bad year, but a little bit better than 2020".

ON FELLOWSHIPS: WHAT WORKED & WHAT DIDN'T

The Editorial Fellowship Program of the Jerusalem Bookfair, which came into existence in 1985, is probably one the first in a long series of “fellowships” which have resulted in an incredible network of publishers and editors connected in different ways all around the world. From London to Shanghai, from Buenos Aires to Finland, they built a crisscross of meetings that have produced projects around books and professional support. Latin America had a relatively long-lasting program in Argentina (TyPA's Editor Week, discontinued in 2018) and two smaller programs run by the book fairs in Bogotá and Guadalajara. There are other, related initiatives, like Talento by Hay Festival or Elipsis by the British Council. The offer is so varied that one editor from Argentina says he has taken part in eleven different programs, and editors seated in Europe have probably been to more.

It would be very interesting to draw the map of all these fellowships and do an in-depth study of their results. For this report we talked to 18 former participants of the British Council's IYPY, the Frankfurt Fellowship and TyPA (and some brought other experiences along). Their comments were exhaustive enough for a first round of conclusions.

What worked best:

- Getting an overview of the industry's working in a different context. Most participants appreciated the contact with a diversity of players, from authors to booksellers, policymakers to warehouse managers. This way they got a general grasp they sometimes lacked even in their own contexts and added a very welcome global perspective.
- Seeing how well-known processes function in different contexts helps to gain perspective. The same debates acquire new meanings. Learning about others, in the end, helps to know more about oneself.
- Access to a wider network, both through the program's fellows and by meeting new people at the host city. The variety of the network is given by nationalities as well as specific occupations. As one publisher put it: “Human cross-pollination and connection. Editors, publishers, writers, translators, book critics, festival directors, booksellers... the conversations between all of us are so important and inspiring.”
- These networks are specially valued as a source of information for many years after the program took place. In the words of another participant: “Relationships are short and intense, quickly interrupted but always useful, they become permanent touchpoints”.
- The chance for discovering new talents (authors, translators, specialists of different areas) and ideas.

- Briefness. Busy book professionals value the possibility of having a full-time, immersive experience in just a few days. The feeling is that of deep, intensive learning in very short time, and the opportunity of applying the new knowledge right away.
- Getting in touch and sometimes working for the first time with international organisms like the British Council or national offices like a Ministry. For some participants this was a way to learn how to work with other standards, as well as getting prime information about many different, useful programs and actions.
- Access to special tokens like participation in VIP meetings or permission to use members-only databases was valued as a nice “extra”.
- As for the actual program, variety was valued: different kind of meetings, general introductions and more theoretical briefings as well as hands-on visits, meeting with independent critics and match-making sessions with potential buyers.
- Concrete business outcomes were difficult to trace. Answers tend to be vague but, at the same time, many say there were things they couldn’t (or wouldn’t) have done without the fellowship experience. (Wendolin Perla from Mexico says that opening her brand-new company Perla Ediciones would have been impossible without her fellowship-based network; according to Víctor Malumian from Argentina’s Godot, the Non-Fiction Prize just launched jointly by eleven publishing houses from different Spanish-speaking countries is the result of several fellowship-encounters. And an international agent affirms: “You can tell when someone has been part of a fellowship: the attitude is different, the curiosity, an open-mindedness that can prompt the purchase of a not-so-obvious book”.)

What could change:

- If a program’s objective is mainly the production of “concrete results” (meaning business), then the participants have to be very carefully chosen. Similar interests, sizes, financial capacity, etc. were quoted as important (but that’s almost the opposite of what was valued in the experience of a “diverse” network).
- Fellowships should be kept small (no more than 10 or 12 participants).
- Long, formal group visits, too school-like in their demeanour should be avoided.
- Promoting competition between fellows, e.g. IYPY’s pitches, is a double-edged proposal.
- Some free time to organize individual visits (with or without help from the organizing team) is valued.
- Extra care should be taken by European and Anglo-American participants to avoid looking at their Global-South colleagues with an “extractive view”, considering them only as possible suppliers or potential markets, never as partners.

In the long run:

Several fellowships look for ways to keep former participants in touch and promote long-range connections, but continuity seems hard to achieve. Often, the meeting points are set in international bookfairs and not all have the means to attend periodically. This is not only the case for Latin American publishers, but many middle managers in more centrally located countries also complain that it's their bosses (or specialists like foreign-rights managers) who get to travel. The reunion of IYPY participants organized by the British Council was unanimously appreciated and valued.

Keeping up a good mailing list, sending out regular information and looking for ways of engaging the network at a distance are important tools. In this sense, the experience of the IYPY alumni network is one-of-a-kind. Fifty young editors and publishers from all over the world kept in touch for a few years and even published a virtual magazine, with articles written and curated by themselves. They also had a common exhibition stand at the London Bookfair in 2008. It would be very interesting to rescue and renew these actions.

Although virtuality will never provide the same experience as real-time travel and presence in another culture, social media and virtual meetings could be helpful at least in keeping up an already created network.

CONCLUSION AND RECOMMENDATIONS

To summarize, we can say that Latin America is characterized by a well-developed though unstable publishing system. The region in general and all four surveyed countries in particular share common traits like economic instability, social inequality, inadequate communications among key players and areas, a fragile distribution system and difficulties for long-term planning. At the same time and at the risk of falling into some clichés, the region is bustling with energy, enthusiasm and inspiring resiliency. The combination of differently sized publishing houses is healthy and contributes to the sector's endurance; catalogues show a high degree of quality and diversity; some literary discussions –in adult fiction as well as in non-fiction, children's books and specializations like translation or illustration– are carried at the worldwide highest levels; among publishing professionals it is possible to find very well trained, creative and committed persons.

International publishers travelling to the region will meet interesting new insights on debates that are strong in their home countries too: issues like inclusion, social justice, gender, feminism, democracy and public opinion are on the table, being discussed in original and very up-to-date terms. Being in touch with other cultures is always a way of growing and learning, but in these particular times there seems to be even more to gain from the possibility of looking at what's going on in Latin American daily life, exchanging experiences and searching for ways to foster common interests. Getting a first-hand impression of how the publishing system works in this part of the world and creating a network with well-informed partners in any of the four surveyed countries can offer ideas and alternatives for times when the European & U.S. publishing structure is looking for more inclusiveness and diversity.

The acceleration of technological change propelled by COVID-19 is also a very interesting process, that allows for the imagination of new and creative ways of connecting and doing business. It should be a good time to start regional and international endeavours of small to medium wingspan. One of the big complexities faced by Latin American publishers, the vastness of its territory, can be a favourable opportunity for entrepreneurs with a panoramic view and international networks, like those brought from abroad.

But the major challenge in the region is still audience development. Fostering solid reading habits is a permanent task, necessary both for doing more and better business as well as for strengthening any country's social fabric. It's an area in which the interests of private companies, not-for-profit groups and national and international public offices could combine efforts and do much more work than what's being done at the moment.

Finally, Latin America's publishers have a complex relation with their colleagues from Spain, whom they see more as profiteers than as allies or partners. At the same time, they're interested in working internationally and understand that they can both learn from and offer insights to publishers from other countries.

FELLOWSHIPS - SOME RECOMMENDATIONS:

According to the information obtained throughout the survey, it is possible to formulate a series of concrete, pragmatic recommendations to keep in mind if a new fellowship programme is organized for the region:

- Participants have to be carefully selected, according to the programme's main goal. Most of the programme's success depends on this.
- Including some non-publishers in the group, like festival programmers, journalists or other specialists dedicated to making literature "travel".
- Reaching the right participants in each country can be tricky. It's important to plan a good communication strategy if there are going to be open calls and work together with local partners (from Book Chambers to Instagram "influencers", depending on the target audience).
- If the participants are properly chosen, it's important to give them their own time and space, let them "do their job" and find what suits them most. Don't over-crowd them with programmed activities.
- Language can be an issue: Latin American publishers are not necessarily fluent in English, so it's important to think about formats and activities and decide what level of language proficiency will be expected (on both sides) or if translators should be present.
- To support such initiatives in the long run, it would be very useful for the British Council to develop some sustained supports like translation subsidies, aids for buying rights, travel bursaries and other complementing benefits for publishers on both ends of the translation process.

Hopefully this report has successfully put forward the idea that there's great interest and potential for a renewed fellowship programme of the British Council in the region. The survey is also committed to pointing out the difficulties and challenges that must be taken into account, with the aim of generating realistic expectations and taking the best possible advantage of this one-of-a-kind opportunity. Stronger and more productive ties between publishers in the UK and Latin America can only result in benefits for all sides.

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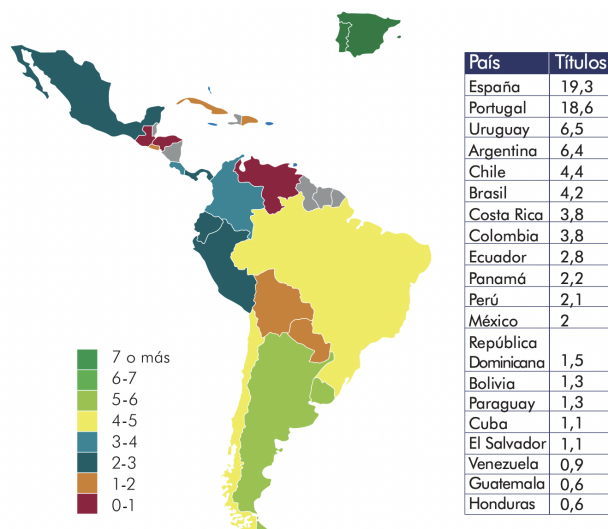
NUMBERS AND GRAPHS

GENERAL FIGURES

	Latin America	Argentina	Colombia	Mexico	Peru
Population	646,430,841	44,938,712	50,339,443	127,575,529	32,510,453
Population Density (people per km²)	32	16	45	65	25
Surface (km²)	20,425,546	2,736,690	1,109,500	1,943,950	1,280,000
Average GDP 2015 - 2019 (Million US\$)	5,696,070	551,796	309,075	1,180,100	208,320
Average Per Capita GDP 2015 - 2019 (US\$)	US\$ 8,977	US\$ 12,548	US\$ 6,314	US\$ 9,456	US\$ 6,613
Average GDP growth 2015-2019	0.78%	3.17%	2.04%	2.44%	-0.24%
Overall exports (Percentage of GDP)	21.95%	13.32%	15.44%	37.46%	23.63%
Overall Imports (Percentage of GDP)	22.86%	14.21%	21.38%	39.09%	23.19%

Source: Banco Mundial / World Development Indicators 2018, 2019

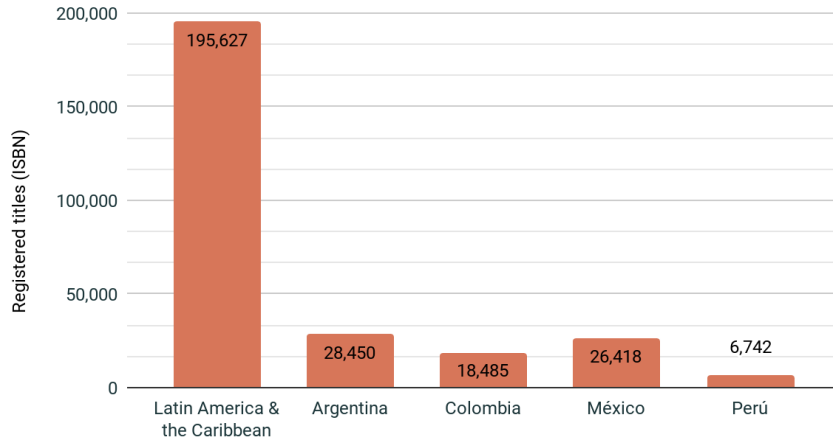
Titles registered every 10,000 Inhabitants



Source: Cerlalc 2019, p.29

INDUSTRY FIGURES

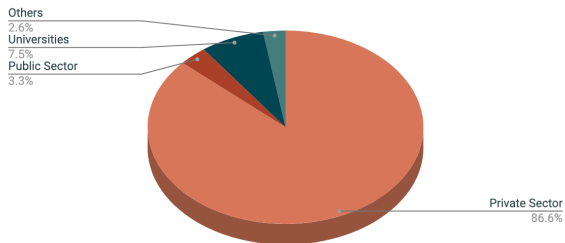
Registered Titles by Country (ISBN)



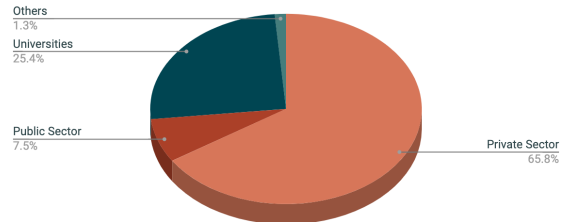
Source: CERLALC 2019

Registered Titles by Type of Publisher

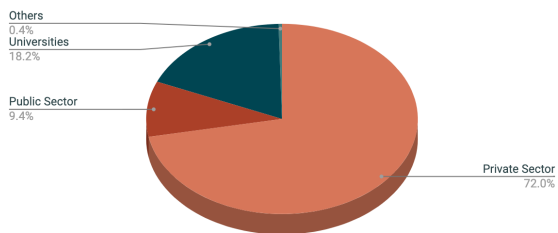
Registered Titles in Argentina
From 28,450 registered titles



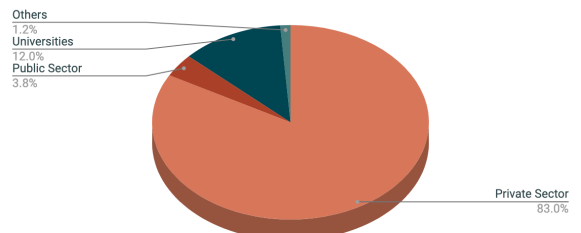
Registered Titles in Colombia
From 18,485 registered titles



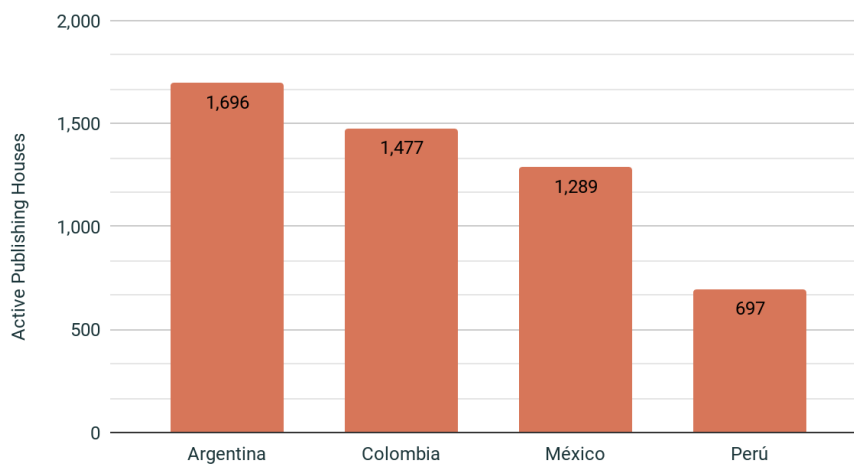
Registered Titles in México
From 26,418 registered titles



Registered Titles in Perú
From 6,742 registered titles

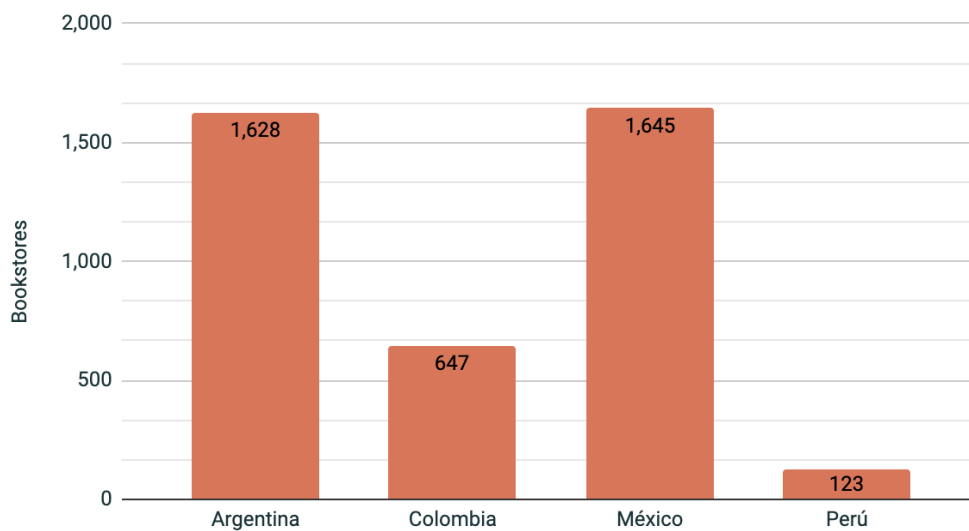


Number of Publishing Houses



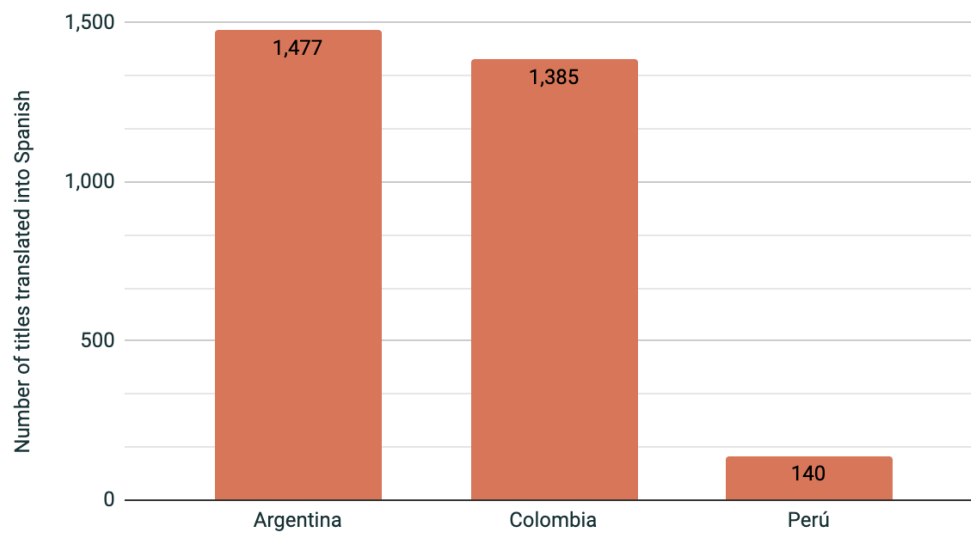
Source: CERLALC 2019

Number of Bookstores



Sources: SINCA 2018; Lado B 2016; Sistema de Información Cultural de México 2020; Atlas Cultural de Perú 2011

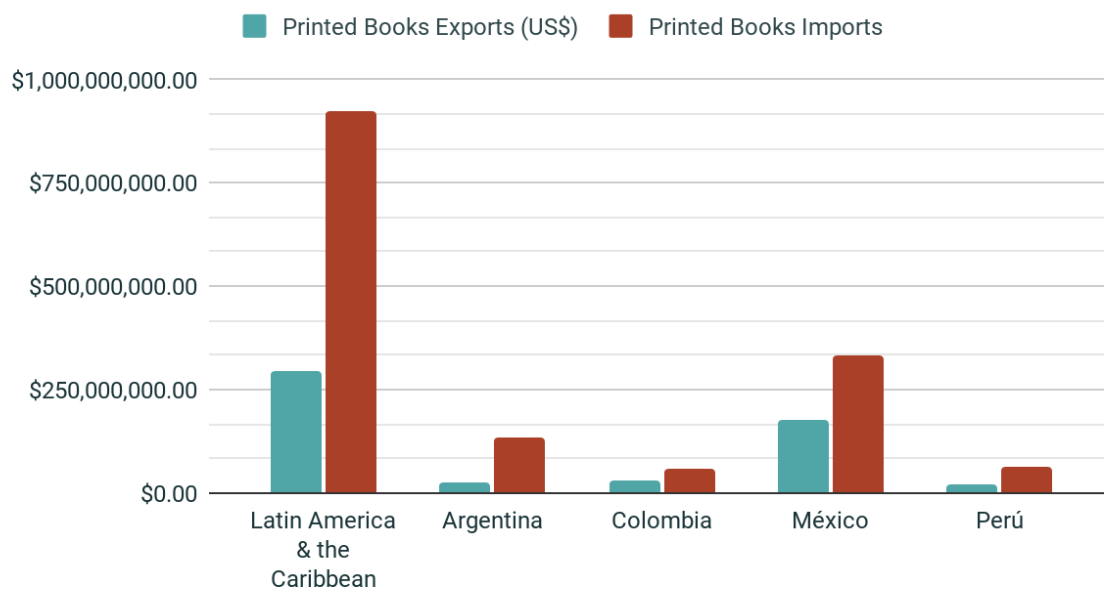
Books translated into Spanish by Country



Sources: Cámara Argentina del Libro, 2019; Cámara Colombiana del Libro 2017; CERLALC 2016; No data available for Mexico

EXPORTS & IMPORTS

Figures by Country



Source: CERLALC 2019

Latin America: Percentage of exported Books by Country

Country	2017
Mexico	60.14%
Colombia	10.98%
Argentina	8.75%
Peru	6.47%

Source: Cerlalc 2019, Table 34, p. 122

Latin America: Percentage of imported Books by Country

Country	2017
México	35.97%
Colombia	6.44%
Argentina	14.47%
Perú	7.06%

Source: Cerlalc 2019, Table 37, p. 126

Latin America: Countries of Origin of all imported Books

Latin America		
Country of origin	Value in million US\$	Percentage
USA	239.79	26%
Spain	223.86	24%
China	150.91	16%
United Kingdom	44.58	5%
Mexico	35.08	4%
Other countries	229.08	25%
Total	923.31	100%

Source: Cerlalc 2019, Table 36, p. 125

LIST OF RELEVANT INSTITUTIONS

ARGENTINA
Business and Professional Associations
CAL - Cámara Argentina del Libro
CAP - Cámara Argentina de Publicaciones
EDINAR - Alianza de Editores Independientes de la Argentina por la Bibliodiversidad
REUP - Red de Editoriales de Universidades Privadas
REUN - Red de Editoriales de las Universidades Nacionales
ALIJA - Asociación de Literatura Infantil y Juvenil de Argentina
Book Fairs
Feria Internacional del Libro de Buenos Aires - Fundación El Libro
Feria del Libro Infantil y Juvenil de Buenos Aires - Fundación El Libro
FED - Feria de Editores
Public Organisms
Ministerio de Cultura de la Nación
Ministerio de Cultura de la Ciudad de Buenos Aires (Dirección General de Promoción del Libro, Bibliotecas y la Cultura; Impulso Editorial)
Ministerio de Educación de la Nación
Ministerio de Relaciones Exteriores - Dirección de Cultura (Programa Sur)
CONABIP - Comisión Nacional de Bibliotecas
Fondo Nacional de las Artes
Associations and NGOs linked to the publishing industry
Fundación Filba
Fundación Leer
Literature Festivals
FILBA - Festival Internacional del Libro Buenos Aires
Filbita - Festival de Literatura Infantil y Juvenil
Festival Internacional de Poesía de Buenos Aires
Festival Basado en Hechos Reales
Agencies related to Native Languages
Instituto Nacional de Asuntos Indígenas
Universidad de Buenos Aires - Laboratorio de Idiomas
Publishing Training Centers
Carrera de Edición - Universidad de Buenos Aires
Especialización en Edición - Universidad de La Plata
Diplomatura en Diseño Editorial - Universidad de Belgrano
Programa de Actualización en Proyecto Editorial - Universidad de Buenos Aires (FADU)
EntreEditores
Translator's Associations
AATI - Asociación Argentina de Traductores e Intérpretes

COLOMBIA
Business and Professional Associations
Cámara Colombiana del Libro
Red de Editoriales Independientes de Colombia
ASEUC - Asociación de Editoriales Universitarias
ACLI - Asociación Colombiana de Libreros Independientes
ACLIJ - Asociación Colombiana de Literatura Infantil y Juvenil
Book Fairs
FILBo - Feria Internacional del Libro de Bogotá
Fiesta del Libro y la Cultura Medellín
Feria del Libro de Barranquilla
Feria del Libro de Bucaramanga
Feria Internacional del Libro de Cali
Public Organisms
Ministerio de Cultura de Colombia (Área de Literatura y Libro, Dirección de Artes, Consejo Nacional de Literatura, SINIC, Biblioteca Nacional - Red Nacional de Bibliotecas Públicas, Reading Colombia)
Alcaldía de Bogotá (Secretaría de Cultura, Dirección de Lectura y Bibliotecas, Instituto Distrital de las Artes)
Associations and NGOs
Fundalectura
Literature Festivals
Festival Internacional de Poesía de Medellín
Hay Festival Medellín
Hay Festival Cartagena
Festival de libros para niños y jóvenes (Cámara Colombiana del Libro, Bogotá)
Agencies related to Native Languages
Ministerio de Cultura (Plan Decenal de Lenguas Nativas)
Ministerio de Educación
Instituto Caro y Cuervo (Portal de lenguas)
Publishing Training Centers
Maestría en Estudios Editoriales - Instituto Caro y Cuervo
Profesional en Estudios Literarios con énfasis en Gestión Editorial - Universidad Javeriana
Profesional en Estudios Literarios y de Edición - Universidad de Bogotá Jorge Tadeo Lozano
Especialización en Edición de Publicaciones - Universidad de Antioquia
Translator's Associations
ACTTI - Asociación colombiana de traductores, terminólogos e intérpretes

MEXICO
Business and Professional Associations
CANIEM - Cámara Nacional de la Industria Editorial Mexicana
LEI - Liga de Editoriales Independientes
AEMI - Alianza de Editoriales Mexicanas Independientes
ALMAC - Asociación de Librerías de México
RELI - Red de Librerías Independientes
IBBY México
Book Fairs
FIL - Feria Internacional del Libro de Guadalajara
Feria Internacional del Libro en el Zócalo
Feria Internacional del Libro del Palacio de Minería
FILIJ - Feria Internacional del Libro Infantil y Juvenil
FILUNI - Feria Internacional del Libro Universitario
Feria del Libro Independiente
Feria del Libro de Oaxaca
Public Organisms
Secretaría de Cultura (Dirección General de Publicaciones, Dirección General de Bibliotecas, Centro Nacional de las Artes, Sistema de Información Cultural, Programa de Apoyo a la Traducción)
CONALITEG - Comisión Nacional de Libros de Texto Gratuitos
FONCA/PROTRAD - Programa de Apoyo a la Traducción
SEP - Secretaría de Educación Pública (Dirección General de Material Educativo)
Biblioteca Nacional de México
FCE/Educal - Fondo de Cultura Económica
Associations and NGOs
FUNLECTURA - Fundación Mexicana para el Fomento de la Lectura
Literature Festivals
Hay Festival Querétaro
Agencies related to Native Languages
INALI - Instituto Nacional de Lenguas Indígenas
INPI - Instituto Nacional de Pueblos Indígenas
UNAM PUIC - Programa Universitario de Diversidad Cultural
Secretaría de Cultura - Subsecretaría de Diversidad Cultural y Fomento a la Lectura
Publishing Training Centers
Editamos - Centro de Innovación y Desarrollo Profesional para la Industria Editorial
Centro Editorial Versal
Maestría en Diseño y Producción Editorial - UAM Xochimilco
Profesionales de la Edición
INDELI - Instituto de Formación Profesional para Libreros
Seminario Permanente de Editores - Red de Revistas Académicas, UNAM
Translator's Associations
Asociación Mexicana de Traductores Literarios
Organización Mexicana de Traductores

PERU
Business and Professional Associations
Cámara Peruana del Libro
EIP - Editores Independientes de Perú
EU Perú - Editoriales Universitarias del Perú
CEDILI - Centro de Documentación e Información de Literatura Infantil
Book Fairs
Feria Internacional del Libro de Lima
Feria Internacional del Libro de Arequipa
Feria Internacional del Libro de Cusco
La independiente
Feria del Libro Ricardo Palma
Public Organisms
Ministerio de Cultura (Dirección General de Industrias Culturales y Artes, Geoportal Cultural, Dirección del libro y la lectura)
PromPerú (Participación en ferias del exterior)
Biblioteca Nacional del Perú
Literature Festivals
Hay Festival Arequipa
Agencies related to Native Languages
Ministerio de Cultura (Premio Nacional de Literatura)
IEP - Instituto de Estudios Peruanos
CBC - Centro Bartolomé de las Casas
Publishing Training Centers
Programa Conecta para gestores culturales - Ministerio de Cultura
Escuela de Edición de Lima
Translator's Associations
Colegio de Traductores del Perú
Asociación de Traductores Profesionales del Perú

REGIONAL & INTERNATIONAL AGENCIES
CERLALC - Centro Regional para el Fomento del Libro en América Latina y el Caribe
British Council
CCE - Centro Cultural de España
Network of French Embassies and Cultural Institutions
EULAC - Editoriales Universitarias de América Latina
Goethe Institut
Iberbibliotecas
Alliance des Editeurs Independants

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