

5. FINDINGS AND ANALYSIS: BOOK PUBLISHING

The book publishing industry in Canada consists of book publishers, exclusive agents which distribute but do not publish books and publishers which also distribute the books of other publishers (publisher/agents). Books are also distributed in Canada by wholesalers and imported directly. The book publishing industry is fragmented by language of publishing operations and books published, region, size, country of controlling interest and into the two major sectors, text and trade book publishing. The financial strength and stability of the Canadian-owned sector has been a major domestic policy issue of the federal government concerning the book publishing industry in Canada. The industry has made minimal in-roads into foreign markets.

The Canadian book publishing industry is supported by the federal government through the Book Publishing Development Program (BPDP) of the DOC, the Canada Council and the Association for the Export of Canadian Books (AECB). A policy paper on the industry is currently being prepared by the DOC. This paper is expected to comment on the issue of foreign marketing. Industry submissions on this policy review have commented on the issue of government support structures to the industry for foreign marketing.

5.1 Analysis of Data Available on Capabilities and Achievements-to-Date in Foreign Marketing

Introduction

- The following data are drawn primarily from the CSP book publishing data base. As we are concerned with export capabilities and achievements, the focus in this analysis is on publishers (including publishers who are also agents) and not exclusive agents operating in Canada.

5.1.1 Industry Size and Structure

- The number of reporting firms identifying themselves as publishers was 202 in 1982. This compares to 179 reporting in 1981 and 186 in