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ROLE OF PUBLISHING INDUSTRY IN THE ASIA PACIFIC REGION

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Objectives of the APAC Study

- Assess current and potential **economic contribution** of the publishing industry across the APAC region
- Identify pathways to **optimise the economic value** of the publishing sector
- Gauge the **potential impact of AI** on the Text and Image Sector

BACKGROUND

Background to APAC Study

- Inspired by the UK Publishers Association's *Vision for Publishing*, the APAC study seeks to extend the approach regionally



Vision for Publishing

The Role of Publishing in the UK's Success

- Publishing contributes £11bn annually to the UK economy
- Supports 84,000 jobs and drives £6.5bn in exports
- UK is the world's largest exporter of books
- Strong global leadership in research publishing & open access

BACKGROUND

Vision for Publishing **Economic & Growth Potential**

- Publishing could add £5.6bn to the economy by 2033
- Potential to create 43,000 additional jobs
- International demand projected to grow 20% by 2033
- Anchors the wider £108bn creative industries sector

BACKGROUND

Vision for Publishing

Strategic Pillars

- **Grow** – Safeguard copyright, expand exports, strengthen clusters, zero VAT on reading
- **Innovate** – Harness AI responsibly, support R&D, fair digital markets, promote sustainability
- **Inspire** – Invest in libraries, literacy & education resources, diversify creative careers

BACKGROUND

Vision for Publishing **Call to Action**

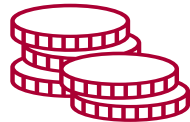
- Government backing is critical to unlock publishing's future value
- Uphold IP and copyright in digital & AI age
- Fund libraries, education, and skills pathways
- Position UK publishing as a driver of growth, innovation, and cultural inspiration

APAC as a region

- Spans **30m km² (22% of Earth's land)**,
- Home to **4.4bn people (55% of world population)**
- Generates **US \$40.9tn GDP (39%)** and **US \$93.8tn PPP (54%)** of world output
- Growth led by **China, India, Japan, South Korea, Australia & ASEAN**
- A hub of **education, innovation & culture**



- 4.4billion people; -
55% of world
population



- USD93.8trillion PPP
-40% of Global GDP
-GDP growth 4% vs
world 3.1%



- 800million students
>50% of world
- 6500+ universities
>33% of world



➤ 3600 spoken languages
➤ 300 written languages
➤ 50-70 widely published

Scope of the study

- Covers 12 countries
- Study includes value of Publishing Revenue
- Value of the overall industry
- Contribution to the country's GDP
- Market Dynamics
- Government Policies and impact of AI



Value of APAC Publishing Revenue

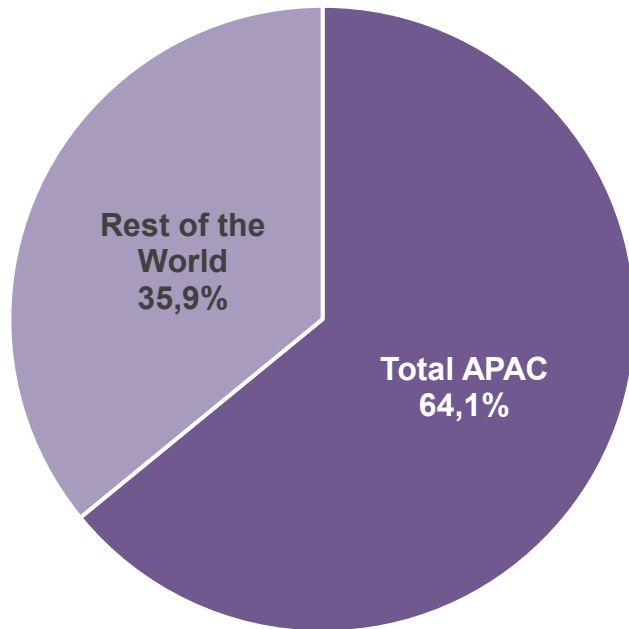
- **APAC^^ leads global publishing with US \$412bn revenue (2024)** vs. US \$170bn for the rest of the world.
- The region commands **75% of global publishing**, powered by China, India, Japan & South Korea as of 2024.
- Europe & North America now contribute **<25%**, showing APAC's rise as a new publishing hub.
- Forecast growth: **~8–10% annually to 2030**, vs. 3–4% for the rest of the world

Note :

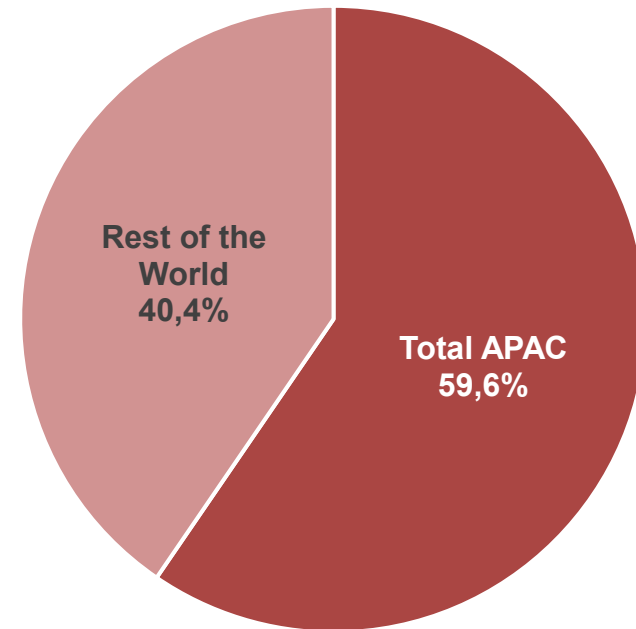
^^ refers to Total APAC countries not restricted to 12 countries focussed in this study

Value of Total APAC Publishing Revenue – Print only

Global Publishing Revenue (Print) 2024 ~
USD206B

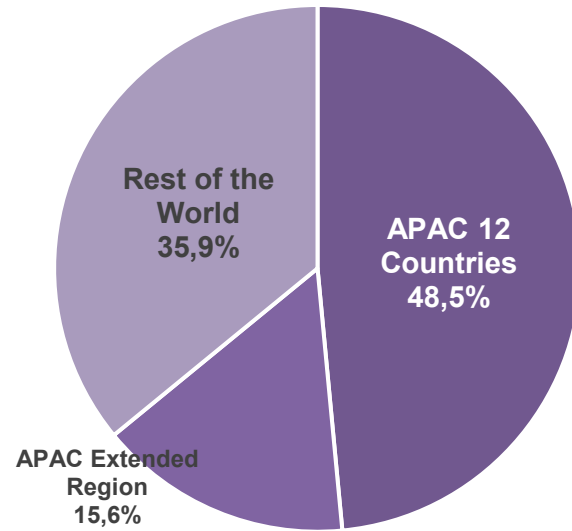


Global Publishing Revenue (Print) Forecast 2030 ~
USD178B

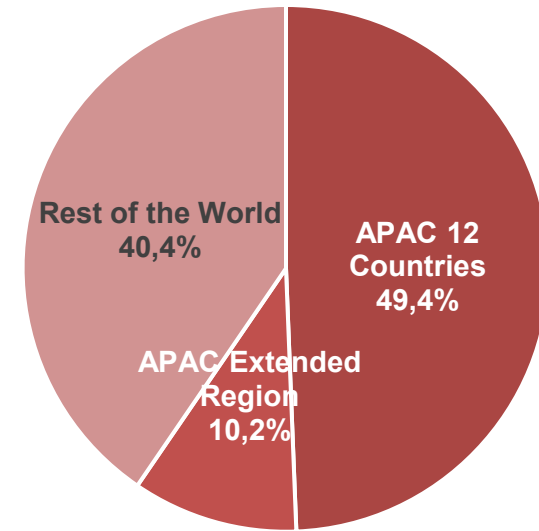


Value of APAC 12 Subset Publishing Revenue – Print only

Global Publishing Revenue (Print) 2024 ~ USD206B
Breakdown of APAC subset



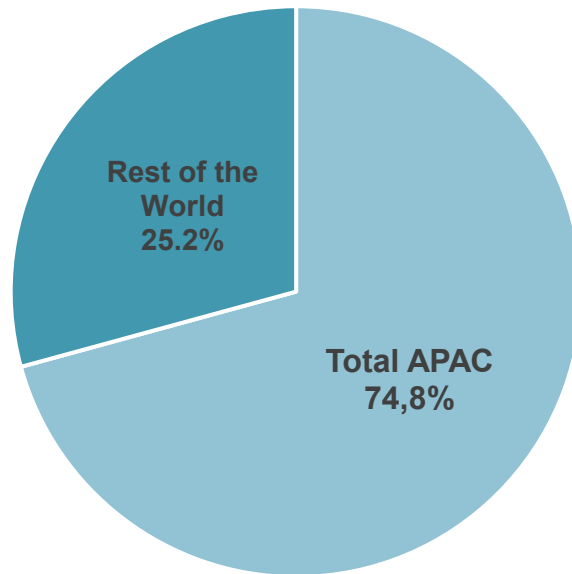
Global Publishing Revenue (Print) Forecast 2030
~ USD178B - Breakdown of APAC subset



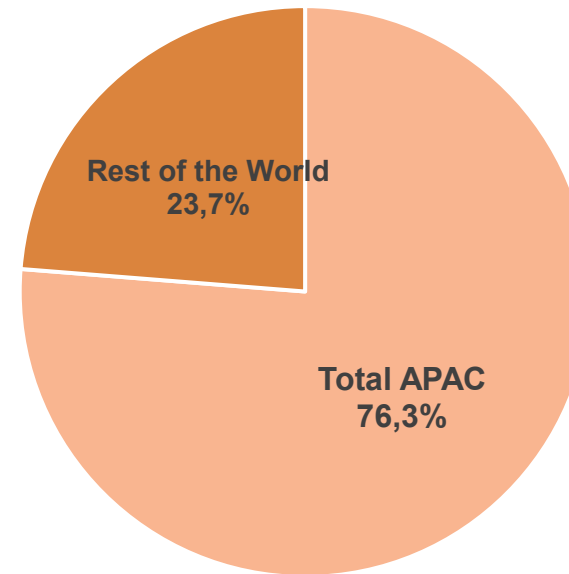
Note : APAC 12 countries are the countries focussed on this study

Value of Total APAC Publishing Revenue – Print and Digital

Global Publishing Revenue (Print & Digital)
2023 ~ USD551B

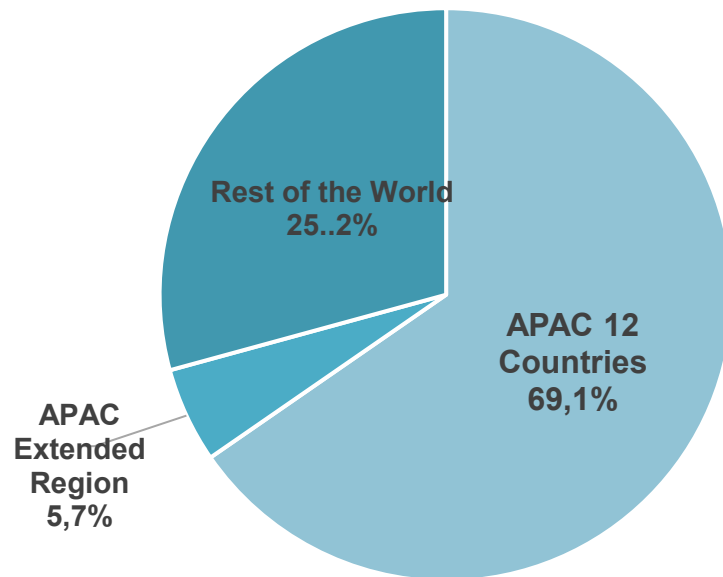


Global Publishing Revenue (Print & Digital)
Forecast 2030 ~ USD 695B

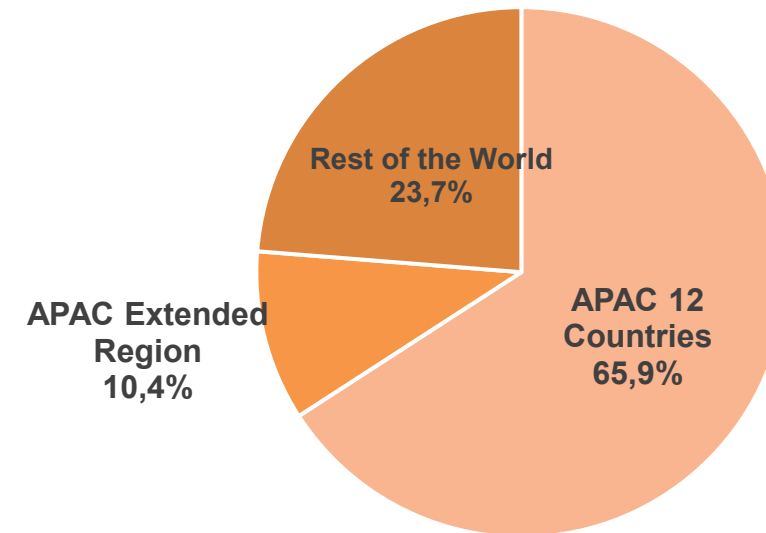


Value of APAC 12 Subset Publishing Revenue – Print and Digital

Global Publishing Revenue (Print & Digital) 2023
~ USD551B Breakdown of APAC subset



Global Publishing Revenue (Print & Digital)
Forecast 2030 ~ USD 695B Breakdown fo APAC
Subset



Note : APAC 12 countries are the countries focussed on this study

Value of APAC Countries Publishing Revenue

- **China dominates** with ~US \$299B (246B digital, 53B print), growing at **8–10% CAGR**.
- **India (28B)** print-heavy but rapidly digitizing
- **Japan (27B)** steady with strong digital manga/web publishing
- **South Korea (10B)** booming in webtoons & online lit.
- Mid-markets: **Australia (5B)** e-textbooks,
- **Indonesia (4.6B)** mobile-first e-learning.
- Smaller markets (Singapore, Malaysia, Thailand, Philippines, Vietnam, NZ) all show **digital > print**

Value of APAC Countries Publishing Revenue

Country	Traditional Publishing 2023 (US\$B)	Digital Publishing 2023/24 (US\$B)	Notes / Forecasts
China	53	246.0 (¥1.75T, 2024)	Digital dominates; CAGR ~8–10%.
India	24.5	3.0–4.0	Regional e-learning & e-books, CAGR ~9–10%.
Japan	21.5	5.5+	Digital manga, e-books, web novels, steady growth.
South Korea	6.6	3.5–4.0	Webtoons & digital lit drive expansion.
Australia	4.1	0.8–1.0	Strong e-textbook & e-book segment.
Indonesia	3.8	0.7–1.0	Fast growth in online lit & e-learning.
Singapore	1.8	0.5–0.7	Digital adoption high, small population.
Malaysia	~1.0 (est.)	0.4–0.5	Market CAGR ~5% traditional; digital catching up.
Thailand	~0.5 (books proxy)	0.6–0.8	Print stable; digital faster growth.
Philippines	~0.5 (est.)	0.4–0.6	Mobile-first digital reading culture.
Vietnam	~0.2	0.3–0.5	Online lit market expanding.
New Zealand	0.17	0.3–0.4	Digital education exports strong.

Indian Case Study - A Readership Revolution

National Book Promotion Policy – NBPP

The NBPP's theme, *Books for All – Improving the availability, accessibility, quality and readership* underscores a transformative journey for India's readership landscape.

- **Capturing a Vast and Diverse Readership Base**
India's literacy rate has steadily risen to almost **80 per cent**, and its large educational infrastructure—from two hundred and forty million school students to over fifty thousand colleges and more than one thousand universities—underpins a formidable readership potential.
- The policy builds upon this infrastructure, seeking to convert literacy into sustained reading habits across languages including **twenty-two scheduled** and **ninety-nine non-scheduled languages**.

Indian Case Study - A Readership Revolution

- **Institutional Anchors and Data-Driven Strategy**

The NBPP conducts **National Readership Surveys** to track reading habits, preferences, and trends across age and linguistic categories. These periodical surveys will enable policymakers to assess the effectiveness of NBPP initiatives and take corrective action.

- **Support for innovators, researchers, and start-ups** is a key lever in modernizing book promotion. NBPP plans to back creators developing new ways to integrate reading into contemporary cultural and digital spaces.

- **Building a Reading Culture through Clubs, Hubs, and Libraries**

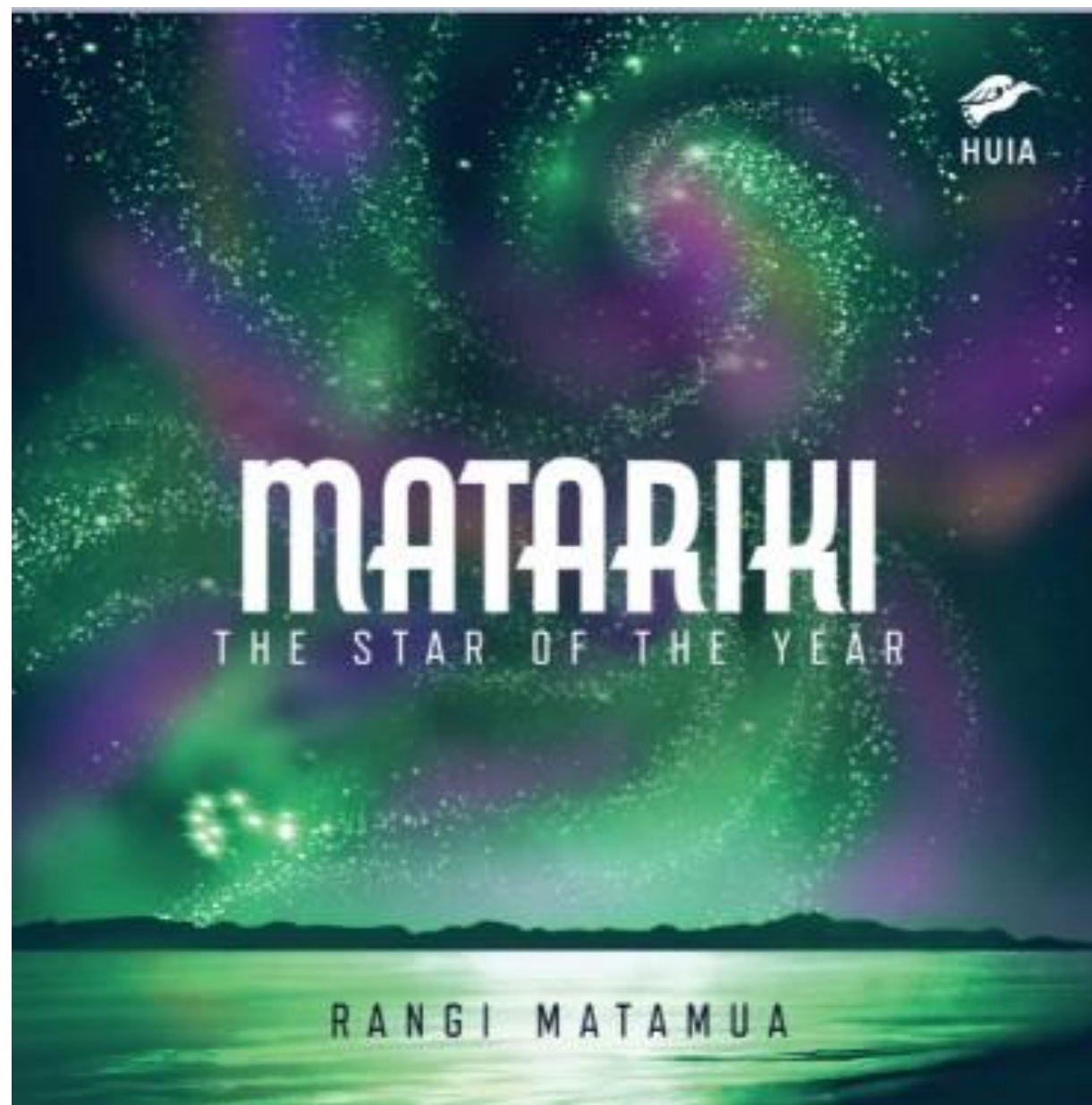
The Readers' Club Movement is being significantly scaled up, with the NBPP encouraging all states and union territories to collaborate with libraries and schools to establish both physical and virtual book clubs.

Indian Case Study - A Readership Revolution

- Children's Book Hubs are being set up at cultural centres These hubs provide book-friendly environments with drawing, sketching, and designing activities to spark youthful interest in reading. hours.
- Wide Reach Through Exhibitions, Fairs, and Campaigns
The NBPP promotes children's book fairs, virtual book exhibitions, mobile book exhibitions such as **rail-based initiatives**.
- Growth indicators and uptake in children's literature –
 - India's **children's picture book segment is valued at US\$130.14 million** in 2024, with a projected annual growth rate of 8.1 per cent.
- NBPP integrates all these efforts into a cohesive strategy: ensuing accessibility and measuring impact

APAC STUDY

New Zealand



New Zealand

- Importance of local publishing in small nation confronting an overwhelming globalised culture
- The Aotearoa New Zealand publishing industry is experiencing exciting year-on-year growth in books published in Te Reo Māori, and those that celebrate and tell the stories of indigenous culture.
- The use of Te Reo Māori by Māori, and in the general population, continues to expand and this is reflected in a vibrant books landscape including publishers Huia, Oratia Media, Bridget Williams Books, Anahera Press, Te Papa Press and the university presses.
- These books also feature strongly in both the New Zealand Book Awards, and the New Zealand Children's Book Awards – a further sign of the increasing value that is being placed by readers, librarians and the industry on sustaining the publishing of stories that are uniquely ours.

New Zealand

- Educational publishers are also playing a crucial role in language preservation and promotion.
- Sunshine Books publishes fiction and non-fiction titles in Te Reo Māori, Samoan and English, supporting literacy development for young readers in their own languages.
- These titles are also available in digital formats, with associated teacher tools, and have sold millions of copies in the USA, Canada, Africa, Australasia, the UK and Asia.
- Huia Publishers also publish books for schools in Te Reo Māori, as do a number of smaller publishing houses. These books are also used in Kura Kaupapa – Māori Language Immersion Schools – where the embedding of language and culture delivers education outcomes for Māori students that are more than twice as likely to result in success in upper secondary examinations than that attained in English-medium schools.