



American markets.

Nevertheless, high prices in pesos after devaluation give little possibilities to increase sales in foreign books in the domestic market (except in specific niches that are detailed below). Companies are reducing the number of volumes by title in order to cope with reduced sales in the market: nowadays, the number of volumes printed per title is 2500, while during the 1990s, it was 4200-5000 volumes.

**Table 1. Argentine Book Production, 1994-2003**

Year	No. of Titles	No. of Volumes	No. of Volumes, per Title	% of New Releases, per Title	Variation of Volume, per Title
1994	9 640	48 089 996	4 989	81.4	0.9
1995	8 733	43 965 453	5 034	86.1	-15.3
1996	9 915	42 296 878	4 266	86.6	5.2
1997	11 875	53 289 819	4 488	87.4	-5.4
1998	12 830	54 490 652	4 247	89.9	
1999	14 351	71 914 010	5 011	84.5	18.0%
2000	13 172	74 294 135	5 640	89.0	12.6%
2001	13 428	59 008 384	4 394	89.0	-22.1%
2002	9 964	33 708 268	3 275	93.0	-25.5%
2003	14 375	38 096 586	2 507	90.0	11.5%

Source: Argentine Chamber of Books

The value of book sales during the 1990s oscillated between \$500 million<sup>(2)</sup> and \$600 million. Afterward, sales dropped to \$285 million in 2002 but grew in 2003 to \$320 million.<sup>(3)</sup>

After devaluation, local printing has been increased because of the lower costs. In 2001, 81.3% of books sold in Argentina were printed in Argentina and 19% abroad, but in 2003, 96% of books sold were printed locally.

**Table 2. Book Volumes Printed in Argentina and Abroad, 2002-2003**

Year	Argentina	Abroad	Total	% of Volumes Printed In Argentina Abroad	
2002	47 657 531	11 153 996	58 811 527	81.03	18.97
2003	31 515 068	2 193 200	33 708 268	93.49	6.51
2004	36 387 950	1 527 291	37 915 241	95.97	4.03

Source: Argentina Chamber of Books

The recovery in 2003 can be explained by two influences. The first is the government campaigns promoting literacy and the government's requirement to buy books in order to modernize schools and public libraries. The second is the importance of the demand of books by foreign tourists, especially in the City of Buenos Aires. The most sought-after themes were Latin American literature, law and education.

Lower editing costs are creating strong competition in the export of books by famous authors, especially in the case of multinational companies with their international links. About 150 companies (including international groups and small and medium-sized enterprises [SMEs]) export Argentine narrative, scientific books and those books written by foreign authors but produced in Argentina because of low costs.

The big players in the book industry are publishing locally with the intent to export. Norma, for example, is producing in Argentina titles that were published previously in Colombia and are now exported to a wider Latin American market. Grupo Editorial Planeta published 300 000 paperback copies of *Lord of the Rings* in Argentina, for

export to Latin American countries. Also for export, Alfaguara published in Argentina 40 000 copies of the last book by Spanish writer Arturo Perez Reverte. Furthermore, well-known authors such as Gabriel Garcia Marquez and Isabel Allende are also published in Argentine houses.

Canadian publishers should hire a local literary agent to facilitate sales and enlist legal representation when selling foreign rights.

## Newspapers and Magazines

There are 274 national and local newspapers, the majority being SMEs. Nevertheless, the market share is concentrated in some few actors: Clarín newspaper has 57% of sales and La Nación newspaper has the 15% of sales. Argentina has a vast market for newspapers and magazines, but sales declined from 2 million units in 1995 to 1 million units in 2002. In 2003, the value of this sector was \$530 million, comprising \$230 million in sales and \$300 million in advertising revenue.

Argentina publishes 600 magazines. The economic crisis had a devastating impact on the magazine sector: while in 1998 sales were 200 million units, in 2002 they dropped to 64 million. In 2003, there was a small recovery and magazine sales reached 68 million units. The categories that sell best are general interest, women and home, and sports (see **Table 3**).

The most significant decrease was in the foreign magazine sector. Twenty million foreign magazines were sold in 1997 but in 2001, the recession produced the first drop to 15.2 million. When devaluation caused a triplication in prices, sales fell to 5.6 million. The recovery in 2003 was very small, increasing just to 6 million units.

**Table 3. Argentine and Foreign Magazines, by Category, 1995-2003 (million copies)**

Category	1995	1996	1997	1998	1999	2000	2001	2002	2003
<b>TOTAL</b>	<b>187</b>	<b>162</b>	<b>195</b>	<b>207</b>	<b>186</b>	<b>162</b>	<b>128</b>	<b>64</b>	<b>68</b>
Total, Argentine Magazines	164	143	172	185	168	145	113	58.4	62
Technical	5.5	5.0	5.7	6.9	7.7	7.1	5.4	2.1	2.1
Educational	38.3	30.0	29.1	29.7	31.2	25.6	19.2	7.0	7.5
Illustrated	7.3	9.2	8.2	7.9	8.2	9.8	6.0	2.1	2.0
Women and Home	25.8	22.2	31.2	38.5	34.5	28.2	23.8	10.6	10.6
Sports	19.4	18.8	19.5	21.0	19.7	17.4	14.1	9.5	11.2
Arts and Performance	12.1	10.4	18.3	15.4	11.9	7.9	6.1	3.9	4.0
General Interest	48.1	41.3	53.1	58.2	46.2	40.5	30.6	18.5	19.0
Others	7.1	5.9	6.5	7.1	8.6	8.4	7.6	4.7	5.6
Total, Foreign Magazines	23.6	19.0	23.0	22.2	18.2	17.1	15.2	5.6	6.0

Source: Argentine Association of Magazine Publishers

Some companies are beginning to work with a two-pronged strategy of exporting and selling licences. For example, Editorial Perfil exports 5% of its magazines *Noticias*, *Caras* and *Mía* to foreign markets and sell licences for *Caras* to Brazil and Portugal, where it manages a joint venture with local firms. Another firm, Editorial Atlántida, exports *Para Ti* to Peru, where the magazine is selling with better results than in the Argentine market.

## OPPORTUNITIES

Companies exporting Canadian books in English or French will face two strong

challenges:

- the high sales price of foreign-made books in Argentina, given the value of the peso; and
- almost all of the market belongs to U.S., British or French companies in their languages. This dominance is especially significant in the one niche showing constant demand: texts for learning English or French as a second language.

However, Canadian culture is highly valued in Argentina because of the quality and sophistication of Canadian authors and Canada's literary history. A key opportunity to introduce Canadian books to Argentine readers is through participation in the annual Book Fair in Buenos Aires, the most important book fair in South America. The Book Fair, produced by Fundación El Libro, will next be held April 18-May 5, 2005.

There are opportunities for Canadian authors to sell copyrights for translation to some of the big players--e.g. Norma and Emecé--or to smaller publishing houses that remain independent from international corporations such as Interzona, Del Zorzal and Adriana Hidalgo.

Furthermore, it is highly possible to sell books in formats other than paper-based, for content in any category, including second languages. There are many possibilities for Canadian companies that are interested in selling content in the electronic or e-learning format. The market value for e-learning was \$24.9 million in 2001 (before the crisis) and is showing a steady and strong recovery; projections see the market reaching \$37.2 million at the end of 2004. Other fields open to opportunities can be found in the public sector (especially in education) but also in private companies (e.g. publishing houses and music recording companies).

The book publishing industry in Argentina has other significant opportunities for Canadian companies. The industry is open to joint ventures with local firms or international groups that work in Argentina. These joint ventures can gain advantages for Canadian exporters, such as lower costs of translation and local editing, and will help Canadians use Argentina to expand Canadian book sales throughout Latin America.

Academic collaborations, educational texts, and books in English-Spanish and French-Spanish also represent opportunities for Canadians.

Argentiniens are now starting to shop in the large, bookstore chains. This change in purchasing habits opens opportunities to Canadian companies that provide design and technical support to big stores.

In the newspaper and magazine market, there are no big opportunities, except in selling licences for Canadian material to appear in the local edition of international magazines. The French magazine *Elle*, for example, is published by Clarín Group and *Rolling Stone* (U.S.) is in the newspaper *La Nación*. Also, opportunities can be found to sell content to existing magazines and newspapers that have sections oriented to specific topics, such as technology, animation, architectural design or lifestyles.

## Trade Shows

### Event/Description

**31<sup>st</sup> Buenos Aires International Book Fair**  
April 13-May 9, 2005 (Annual)  
La Rural, Predio Ferial de Buenos Aires

### Organizer

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## KEY PARTICIPANTS

The local publishing and book sectors have suffered a significant change in ownership during the last five years. Twenty publishing houses now dominate the book market--all of them belong to international companies.

The most important players to appear on the Argentine book and publishing scene are the Spanish group Planeta, which owns the local firms Emecé, Tusquets, Minotauro and Paidós, and the German group Bertlesmann (shareholder of Random House, Grijalbo and Mondadori), which bought Sudamericana (the most important national firm during the 1970s and 1980s). Other significant participants are the Spanish Group Prisa (which owns Santillana, Alfaguara, Taurus, Aguilar, Altea and Richmond-Publishing) and Ediciones B, which bought Javier Vergara Editores; the French group Havas (linked to the Group Vivendi), which owns Alianza Editorial, Aique and Larousse; and the Colombian group Norma, which bought Kapelusz.

There are two important niches in the Argentine market: educational and law books. The educational sector is concentrated in four publishers: Kapelusz-Norma, Santillana, Estrada (which belongs to Invest Capital) and Aique. In 2005, the Clarín Group will enter this sector through its new publishing house, Tinta Fresca. In the area of law books and periodicals, there are two key players: Thomson Corporation, <sup>(4)</sup> which in 1997 bought La Ley (the most important local publisher), and Reed Elsevier, which owns Abeledo Perrot and Depalma.

To aid their recovery from the economic crisis, publishing houses developed a two-pronged strategy: to publish small editions of new releases, and to reprint those titles and authors that offer a safe probability of profitability. During 2003, many small and medium-sized publishers reappeared in the market to print limited-run editions, up to 1000 volumes.

There are also important changes in the bookstore sector. Since the 1990s, big bookstore chains have been built in Argentina. The most important, Yenny-El Ateneo (owned by an Argentine oil group), has 31 bookstores in Argentina. These chains also buy copyrights to books that they print in Argentina for export. Another large player is Fausto, a chain of bookstores owned by Santillana.

To attract sales in the foreign language book sector, Alliance Française, the Goethe Institute and the British Council each have their own cultural centre in Argentina that feature bookstores. Also, Brazil has an educational institute that is quickly growing into an art centre with an audiovisual section and a bookstore. These bookstores attract students and academics as well as the general public.

In the newspaper and magazine sector, the most important player is the multimedia group Clarín. Clarín holds 57% of the total newspaper market, including newspapers sold by Clarín group members in the country's provinces. The second-largest player is La Nación with a 15% share.

There are two niches in the Argentine newspaper market: sports and business. The sports segment has one dominant player: *Olé*, which belongs to Clarín Group. Business news is divided among three newspapers: *Ambito Financiero*, *Cronista Comercial* (which belongs to the Group Recoletos, linked to the Group Pearson) and *Infobae* (which belongs to the Argentine multimedia group Hadad-Vigil).

The most successful magazines are produced by the Sunday editions of the most important newspapers (such as *Viva*, which belongs to Clarín) and several free magazines produced by cable companies. The two most important players in the magazine market are Editorial Atlántida and Editorial Perfil.

## PRIVATE- AND PUBLIC-SECTOR CUSTOMERS

Within Argentina, the educational system, which involves both public- and private-sector participation, represents a very important potential client. Items in demand include foreign language books—including English and French as a second language—as well as other educational learning resources and e-learning content and devices.

The private sector could represent a crucial customer for e-learning content, particularly within the education system and corporate training for private companies.

Other potential customers are in the greater Latin American market, through joint ventures with Argentine companies.

Canada and Argentina share three important agreements related to trade and investment: the Canada-Argentina Foreign Investment Protection Agreement (signed in 1991); the Double Taxation Agreement; and the Trade and Investment Co-operation Agreement (TICA, which involves Canada, Argentina and all Mercosur countries). Furthermore, Argentina is also involved in the process for negotiation of the Free Trade Area of the Americas (FTAA).

Canadian publishers should hire a local agent to facilitate sales. In general, Canadians should consider enlisting legal representation when selling foreign rights to their intellectual property. Some independent publishing houses such as Interzona, Del Zorzal and Adriana Hidalgo could perform this role.

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 E-mail: [info@yenny.com.ar](mailto:info@yenny.com.ar)  
 Internet: <http://www.yenny.com.ar> (In Spanish)

**La Ley**  
 Tucuman 1471  
 C1050AAC Buenos Aires, Argentina  
 Tel.: (54-11) 4378-4841  
 Fax: (54-11) 4372-0953  
 E-mail: [info@laley.com.ar](mailto:info@laley.com.ar)  
 Internet: <http://www.la-ley.com.ar> (In Spanish)

**Del Zorzal**  
 Tucuman 3350, Piso 1 N  
 1009 Buenos Aires, Argentina  
 Contact: Leopoldo Kuletz  
 Tel./Fax: (54-11) 4864-4150  
 Internet: <http://www.delzorzal.com.ar>  
 (In Spanish)

## Argentine Newspapers

**Ambito Financiero Newspaper**  
 Paseo Colon 1196  
 C1063ACY Buenos Aires, Argentina  
 Tel.: (54-11) 4349-1500  
 Internet: <http://www.ambitoweb.com>  
 (In Spanish)

**La Nacion Newspaper**  
 Bouchard 557  
 C1106ABG, Buenos Aires, Argentina  
 Tel.: (54-11) 4319-1600  
 Internet: <http://www.lanacion.com.ar>  
 (In Spanish)

**Clarín Newspaper**  
 Tacuari 1842  
 C1139AAN Buenos Aires, Argentina  
 Tel.: (54-11) 4309-7500  
 Internet: <http://www.clarin.com.ar> (In Spanish)

**Cronista Comercial**  
 Paseo Colon 740 Piso 1  
 1408 Buenos Aires, Argentina  
 Tel:(54-11) 4338-3088  
 Internet: <http://www.cronista.com>

**Diario Deportivo Olé**  
 Tacuari 1842  
 C1139AAN Buenos Aires, Argentina  
 Contact: María Cloux  
 Tel/Fax.: (54-11) 4309-7500  
 E-mail: [mcloux@clarin.com.ar](mailto:mcloux@clarin.com.ar)  
 Internet: <http://www.ole.clarin.com.ar>  
 (in Spanish)

**Infobae**  
 Contact: Carlos Nougues  
 Internet: <http://www.infobae.com.ar>

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Getino, Octavio. *Las industrias culturales en el Mercosur*. [Cultural Industries in the MERCOSUR.] December 2003.

## USEFUL INTERNET SITES

Argentina Business (Fundación Invertir): <http://www.invertir.com>

Canadian Heritage. Trade Routes: <http://www.canadianheritage.gc.ca/routes>

Chamber of Books: <http://www.editores.org.ar> (In Spanish)

Cultural Industry Observatory of the City of Buenos Aires:  
<http://www.buenosaires.gov.ar/areas/cultura/observatorio> (In Spanish)

ExportSource: <http://www.exportsource.ca>

Foreign Affairs Canada (FAC): <http://www.fac-aec.gc.ca>

FAC. Latin America and Caribbean Bureau: <http://www.dfait-maeci.gc.ca/latinamerica>

InfoExport: <http://www.infoexport.gc.ca>

International Trade Canada (ITCan): <http://www.itcan-cican.gc.ca>

Regional Centre for Book Promotion in Latin America and the Caribbean (Centro Regional para el Fomento del Libro en América Latina y el Caribe [CERLALC]):  
<http://www.cerlalc.org> (In Spanish)

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1. The production of this profile was commissioned by the Department of Canadian Heritage, Trade Routes program and prepared with the collaboration of the Canadian Embassy in Argentina. The opinions expressed are those of the author and do not necessarily reflect the view of the Government of Canada. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information.

2. All monetary units are expressed in Canadian dollars, unless otherwise indicated. The conversion rate to Canadian dollars is based on IDD Information Services, Tradeline, December 2003.

3. Secondary sources, because neither the Chamber of Books nor the companies provide this kind of information.

4. Thomson represents the only case in which Canadian capital is involved in the Argentine book and publishing market.

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