



New Zealand Publishing Market Size Report 2024



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The data in this report is taken from NielsenIQ BookData’s PANZ Market Size Survey 2024 conducted across March/April 2025 and is ©NielsenIQ BookData 2025. This report was compiled for the use of the Publishers Association of New Zealand and is not for publication or dissemination without their permission.

Introduction

NielsenIQ BookData's PANZ Market-size Survey 2024

NielsenIQ BookData's **PANZ Market-size Survey 2024** surveyed Publisher's Association of New Zealand members (and a few non-member publishers) to size the value and unit volume of the New Zealand publishing market across all formats (digital and physical), from all channels (shops, online, schools & libraries) and across both domestic and export markets.

This Report highlights key findings from the survey results from the calendar year January to December 2024. It is based on a nationally representative sample of 29 publishers during this period and makes comparisons to book publishing in the equivalent period in 2023 with a like-for-like comparison of the data submitted.

The report provides data on most of the areas covered by previous reports from 2019-2023; including category and format revenue; total revenue and units sold; and includes some reference to trend data across those 6 years. See tables on page 9-10 for summarised totals in each sector.

For variables covered by the survey – see the Methodology section at the end of the report.

Foreword



Message from Graeme Cosslett, President, Publishers Association of New Zealand

Tēnā koutou

Welcome to the New Zealand Publishing Market Size Report 2024, now in its sixth year. This report covers the period January to December 2024, along with summary trends covering the period 2019–2024.

During 2024, the publishing industry contributed a total of \$282.3m to New Zealand's creative economy and 544 FTE jobs over 18.2m individual units sold. The Publishers Association of New Zealand (PANZ) / Te Rau o Tākupu is committed to fostering a thriving, sustainable, and inclusive publishing industry for local and global readers, and to giving publishers the support and information they need to succeed in their diverse businesses. PANZ actively advocates for the sector's interests and value across industry and government, and this report is critical to that work. Its utility and value have grown annually, thanks to the ongoing support of Copyright Licensing New Zealand (CLNZ) via its Cultural Fund, and to those who have continued to contribute annually. Ngā mihi nui.

Despite the challenging economic conditions in 2024, and a reduction in overall number of books published (-4.7%), the year did produce modest revenue growth compared to 2023, including a slight increase in both the value and number of units sold, along with gains in domestic and export revenues. Domestic publishing revenue grew by 5% to \$51.1 million. Exports increased by 2.3%, with notable 10% export growth in the trade sector to Australia.

The total units of books published in Te Reo Māori increased by 2% year-on-year, this being nearly four-fold growth since 2019. Revenue also rose by 1.7% in trade publishing and 1.8% in education publishing, reflecting increased demand and engagement across these sectors.

Employment held strong, with very slightly fewer people (-0.3%) employed in-house, alongside growth in freelancing opportunities (+11%), and marketing (9%).

This year's data is more vital than ever, offering clear evidence of the publishing industry's agility in navigating economic pressures while staying focused on strategic growth. It reflects a sector committed to adaptive commercial practices, relevant and timely content creation, and the sustained development of diverse readerships. The report underscores the pivotal role the New Zealand publishing industry plays in generating and safeguarding national intellectual property, both locally and abroad, and reaffirms the enduring importance of books in advancing literacy and supporting the wellbeing of our society, especially in these times of uncertainty.

Ngā manaakitanga,

A handwritten signature in blue ink, appearing to read 'G Cosslett', with a stylized flourish at the end.

Graeme Cosslett

President, Publishers Association of New Zealand / Te Rau o Tākupu

Executive Summary



Now in the 6th year of data collection, this survey on behalf of PANZ (Publishers Association of New Zealand, Te Rau o Tākupu) covers some robust trends in New Zealand publishing.

The economy is still marked by a consumer cost of living crisis; however, CPI dropped back to 2.2%* by year end 2024, which no doubt contributed to the gains which were made. There was a slight value increase in net sales of 0.4% against 2023 to \$282.3 million, with total units sitting around 18.2m (+0.9%).

Growth from trade fiction was recorded for 5 years straight, and 2024 was no exception, with adult fiction up 1.4% to \$34.1m. Trade non-fiction turned around a 3-year downward trend to finish \$2m up on the prior year at \$55.6m, and trade children's is now in its 4th year of year-on-year decline to \$49.8m (-0.4%). The educational sector grew by 1.8% to \$34.8m.

Full-time employment remained stable at 544 FTEs, and fewer books were published than in 2023, down around 100 separate ISBNs to 2,136 (-5% year-on-year). The number of trade children's titles published overtook non-fiction for the first time.

Physical bookstores while still the most important channel to market for trade publishers, and second for educational, posted a decline to \$89.4m (-5%) across both sectors combined. Digital value sales increased by 1.6% to just over \$13m, with trade fiction, trade non-fiction, and educational titles driving this uplift.

Revenue from local publishing in the domestic market grew 5% to just over \$51m speaking to a healthy domestic publishing sector. Exports grew 2.3% in value, with a notable rise in trade publishing exports to Australia by 10%, and in the educational sector by 10% also.

Te reo Māori publishing, an area unique to Aotearoa, saw a volume increase of 2% year-on-year, and its share of all publishing remained stable at 1.8%. Demand for books published solely in te reo Māori saw a drop of 19% to a 6% share of this sector. When combined with translated works from English to te reo Māori however, they accounted for a fifth of the 325k books sold, speaking to the continuing appetite for books published in te reo Māori.

To explore these insights in greater depth, we invite you to read the full report. We trust this overview of Aotearoa's publishing landscape in 2024 will prove valuable as we continue to benchmark publisher performance year-on-year and build a clearer picture of the long-term trends shaping the industry.

Ngā mihi nui,

NNikolic

Nevena Nikolic
Territory Manager, NielsenIQ BookData, New Zealand

* Source: Statistics New Zealand / Tatauranga Aotearoa 2024

An overview of Aotearoa Publishing in 2024

New Zealand publishing 2024

\$282.3m ↑0.4%
Total publishing revenue*

*includes trade, education & professional sectors - all other figures below include trade & education sectors only

18.2m ↑0.9%
Total units sold

2136 ↓4.7%
Number of books published

544 ↓0.3%
People employed



\$14.5m ↑2.3%
Export earnings



\$51.1m ↑5.0%
Domestic revenue
(from NZ content)



\$161.4m ↑1.7%
Print book revenue



\$13.1m ↑1.6%
Digital book revenue
(all types)



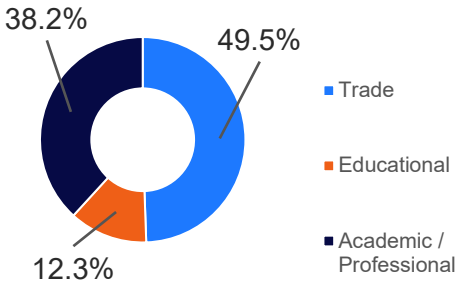
\$89.4m ↓5.3%
Physical
bookstore channel



\$10.8m ↑6.5%
Online retail
channel

The shape of New Zealand publishing: 2024 Highlights

Revenue share by sector



2024 highlights include a small overall uplift, proving to be a better year for most types of publishers, than the previous one. Total revenue generated from all sectors combined, across both domestic and export markets, showed an uplift in revenue to \$282.3m—an increase of 0.4% year-on-year—the first since 2021. Revenue from trade and education titles only (excluding the academic/professional sector) totalled \$174.4m (1.8% increase on 2023), of which \$159.9m were domestic sales and \$14.5m in exports. Exports grew 2.3% against 2023, a rebound on the prior year, and this was driven by increased demand for New Zealand trade and education titles in Australia (+9.6%).

The market average price showed a decline of 0.5% to \$15.50 per book. The Trade Fiction sector showed the largest average price increase of 5.7% to \$14.77 (from \$13.97).

Aotearoa publishing employed 544 full-time equivalent employees, with a flat result of +0.3%, and publishers produced 2,136 separate New Zealand books by ISBN, down nearly 5%, with more trade children's published than non-fiction for the first time in 6 years.

Te reo Māori publishing accounted for 325k of all unit sales, an increase of 1.9% on 2023. This unit volume represented a 1.8% share of total sales of 18.2m—flat against the prior year.

Print formats continue to represent the bulk of publisher revenue for \$161.4m (93% share, slightly up on 2023), while digital formats also grew in value to just over \$13.1m (to hold 7% share).

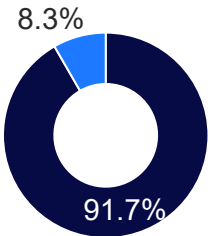
Export value increased by 2.3% overall (to \$14.5m), driven by an increase in both trade and educational sales to Australia for the second year in a row.

Physical bookstores were the dominant channel to market accounting for 60% of all print sales—or \$89.4m in revenue—a drop of 5% on 2023. The next largest channel to market was schools & educational institutions worth \$37.2m (24.9% share, up 19%), followed by the online channel at \$10.8m (at 7.2% share, 0.3 share point gain on 2023), reflecting a slight shift in consumer shopping habits towards online purchasing.

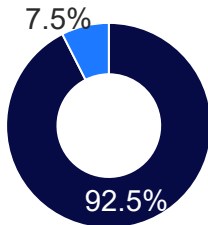
Libraries accounted for \$2.9m, an increase of 10.5%, and by units, growth over the past 4 years has been by double-digits each year (+45% in 2024 to 320k). Finally, 'other'—a broad category incorporating all sales from direct, corporate, licences, and rights etcetera at \$8.9m (-7.0%) saw a decline in 2024 after two prior years of growth.

For summarised broad sector data 2019 to 2024—see Tables 1.0 to 1.2 on page 9.

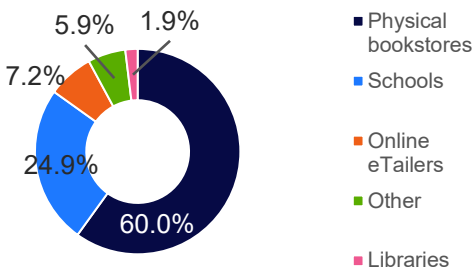
Domestic vs export sales



Print vs digital formats



Channels to market



\$282.3m total revenue
2024

- vs. \$280.3m in 2023 (+0.4%)
- 49.5% ↑ Trade share of sales
- 38.2% ↓ Academic/professional share
- 12.3% ↑ Educational share

Confidential and proprietary

New Zealand publishing: Summary trends 2019-2024

Table 1.0 \$ Revenue millions: Genres

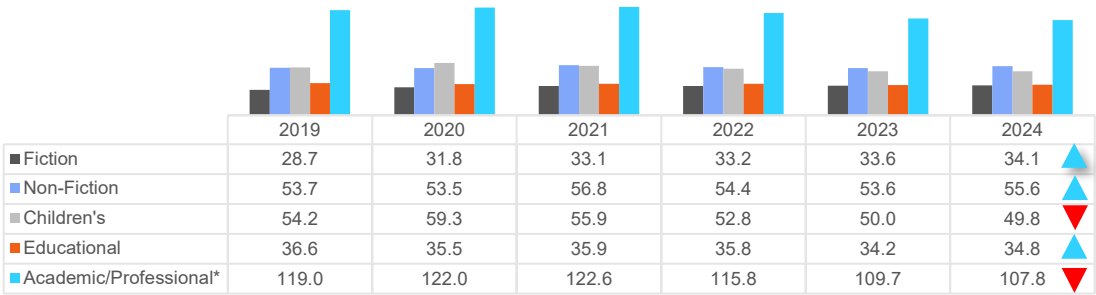


Table 1.1 \$ Revenue millions: Formats**

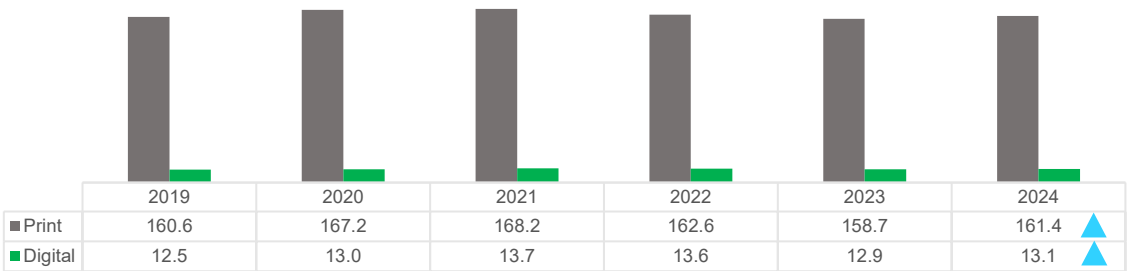
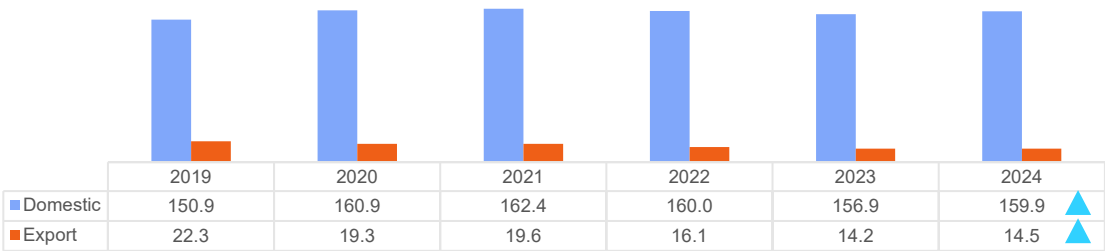


Table 1.2 \$ Revenue millions: Domestic vs Export**



*Estimate – see p. 27 for methodology
**Trade + Educational sectors only

Confidential and proprietary

New Zealand publishing: Summary trends 2019-2024

Table 2.0 FTE: Staff employed

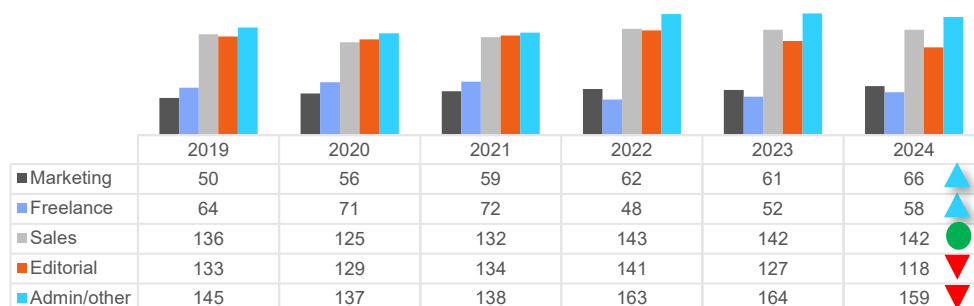


Table 2.1 ISBNs published

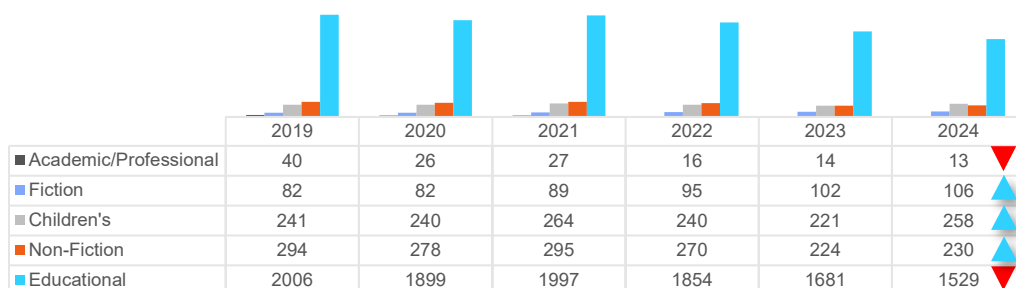
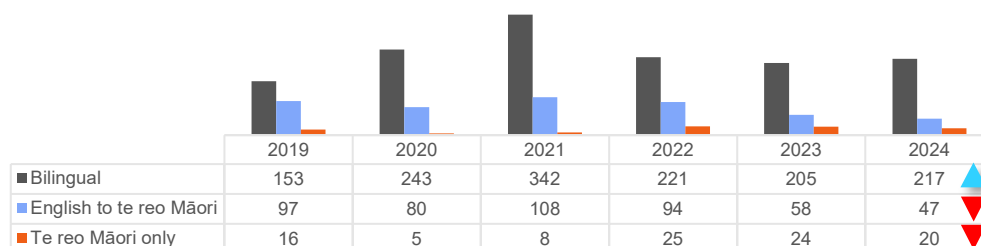
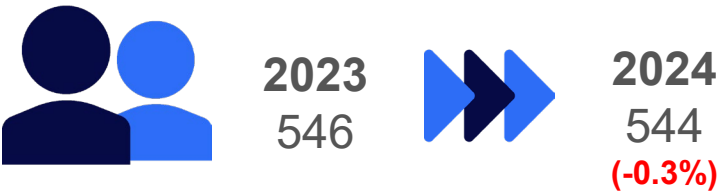


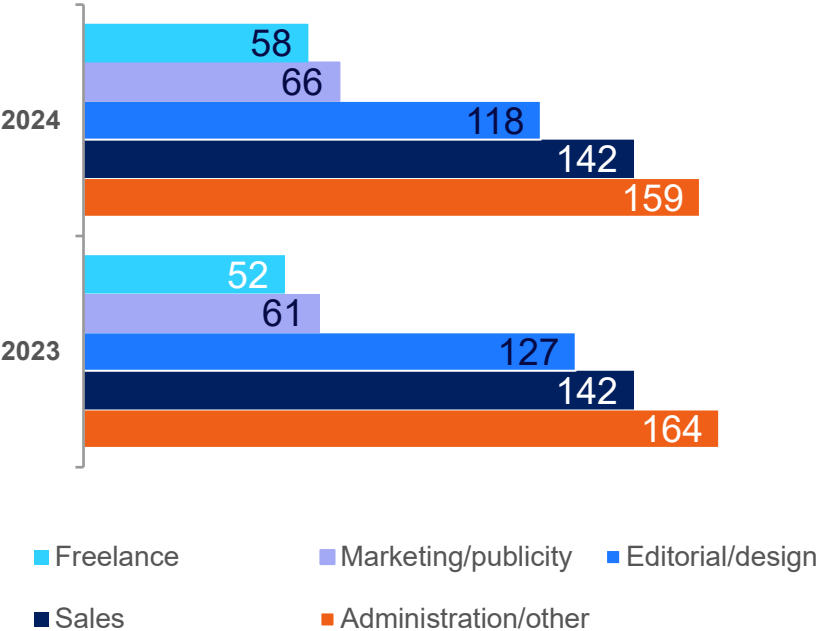
Table 2.2 Te reo Māori publishing (in '000s)



New Zealand publishing: Number of staff employed



Employment sectors in book publishing

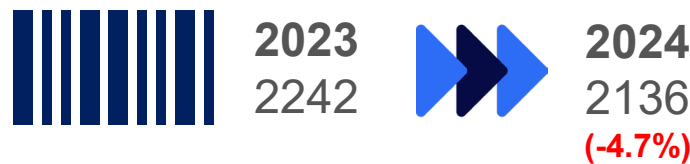


The total number of people employed in New Zealand book publishing across the trade and education sectors combined remained flat against the prior year at 544 full-time equivalent (FTE). There was however some movement in roles, with administrative and editorial roles decreasing, and the freelance and marketing sectors increasing. The area which saw the greatest increase in numbers was the freelance sector, going from 52 to 58 (+11%), Marketing also grew to 66 (+9%). All other areas declined or were flat, Sales & Product Management held steady at 142 people year-on-year, Administration decreased from 164 to 159 (-2.7%), with Editorial & Design showing the greatest drop from 127 to 118 (-7%) for the second year in a row.

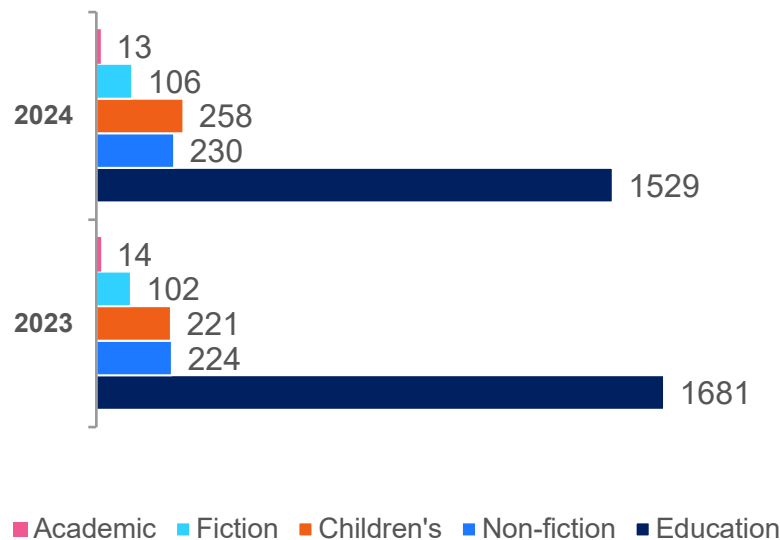
The largest employment sector was Administration & other, holding 29% share of all employees, edging out Sales & Product Management at 26%, followed by Editorial, Design & Production at 22%. Marketing & Publicity held steady as the fourth largest sector at 66 FTEs (or 12% of total employed) and finally, Freelance grew to 11% share (from 10% the prior year) to 58 FTE, representing the smallest sector again, perhaps absorbing some of the decrease in Editorial & Design roles.

See page 10, table 2.0 for 6-year summary data.

New Zealand publishing: Number of ISBNs* published



Main categories of books published



2024 marked the third year that the total number of unique ISBNs published contracted, dropping by nearly 5%, with the largest contraction coming from the Education sector (-9%).

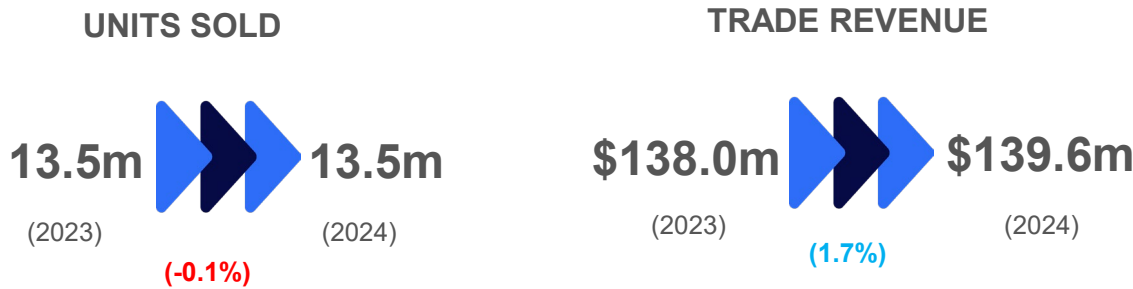
Education titles as usual accounted for the majority of New Zealand titles published, with 1,529 in total, representing 72% share (3 share points down on the prior year). The next largest category was children's at 258 ISBNs, (12% share, an increase of 16.7%, the first uplift since 2021), and overtaking trade non-fiction for the first time. Trade non-fiction at 230 or 11% share (a year-on-year increase of 2.7%, coming after the prior year's double-digit decline). Trade fiction continued its longer-term growth trend with 106 unique ISBNs published for 5% share (+3.4%), the fourth year of consecutive uplifts, reflecting an increased appetite to publish stories based here in Aotearoa.

See page 10, table 2.1 for 6-year summary data.

**ISBN or International Standard Book Number is a numeric commercial book identifier that is intended to be unique and for this measure New Zealand-published only.*

Trade Publishing 2024

Trade* publishing: An overview



Trade publishing fared better in 2024 with revenue at \$139.6m, around \$3m higher than where it was pre-pandemic (\$136.6m). Trade sales through the physical bookstore channel declined last year, while online channels reported growth. Inflationary pressure also made an impact with the average sell price (ASP) up in trade fiction to \$14.77 (+5.7%). Total units sold were flat at 13.5m (on par with 2023), with revenue up 1.7% to nearly \$140m. Trade publishing revenue accounted for 49.5% of all publishing revenue in New Zealand (a share point gain of 0.5 on 2023), and 77% of all revenue earned came from international ISBNs.

In terms of formats, print trade revenue increased 1.7% to \$129.7m. Digital book** revenue also increased by 1.9% to \$9.9m, an uplift similar to that of 2022. Two of the main categories in trade print publishing; fiction and non-fiction both saw value increases of 1.1% and 3.8% respectively. In contrast, trade children’s print book revenue was flat by -0.3% at just over \$49m, holding steady after 3 previous years of falling revenue.

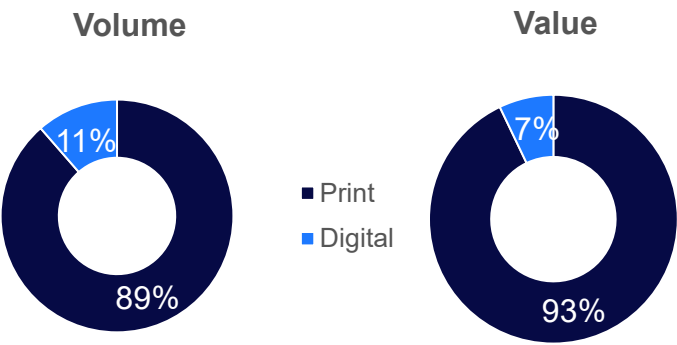
By volume, children’s books were the largest sector within trade publishing, holding 51% market share of total sales at 6.8m units, and higher than the next largest sector, non-fiction, by 56%. Trade non-fiction came in second with 4.4m units (32% share), and finally adult fiction at 2.3m units (17% volume share).

By value, it looked different with non-fiction ahead of children’s revenue to hold the largest share at \$55.6m or 40%, followed by children’s books at \$49.8m (36%), with fiction coming in third at \$34.1m, or 24% value share of all trade publishing. Adult fiction is now showing 6 years of year-on-year value growth as a category.



*Trade publishing totals above included domestic and export sales of fiction, non-fiction and children’s books combined across all formats.
 ** Primarily reported as eBooks

Trade publishing: **Formats**



Trade publishing in New Zealand is predominantly in physical format, holding 93% share by value in 2024. Digital formats do not change significantly from year-to-year, if all revenue grows, the print book format increases keeping the digital share static at around 7%.

By volume, print books held 89% market share in 2024 (similar to 2023) at just under 12m units for the second year in a row, and digital formats (mostly eBooks) held 11% share at 1.5m units (a slight drop on 2023). By value, print books increased to a total of \$129.7m in revenue (up \$2.1m on the prior year) and continued to hold the majority of trade book market share.

Digital formats* held 7.1% or \$9.9m of the trade market by value, flat against prior year, and the first year of reported decline since 2019. By volume, digital books also decreased to 1.5m units (-2.1%), a further correction on the growth experienced over the pandemic years.

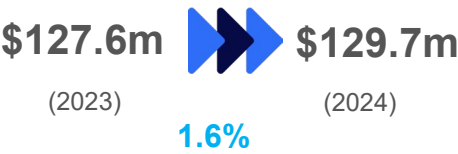
In print format, non-fiction grew by nearly \$2m as a category, while children’s decreased slightly. Non-fiction held the largest value share once again at \$52.9m (+3.8% to 41%). Children’s books were not far behind at \$49m (dropping 0.3% to 38% share), and the fiction genre increased to \$27.7m (+1.1% to 21%).

In digital formats, fiction and non-fiction grew value share. Fiction continued to hold the largest share at \$6.4m (65%), followed by non-fiction at \$2.7m (27%), and children’s books at \$0.80m (8%).

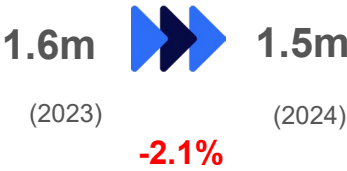
PRINT BOOKS (VOLUME)



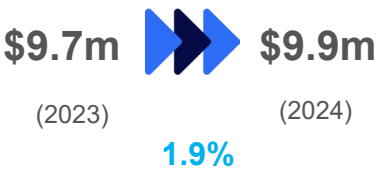
PRINT BOOKS (VALUE)



DIGITAL BOOKS (VOLUME)



DIGITAL BOOKS (VALUE)



By volume share:

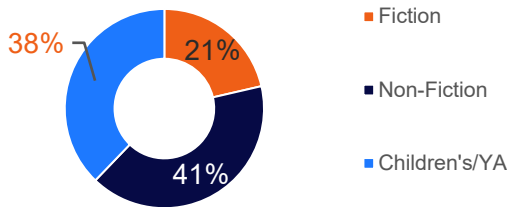
88.6% print ↑

11.4% digital ↓

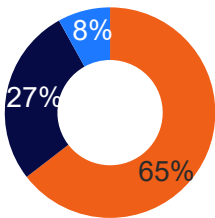
(digital format reduced 0.2 share points v '23)

Trade publishing: Formats by main categories

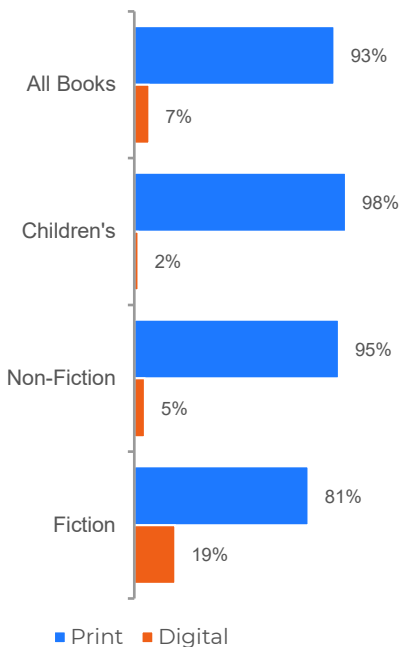
Print Category by Value Share



Digital Category by Value Share



Format by main categories –
VALUE%



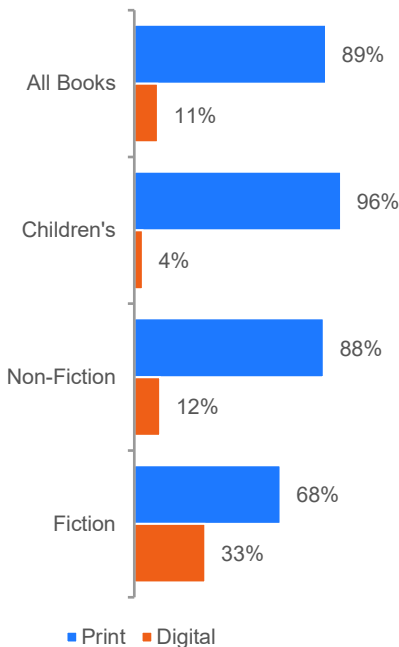
Print

Trade print fiction stayed flat at 21% value share when compared with 2023 (21.5%), while print children's reduced share marginally to 38%, and non-fiction print gained a share point to 41% value of all print sales (see donut chart, top left), the same share point increase as the prior year.

Within the main trade genres, children's books still hold the largest share by volume in print format vs digital at 96% (same as the prior year), followed by non-fiction at 88%, and fiction at 68% (+1 share point).

In terms of value growth, print fiction grew by 1.1%, with non-fiction also in growth at 3.8%, and print children's titles were flat at -0.3% (halting three prior years of single digit decline).

Format by main categories –
VOLUME%



Digital

Across all digital sales, fiction share increased to 65% (+0.7) while digital non-fiction remained flat at 27%, and children's dropped to 8% share (see donut chart, top right).

Digital fiction (+3.1%) and non-fiction (+1.6%) genres were in value growth in 2024, including fiction for the second time in 5 years. Digital fiction increased share of overall fiction sales to 19% by value. Digital children's experienced the steepest decline at -6.2%.

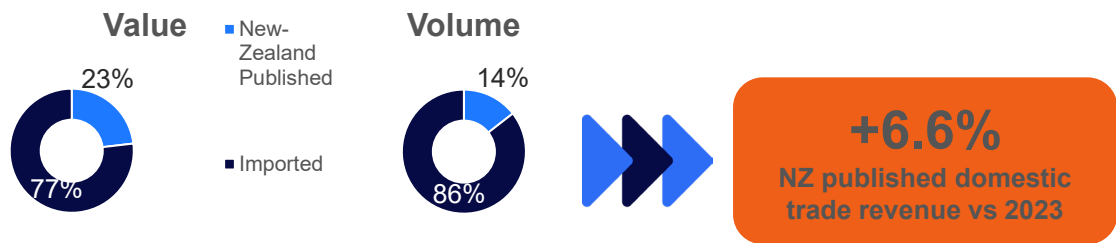
By volume however, non-fiction showed the biggest uplift of 4.5% to 527k units. And looking at all books by volume, the percentage share of digital has increased to 11% (from 7% prior year).

Confidential and proprietary

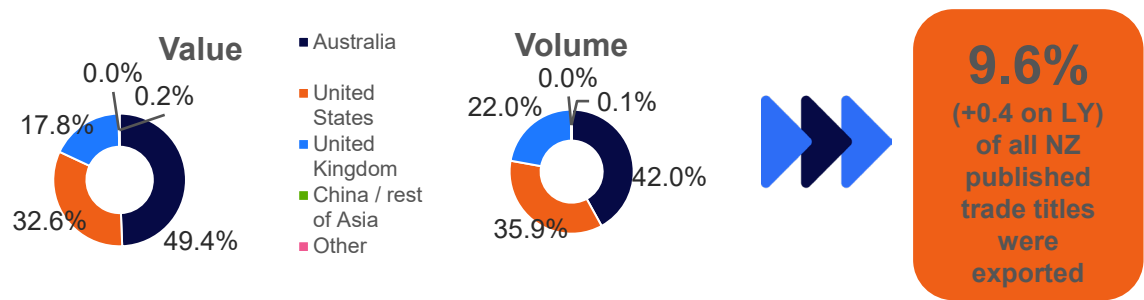
*digital formats were primarily reported as eBooks

Trade publishing: Domestic vs Export Markets

Domestic



Exports



New Zealand publishing relies heavily on imported books with 77% (1 share point lower than in 2023) of the revenue generated in trade publishing coming from overseas-issued ISBNs or unique identifiers. Imported titles accounted for \$104.7m of all trade sales domestically (flat on 2023 at +0.4%, still over \$5m higher than 2019’s reported \$99.3m). The remaining 23% by value share (1 share point higher than in 2023) were New Zealand-published ISBNs or unique identifiers worth \$31.5m (6.6% up on prior year).

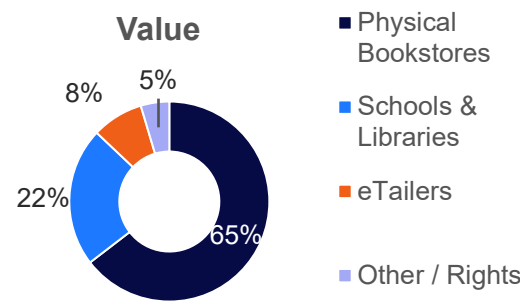
By volume, imported titles accounted for 11.6m units (85.5% share, up 900k units, +8.4%) and New-Zealand-published books accounted for 2m units or 14.5% of all domestic sales—slightly less than in 2023 by share—around 35k units less.

10% (9% prior year) of all New Zealand-published trade titles by value were exported to markets elsewhere (see Exports graph for destinations) with the total trade export market increasing by 11% to a value of \$3.3m. Exports were up across the board in all our key markets.

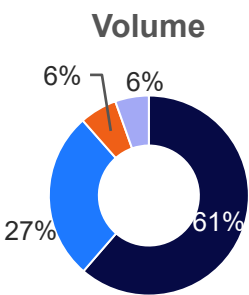
The key export market for New Zealand-published trade books was still Australia, and in 2024 this market for New Zealand titles increased by 10% to \$1.7m, with the Australian revenue share of exports flat at nearly 50% of the total. The rest of the export market for trade books (\$1.7m) was split across the United States (33%, same as prior year, over \$1m for the first time), United Kingdom (18%), and other markets such as China and Europe (0.25%). By volume, these keys export markets combined imported 1.6m units of New Zealand-published books.

Trade publishing: Channels to market

REVENUE EARNED BY CHANNEL



UNITS SOLD BY CHANNEL



New Zealand trade publishers have four main channels to market. The physical bookstore channel has reduced from a 72% share high in the pandemic year 2021 by 7 percentage points, with a shift towards eTailer and ‘other’ channels instead.

Physical bookstores held the largest share of domestic sales and were the most important channel to market at 65% (4 share point drop on 2023), or in terms of dollar value, \$83.7m of all trade sales. This channel showed 4.2% decline by value, with a similar result the prior year. By volume 7.4m units were sold through physical bookstores, a 1.3% increase on 2023.

Sales direct to schools and libraries combined accounted for the next largest share of sales at \$29.2m (22% share, +2 share pts on prior year). This channel saw a \$3.5m increase in revenue (+13.6%), whereas unit sales decreased to 3m (-10.5% on 2023).

Online eTailers accounted for nearly \$10.8m or 8% share of total sales to market by value, an increase on the prior year (+21%). By volume, unit sales decreased to 725k (6% channel share) reflecting a slight contraction in the market. Pre-pandemic (2019) unit sales via online channels were around 310k so this sector is still well up.

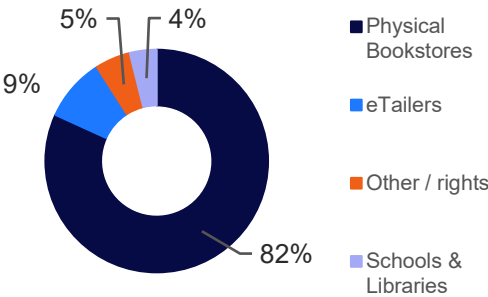
Other sales channels combined (including corporate, direct or publisher own sales, plus rights sales and co-editions) accounted for another 5% of revenue or \$6m (1 share point up on 2023). Two years ago, this channel accounted for approximately \$3.9m, and in 2024 grew another \$400k from \$5.6m the prior year).

65% or \$83.7m
trade print books
sold through **physical
bookstores**
(4 share pt drop on 2023)

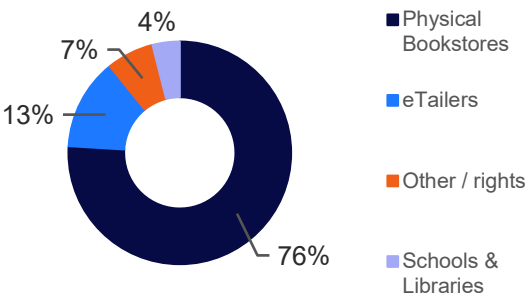
8.0% or \$10.8m
trade print books
sold through the
e-tailer channel
(1 share pt value increase)

Trade publishing: Channels by main category

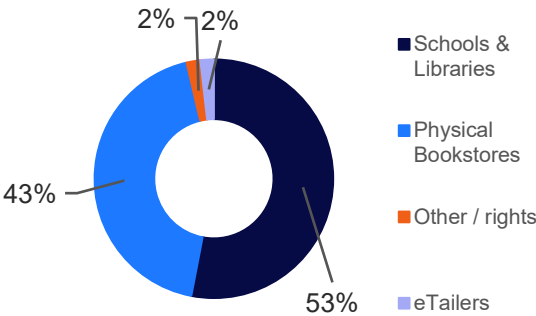
Fiction channel by value



Non-Fiction channel by value



Children's channel by value



Physical bookstores declined slightly by value share (65% in 2024 vs 69% in 2023) as the primary sales channel across all main genres, continuing a downward trend since 2021. Most adult fiction (80%) and non-fiction titles (76%) sold through physical outlets by value. However, with children's books, physical bookstores were of lesser importance—representing less than half of all channel value sales at 43%, a decline on 2023 of 3 share points. The largest channel was schools and libraries combined which held 53% value share of trade children's sales (the same as the prior year).

eTailers represented the third largest channel to market for all trade titles at 8% by value share (+1). When considering children's books only, their share remains at 2% (no change). The most successful genre via the eTailor channel is non-fiction for the third year in a row, now at 13%, and to a slightly lesser extent adult fiction titles at 9% (same as 2023).

By volume, 59%, or 7.4m units, of all books were sold through physical bookstores (+1.3% on 2023). 81% of trade fiction, 73% of all non-fiction (-5 share pts) and 50% (+4 share pts) of children's volume sold through physical outlets.

eTailers accounted for 10% of fiction, 13% of non-fiction and 1% of children's by volume. Schools and libraries combined accounted for 5% of fiction, 5% of non-fiction and 46% of trade children's unit sales.

All 'other' channels by units (e.g. direct & corporate sales) accounted for 4% of fiction, 10% of non-fiction (a notable uplift of 7 share pts), and 3% of children's.

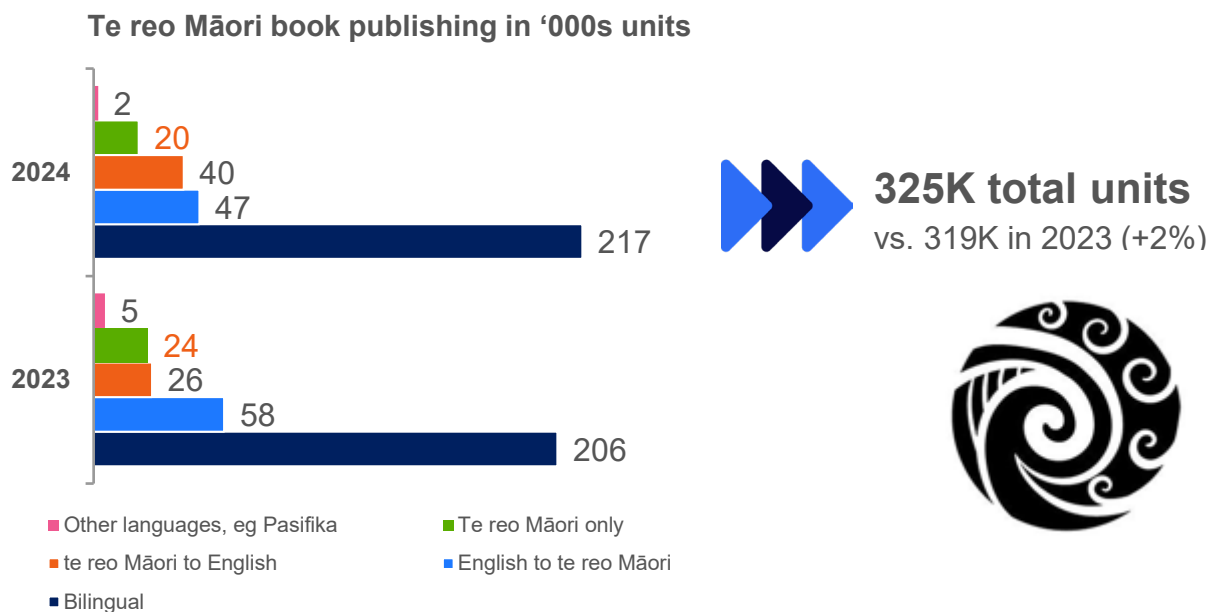


Physical bookstores: 7.4m units (+1.3%)

- 59% of all trade titles
- 81% of Fiction ↑
- 73% of all Non-Fiction ↓
- 50% of all Children's ↑

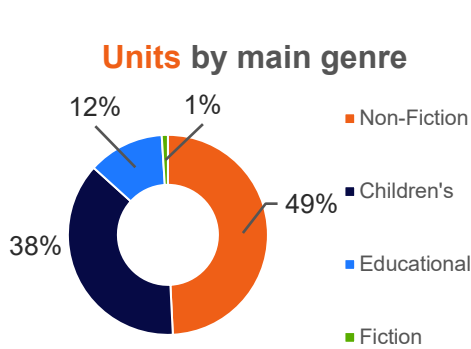
Te reo Māori Publishing 2024

Te reo Māori Publishing 2024



New Zealand’s Māori-language publishing reversed the previous two year’s downward trend, showing a 2% year-on-year uplift, representing 1.8% share of total unit sales (the same as the prior year). This share of all sales was higher than when we started this annual survey back in 2019 when this sector represented only 1% of all unit sales.

The bulk of revenue came from titles published bilingually (in both te reo Māori and English), and they represented 67% by volume share or 217k units of all books sold in this sector, an increase of 5% on 2023. The second largest segment, with 15% share, were books translated to te reo Māori from English, which showed a decline of 19% year-on-year to 47k units. Demand for books published solely in te reo Māori reduced slightly to a 6% share or 20k units, and when combined with translated works from English to te reo (a further 47k units), they accounted for 21% of all te reo books sold. This speaks to the ongoing appetite for books published in te reo Māori (though at 5 share points less than in the prior year). Translated content into English, represented 40k units or a further 12% (an increase of 4 share points on last year) and finally, ‘other’ language publishing, e.g. Pasifika, accounted for 2k units or 0.5% (a 70% decline on prior year).



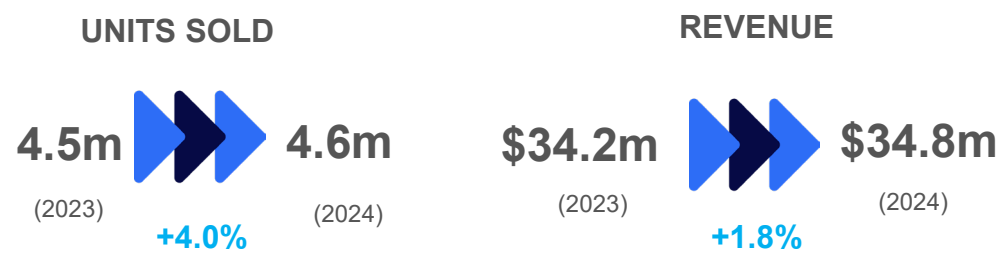
As usual the bulk of te reo Māori-language publishing fell under the trade non-fiction genre (49% share, +1 share point on the prior year), then children’s (38% share, -1 share point), followed by educational at 12% (same as last year).

Adult Fiction still represented 1% of publishing in this sector (the same as the prior year, or just over 3k units) and could be viewed as an opportunity to publish more te ao Māori fiction in line with general publishing’s growth in fiction.

See page 10, table 2.2 for 6-year summary data.

Educational Publishing 2024

Educational publishing: An overview

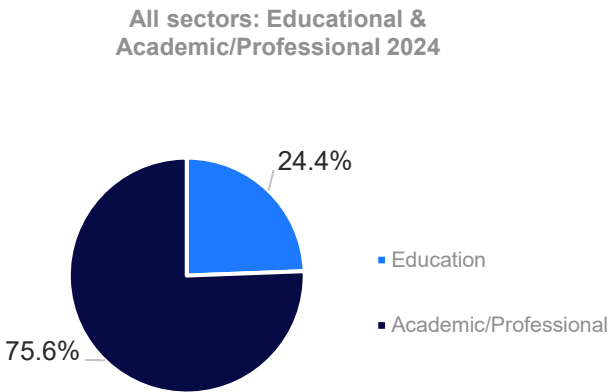


The educational sector recovered in 2024 to reflect a slightly stronger result than the prior year. This sector accounted for 12.3% share of all publishing revenue in New Zealand (a 0.4 share point increase on 2023). The revenue generated by publisher sales of educational books, or those titles destined for early childhood, primary and secondary institutions, totaled \$34.8m (+1.8%). Unit sales recorded an increase of 4% to 4.6m year-on-year.

By value, print content (\$31.7m, +1.9%) held the largest share of total revenue across both domestic and export markets (91% share of all sales, no change), with volume at around 4.5m units (+3.8%). Digital revenue across all markets was \$3.2m (9% share, no change) with digital format volumes at 120k in 2024 (+13% uplift).

Domestic sales from local content totaled \$19.6m (+2.6%), and from imported content just over \$4m (+1.0%) in value. Export revenues totaled \$11.2m, a flat result against 2023, signaling a level of stability in export markets across the past two years. However, educational exports are still below the pre-pandemic level (2019) when total value sat at \$15.7m.

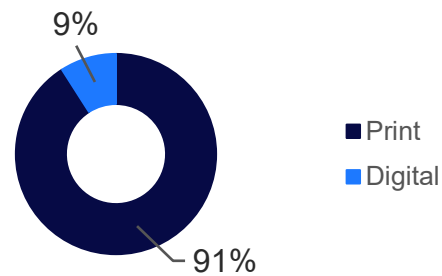
Revenue generated by the academic sector, titles published for the higher education market or tertiary institutions— including journal and professional publishing—accounted for \$108m (a 1.7% decline against 2023). This represented 38% share of all publishing revenue last year (-1 share pt). This academic estimate is treated as a separate measure from other reported values in this section due to a lack of participation in the survey from this sector – see page 27 for estimate methodology. All data in this section refers to the educational sector only (up to secondary level) as a result.



83% of Educational revenue
came from local content vs 17% from imported content (flat vs 2023)

Educational Publishing: **Formats**

Value share: education by format



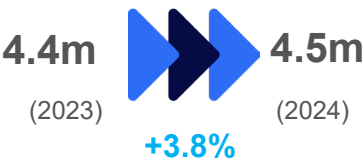
Physical editions continue to dominate the educational sector—at 91% share by value (the same as the prior year)—slightly less than in trade publishing however, where 93% of all titles are in print format. Looking at digital education books in 2024, this share sat slightly higher at 9% vs 7% in trade publishing.

By value, print books held \$31.7m of all educational revenue (+1.9% on 2023) and all digital (eBooks, and other Digital formats) held a value of \$3.2m (+0.7% on 2023). Education print books showed a volume increase against 2023 of 4%—up from 4.4m to 4.5m units.

Digital format volumes were difficult for some survey participants to report on due to lack of data and/or the subscription-based model in education where an institution pays for user access rather than by units. Despite that limitation, 121k digital units were reported by educational publishers as having sold during 2024 (+13%).



PRINT BOOKS (VOLUME)



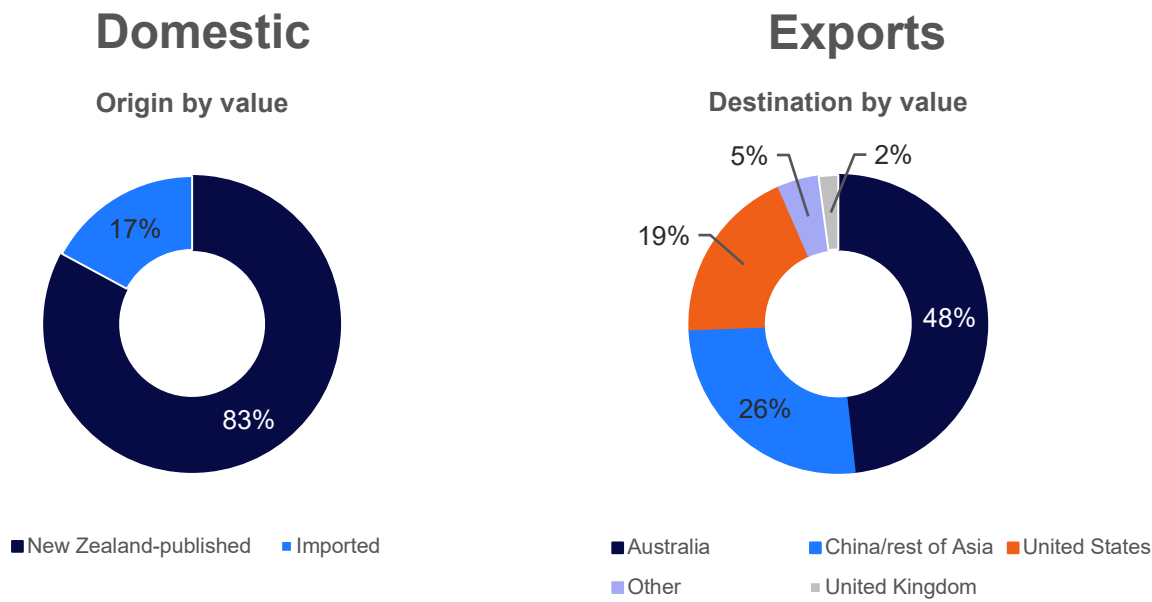
PRINT BOOKS (VALUE)



DIGITAL BOOKS (VALUE)



Educational publishing: Domestic v Export



Educational publishers derive the bulk of their revenue domestically from New Zealand produced content, in strong contrast to trade publishers. In 2024, New Zealand content accounted for 83% by value, or \$19.6m (+2.6% growth on 2023, the same share as the prior year). In direct contrast with the trade sector, where the bulk of revenue came from imported titles 77% (1 share point down on the prior year). The remaining 17% in the educational sector by value came from imported titles (overseas-issued ISBNs) worth just over \$4.0m—a small year-on-year increase of 1%.

In contrast to the nearly 10% of New Zealand trade books that were exported to markets outside of the country in 2024, the educational sector saw 3.3 times as many titles exported at 36% (a similar percentage to 2023). The export market was flat against the prior year at \$11.2m primarily due to a decline in exports to the United States and China, offset by an increase in exports to Australia.

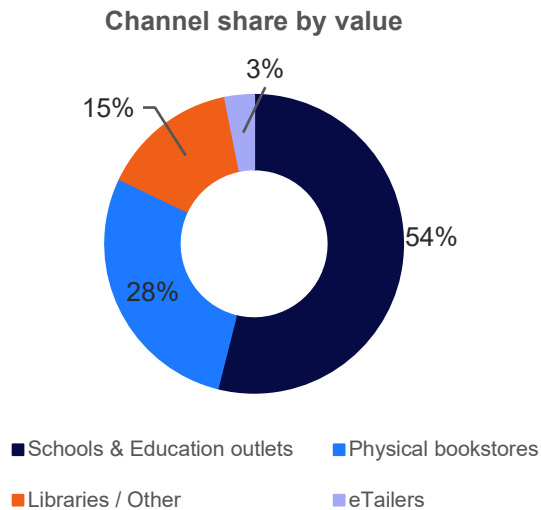
Australia was the lead destination for the third year running with 48% share of all exports (\$5.4m, 9.6% uplift, share increase from 44% the prior year), followed by China/rest of Asia at \$2.9m or 26% share (-7% on 2023). In 2021 China was the lead export destination. In third place, United States at \$2.1m or 19% share (-10% on 2023). The balance of the export market for New Zealand educational books at \$730k or 7%, similar to prior year, came from the United Kingdom & other markets such as Europe.

36% of educational revenue earned from exports

vs. 37% in 2023
(-0.6 share points)

Educational publishing: Channel to market

REVENUE EARNED BY CHANNEL



**54% of
educational revenue**
through schools & other institutions vs.
40% in 2023

New Zealand educational publishers have three primary channels to market domestically, plus a broad group 'other' which includes library sales, direct sales, and rights. Domestic revenue of \$19.6m was split across the following channels as below:

Sales direct to schools and education outlets accounted for the largest share of domestic revenue as usual, with an increase in share to 56% vs 40% the prior year or \$10.8m (+33% in value uplift) indicating a recovery from the prior year's double-digit decline (-37%).

Sales to physical bookstores accounted for the second largest share of sales at 28% or \$5.7m of all educational revenue. This channel showed a value decrease of 19%—down from \$6.9m—in line with trade publishing where revenue through physical bookstores also dropped to a lesser extent (-4%).

Other sales channels combined, including to **libraries and library suppliers, corporate, direct or publisher own sales, rights sales and co-editions** accounted for the next 15% of revenue or \$3.0m (down a significant 26% on 2023).

Sales to eTailers accounted for \$626k or 3% share of total sales (half that of 2023) which placed this channel at least importance to educational publishers.

This page concludes the educational section, and the 2024 Market-size of Aotearoa New Zealand Publishing.

For further queries, or to obtain a copy, please refer to The Publishers Association of New Zealand (PANZ) / Te Rau o Tākupu at: admin@publishers.org.nz

Definitions

Print – sales of physical products only, that is, printed books and maps in hardback, paperback and other bindings (including print on demand).

Digital – sales of digital (non-physical) products, such as eBooks, audiobooks, or downloads of all/part of a book.

Origin – is the country of publication of title.

Trade – books produced by publishers for the general consumer market.

Educational – all publishing for early childhood, primary and secondary institutions.

Academic/professional – all higher educational publishing for tertiary institutions (including journals) and all professional publishing (including STM and Humanities).

eTailer – those book retailers that are purely online, for example, Mighty Ape, Fishpond, The Nile, etc.

Sources

Quantitative financial survey – market-size survey sent direct to PANZ member and non-member publishers across March–April 2025. Like-for-like responses: 29

NielsenIQ BookScan New Zealand – sales data from a panel of participating retailers for insights into market and publisher genres.

Notes on methodology

All data shown in this report have been grossed-up from figures collected through the sources described above in order to estimate figures for New Zealand publishing as a whole. Different methodologies were used for each of the market sectors as follows:

Trade: gross-up factors were applied to the data collected from the publisher survey, calculated using an estimate of the share of total trade sales taken by these participating publishers within the three broad categories of fiction, non-fiction and children's books, based on figures from NielsenIQ BookScan.

Education: gross-up factors were applied to the data collected from the publisher survey, calculated using an estimate of the share of total educational sales taken by these participating publishers, based on comparing the recorded sales against publicly available data on the sales of those educational publishers that did not participate in the survey.

Academic/professional: no primary academic/professional publishers participated in the publisher survey, so it has not been possible to report on format, channel or export splits for this sector. Only a total value figure has been provided in this report, calculated by analysing a limited amount of publicly available data on the sales of NZ academic/professional publishers and, in lieu of any more concrete figures, by looking at the relative size of NZ publishing vs UK publishing within the main publishing sectors.

About the Publishers Association of New Zealand/Te Rau o Tākupu

The Publishers Association of New Zealand (PANZ)/Te Rau o Tākupu actively represents publishers' interests to industry and government. The PANZ advocacy team works to inform the relevant government departments and industry bodies of key issues facing book publishers and how we can work effectively together. Strong support from the publishing industry is vital to this work.

Association members are a diverse mix of general, literary and educational publishers, ranging from small independent niche publishers to large multinationals.

For more information, visit www.publishers.org.nz

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NielsenIQ BookData offers a comprehensive range of services to the international book industry, supporting the discovery, purchase, distribution, and sales measurement of books. We proudly manage the ISBN and SAN Agencies for the UK & Ireland, providing publishers with a suite of services, from assigning ISBNs to adding metadata to our database, along with promotional tools to help market your book effectively.

For booksellers and libraries, we offer access to our database of over 52 million book records for title look-up, enriching websites, and managing internal systems. Our research services deliver retail sales analysis for both print and e-books across 17 territories, complemented by insights from our Books and Consumers Survey, as well as Country and Genre-specific reports. The company is wholly owned by NIQ.

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