International Publishing Distribution Association

13th European Press Distribution Round Table
Seville, 26th September 2023

Situation of the Spanish Press Distribution Market

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The press market in Spain

Data Logista Publicaciones | OJD

Turnover millions €

Medium price

Number copies sold (millions)

Newspapers sector

Data Logista Publicaciones | OJD

Turnover million € / Market %

Number copies sold (millions)

Medium price

Magazines sector

Data Logista Publicaciones | OJD

Turnover million € / Market %

Number copies sold (millions)

Medium price

Press market 2022 /2021 (Million euros)

Data Logista Publicaciones | OJD

Product	2022	2021
Newspapers	-10,8%	-7,7%
Magazines	-3,5%	-3,2%
Flow Pack / Stickers	40,8%	3,8%
Partworks	-11,5%	5,5%
Quiz	0,7%	-4,0%

Press Market / 1º Semester 2023

Data Logista Publicaciones | OJD

Product	2023	2022
Newspapers	-12,7%	-9,7%
Magazines	-7,5%	-1,0%
Flow Pack / Stickers	23,3%	16,8%
Partworks	-18,6%	-9,1%
Quiz	2,1%	0,0%

The Spanish press distribution sector

Magazines

- Two levels of distribution: National and Local Distributors.

  National Distributors (3): Services to publishers (nationals and foreigners) distribution all over Spain:

SGEL, LOGISTA PUBLICACIONES and BOYACÁ

Also some publishers with distribution department

The Spanish press distribution sector

Newspapers

- Two levels of distribution: National and Local Distributors.
  National Distributors (1): Services to publishers all over Spain:
  GRUPO BOYACÁ

- The Regional Newspapers are also very important

The Spanish press distribution sector

Local distributors

- LOCAL DISTRIBUTORS (76): deliver the publications they receive from their suppliers (national distributors or the publishers directly) to the retail.
- The local distributors work in set territories on an exclusivity basis for the publications they distribute.
- Three groups:

1. Independent distributors (4)
2. Local delegations of national distributors
   - ✓ Boyacá (31)
   - ✓ Sgel (22)
   - ✓ Logista (9)
3. Distributors owned by newspaper groups (10)

The Spanish press distribution sector

- Geographical exclusivity given by the Publishers/National Distributor to the local distributor, but with competition (Normally there are 2 Local Distributors in each province, except some cases of one only distributor, or even more than 2 in some province):

The Spanish press distribution sector

Points of Sale

- 14.764 press PoS in Spain (2022)
- Influence limited of newsstand chains and supermarkets.
- Hard decrease (2012: 25.423 PoS)
- - 42% in last 10 years

The Spanish press distribution sector

The Spanish press distribution sector

PoS number (2010 – 2022)

Source: ANDP Study *"Press Point of Sales Number in Spain"*

The Spanish press distribution sector

PoS Number 2012 - 2022 (By typologies)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
01 Kiosko/Local Prensa	7.639	7.842	7.689	7.010	6.943	6.757	5.802	5.134	4.492	4.252	3.897
02 Papelería/Librería	6.179	5.576	5.334	5.297	4.551	4.168	3.616	3.233	2.886	2.774	2.670
03 Gasolinera/Est. Servicio	3.006	3.005	2.936	3.131	2.877	2.771	2.672	2.530	2.233	1.989	1.790
04 Local de Proximidad	6.146	5.444	5.333	5.238	4.821	4.950	3.714	3.159	2.953	2.671	2.670
05 Superficie Comercial	925	1.371	1.524	1.504	1.548	1.541	430	334	317	223	220
06 Establecimiento Turístico	295	323	289	275	280	319	295	279	141	112	147
07 Edificio Uso Público	181	181	180	172	153	149	173	149	125	119	118
08 Estación Viajeros	209	212	198	197	183	172	188	156	106	99	117
09 Otros	843	831	673	623	515	663	498	503	332	266	219
10 Estanco							1.654	1.828	1.703	1.629	1.578
11 Hipermercados							163	161	139	147	207
12 Supermercados							1.123	1.585	1.133	1.162	1.093
13 Subdistribuidor							66	44	35	34	38
Total	**25.423**	**24.785**	**24.156**	**23.447**	**21.871**	**21.490**	**20.394**	**19.095**	**16.595**	**15.477**	**14.764**

Source: ANDP Study *"Press Point of Sales Number in Spain"*

The Spanish press distribution sector

Source: ANDP Study *"Press Point of Sales Number in Spain"*

The Spanish press distribution sector

PoS Number 2022 (By typologies) (% number / turnover)

TIPOLOGÍAS	SUBT. PROM 2022	% SOBRE TOTAL 2022	% FACTURACIÓN SOBRE TOTAL
01 Kiosko/Local Prensa	3.897	26,40	36,35
02 Papelería/Librería	2.670	18,08	21,94
03 Gasolinera/Estación Sevicio	1.790	12,12	5,68
04 Local de Proximidad	2.670	18,08	16,80
05 Superficie Comercial	220	1,49	1,91
06 Establecimiento Turístico	147	1,00	0,53
07 Edificio Uso Público	118	0,80	0,67
08 Estación Viajeros	117	0,79	0,69
09 Otros	219	1,48	0,59
10 Estanco	1.578	10,69	8,95
11 Hipermercados	207	1,40	1,40
12 Supermercados	1.093	7,40	4,05
13 Subdistribuidor	38	0,27	0,45
Total	14.764	100,00	100,00

Source: ANDP Study *"Press Point of Sales Number in Spain"*

The Spanish press distribution sector (Trends)

- Press market reduction (60% in the last 10 years).
- Reduction of National Distributors number (3 national distributors nowadays in Spain)
- Process of concentration at local distributors level: closures, mergers and acquisitions
- Reduction of PoS number (around 14.700 nowadays, 42% less in last 10 years)
- Changes in the PoS tipology (from professional PoS to convenience stores)

The Spanish press distribution sector (Trends)

<u>Collaboration projects developed for supporting the professional press supply chain</u>

- Collaboration with the Newsagents Associations: New products and services in the profesional kiosk network + connection with the local distributors using EDI systems (FANDITE)

- Press Publishing and Commercializaciation Lobby: Proposals and Measures to take from the Publisher / Distributor / Point of Sale / Government side. No advance in this case by the Spanish Government, as in other countries (France, Italy…).

The Spanish press distribution sector (Trends)

MEDIOS DE COMUNICACION >

El Gobierno lanzará un programa de ayudas para la digitalización de los medios de comunicación

Calviño anuncia que los fondos se destinarán a la transformación online y la ciberseguridad de las empresas periodísticas

International Publishing Distribution Association

THE PRESS DISTRIBUTION NETWORK AND THE RIGHT TO THE INFORMATION BY EUROPEAN CITIZENS

Situation and options for the future

European Parliament

European Parliament
Brussels, July 9th 2018

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Situation an data about the Press Distribution Sector in Europe

- Around 300.000 press points of sales in Europe
- Around 300 press distribution companies
- More than 1 million people working in the press distribution sector in Europe

COUNTRY	GERMANY	FRANCE	ITALY	SPAIN	BELGIUM	PORTUGAL
POPULATION	82.800.000	67.024.000	60.589.000	46.529.000	11.400.000	10.309.000
POINTS OF SALE	108.000	38.000	29.500	21.100	5.100	7.800
INHABITANTS / PoS	766	1.763	2.053	2.205	2.325	1.321
NATIONAL DISTRIBUTORS	4	2	4	5		1
LOCAL DISTRIBUTORS	49	66	69	87		

Source: IPDA – International Publishing Distribution Association

International Publishing Distribution Association

Arguments for the EU institutions support

Regarding this question, during last years, in several European countries (France, Italy, UK…), **some national initiatives have been launched in support of the Press Publishing and Distribution sector, as a formula to guarantee citizens access to all periodicals**, placing particular emphasis on the support to the Professional PoS network, as this network represents the main distribution channel of newspapers and magazines for Publishers.

If journalism is considered essential for Pluralism, Freedom of Expression and Democracy, as an essential service in front of the Fake News, its **supply distribution chain (distribution companies and professional PoS) must also be considered in public policies**.

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Proposals for the support

Considering the difficult situation of the sector, and the arguments that we underline first, the International Publishing Distribution Association (IPDA), as the representative association of distributors of publishing products, considers as priority to **urge the attention of the various European Institutions, in order to create a homogeneous support for the press distribution sector**, and more in general for the entire newspapers and magazines publishing industry.

International Publishing Distribution Association

Proposals for the support

Economic support (tax reduction for POS, aid for transport costs…) for the Press Distribution in low GDP regions, islands, low population areas, or high unemployment geographical areas.

European legal and fiscal common framework that could helps to the Press Distribution support

Support to the PoS 2.0 (The new professional PoS as reference for the European Citizens as key players for the access to information and services)

The Press Distribution should be on the agenda of the Creative Europe Cultural Program 2021-2027

International Publishing Distribution Association

FANDE
Federación de Asociaciones Nacionales de Distribuidores de Ediciones

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Thank you¡¡¡
Gracias¡¡¡