



FEP Sustainability Working Group

Presentation of the FEP survey's main results

Methodology and sample

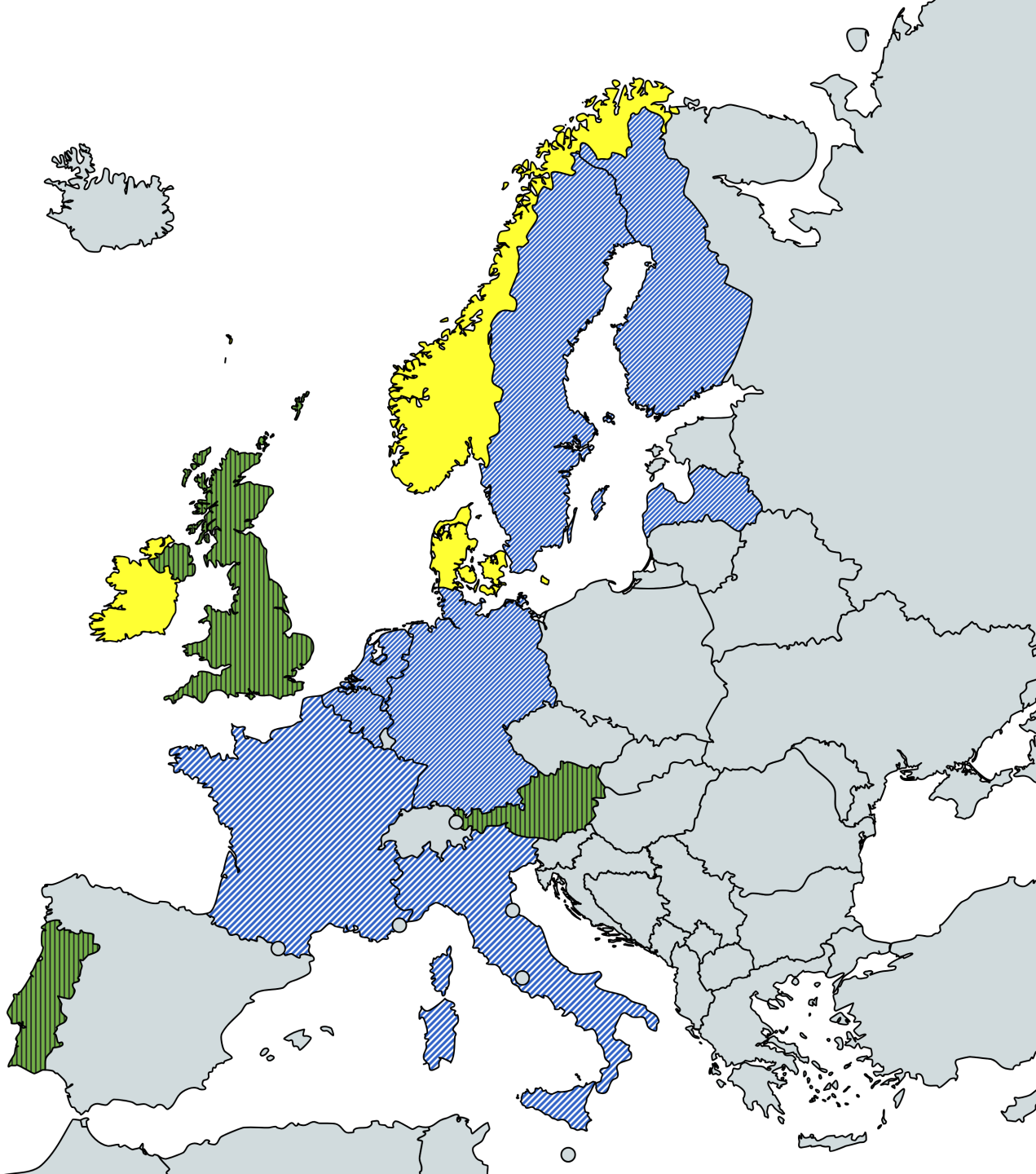
- Assess how much of a priority sustainability is for the sector
- Collect information on some of the actions already undertaken
- Assess the main challenges in becoming more sustainable

Objective and structure

- Questionnaire targeted at PAs and individual publishers with differentiated questions
- Respondents could fill a "simplified" or "full" version of the survey
- Answers collected over the course of 2 months

Representativeness

- Only the PA answered the survey
- Only publishers answered the survey
- Both the PA and publishers answered the survey

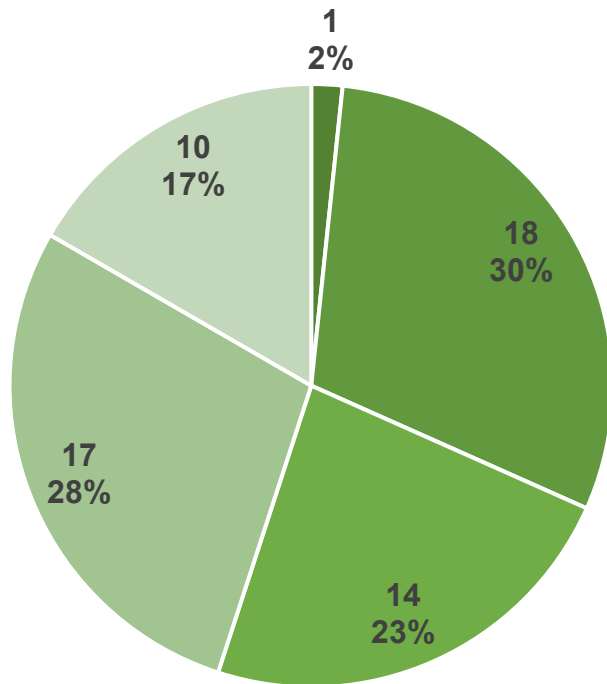


- 11 PAs and 60 publishers answered
- 14 different countries
- PAs represent 80% of the book market

Methodology and sample

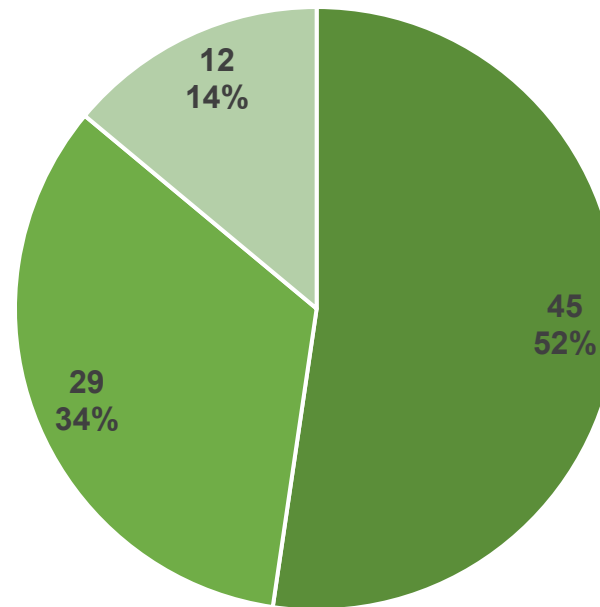
Publisher representativeness

Publishers by size



■ Solo trader ■ Micro ■ Small ■ Medium ■ Large

Publishers by sector



■ Trade ■ Scientific/Academic ■ Educational

Methodology and sample

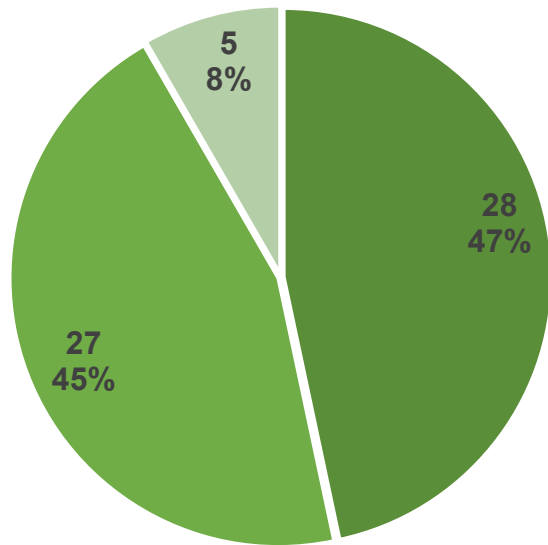
Limits and bias

- Answers came mostly from Western and Northern Europe
- For publishers most answers came from 4 countries
- Possible that only the PAs and publishers most concerned by sustainability answered
- Still useful data because of the market representativeness
- Charts some of the best practices and challenges for the sector
- Can be helpful to give a point of reference for those who are not yet there

Green Awareness

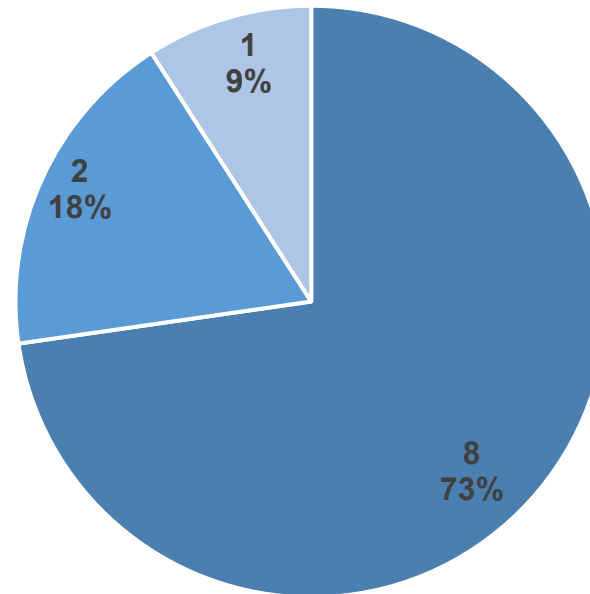
How important is sustainability?

Green awareness on sustainability issues for publishing houses



■ Very aware ■ A bit aware ■ Not so aware

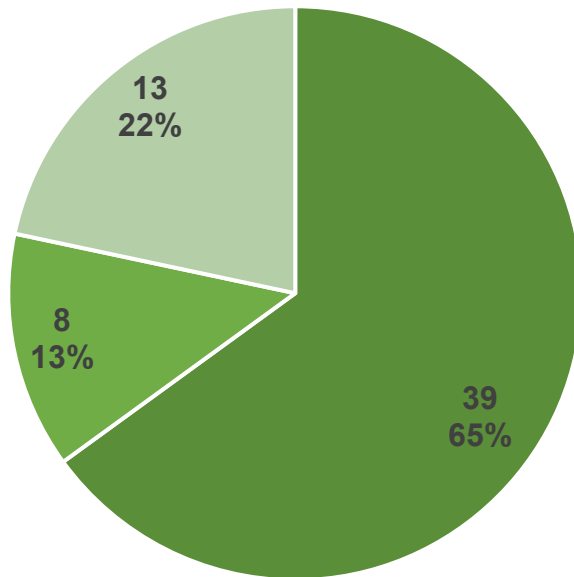
Green awareness for the Publishers' Associations



■ Very aware ■ A bit aware ■ Not so aware

Green Awareness

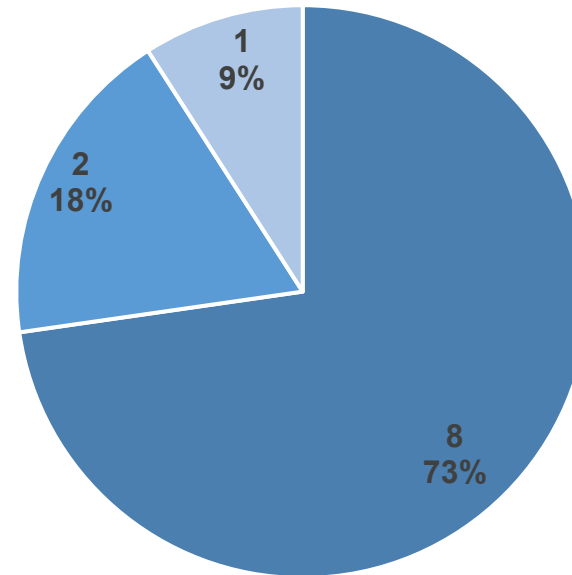
Publishers working on sustainability



■ Yes ■ No ■ No, but planning to within 1/2 year

Working on sustainability

PAs with a Sustainability Working Group (or equivalent)

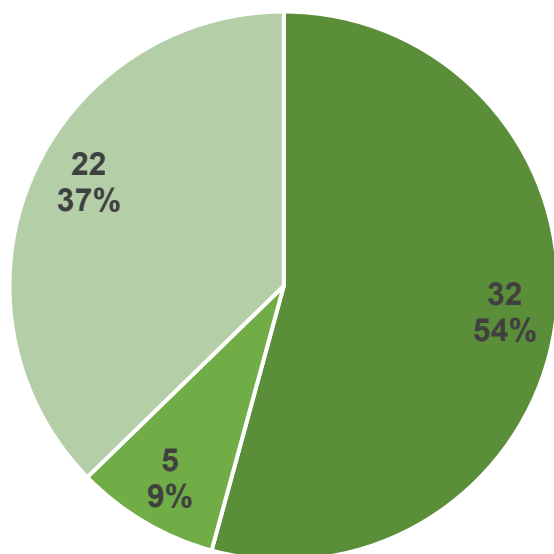


■ Yes ■ No ■ No, but planning to in the next 1-2 years

Concrete actions

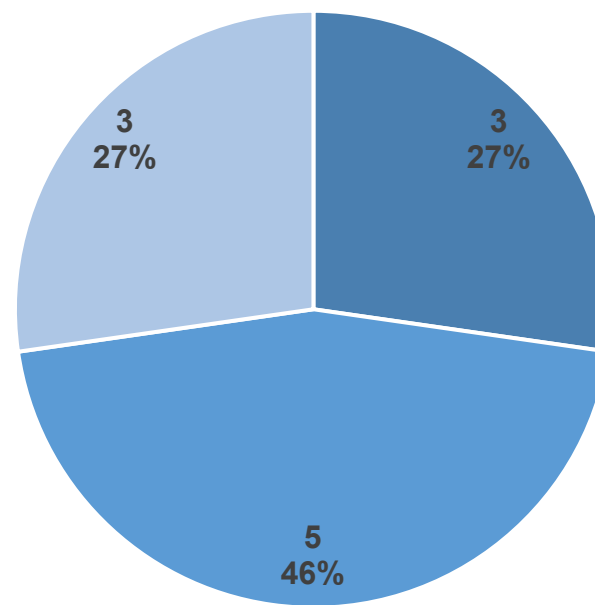
Environmental targets

Publishers with environmental targets



■ Yes ■ No ■ No, but planning to in the next 1-2 years

PAs with environmental targets



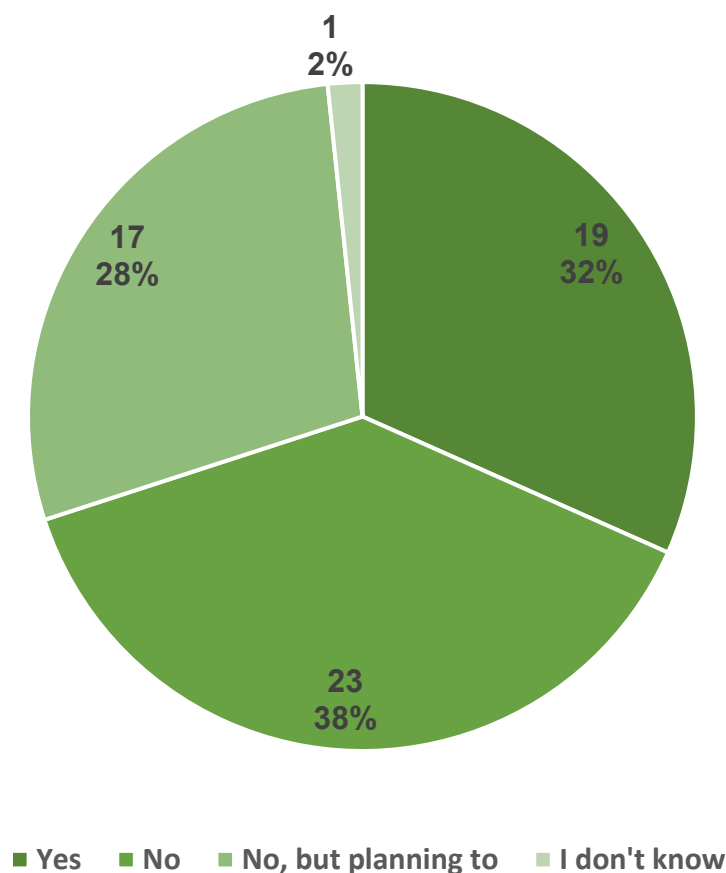
■ Yes ■ No ■ No, but planning to in the next 1-2 years

- Paper certifications (FSC, PEFC, Ecolabel)
- Reducing carbon emissions
- Recycling
- Renewable energies

Concrete actions

Carbon calculation

Publishers who calculate their carbon emissions

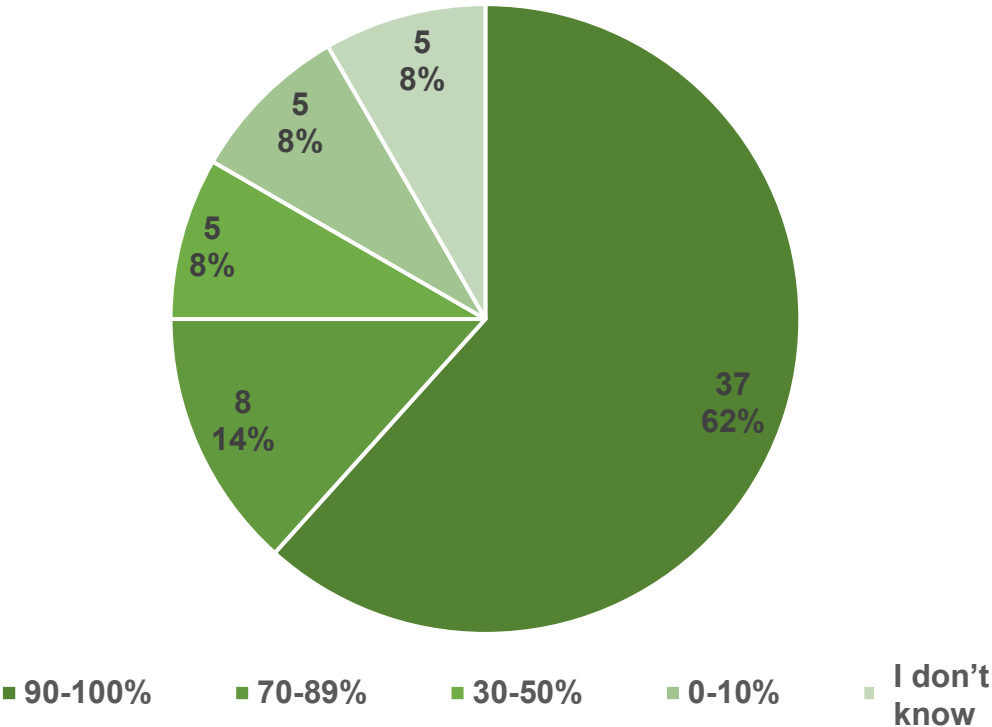


- For now, a majority of publishers don't calculate their carbon emissions
- Within the next couple of years the tendency should be reversed
- Production is the biggest source of emission followed by distribution

Concrete actions

Paper certification

Percentage of certified paper used by publishers

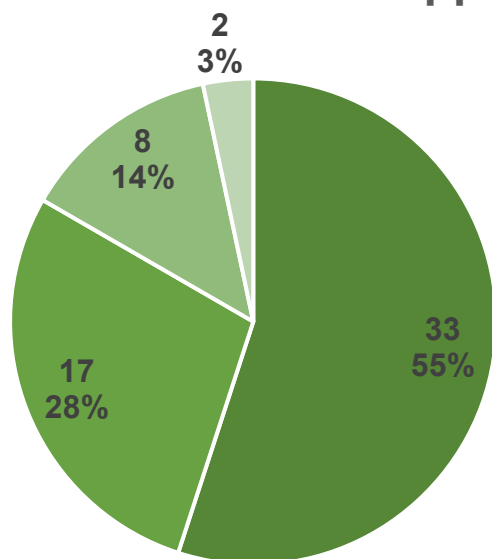


- Nearly 2/3 of publishers use certified paper in over 90% of the cases
- No detailed explanation for those who use it less than 50% of the time

Concrete actions

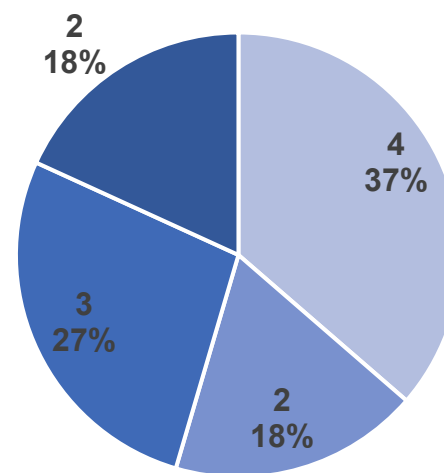
Sustainable credentials

Publishers asking sustainable credentials to their suppliers



■ Yes ■ Planning to in the next 1-2 years ■ No ■ I don't know

PAs whose members require sustainable credentials



■ Yes, the vast majority ■ Yes, some of them
■ Planning to ask ■ I don't know

Concrete actions

- Use recycled/certified paper
- Plan to reduce emission
- Print locally
- Print on demand

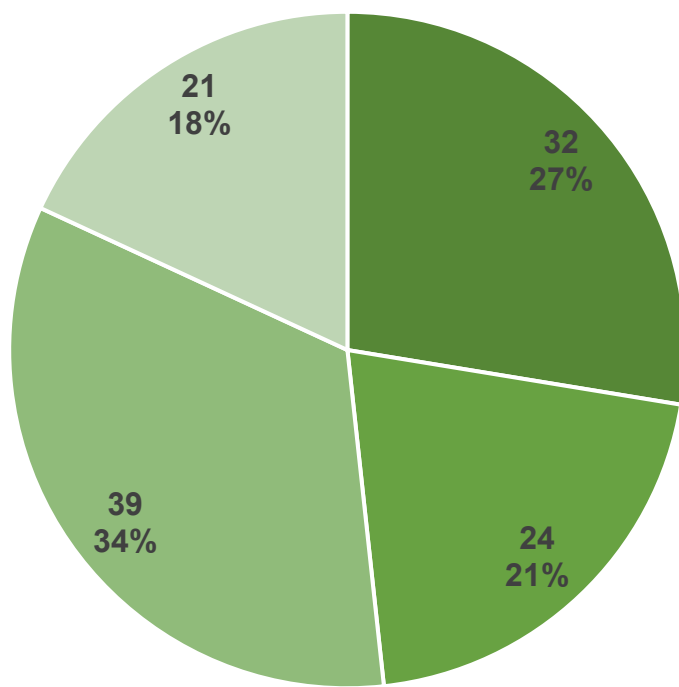
Good practices

- Reduce packaging
- Use carbon calculator
- Carbon offsetting
- PAs share good practices

What challenges

Operational barriers to sustainability

Main operational barriers to sustainability



■ Distribution ■ Carbon emissions ■ Paper consumption ■ Inks and chemicals

Main operative barriers

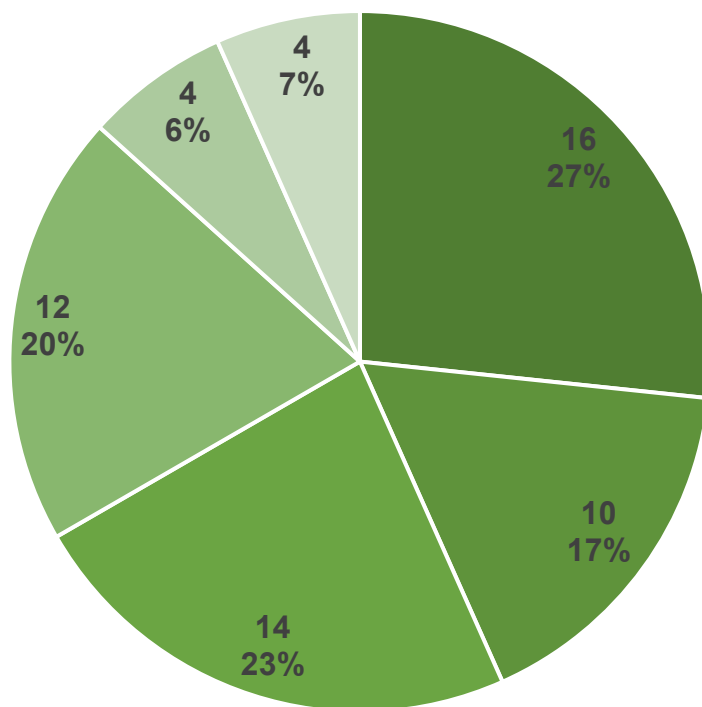
- Lack of resources
- Lack of data
- Lack of technical guidance
- Lack of time
- Lack of service providers

Several publishers also complain about **lack of public support** (or lack of knowledge about it)

What challenges

Returns policy

Returns rate



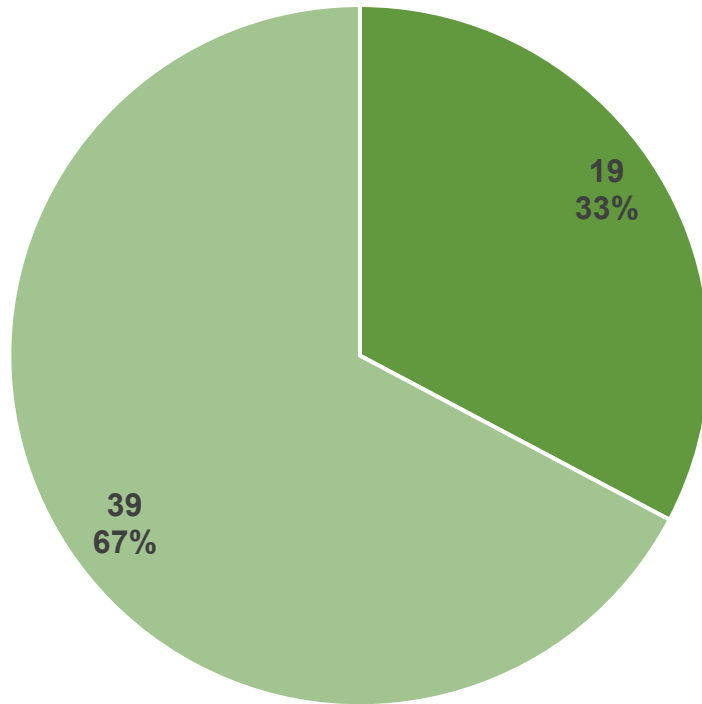
■ 0-5% ■ 6-10% ■ 11-20% ■ 21-30% ■ >30% ■ I don't know

- Returned books are mostly put back on the market (at least 50% of the cases) or recycled
- “Auto-selected” sample of publishers already engaged in sustainability, not in line with other studies on the returns' rates
- The survey also includes academic and educational publishers

What challenges

Production outside the EU

Production outside the EU



■ Yes ■ No

Main reasons

- Economically more convenient
- Lack of productive capacity for complex products (i.e., children books, books with electronic components or high-quality co-edition, etc.)
- Production closer to the outlet market (1)

Conclusions

Main legislative outcomes

- Deforestation Regulation
- Ecodesign Regulation
- Regulation on packaging

Conclusions

How can the EU and FEP help ?

Help expected from the EU:

- Financial support
- Technical tools
- Guidelines

Help expected from FEP:

- PAs would like information sharing
- Publishers would like technical support

Conclusions and next steps

- A first useful exercise
- Confirms some of the trends we were suspecting
- Awareness is there and publishers are already active across the board
- Certified paper is the biggest success story
- Need to get other countries and publishers involved
- Findings on support required align with what we had already identified
- Data could be refined further (for instance according to the size of publishers)