

Japanese Publishing Industry

Japanese Economy Division

Summary

The Japanese publishing industry is expanding its use of online business and strategic combinations of various media for more effective marketing. Overseas, the increasing popularity of Japanese comic books and magazines is has prompted publishers to pursue business opportunities more aggressively.

1. Background

The proliferation of non-print entertainment media, such as mobile networks and the Internet, and the rapid expansion of new and used bookstores that offer recent releases at discount prices, have forced the publishing industry to rethink its business and marketing strategies. As the market changes rapidly, publishers are exploring a number of innovative business strategies.

A. Popularization of Electronic Books

Retail sales methods are diversifying in response to the collapse of the conventional resale-price system and distribution structure (publisher – distributor – bookstore), and the increase in Internet sales. In addition, the advent of electronic publishing has enabled publishers to distribute directly online. The market for electronic books is estimated to have doubled in one year to around 9.4 billion yen in FY2005, according to the *Report on the Electronic Book Business Survey 2006*, compiled Impress, a publishing and digital media company. While publishers set up electronic distribution systems, companies from other fields are entering the market. Also, some authors are beginning to distribute their own works online, thanks to the increased ease and efficiency of online services. Additionally, the new genre of mobile novels is now distributed on mobile phone networks, while other mobile devices are used in new business models, such the Apple iPod for audio books and the Nintendo DS for books with animation.

Electronic publishing includes online downloading, packaged products such as CD-ROMs and DVDs, and small-volume on-demand publishing of discontinued titles. Growth prospects look good for online and on-demand sales channels, which help to reduce inventory risk.

B. Media Mix for Mainstream Marketing

Using mixed media has become the prevalent marketing technique, wherein campaigns are conducted through a mixture of media types to achieve synergistic effects. Products are promoted not only in print media, but also TV shows, movies and newspaper ads, as well as tie-ins with the marketing of video games and merchandise. In 2004, the popular online *Densha Otoko* story evolved into a book, TV drama and eventually a movie. Numerous projects followed suit in 2005, such as the *Dragon Sakura* comic series featured in the weekly magazine *Morning* (published by Kodansha), and *NANA* (Shueisha).

C. Increased Print Publication of Online Content

During 2005 there was an increase in print publication of online projects. Putting together the contents of online forums and blog entries, publishers released *Densha Otoko* and other popular online titles by amateur authors, such as *Seikyo no Shiraiishi san*, *Jitsuroku Oniyome Nikki* and *Kyo no Nekomura san*.

2. Industry Overview

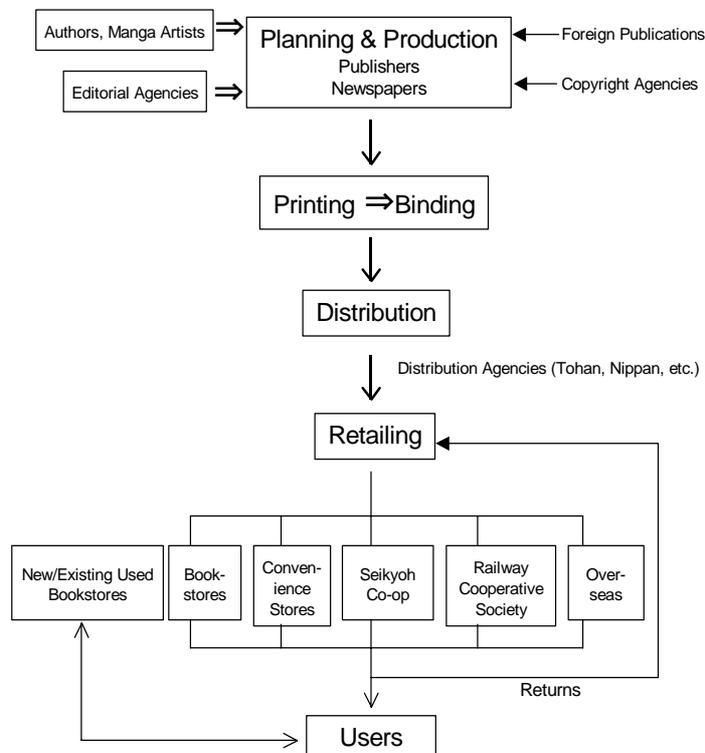
A. Characteristics

Books and magazines, except those for subscription, are sold much like music CDs, DVDs and other packaged titles. Customers browse products at retailers to determine what to buy. The publishing industry deals with a massive number of titles, with as many as 70,000 new titles added each year. Over 500,000 titles, along with 4,000 magazine titles, are currently in retail circulation. Some titles sell several million copies, while academic publications may sell only a few hundred copies. Major features of the industry are the resale-price maintenance scheme and the commission-sales mechanism, both explained later.

B. Structure

Japan has, roughly speaking, 4,000 publishers. Their releases are printed and bound at printing companies, forwarded to over 70 distributors, and sold at over 20,000 bookstores and other retailers across the nation (Fig. 1).

Fig. 1. Japanese Publishing Industry



1) Publishers

Including branches, publishers operated 5,405 offices employing 97,188 people in 2004, according to the Establishment and Enterprise Census taken by the Statistics Bureau in the Internal Affairs and Communications Ministry. The number of enterprises decreased from the 2001 survey, although employees increased by 3.2%. Most were small and mid-sized enterprises and sole traders. Just under 50% had fewer than five employees (2001).

2) Distributors

Finished books and magazines are distributed to bookstores and other retailers via distributors, called *toritsugi*. While there are about 70 distributors, Tohan and Nippan dominate with a combined share of nearly 90%.

The distribution system features two distinct business practices: resale-price maintenance system and the commission-sales system. Under the former, publishers set retail prices and conclude an agreement with distributors and retailers to impose these defined prices. This scheme is accepted as an exception to the Anti-Monopoly Law for cultural and public policy reasons.

The commission-sales system enables retailers, such as bookstores, to sell publications on consignment. In principle, all Japanese publications are sold under this system. Bookstores can return unsold stock to publishers within a set period of time, and therefore minimize their inventory risk. This system, however, has led to the problem of massive returns.

3) Retail Stores

Conventionally, most publications are sold via retailers, such as bookstores and co-ops.

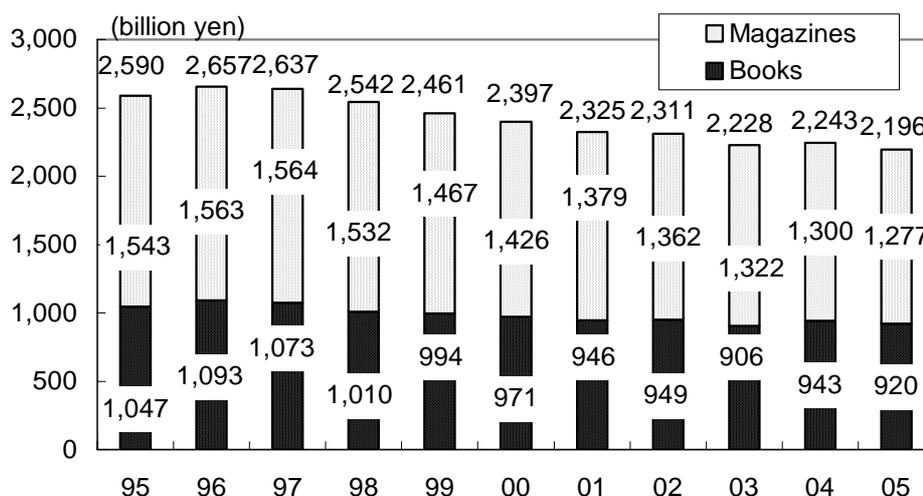
According to a survey by the Ministry of Economy, Trade and Industry, Japan had 34,233 book/magazine retailers (including paper/stationery shops)¹ in 2004, down 4,417 from the 2002 survey. They employed 208,356 people, and over 80% had less than 10 employees, including 40% with only one or two employees. The biggest drop was among retailers with less than 10 employees, indicating the continuing demise of small and mid-sized stores. In contrast, new retailers with retail space of at least 1,650 square meters were on the increase, reflecting a trend toward large stores.

The user base for online book sales has grown in recent years, due to the popularity of online shopping sites such as Amazon and Rakuten, or similar services by convenience stores that take advantage of multi-outlet chains. Thus the means of obtaining publications has diversified for end users.

3. 2005 Market Overview

Sales climbed in 2004 for the first time in eight years, but sank again in 2005 to around 80% of the peak in 1996. The Research Institute for Publications, a research wing of the All Japan Magazine and Book Publishers' and Editors' Association, estimated that sales dropped 2.1% to 2,196.4 billion yen, resuming its downward trend. Book sales fell 2.5% to 919.7 billion and magazines were down 1.8% to 1,276.7 billion yen (Fig. 2). The decline among books basically reflected the sales spike of 2004, which enjoyed a number of million-sellers. Magazine sales continued to tumble, dragged down by substantial drops among weekly magazines.

Fig. 2 Estimated Unit Sales



Sources: Figs 2-4 and 6 were compiled from the Research Institute for Publications' "Annual Report of Publishing Indicators"

Sales on a volume (unit) basis were estimated to have decreased 2.9% to 3,612.69 million, the tenth consecutive year-on-year decline. Sales included 739.44 million books (down 1.3%) and 2,873.25 million magazines (down 3.3%)

While unit sales continued to decline, new titles increased for both books (up 2.6% to 76,528) and magazines (up 0.5% to 3,642). The ongoing trend is to release a wide variety of publications in small numbers to address the diversifying interests of readers (Fig. 3).

The rate of returns in terms of value was 38.7% for books, down 2%, and a record 32.9% for magazines, up 1.2% (Fig. 4).

¹ Compared with the 2002 survey, the 2004 version was more simple and used different industry categories. For example, book/magazine retailers and paper/stationery retailers are combined into a single category.

Fig. 3 Magazine and New Book Titles

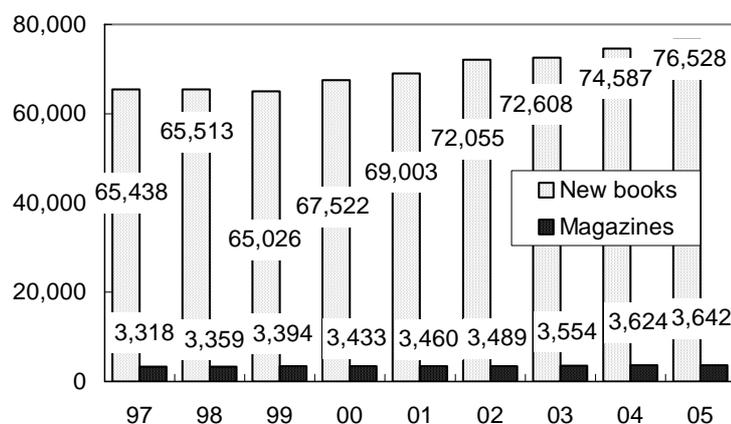
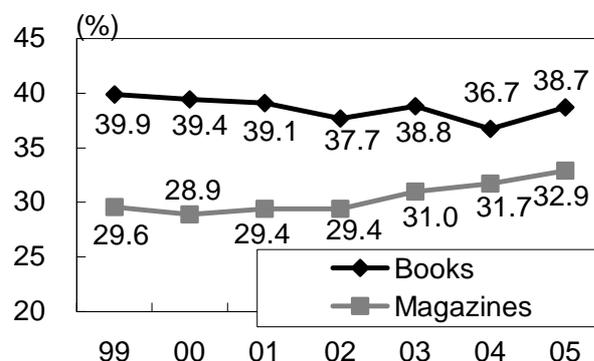


Fig. 4 Unsold Book and Magazine Return Rates



4. Product Trends

A. Sales Decline in 2005

In 2005, five books became million-sellers, including *Atama-ga Ii Hito*, *Warui Hito-no Hanashikata*, *Kaneko-Sho* and *Saodakeya ha Naze Tsuburenainoka?* (Fig. 5). This was down from 2004, which produced seven million-sellers including *Harry Potter and the Order of the Phoenix*. Book sales in 2005 totaled 919.7 billion yen, down 2.5% from 2004 and a return to the 2003 level. Units sold also edged down 1.3% to 73,944. Educational paperback sales volume rose, but sales value did not rise substantially due to low prices for paperbacks.

B. Magazine Sales Edge Down

Magazine sales sank 1.8% to 1,276.7 billion yen, the eighth consecutive year of decline. Sales at convenience stores once contributed significantly to magazine sales, but weekly magazines sold mainly through convenience stores dropped sharply by 7.1%. Since magazines are supported by regular readers, sales and circulation cannot be boosted with one-off best sellers, unlike with books. Moreover, the climate for magazines is expected to become even tougher due to the declining size of Japan's young population, i.e. primary magazine buyers, and competition from the Internet.

New magazine launches also took a downturn (Fig. 6). The Research Institute for Publications found that only 201 new magazines were launched in 2005, far fewer than in 2004, which recorded the highest number of new titles in 10 years. The categories with the most new magazines were general interest (67), hobbies (43), lifestyle (13) and weekly (13). A number of puzzle magazines (such as crossword puzzles) were launched. Conversely, 140 magazines either went into hiatus or were discontinued, a substantial drop from the record 2004 figure of 172 magazines and similarly high figures of 2001–2003. The leading categories were general interest (35), hobbies (22) and weekly (18).

C. Record Comic Book Sales

Sales of comic books and comic magazines in 2005 edged down 0.5% to 502.3 billion yen, and dropped 2.6% to 1,348.74 million copies. Value included 260.2 billion yen for comic books (up 4.2%) and 242.1 billion yen for comic magazines (down 5.0%). Comic books outperformed comic magazines for the first time, thanks to strong sales of popular titles such as *NANA*, *Hanayori Dango* and *Dragon Sakura*.

Comic magazine sales have tumbled since 1996 and were down nearly 30% from the 1995 level in 2005. The slump is attributed to the growing popularity of book discounters and book rental stores,

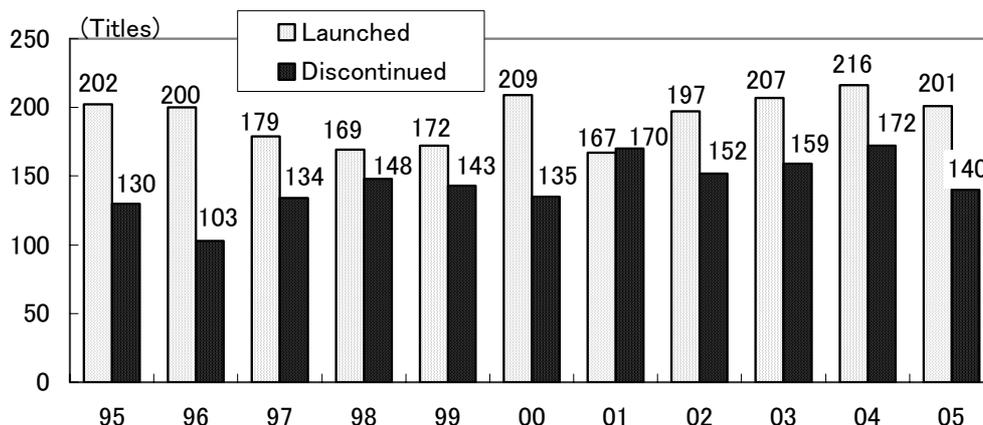
which offer cheaper access to new titles just several days after release. Another main factor is the spread of comic cafes, where customers can read comics for free, reducing the number of people who actually purchase comics.

Fig. 5 Best Sellers in 2005

Rank	Title	Author(s)	Publisher	Notes
1	Atamaga Iihito, Waruihito no Hanashikata	Yuichi Higuchi	PHP Kenkyusho	Practical information
2	Kaneko-sho	Kaneko Ikeda Edited and compiled by Shufunotomo	Shufunotomo	Religious corporation
3	Saodakeya-ha Naze Tsuburenainoka?	Sinya Yamada	Kobunsha	Practical information
4	New Human Revolution (14)	Daisaku Ikeda	Seikyo Shimbun	Religious corporation
5	Koredakeha Shitteokitai Kojin Joho Hogo	Hisamicbi Okamura, Masatomo Suzuki	Nihon Keizai Shimbun	Practical information
6	Motto Ikitai...	Yoshi	Starts Publishing	Print version of mobile phone novel
7	Densha Otoko	Hitori Nakano	Shinchosha	Internet fiction adapted for book, TV drama and movie
8	Shinpi no Ho	Ryuhoo Ookawa	Kofuku-no-kagaku IRH Press	Religious corporation
9	Mondai na Nihongo	Edited by Yasuo Kitahara	Taishukan	Practical information
10	Waru-no Chiehon	Akio Kado and Jinsei-no Tatsujin Kenkyukai	Kawade Shobo Shinsha	Practical information
11	Tokyo Tower	Lily Franky	Fusosha	2006 Booksellers Prize winner, movie adaptation scheduled
12	Koibana (Blue, Red)	Yoshi	Starts Publishing	Print version of mobile phone novel
13	Nobuta-wo Produce	Gen Shiraiwa	Kawade Shobo Shinsha	Nominated for 132th Akutagawa Prize, adapted for TV drama
14	Happy Birthday	Kazuo Aoki, Tami Yoshitomi	Kinnohoshisha	Novel
15	Angels and Demons and The Da Vinci Code	Dan Brown	Kadokawa Shoten	Translations
16	Ikite Shinu Chie	Keiko Yanagisawa, illustration by Fumiko Hori	Shogakkan	Modern-language adaptation of Hannya Shinkyō sutra
17	Seikyo-no Shiraishisan	Masanori Shiraishi and Tokyo University of Agriculture and Technology	Kodansha	Novel adaptation of online story
18	Karyu Shakai	Atsushi Miura	Kobunsha	Author is consumer-society researcher
19	Byoki-ni Naranai Iki kata	Hiroshi Shinya	Sunmark Publishing	Author is gastrointestinal endoscopy surgeon
20	Kotsuban Kyoshitsu	Takumi Terakado	Gentosha	Author is chiropractor

Source: The Research Institute for Publications

Fig. 6 Magazine Launches (or Restarts) and Withdrawals



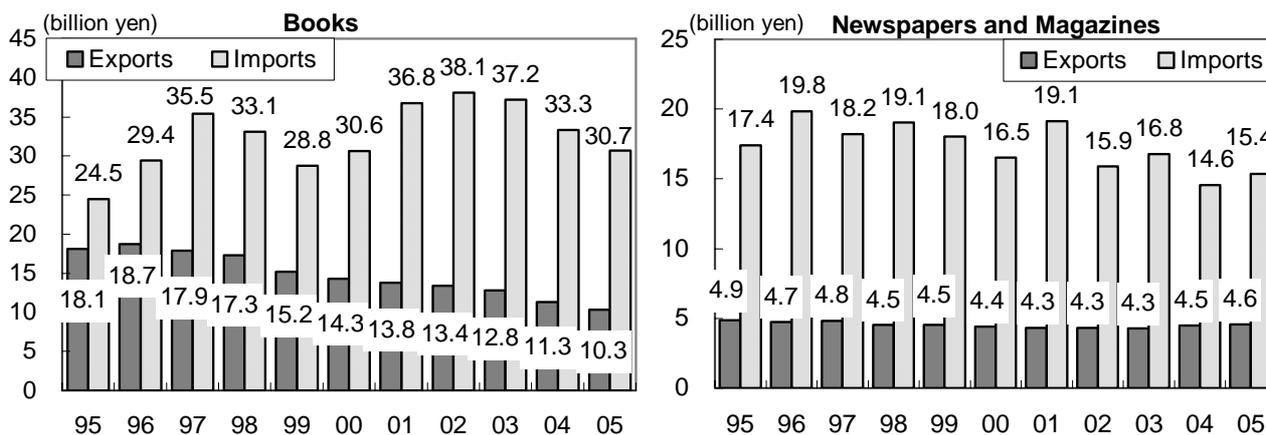
As with regular books, the comic market in 2005 saw some titles gain popularity through marketing strategies employing a mix of media. This took advantage of synergies to boost the popularity of many comics, such as *NANA*, which increased readership through the release of a CD and movie. Adaptation into TV animation and drama helped promote *Hagane no Renkinjutsu-Shi*, *Hanayori Dango* and *Hachimitsu to Clover*, and *Nodame Cantabile*.

5. Import / Export Trends and Overseas Development

A. Import/Export Trends

The Finance Ministry's *Trade Statistics* reported that exports of books and printed matter in 2005 dropped 8.5% to 10,318 million yen, while imports dropped 7.9% to 30,689 million yen (Fig. 7). The value of book exports has tumbled since 1996. Newspaper and magazine exports rose 2.1% to 4,587 million yen, while imports increased 5.3% to 15,353 million yen.

Fig. 7 Import/Export Trends



Sources: Figs. 7, 8 were compiled from the Ministry of Finance's Trade Statistics

The majority of publications exported from Japan were shipped to Japanese bookstores overseas (especially in the United States and East Asia), European-language publications edited/published in Japan (academic publications and books on Japan) or newspapers/magazines published in Japan. Japanese companies are cutting back on the number of expatriates stationed overseas, which has

adversely affected Japanese bookstores abroad.

Imported publications mainly consist of academic books, academic periodicals (especially expensive, technical periodicals from the fields of science, engineering, medicine and pharmaceuticals/chemistry), language textbooks, general interest books, dictionaries and encyclopedias. They are typically imported via distributors/wholesalers specializing in foreign books. Import figures are also expected to tumble in the future, due to budget cuts at major clients such as libraries, research labs and universities, and because of ample information now available on the Internet.

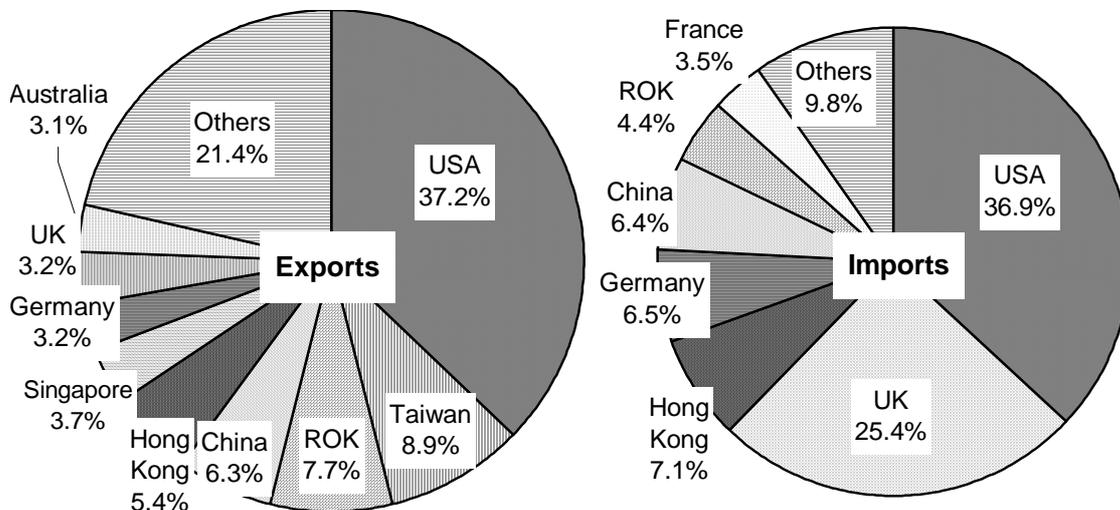
Statistics are limited in regard to the sale of translation rights to overseas publishers for localized marketing. However, the overwhelming majority of such sales involve paperbacks, and it is estimated that paperback imports far exceed exports.

1) United States: Largest Trading Partner

By country, the United States is by far Japan's largest trading partner in books, accounting for just under 40% of all books bought and sold by Japan. Most other major export destinations are concentrated in East Asia, while major sources of imports are the UK and East Asian countries. Recently, imports from East Asia have been increasing due to a growing demand for publications and language textbooks from China, Hong Kong, South Korea and Taiwan. Another factor is the trend among western countries to establish Asian distribution bases in Singapore, Hong Kong and other places, from which Japanese book importers have started sourcing western publications.

Major export destinations are South Korea, Taiwan and the United States, while the majority of imports come from the United States and the UK. In 2005, imports from China and South Korea more than doubled, reflecting increasing interest in the cultures of these nations.

Fig. 8 Book Exports and Imports by Country / Region (2005)



B. Japanese Publications Overseas

Traditionally, Japanese titles translated for overseas publications were classics like *The Tale of Genji*, or works by authors well known abroad, such as Yasunari Kawabata and Yukio Mishima. Until recently, the only modern-literature titles that attracted overseas interest were by Haruki Murakami and Banana Yoshimoto. However, many by contemporary Japanese authors, especially those of a highly entertaining nature, are now translated for publication.

The Japan Foundation, a government-related organization that promotes international cultural exchange, has translated and published books by authors such as Jiro Asaka, Miyuki Miyabe and Ryotaro Shiba to introduce contemporary Japanese literature to the rest of the world. Such

publications are gaining recognition overseas.

The Cultural Affairs Agency has run a project to promote the translation of contemporary Japanese literature since 2002. A total of 34 titles were translated into English, French, Russian or German and released by mainstream publishers around the world in 2005. These include works of a highly entertaining nature, by authors such as Go Osaka, Shoji Shimada, Eimi Yamada and Kyusaku Yumeno. Going forward, the translation of works by such Japanese authors is expected to become a viable business. In a related move, the Suntory Foundation is subsidizing the annual overseas publication of about 10 books in the areas of social or human sciences as a means to introduce academic findings on Japanese culture to the rest of the world.

Japanese publisher Kodansha and U.S. publisher Random House set up Random House Kodansha in 2003 to translate works by Japanese novel/comic authors and market them via Random House's networks in Australia, Britain, Germany, the United States and other countries. In September 2005, Kodansha established a wholly owned subsidiary in China to release fashion magazines, in cooperation with Chinese companies, and to strengthen its business with copyrighted content, including books and photographs.

In 2001, entrepreneur Hiroki Sakai set up Vertical Inc. in the United States to acquire translation rights to contemporary Japanese authors. By 2006, the company had released 27 titles, including *Ring* and *Dark Water* by Koji Suzuki, *Buddha* by Osamu Tezuka, *Twinkle Twinkle* by Kaori Ekuni, *Naoko* by Keigo Higashino and *A Rabbit's Eyes* by Kenjiro Haitani.

Other companies are also seeking to expand business in China. Based on the terms of China's entry into the WTO in 2001, the country began lifting distribution restrictions on foreign books, magazines and newspapers in 2006. In response, Japanese companies are actively developing the market for Japanese publications. The IT publisher/media enterprise Impress signed a partnership agreement with China's major IT publisher to market publications in 2005. Poplar Publishing became the first Japanese-capitalized firm to open a children's bookshop in Beijing in 2005. Although births are declining, the children's market is forecast to grow because per-child spending on education is expected to rise. Japan's major book distributor, Nippan, set up a subsidiary to cooperate in publishing Japanese books in China from 2005. The company helps manage copyrights, translation, editing and marketing for Japanese publishers who want to enter the market.

1) Surging International Popularity of Japanese Comics

Japanese comics are gaining popularity and creating their own unique market around the world. Shogakukan and Shueisha have traditionally licensed out Japanese comic books and marketed them in 20-30 countries. In the United States, Shogakukan and Shueisha jointly set up VIZ LLC in San Francisco in 2000 to publish an English version of the popular comic monthly *Shonen Jump*, marking the first overseas release of a Japanese comic periodical. In response to growing female readership, the company also launched an English-language comic monthly for girls, *Shojo Beat*, in 2005. In January 2005, VIZ and Shogakukan Production Entertainment (capitalized by Shogakukan and Shogakukan Production) launched VIZ Media to market Japanese comics and animation in North America. Another firm, Los Angeles-based Tokyopop, publishes over 80 titles.

The market for Japanese comics is also growing steadily in Europe, although demand has been relatively small due to a limited number of Japanese bookstores.² In France, small and midsized enterprises have been importing Japanese comics since the 1990s, building up readership for some 700 translated titles. In Germany, selected comics featured in the Japanese version of *Shonen Jump* are compiled into a monthly magazine called *Banzai!*, launched in 2001. A girls' version, *Daisuki*, followed in 2003, bolstering the spread of girls' comics. In 2004, Tokyopop set up a branch office in Hamburg to make a full entry to the German-language market. In 2005, the company and VIZ Media announced a partnership in the German market. VIZ Media also joined forces with a British

² See the JETRO reports "Penetration of Japanese animation and other contents in the French market" (March 2005)(<http://www.jetro.go.jp/biz/world/europe/fr/reports/05001223>), "China's animation market" (March 2005)(<http://www.jetro.go.jp/biz/world/asia/cn/reports/05000973>), "Japanese comic market in German" (March 2006)(<http://www.jetro.go.jp/biz/world/europe/de/reports/05001277>), "Current status and future outlook of the U.S. animation market" (March 2006)(http://www.jetro.go.jp/biz/world/n_america/reports/05001256).

copyright licensing agency and launched VIZ Media Europe in the Netherlands to centrally manage comic content by Shogakukan and Shueisha, and to facilitate licensing. *Shonen Jump* debuted as a monthly magazine in Sweden in 2004, and was subsequently launched in Norway in 2005. Increasing readership should encourage publishers to pursue opportunities more aggressively.

Stagnant sales forced *Raijin Comics*, launched in the U.S. in 2002, to suspend publication in June 2004. *Shonen Jump* has a monthly print run of 350,000 copies, but actual circulation is believed to be 180,000. To boost sales, the company hopes to achieve synergy with Japanese animation, which is more popular than comics overseas.

2) Shift from Overseas Distribution to Local Adaptation

Japanese magazines are making headway into China and South Korea. In China, which has a circulation potential three times that of Japan in Shanghai and coastal cities alone, European and American fashion magazines are starting to appear, including *Cosmopolitan*, *Harpers Bazaar* and *Elle*. However, Chinese women appear to prefer Japanese magazines to western ones for fashion information. Some publishers are launching more than one magazine to target separate reader groups (e.g. by age). Through partnerships with local companies, Japanese publishers have introduced localized versions of both comic and fashion magazines (Fig. 9). The trend was initiated by Shufunotomo's fashion magazine *Ray*, which now has a Chinese circulation of 400,000 copies, outstripping the publication's Japanese circulation. Typically, Japanese publishers receive a licensing fee (7-8% of sales) and part of advertising revenues.

Fig. 9 Examples of Japanese Magazines Sold Overseas

Type	Publisher	Title in Japan	Country	Title Abroad	Launch
Fashion	Shufunotomo	Ray	China	瑞麗服飾美容	1995
		Cawaii! and others	China	瑞麗伊人風尚、瑞麗可愛先鋒 他	
	Kodansha	ViVi	China	米娜時尚	2000
		with	China	昕薇	2002
		Style	China	俏麗	2005
	Shogakukan	Oggi	China	今日風采	2001
		CanCam	China	今日佳麗	2005
	Hachette Fujingaho	25 ans	South Korea	炫色	2002
Fusosha	Luci	China	露茜	2004	
Comics	Coamix	Comic Punch	South Korea		2002
	Shogakukan & Shueisha	Shonen Jump	United States	SHONEN JUMP	2003
Information	Kadokawa Shoten	Walker series	South Korea		2001
		Newtype	United States, Canada	Newtype USA	2002
	Recruit	Zexy	China	皆喜	2004
	JTB	Rurubu Johobar	South Korea		2002

Sources: Various

An increasing number of publishers are editing and publishing overseas editions and distributing them via subcontractors, rather than entering into partnership with local companies. Some major publishers have international trading affiliates within their group (e.g. Kodansha International), while collaborate with trading companies to release magazines overseas. Shufunotomo, which licenses out content from *Ray* and *ef* to a Chinese company, set up the joint venture SOCO (Shanghai) Co. Ltd. with Mitsubishi Corporation in 2004 to provide content to Chinese publishers, and to enter fields such as publication distribution, mail order and digital content distribution.

International book fairs held regularly around the world are key venues for promoting Japanese publications. Both Japanese publishers and overseas companies favor the fairs as places for negotiating deals. The Frankfurt Book Fair (held October 4-8, 2006, and scheduled for October

10-15, 2007) boasts about 250,000 visitors each year, and featured 14 Japanese publisher booths in the Japan Section in the last fair. Combined with exhibitors at joint booths and the Comic Center, a total of 39 Japanese companies took part.

The Tokyo International Book Fair 2006, held at Tokyo Big Sight July 6-9, 2006 (and scheduled for July 5-8, 2007), featured 700 companies from 30 countries. Exhibitors included major publishers from Europe and the U.S., and numerous companies from Asia. The show drew some 60,000 visitors.

6. Industry Topics

● Media-Mix Strategies Help Expand Popularity of Comics

The comic series *Dragon Sakura* carried in the weekly comic magazine *Morning* (Kodansha) transcended the conventional level of comic readership due to its informative theme of entrance examinations for the University of Tokyo, Japan's most prestigious university. The series evolved into a TV drama and feature programs with characters identical to those in the comic series. The strategy of using a mix of various media led to the publication of university entrance study materials by a related party, and the distribution of special content for mobile phones, generating significant spin-off business along the way. This success is believed to have contributed to a 20% increase in the number of applicants to Tokyo University in 2006. The phenomena also attracted public attention and media coverage in Asia.

● Decision on System Revisions Postponed

The Fair Trade Commission decided to retain the resale-price maintenance system intact for the time being in 2001. But it introduced a more flexible system, saying that public consensus has yet to be reached on the core system's abolition, even though in principle it contradicts competition policy. A taskforce set up in 2005 is currently examining the issue in detail.

Concerning purchase-point systems used widely by discount shops and large bookstores, a publishing organization demanded the systems be disbanded in 2004, claiming that they are effectively discounts that breach resale-price agreements. Nevertheless, they continue to be used by an increasing number of bookstores, since they offer clear benefits to consumers.

● Enactment of Text and Printed Culture Promotion Law

The Text and Printed Culture Promotion Law enacted in July 2005 established October 27 as the annually observed Text and Printed Culture Day. The law stipulates that the national and local governments are responsible for drawing up and implementing measures to promote text and printed culture, aiming to promote wider use of books, newspapers and other printed materials. The law calls for the expansion and enhancement of public libraries, and the implementation of educational programs for training, enhanced reference materials at school libraries and digitization of educational materials.

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This report is based on Japan's Publishing Industry (July 2005) with some additional information.