

Global and China E-book Industry Report, 2009-2010

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Abstracts

Emerged and matured in the United States, eBook has swept the globe as a brand new convenient and eco-friendly medium for reading. The global eBook shipment was about 1 million in 2008, jumped to 3.82 million in 2009, and is expected to hit 9.3 million by 2010. Amazon Kindle, Hanvon eBook Reader and Sony Reader account for more than 90% of global market sales. In China, about 380,000 eBook readers, including 260,000 from Hanwang, were sold in 2009, and 480,300 were sold in the first half of 2010.

With the popularity of smart phones and the launch of iPad, the price of eBook reader will decline quickly. In 2010, Amazon reduced the price of Kindle from US\$259 to US\$189, making its sales volume in H1 2010 three times more than that in H1 2009. It is expected that the eBook market will keep growing in H2 2010.

In terms of upstream, midstream and downstream of eBook industry, upstream technology vendors E Ink and SiPix were integrated with midstream Taiwanese manufacturers PVI and AUO respectively. PVI acquired 100% stake in E Ink, while AUO got 31.58% shares of SiPix. Downstream terminal manufacturers regard content resources as their core competitiveness, for example, Hanwang focuses on best-selling books; Founder Apabi focuses on academic books; Shanda Literature focuses on Internet literature which young people are more interested in, and publishing houses also develop content based on their existing resources.

As for the eBook business model, the USA's eBook industry model is relatively mature. For example, in Amazon's model, mobile operators are only the channels for content download, while Amazon, offering both terminal device and content download platform, is the leader of the industry. The "terminal + content" model of Amazon is successful. In June 2010, Amazon adopted a 70% royalty plan to improve its business model and further coordinate the interests of manufacturers in the industry chain.

China's eBook business model is still in the exploration phase, and current models include the terminal manufacturer-dominated model, the operator-dominated model, the eBook portal model and the publishing house-dominated model.

Hanwang has given a successful example of the terminal manufacturer-dominated model. It invested RMB30 million in establishing Hanvon E-book Store and purchasing content. Learning from Amazon's experience, it has taken the interests of content providers into full account, split profits 20/80 with content providers, and established the "terminal + content" model quickly.

The successful example of the operator-dominated model is set by China Mobile with its mobile reading base. Compared with American mobile operators, China's mobile operators are more powerful in influence and control, and have sufficient resources to negotiate with content providers, set up download platforms and promote terminals. By customizing terminals, China Mobile cooperates with content providers to develop 3G eBook business. However, its 40/60 profit split method is not so attractive to content providers, the content charging mode is copying from the original charging mode for value-added services, and the subsidies for terminals cannot bring a larger profit margin in a short time. Besides, its eReading business is facing the ferocious competition from latecomers China Telecom and China Unicom, so its 3G eReading business is facing a fickle future.

Typical examples of the eBook portal model are Shanda and Founder, which have built Shanda Literature and Fanshu as their eBook content platforms respectively. Shanda's Bambook has great potentials, because Bambook provides not only the literature of Shanda, but also the music of Hurray, the movies of Shanda Pictures, and even the games of Shanda, that's also why the mighty China Mobile is willing to cooperate with Shanda.

The typical example of the publishing house-dominated model is set by Shanghai Century Publishing Group, which released the Cihai Reader with massive content by independent research and development. In a short term, the publishing house-dominated model can possess high-quality content resources without copyright concerns; but in the long run, the content advantages of publishers may become the barrier to their development. Exclusive content is always limited, and the content of one publishing house cannot meet the diversified demand of all readers. The only way out for traditional publishing houses to grab a share in the eReading market is to form super-media groups through mergers and acquisitions.

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