

Scuola per Librai Umberto e Elisabetta Mauri

XXX Seminario di Perfezionamento

Hans Willem Cortenraad, CEO

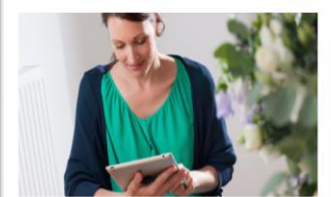
25/01/2013



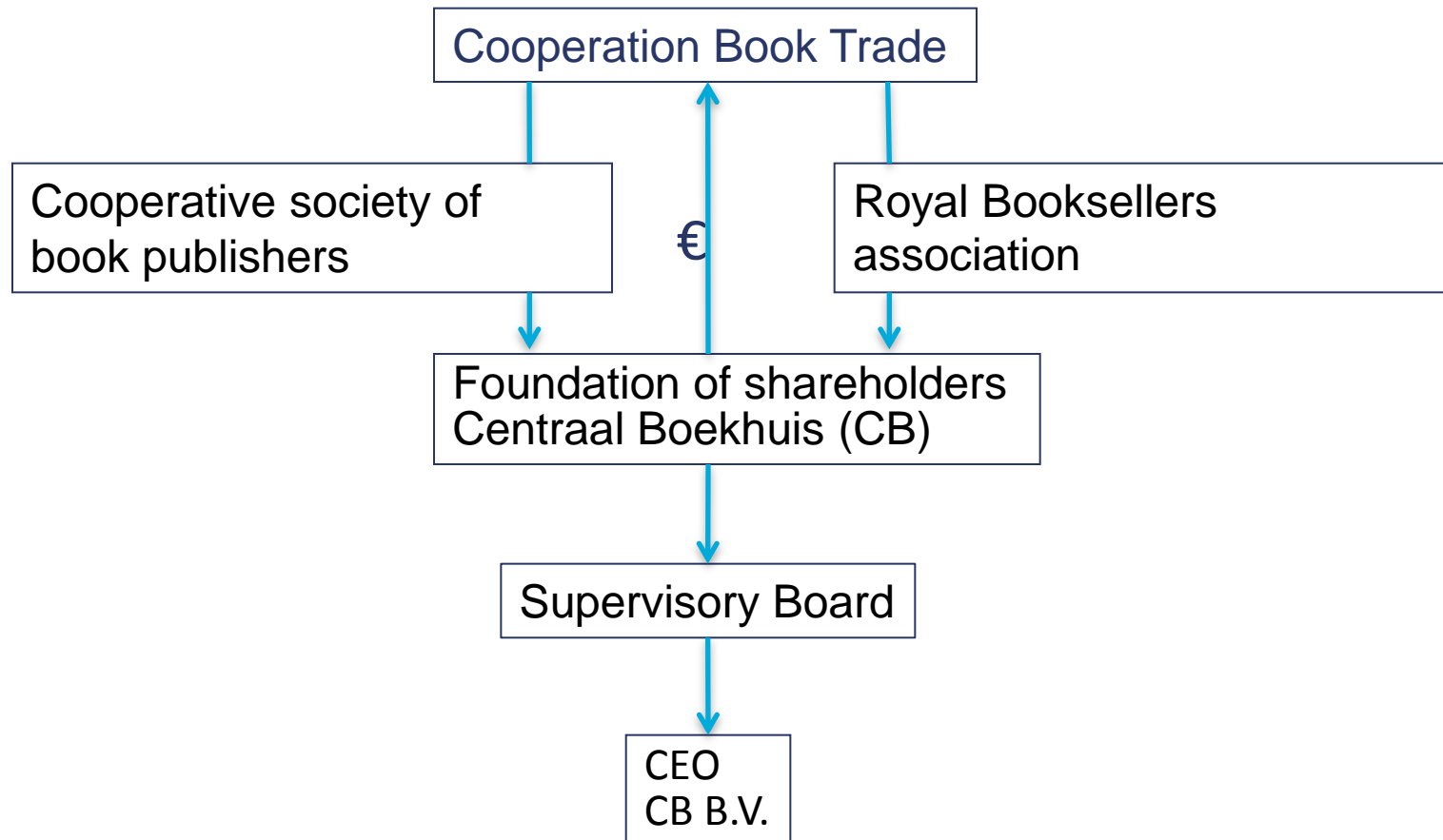
ahead with
smart logistics

About us and content

- Founded in 1871
- Distribution services for all Dutch language publications to both bookstores and consumers (webshop fulfilment).
Services include:
 - Warehousing
 - Distribution & transportation
 - Ordering, financial services and reporting
 - Title information and Dutch ISBN agency
for both physical and digital books
- Wholesale services for foreign language publications
- Print on Demand integrated in logistical process



Structure

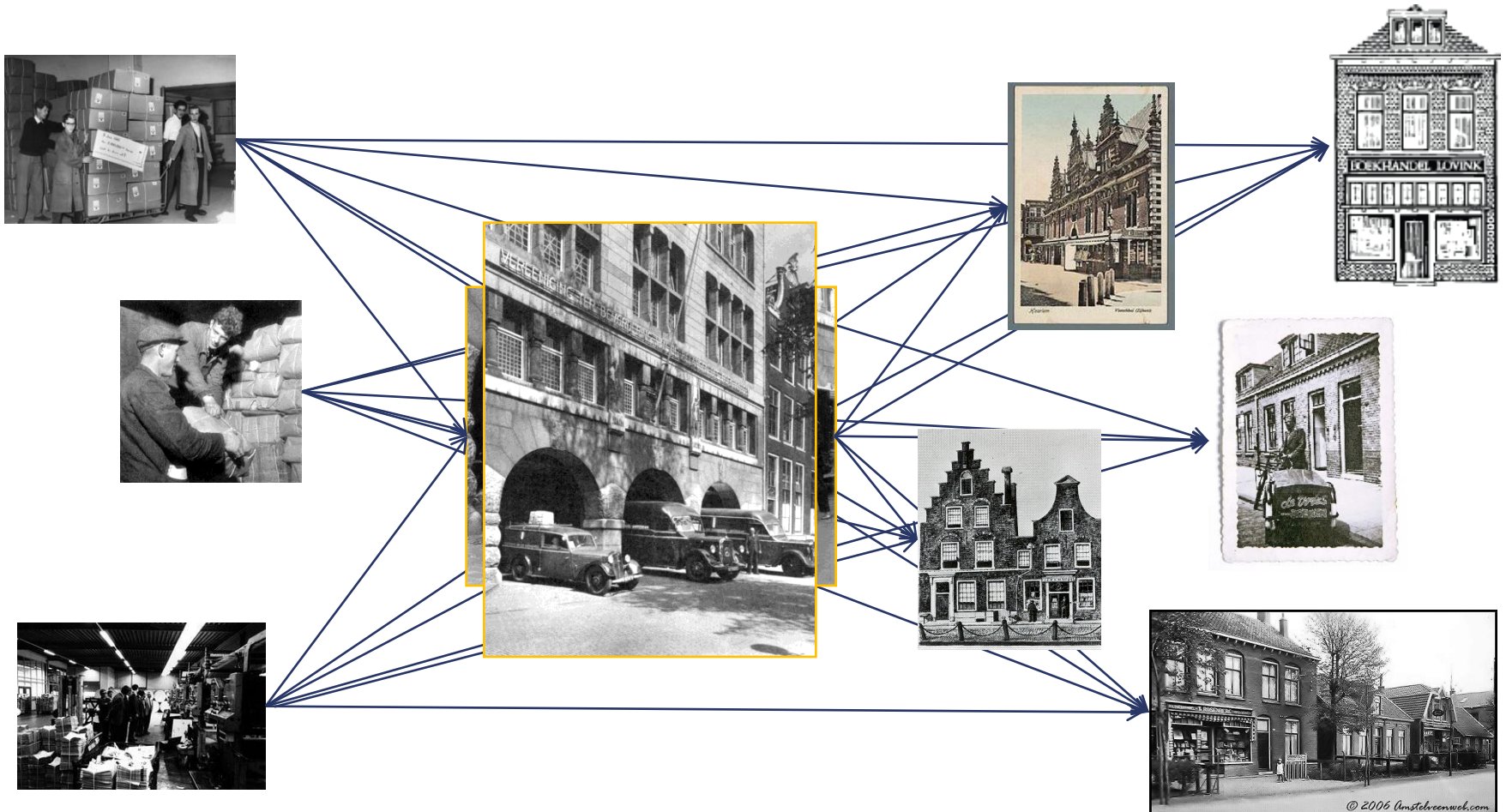


Mission statement

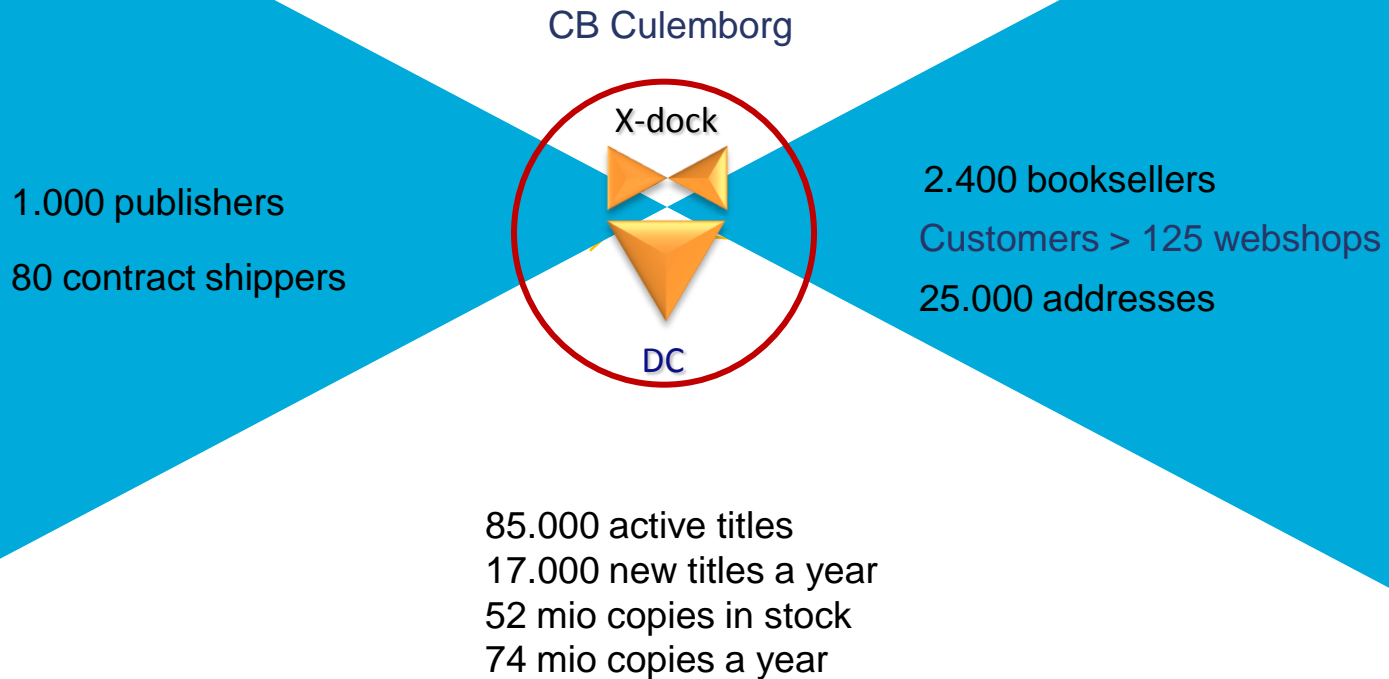
“CB strives to deliver a sustainable contribution to the succes of our clients by integrated logistical solutions”

- CB is committed to achieve maximum efficiency in the physical and digital network. We constantly search for the best fit between quality and costs
→ Customer intimacy, operational and people excellence are in tens relationship.

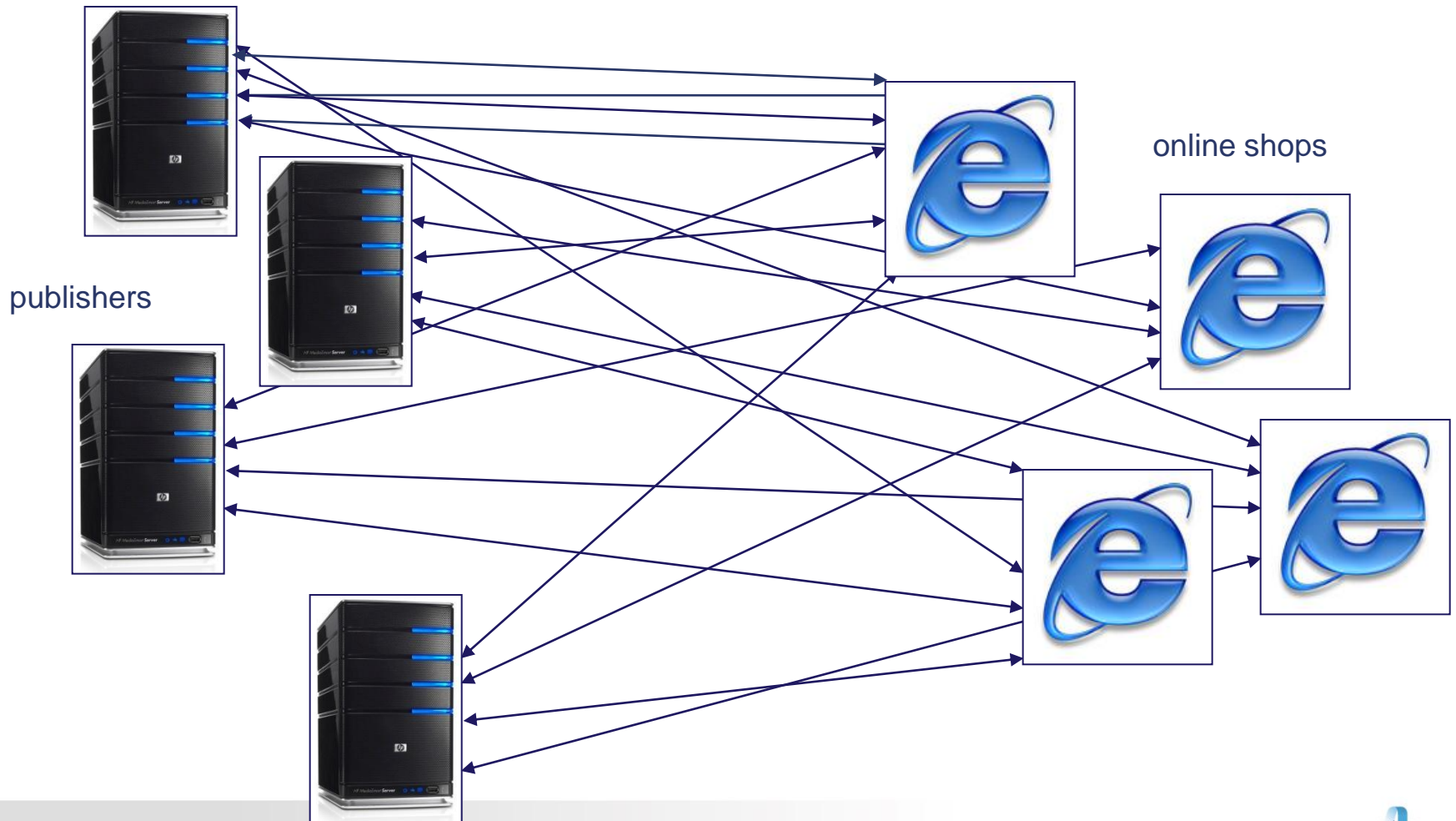
1871: As it began....



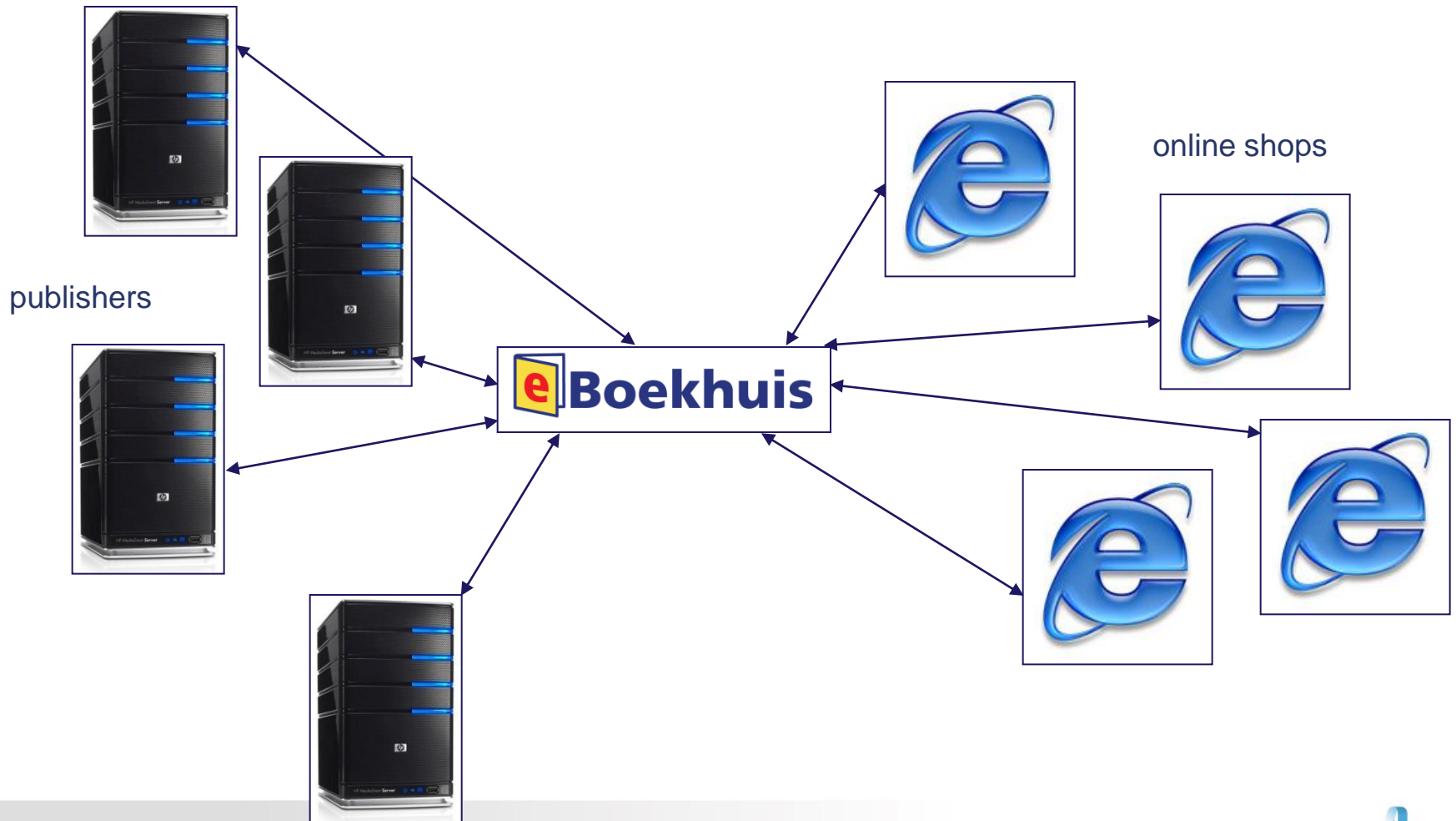
.... And this is how it still works



.... also in a digital environment



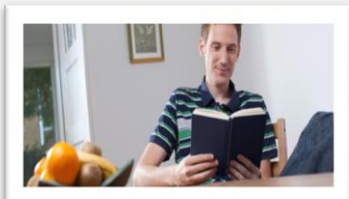
.... also in a digital environment



About us, in figures P versus E

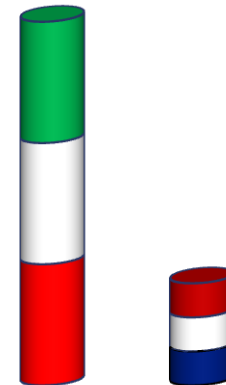
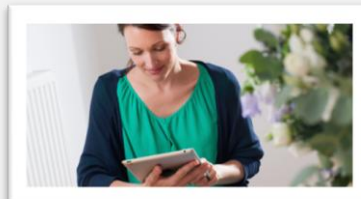
Physical books:

- 85,000 titles
- 74 million copies
- 1.000 publishers
- 2.400 bookstores
- 125 webshops



Ebooks:

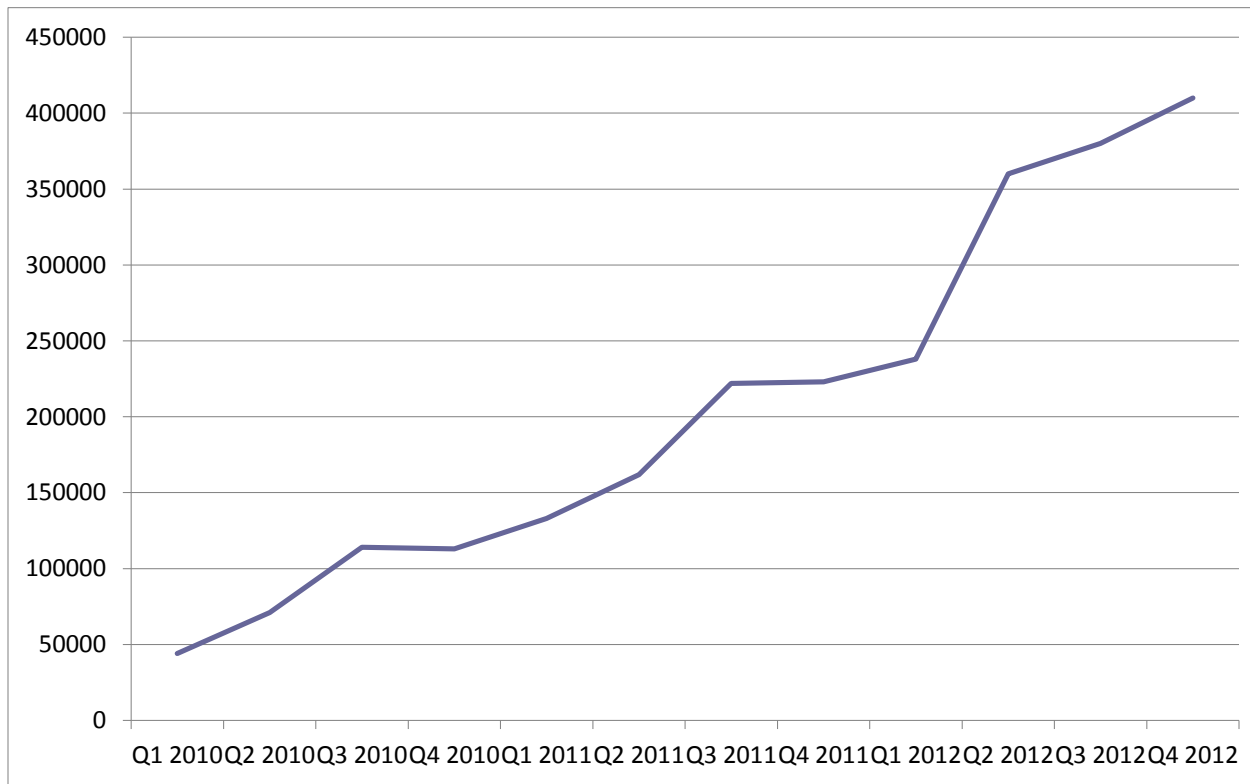
- 20.000 titles
- 1,4 million copies
- 1.000 publishers
- 100 webshops



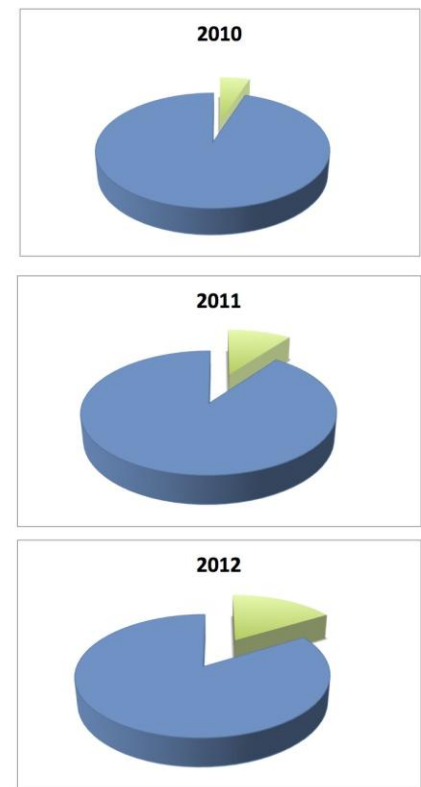
Italian vs Dutch readers

Growth of ebook distribution in the Netherlands

copies sold in past 2 years

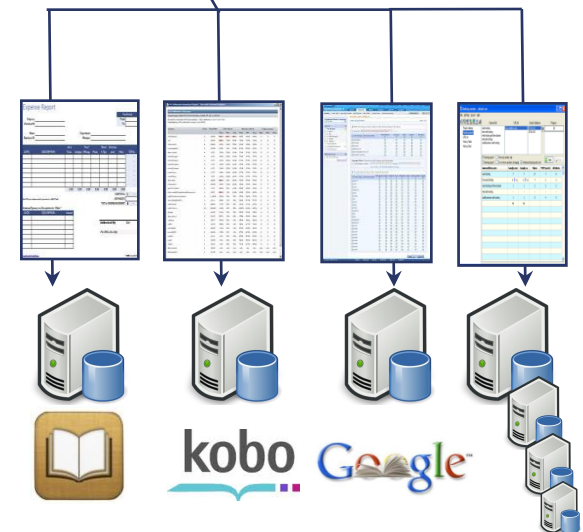


available titles



Ebook distribution infrastructure

publishers



* logo's above are just some of the 100+ ebook stores which are connected to CB ebook distribution webservices



Dedicated digital platform for textbooks

- CB will launch a dedicated digital platform for the textbook market as of June 2013
- The platform not only enables distribution of digital textbooks to students, it enables students to:
 - access their titles via a wide variety of devices
 - access exclusive portal sites which are part of textbooks
 - annotate their titles and share annotations with other students and professors (and vv).
- The platform enables professors to access textbooks for curriculum selecting purposes.
- The platform enables connectivity via ELO's such as Blackboard for students to access textbooks.
- The platform is fully integrated with CB's digital repository.
- CB manages the financial administrative and invoicing processes between publishers and points of sales (webstores, elo's) for all e-textbook transactions in the platform



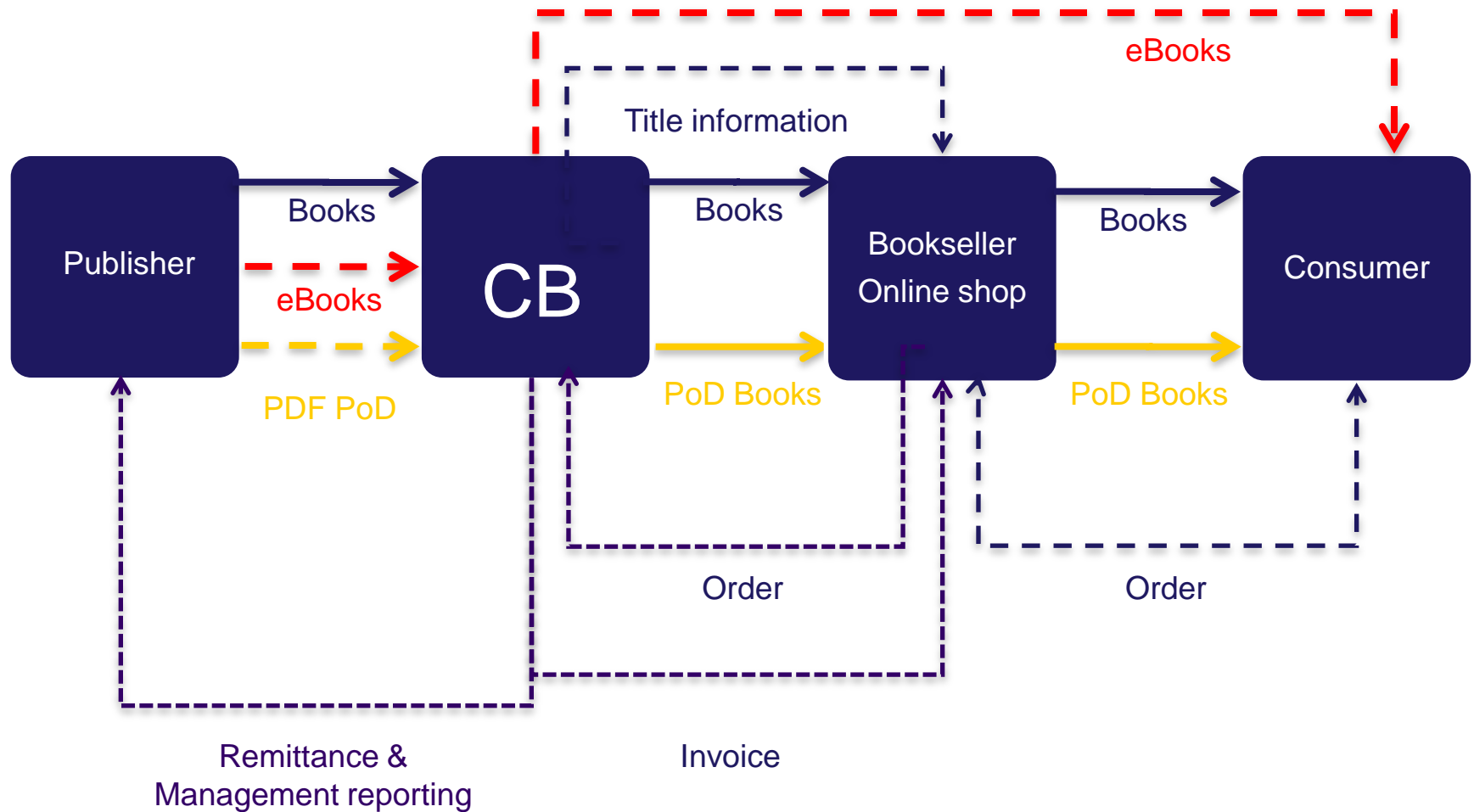
Bookshelf

Integrated POD operation at CB

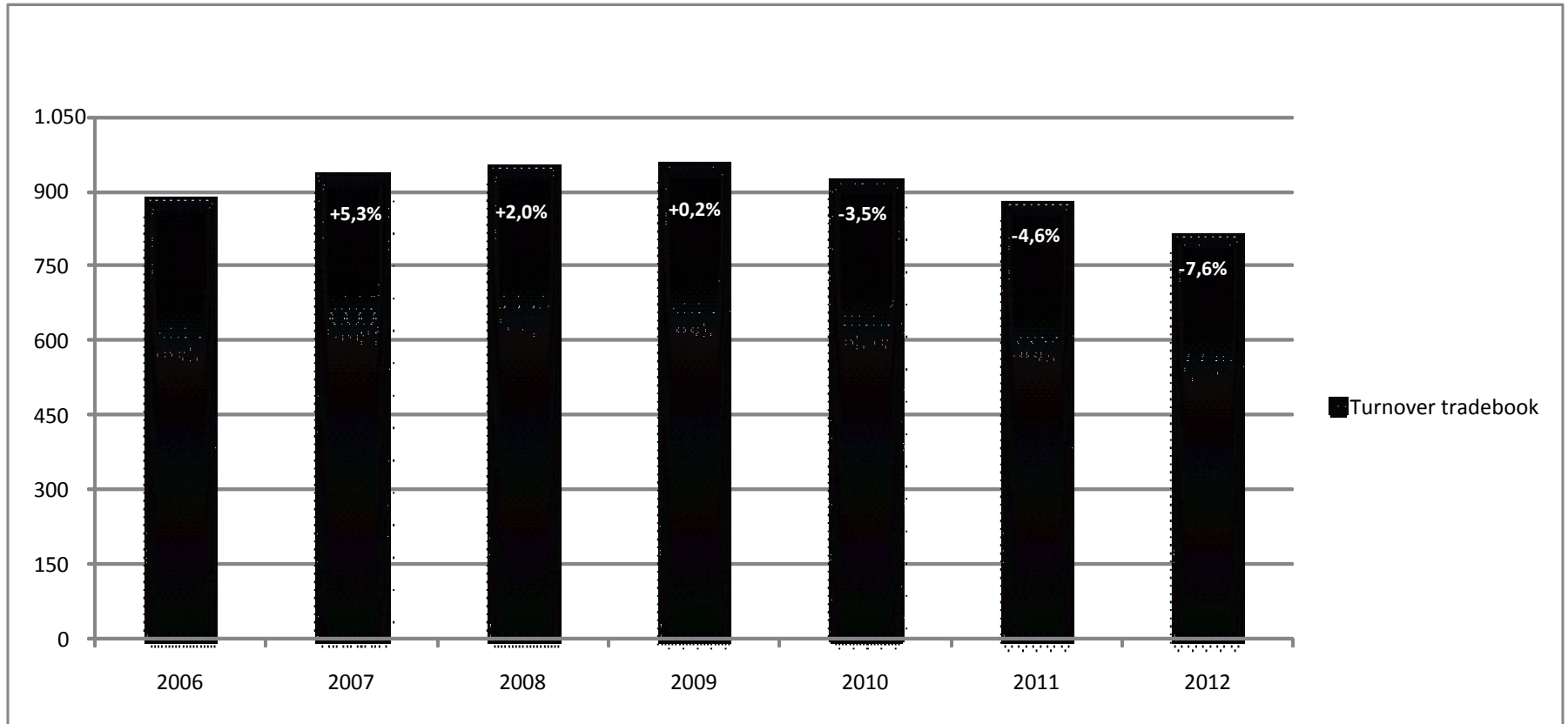


- Publishers can easily upload and manage print PDF's and technical metadata at their CB portal interface and FTP
- The print facility is fully integrated within CB's warehouse, being able to print and deliver books within 24h:
ordered at 8 pm is printed at night and shipped to the customer of bookshop that same night!
- 200 publishers are currently using the POD service.
- 10% of all titles at CB is available through POD

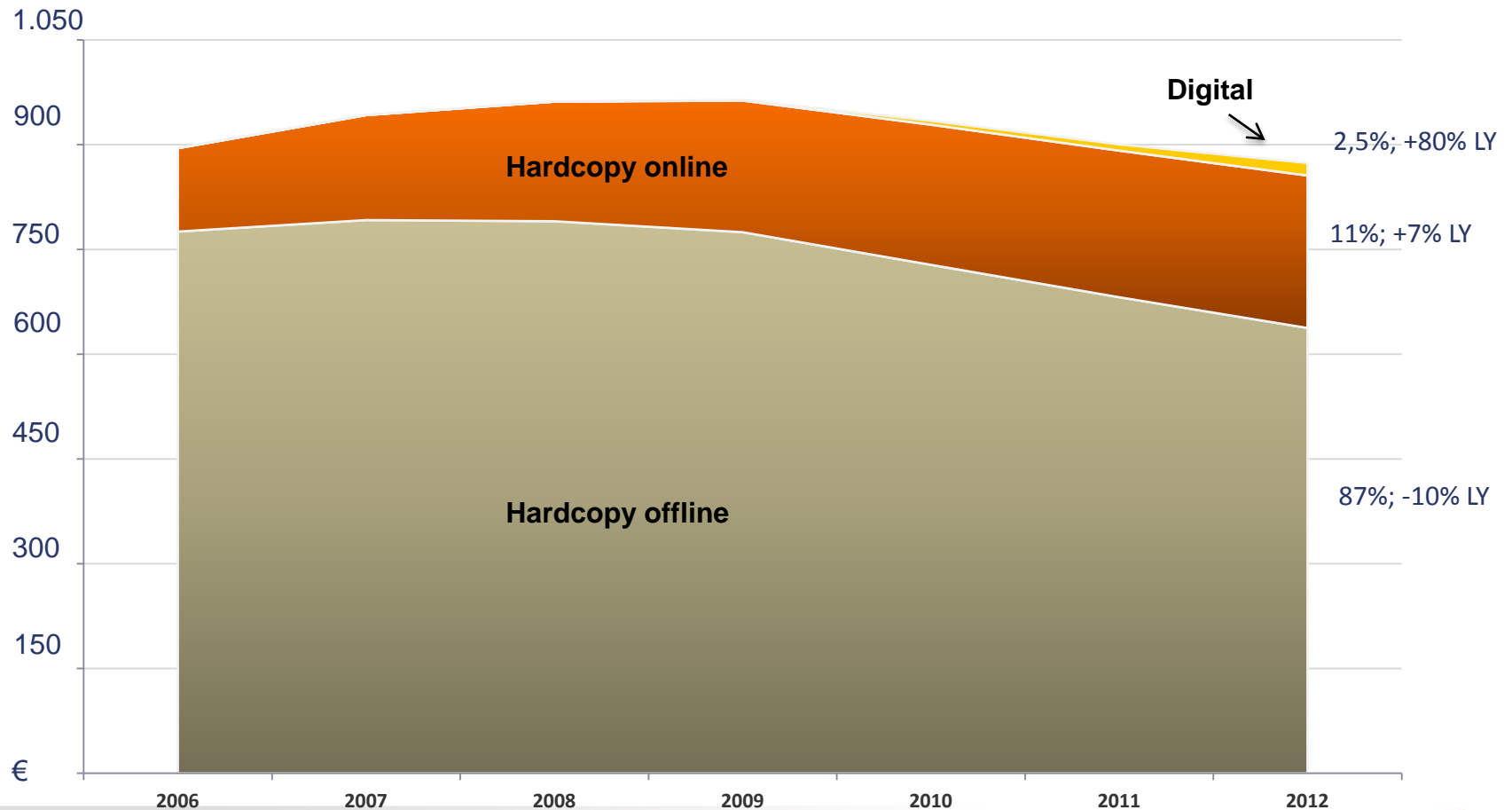
Content business model



Turnover tradebooks the Netherlands in million €

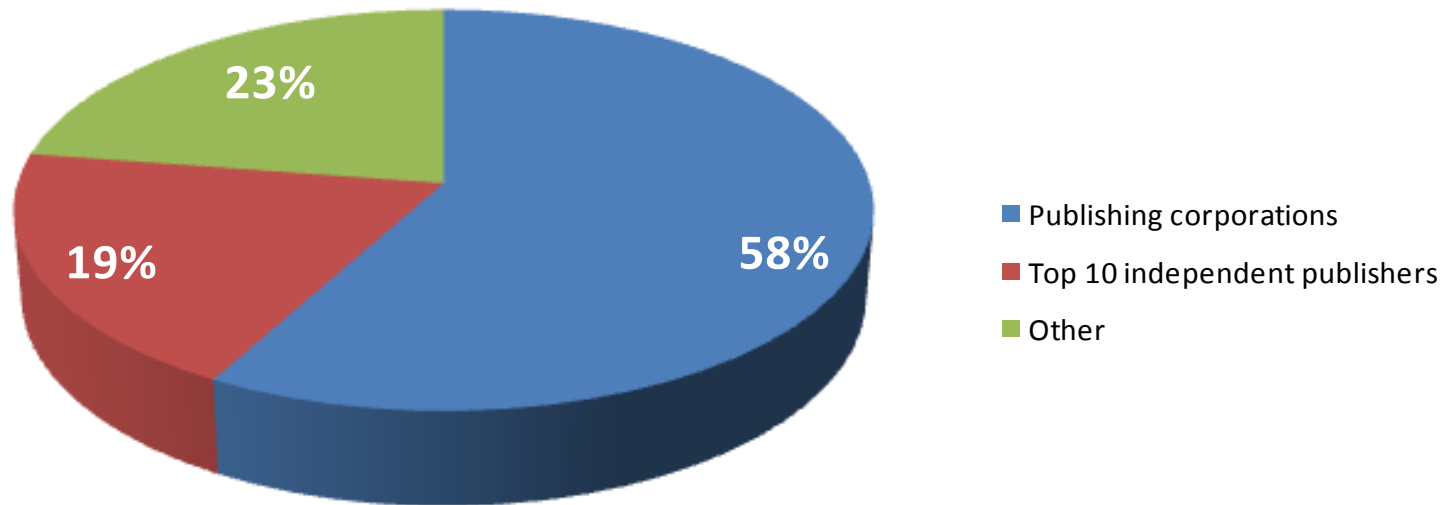


Digital vs online vs offline

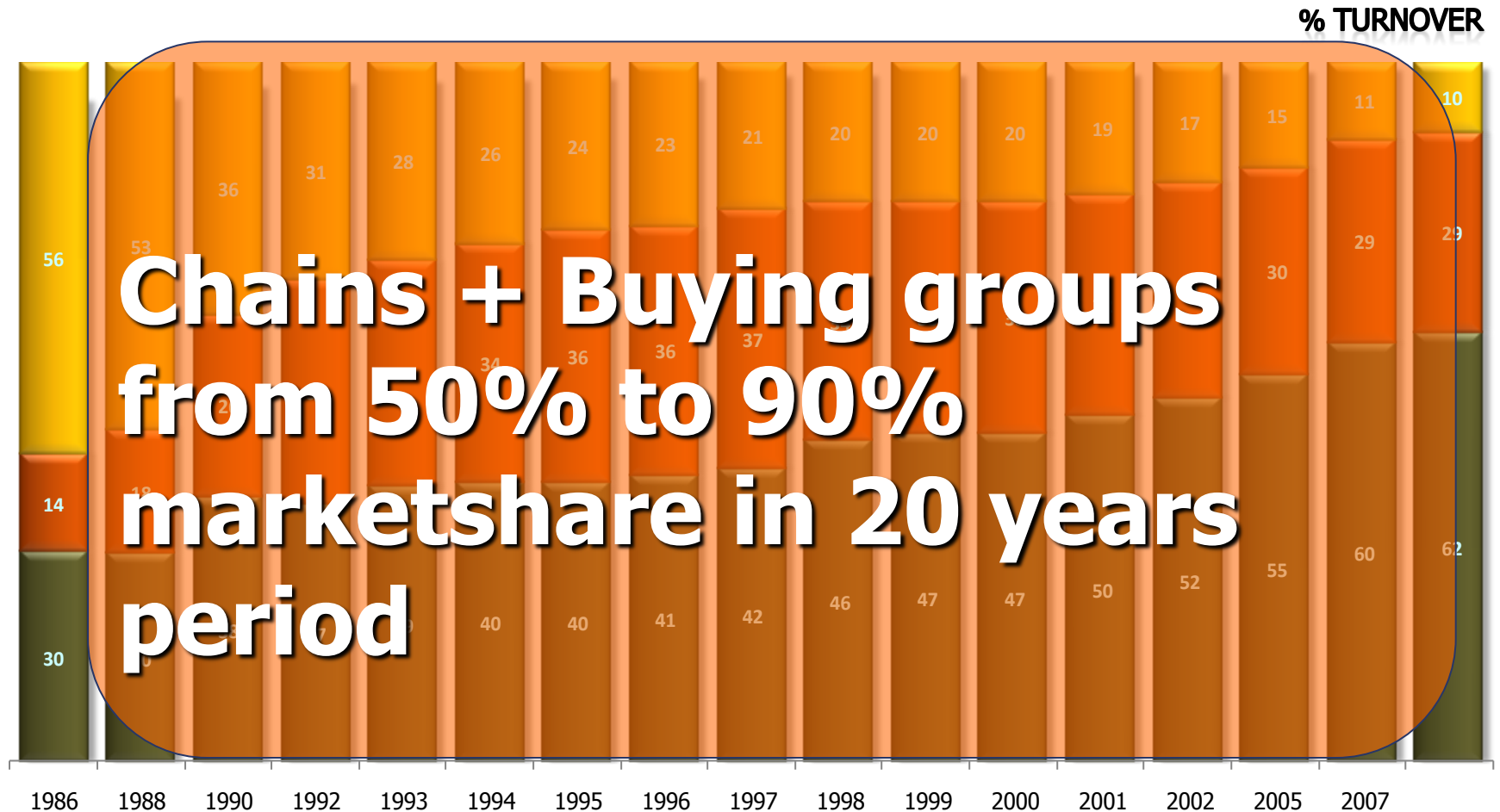


Publishers developments

Marketshare by publisher group



Market developments per channel



Chains



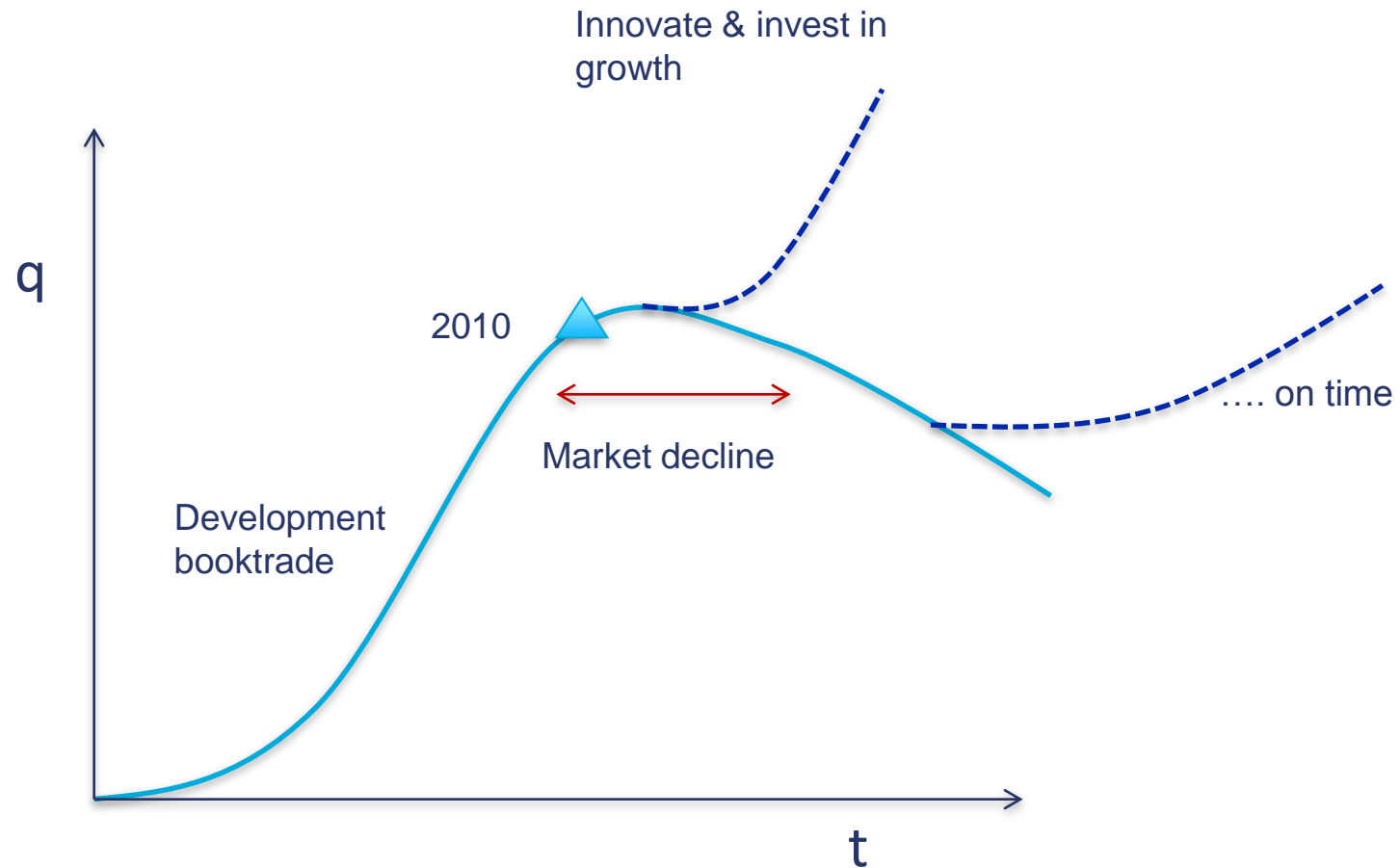
Buying Groups



Independents



Importance of innovation



Diversification

- Centraal Boekhuis turned into CB



- CB entered into new markets; Fashion and Healthcare



- Goal ; within three years 25 - 30% of revenues out of new markets
- Autinomous growth in new markets & Acquistions
- Book & media markets are core