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BOLOGNA CHILDREN'S BOOK FAIR

Special Report For 2026 Bologna Children's Book Fair

2025 Chinese Children's Publishing:

Reshaping Value Amid Transformation and Challenges

Reshaping Value Amid Transformation and Challenges: An Interpretation of 2025 China's Children's Publishing Market

by Zhao Bing

Every March, the global children's publishing community gathers at the Bologna Children's Book Fair in Italy. This event serves not only as a central marketplace for rights trading, but also as a key vantage point for observing trends across the global children's book market. As one of the world's largest children's book markets, China's children's publishing sector has undergone profound transformation over the past year. Livestream e-commerce has completely redefined the logic of book distribution. Domestic original content is accelerating its entry onto the international stage. Meanwhile, the combined effects of demographic change and consumption upgrading are redefining market demand.

In 2025, while the overall scale of China's children's book market remained stable, its internal structure was undergoing significant transformation. Physical bookstores and traditional e-commerce platforms continued to decline, whereas live-stream e-commerce platforms such as Douyin have become the only growing sales channel. Demand for popular science and general knowledge titles surged, while traditional literary works and picture books faced mounting pressure to transform. Leading publishing groups strengthened their advantages through full-industry-chain IP operations, while small and medium-sized organizations struggled to survive under cash-flow pressure.

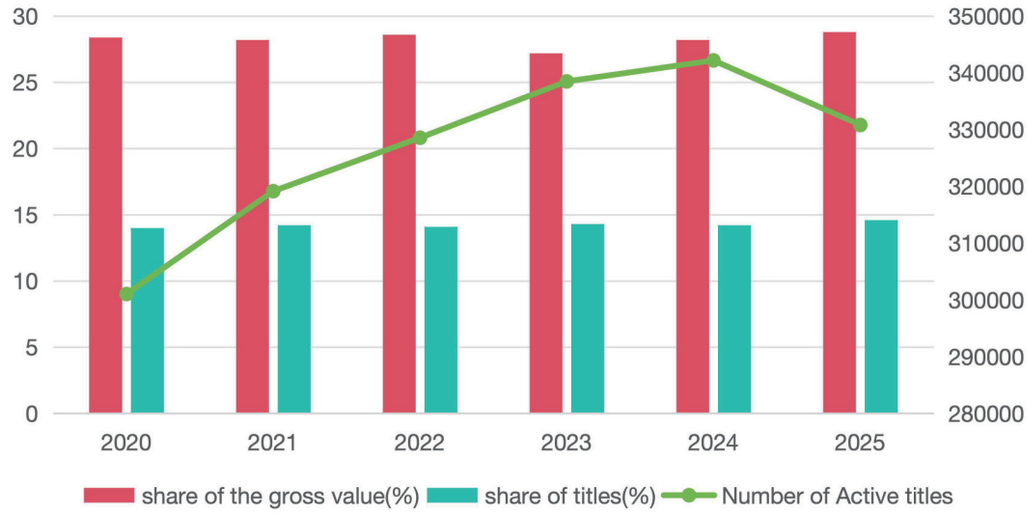


Figure 1. Changes in the Scale of China's Children's Book Retail Market

These shifts are reshaping China's publishing ecosystem and creating new opportunities and challenges for international publishing collaboration.

Based on full-year market monitoring data for 2025, this report systematically presents the scale trends, channel transformation, category evolution, and competitive dynamics within China's children's publishing sector, offering international publishing professionals a reliable market reference.

I. Market Overview

1. Market Scale and Growth Drivers

Over the past several, the broader macroeconomic environment has led to more cautions consumer spending, which has inevitably affected the book retail market. The China's book retail market has remained in a state of fluctuation. In 2025, the Gross Value of China's overall book retail market reached RMB 110.4 billion, representing a slight decline compared with 2024.

As the segment with the largest share of Gross Value within China's book market, the children's publishing sector has, for many years, undergone significant transformation in both content production and marketing models. In 2025, the children's book market demonstrated a clear pattern characterized by stable overall volume alongside structural adjustment. According to monitoring data from Beijing OpenBook Information Technology Co., Ltd., children's books accounted for 28.8% of the Gross Value of the retail market, maintaining their position as the largest category. During the same year, 330,808 children's titles recorded sales activity, representing a slight decrease of 3.3% from 342,180 titles in 2024.

Over the past five years, due to factors such as a decline in the number of readers and changes in channel structures, the children's book market has begun to "cool down," signaling that Chinese children's publishing has entered a phase of rational adjustment, pivoting from rapid expansion toward a focus on quality and depth.

The children's market recorded an overall year-on-year increase of 1.2% for the full year. Compared with this modest growth, more notable were the pronounced

channel diversification and fluctuations across subcategories. In 2025, a landmark shift occurred in China's publishing industry. Within the book retail market, content e-commerce accounted for 40.53%, surpassing platform e-commerce at 32.37%, vertical and other e-commerce at 13.44%, and physical store retail channels at 13.65%, thereby becoming the largest retail sub-channel in the publishing sector.

Within the children's publishing segment, data from January to September 2025 show that content e-commerce ranked first in the retail market with a Gross Value share of 47.6%, representing a year-on-year increase of 23.4%. This continued the development trajectory observed in 2024 and positioned content e-commerce as the primary growth driver. The pattern of relative decline and expansion across channels indicates that China's children's publishing market is shifting from traditional shelf-based sales toward content-driven sales.

From a global perspective, China remains one of the world's largest children's book markets, with annual sales exceeding USD 10 billion. However, per-capita spending on children's books still lags behind that of developed markets in Europe and North America. The market adjustment in 2025 has, to some extent, created a window for publishers to move beyond a sole focus on sales volume and toward a deeper emphasis on brand value.

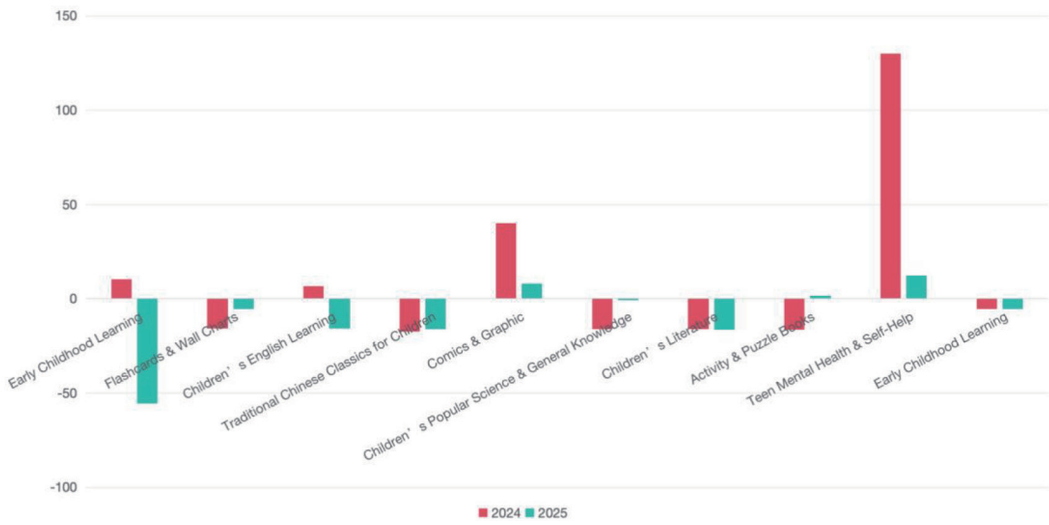


Figure 2. Year-on-Year Growth Rates of Children's Book Sub-categories (%)

2. Channel Structure Divergence

Changes in children's publishing retail channel data in 2025 reveal a clear shift in market power. Although content e-commerce maintained positive growth of 27.6%, the pace has slowed significantly compared with 33.5% in 2024, indicating that the traffic advantage of content-driven e-commerce is weakening. This poses a serious challenge for publishers that have become overly dependent on traffic in recent years. The model driven solely on deep discounting and influencer-led sales is becoming unsustainable, as content e-commerce is transitioning from being traffic-driven growth toward a stronger emphasis on content quality.

Platform e-commerce continues to hold a stable position in the sale of series titles and boxed sets due to its mature supply chain and membership ecosystems. Long-running IP such as *The Great China Treasure Hunt and Little Goat Goes Up the Mountain: Graded Chinese Readers for Children* demonstrate steady performance on these platforms.

Although physical retail channels declined by 10.3% overall, it remains irreplaceable in picture books and early childhood educational categories. Chinese parents continue to view physical bookstores as an important space for children's reading experiences. The *Math Princess Detective Series*, published by Anhui Children's Publishing House, performed strongly in physical retail channels, indicating that traditional models combining offline promotion with school and library channels still retains vitality.

Notably, vertical and other e-commerce channels, including community-based e-commerce and mini-program stores, declined by 17.2% in 2025, representing the largest decrease. This reflects an ongoing concentration of traffic toward major platforms. Smaller vertical platforms face increasing difficulty competing with Douyin and WeChat Channels, leading to further consolidation of channel concentration.

This transformation directly shapes the survival conditions of different publishers and fundamentally reshapes book circulation logic. In China, the operating logic of content-driven e-commerce differs substantially from traditional book distribution. Within the new channel structure, books function not merely as products but as key materials for content creation. Sales increasingly depend on KOL livestream promotion and short-video recommendation.

In 2025, the average selling discount in content-driven e-commerce was 35% of the list price, compared with 41% in platform e-commerce. This lower pricing plays a central role in rapid customer acquisition, but it also compresses Profit margins across the industry.

3. Product Structure: Sharp Divergence Across Subcategories

Against the backdrop of channel transformation, different categories within the children's publishing market have experiencing markedly different trajectories. Over the past five years, the share of Gross Value represented by children's popular science and general knowledge titles has increased steadily. By 2025, this category ranked first among all subsegments with a Gross Value share of 29.3%, representing an increase of 8 percentage points from 21.3% in 2020, while maintaining an average annual growth rate of approximately 7.9%.

This trend is closely linked to policy adjustments in education and the growing emphasis placed by parents on holistic education. Popular science titles have become an important supplement to family education.

In contrast to the steady growth of popular science titles, teen mental health and self-help emerged as another breakout category in 2025. The Gross Value of this category increased by 12.5% year on year, securing 33 titles within the TOP 100 bestsellers, indicating a pronounced head-title effect. The strong sales of titles such as Those Destined for Great Achievement: *My Fate Is Determined by Me* and *Bedside Guide*

Table 1. Number of Active Titles Across Children's Book Subsegments

Subcategory	Number of Active Titles	Year-on-Year Change in Number of Active Titles	Number of New Titles	Year-on-Year Change in Number of New Titles
Children's Popular Science & General Knowledge	72938	-2	5604	-477
Children's Literature	96769	-1956	4518	+164
Children's Picture Books	50843	-624	2964	-535
een Mental Health & Self-Help	6792	+427	858	+305
Early Childhood Learning	19173	-3199	725	-505
Comics & Graphic Titles	24736	-782	1609	-105
Children's English Learning	11472	-681	628	+151
Activity & Puzzle Books	22475	-2779	814	-275
Traditional Chinese Classics for Children	12177	-193	644	-159
Children's Arts	10423	-1248	343	-209
Flashcards & Wall Charts	3010	-335	45	-39

for Teenage Boys / Girls highlight the rise of functional reading, where books serve not only as vehicles for cultural and emotional engagement but also as practical resources for addressing developmental challenges.

However, traditional categories are facing mounting pressure. The Gross Value share of children's literature declined from 22.4% in 2020 to 16.8% in 2025. Comics and graphic titles decreased by 16.1%, while children's picture books fell by 5.3%. This does not suggest a disappearance of reading demand. Instead, it reflects a shift in content consumption formats, with children's literature and picture books increasingly migrating toward audio, animation, and interactive reading formats.

It is also notable that children's English learning titles achieved positive growth of 6.6% in 2025, reversing the previous downward trend.

4. New Title Market: From Quantity Expansion to Quality Development

In 2025, the number of new titles in the children's market reached 18,752, representing a decrease of 8.2% compared with 20,436 in 2024. This reflects a more cautious approach among publishers toward new title development amid market volatility and a newly formed channel structure. Across the children's publishing market, new titles contributed 21% of Gross Value, while their share by title count accounted for only 5.7%. This indicates that a large proportion of new titles failed to generate effective sales, with market resources increasingly concentrating on leading titles.

Within the content-driven e-commerce environment, the promotion cost of new titles remains high. Leading influencers, due to risk considerations, are often reluctant to recommend untested titles, which places new releases in a difficult cycle of limited exposure and weak sales. In 2025, publishers widely adopted a strategy of leveraging established titles to support new releases by building on mature IP. For example, the series *The Great China Treasure Hunt* released its 32nd volume *Ningxia Treasure Hunt*, which quickly achieved strong sales by relying on an existing reader base and further strengthened the overall influence of the series.

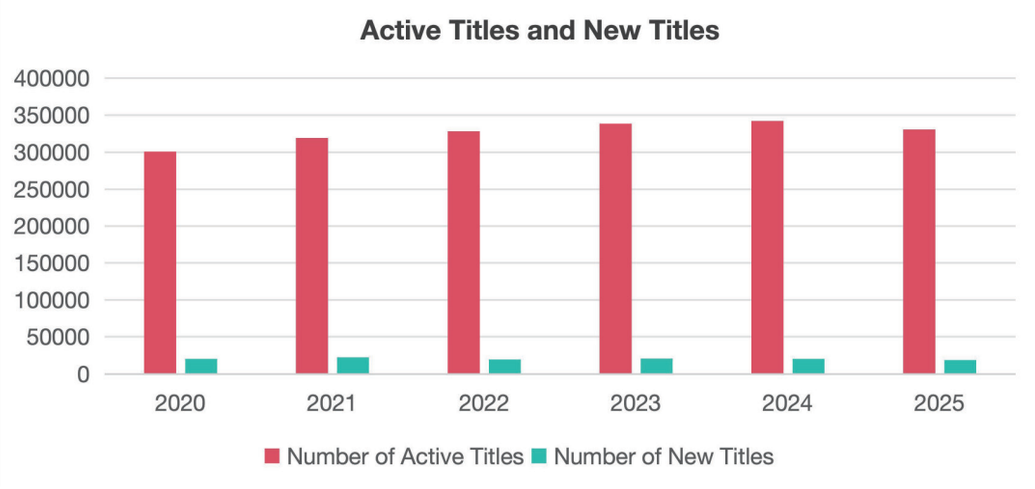
II. Bestseller Highlights and Content Trends: Intensifying Head-Title Effect and Format Innovation

1. Expanding Influence of Leading Titles

In 2025, China's children's book market exhibited a more pronounced Matthew effect. The top 1% of titles accounted for more than 55% of Gross Value. The *Great China Treasure Hunt series* published by 21st Century Publishing Group surpassed cumulative sales of 88 million copies and has evolved into a major IP ecosystem comprising multiple product lines, including geography comics, mythical creature series, dinosaur comics, and history comics, covering more than 70 book titles and over 100 cultural merchandise products.

The *Miwu Science Comics: Wonders of Everything* series published by Rongxin Culture exceeded cumulative sales of 10 million copies. The sixth instalment alone recorded sales of more than 750,000 copies in the first half of 2025.

This concentration of leading titles has significant implications for international rights cooperation. Chinese publishers increasingly prefer to acquire series with proven market success or IP with strong visual identity rather than



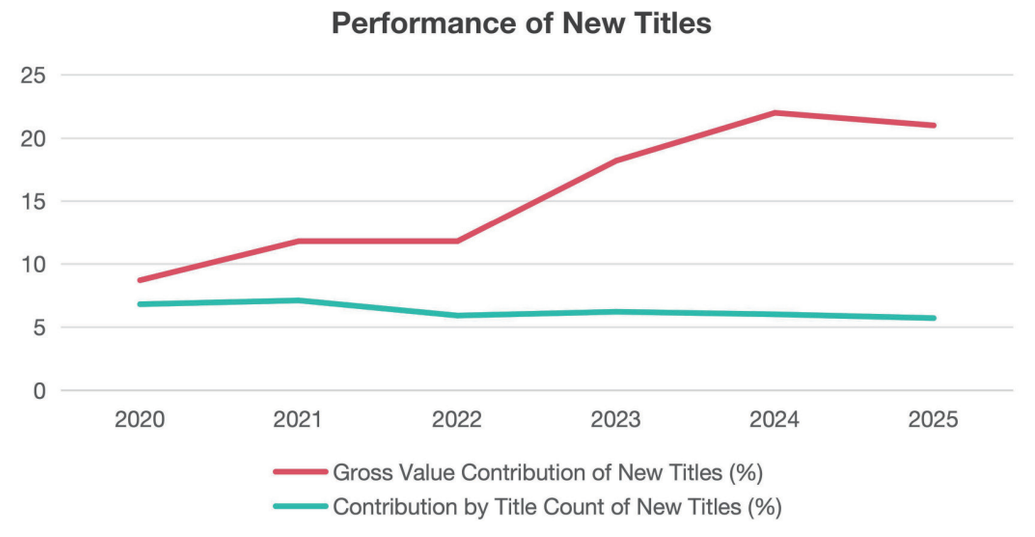


Figure 3. Retail Performance of New Children's Titles

standalone titles. At the same time, full-industry-chain development of major IP has become standard practice. Books serve primarily as the entry point, while derivatives such as animation, merchandise, educational programmes, and games constitute the core source of Profit.

2. Innovation in Content Formats

The combination of comics and knowledge emerged as the most prominent content trend in 2025. Titles such as *1,000 Questions on Chinese Culture in Comics* and *Comic Adventure for Young Explorers: The Way of the Wolf* led sales on content-driven e-commerce platforms, reflecting strong demand for the visualization and entertainment of knowledge. The comic format lowers reading barriers and aligns well with short-video distribution logic, becoming an effective medium connecting education and entertainment.

In early childhood learning, interactive formats continue to gain popularity. Lift-the-flap books, pop-up books, touch-and-feel books, and sound books remain strong sellers. The *See Inside Lift-the-Flap Books* series published by Tomorrow Publishing maintains a leading position on platform e-commerce channels. These products deliver reading value while also creating experiential consumption scenarios, making them important categories for physical bookstores and the gift market.

3. Channel-Specific Bestseller Characteristics

Bestseller lists show clear differentiation across channels. On content-driven e-commerce platforms, the TOP 10 titles are largely single-volume books priced between RMB 50 and 60, primarily within the self-help and traditional culture comic categories, including Those Destined for Great Achievement: *My Fate Is Determined by Me* and *1,000 Questions on Chinese Culture in Comics* . These titles offer strong emotional appeal and visual impact, making them well suited to short-video presentation.

On platform e-commerce channels, series and boxed sets dominate. Long-running IP such as *Great China Treasure Hunt* , *Little Goat Goes Up the Mountain: Graded Chinese Readers*, and *The Magic School Bus* demonstrate stable performance, indicating that consumers on these platforms place greater emphasis on systematic content and educational value.

In physical retail channels, the *Math Princess Detective Series* published by Anhui Children's Publishing House occupies multiple positions on bestseller lists, highlighting the close relationship between offline retail performance and institutional purchasing by schools and libraries.

4. Author Resources and Rights Structure

From the perspective of author resource distribution, in 2025 non-domestic authors accounted for 25% of Gross Value and 33.3% of titles in the children's book market, indicating a pattern in which translated titles are fewer in number but stronger in quality. In the children's English learning and picture book categories, non-domestic works continued to represent significant shares at 40.6% and 41.6% respectively. However, in the teen mental health and self-help category, domestic works have become dominant, with non-domestic titles accounting for only 5%.

Leading authors in 2025 included domestic creators such as Jingding Animation, known for *Great China Treasure Hunt* , Beimao, author of *Mi Xiaoquan Goes to School*, and Yang Hongying, creator of *Diary of a Smiling Cat*. International authors also remained prominent, including Christian Jolibois from

Talbe2. 2025 Platform E-commerce Bestseller Titles in the 2025Children's Book Market

Rank	Title	Publisher	Book Company
1	Lift-the-Flap Books.Oceans	Tomorrow Publishing House	Hollo Book
2	The Legend of Ao Bing (Volume 1)	Jiuzhou Press	Huawen Tianxia
3	An Illustrated Chronology of Chinese History	Phoenix Publishing House	/
4	Great China Treasure Hunt(31). Jilin Treasure Hunt	21st Century Publishing Group	/
5	1,000 Questions on Chinese Culture in Comics	Sanhuan Publishing House	/
6	Lift-the-Flap Book.Animals	Tomorrow Publishing House	Miwu Science Comics
7	Little Goat Goes Up the Mountain: Graded Chinese Readers for Children	Posts&Telecom Press	Different Like me (Carmela Series)
8	Charlotte's Web (New Edition)	Shanghai Yiwen Publishing House	/
9	Big Head Son and Little Head Father(New Adventures)	Qingdao Publishing House	/
10	Great China Treasure Hunt (30). Shanxi Treasure Hunt	21st Century Publishing Group	/

Talbe3. Content-driven E-commerce Bestseller Titles in the 2025 Children's Book Market

Rank	Title	Publisher	Book Company
1	*1,000 Questions on Chinese Culture in Comics*	Sanhuan Publishing House	/
2	Those Destined for Great Achievement: My Fate Is Determined by Me	Cultural Development Press	/
3	The Way of the Wolf	Tomorrow Publishing House	/
4	Success Through Breakthrough Thinking	Guowen Press	/
5	Home with Kids: For Girls, Personal Safety Matters More	Northern China Women and Children's Publishing House	/
6	Top Thinking That Changes Children's Destiny	Guowen Press	/
7	1,000 Questions on Chinese Culture in Comics	China Peace Publishing House	/
8	Bedside Guide for Teenage Boys	New Buds Publishing House	Qinglan Books
9	Bedside Guide for Teenage Girls	New Buds Publishing House	Qinglan Books
10	A Little Worldly Wisdom for Kids	Yunnan Science and Technology Press	Zijin Shangpin

France, known for *Different Like me* (Carmela Series), and Erin Hunter from the United Kingdom, author of *Warriors*.

This structure provides a clear direction for international publishers. In traditional stronghold categories such as popular science, picture books, and children's literature, European and North American publishers continue to demonstrate strong competitiveness. However, in emerging high-growth areas including mental health and traditional culture, domestic content has established a cultural barrier to entry.

III. Evolution of the Competitive Landscape: Concentration and Cross-sector Competition

1. Increasing Market Concentration

Market concentration in the children's publishing sector increased significantly in 2025. At the publishing group level, the CR10 (Concentration Ratio of the Top 10 Firms), representing the market concentration of the top ten groups, reached 45.26%, up 3.01 percentage points year on year. China South Publishing & Media Group, China Publishing Group, and Shandong Publishing Group ranked among the top three, with Shandong Publishing Group moving up in the rankings driven by bestselling titles such as *The Way of the Wolf*.

Publishers at the institutional level also experienced rising concentration. 21st Century Publishing House maintained the leading position with a Net Value share of 4.9%. Its *Great China Treasure Hun*t series has become a model for full-industry-chain development of children's IP through integrated operations spanning books, animation, cultural merchandise, and cultural tourism. CITIC Press Group, Tomorrow Publishing, and Posts & Telecom Press further strengthened their market positions through capital operations and resource integration.

This concentration trend is closely linked to channel trans-

Talbe4. Physical Retail Bestseller Titles in the 2025 Children's Book Market

Rank	Title	Publisher	Book Company
1	The Legend of Ao Bing (Volume 1)	Jiuzhou Press	Huawen Tianxia
2	Math Princess Detective Series(3)	Anhui Children's Publishing House	/
3	Math Princess Detective Series(4)	Anhui Children's Publishing House	/
4	Math Princess Detective Series(1)	Anhui Children's Publishing House	/
5	Math Princess Detective Series(5)	Anhui Children's Publishing House	/
6	Math Princess Detective Series(2)	Anhui Children's Publishing House	/
7	Math Princess Detective Series(6)	Anhui Children's Publishing House	/
8	Great China Treasure Hunt(32). Ningxia Treasure Hunt	21st Century Publishing Group	/
9	Dinosaur World: The Gentle Tyrannosaurus	Anhui Children's Publishing House	/
10	Dinosaur World:The Flying Scansoriopterygid	Anhui Children's Publishing House	/

Table 5. TOP 10 Authors in China's Children's Book Market, 2025

Sales Rank	Author	Country/Region	Top-selling Title
1	Jingding Animation	China	Great China Treasure Hunt
2	Beimao	China	Mi Xiaoquan Goes to School
3	Yang Hongying	China	Diary of a Smiling Cat
4	Shen Shixi	China	The Wolf King's Dream (Updated Edition) by Shen Shixi
5	Leo Huanxiang	China	Mo Duoduo's Mystery Adventure Series
6	Weihua Publishing	China	Miwu Science Comics
7	Christian Jolibois	France	Different Like me (Carmela Series)
8	Zhang Qiusheng	China	Chinese Masters' Award-Winning Picture Books
9	Erin Hunter	UK	Warriors
10	Duoduoluo	China	Detective Mike Fox

formation. In a fragmented traffic environment, small and medium-sized publishers face limited capacity to acquire users, while leading groups benefit from established new media teams, private traffic ecosystems, and stronger financial resources, enabling them to absorb higher traffic costs and longer payment cycles. International publishers increasingly prefer strategic partnerships with leading Chinese publishing groups and major children's publishers. This reflects not only a channel decision but also a risk-mitigation strategy in response to market volatility.

2. Intensifying Competition

In recent years, a group of non-traditional entrants with backgrounds in sales, product promotion, and internet operations have entered the children's publishing sector. These organizations demonstrate stronger internet capabilities and a deeper understanding of traffic operations and emerging distribution channels, creating substantial competitive pressure for traditional children's publishers.

In 2025, this segment of children's content planning companies underwent significant reshuffling, leading to intensified competition. Hollobooks, Xueersi, and Tongqu publishing remained among the top ten, yet the market concentration CR10 reached only 18.41%, indicating a highly competitive environment. Xueersi leveraged its educational technology background and extensive user base to rise rapidly through products such as *Red Nose Dots Bedtime Story Sound Book* , ranking second and illustrating the growing impact of cross-sector entrants.

However, the core challenge facing these organizations is cash-flow pressure. In 2025, many small and mid-sized children's content planning companies shifted from expansion-focused strategies toward prioritizing high-quality content development. The annual number of new titles was typically reduced to fewer than ten, with greater emphasis placed on maintaining existing IP.

3. New Characteristics of Rights Trade

As the international influence of original Chinese children's books increases, publishing cooperation is shifting from one-way acquisition toward joint development. According to the *China–ASEAN Book Influence Report 2025*, between 2020 and 2024 the number of children's titles exported from China to ASEAN countries grew by 4.2%, while the influence index increased by 183%, positioning children's books as a new growth driver in rights trade.

At the 62nd Bologna Children's Book Fair, the Chinese publishing delegation presented more than 2,500 titles. Projects including the *This Is Xinjiang* series published by Xinjiang Juvenile Publishing House, works by Cai Gao from Hunan Children's Publishing House, and The *Little Teahouse in the Woods* from CITIC Children's Books secured multilingual rights deals. This signals China's transition from a major importer of rights to a growing exporter of rights.

Looking ahead, international publishing cooperation is expected to move toward deeper localization. In rights acquisition, overseas publishers and Chinese teams will increasingly engage in collaborative creation while preserving core IP value, jointly developing products tailored to the Chinese market. At the same time, high-quality original Chinese content will expand more systematically into global markets, particularly in younger and rapidly growing regions, where China's capacity for content innovation is likely to become a key driver of international publishing cooperation and cross-cultural exchange.

IV. Challenges and Future Trends: Identifying New Growth Drivers

1.Core Challenges at Present

In recent years, China's children's publishing sector has been undergoing significant transformation, placing widespread pressure on publishers. Rapid changes across distribution channels have reshaped pricing structures, and low retail pricing remains the most prominent challenge in the children's market. Over the past year, publishers have yet to identify an effective solution to this structural issue.

Meanwhile, rising traffic costs, broader economic pressures, and a shrinking target readership have increased customer acquisition costs, further constraining publishers. In 2025, many book influencers reduced or ceased livestream promotion due to low average order value and limited conversion rates, suggesting that the peak growth phase of short-video live streaming platforms has largely passed. Children's publishers will need to identify new growth pathways in the coming years.

2. Technology Enablement and Business Model Innovation

AI is expected to deeply penetrate the children's publishing value chain by 2026. 21st Century Publishing House, China South Publishing & Media, and Langzhi Media established a joint AI venture focused on publishing technology development. Rongxin Culture integrated the DeepSeek large model into its AI reading pen, enabling intelligent story creation and knowledge interaction. From data-driven topic selection and AI-assisted illustration to personalized marketing recommendations, technology is reshaping publishing workflows.

The "publishing plus" ecosystem continues to expand. Extension of children's IP into film, animation, merchandise, and educational experiences has become standard practice. In 2025, the Shanghai International Children's Book Fair recorded approximately RMB 15 million in Gross Value from book sales, while merchandise and derivatives generated nearly RMB 2 million, demonstrating the strong potential of IP commercialization. Publishers with cross-media storytelling capabilities will hold competitive advantages, while pure book publishers face increasing marginalization risk.

3. Channel Development and IP Strategy

In recent years, Chinese children's publishers have continued to strengthen proprietary sales channels. By 2026, the market is expected to accelerate its shift from traffic-driven growth toward user operations. Through private ecosystems, membership systems, and community engagement, publishers aim to build long-term user relationships and reduce dependence on platform algorithms.

The industry will also place greater emphasis on building distinctive IP brands and serialized product portfolios, actively cultivating original IP and expanding into film, gaming, and derivatives to achieve multidimensional IP value development.

From a marketing perspective, content seeding is expected to become a core long-term promotional approach. Continuous content development on platforms such as Xiaohongshu and WeChat Channels supports brand building and long-tail sales. Furthermore, collaboration between international publishers and leading Chinese publishing groups is expected to deepen, allowing overseas partners to leverage local channel networks and operational expertise to participate in the Chinese market with lower risk and higher efficiency.

Overall, China's children's publishing market is currently undergoing a painful transition. Channel restructuring and pricing realignment present short-term challenges, yet in the medium to long term, improvements in population quality, the deepening of education policies, and the upgrading of cultural consumption are expected to continue supporting market growth.