ConsumAsiaN Book Series

edited by

Brian Moeran and Lise Skov

The ConsumAsiaN book series examines the way in which things and ideas about things are consumed in Asia, the role of consumption in the formation of attitudes, experiences, lifestyles and social relations, and the way in which consumption relates to the broader cultures and societies of which it is a part. While seeking to map current and recent consumer trends in various aspects of Asian cultures, the series pays special attention to the interactions and influences among the countries concerned, as well as to the region as a whole in a global context. The volumes in the series apply up-to-date theoretical arguments frequently developed in Europe and America to non-western societies – both in order to analyse how consumption practices in Asia compare to those found elsewhere, and to develop new theories that match a specific Asian context.

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ADULT MANGA

Culture and Power in Contemporary Japanese Society

Sharon Kinsella

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THE MANGA PRODUCTION CYCLE

Between the 1950s and the 1990s manga did not just transform from the outside, in its relationship to society, it also changed on the inside. Change in the mode of production of a culture like manga is a more elusive and less quantifiable process, not as easily isolated for the purpose of analysis, than cultural change visible in society. And yet it is a vital aspect of how cultural change happens and one which is closely tied up with the question of freedom of expression, democratization, participation, and representation. For technology and resources are the bare bones of a cultural production cycle upon which small groups of people, representing different sections of society, exchange skills and interests with one another, driving the production cycle forward, to produce a single unified cultural product. Without some understanding of how the industrial production cycle itself operates and how, therefore, its various producers interact, it is not possible to fully understand the sociology of cultural producers, or how this sociology may change and with what significance. This chapter outlines the basic cycle of production developed by publishing companies to make manga magazines and books, and it prepares the ground for analysing the organization of amateur manga subculture in Chapter four, and the recent trends in manga production and editing in Chapter six.

Division of Labour

The take-over of the large numbers of small *kashihon* and *akahon* manga publishers by large publishing companies based in Tokyo during the 1960s also involved the simultaneous reorganization of

manga production. Large publishers introduced a new division of labour into manga production which speeded up the process of manga production and enabled manga to be published on a weekly basis. Newly established manga editorial offices developed systems for the ongoing recruitment and training of new artists and the management and control of artists producing popular serialized stories. Manga editors began to carry out separable tasks such as checking the first 'pencil manuscripts' (*shitagaki*) before they were drawn in ink, ordering typeset lettering for speech bubbles, sticking in typeset lettering, and checking the spelling of speech bubbles before and after typesetting. By reapportioning the more mechanical stages of manga production to editors, publishers were able to speed up manga production to meet weekly deadlines. Uchida Masaru, the ex-Chief editor of *Magazine*, describes the new 'bundle of tasks' for editors (Becker 1982:7–14) created by large publishing companies as 'editorial production' (*henshū saisan*), and 'editorial production' as one section of the wider 'manga division of labour' (*manga bungyo*).[1]

Rental manga and *akabon* artists accustomed to working to monthly publishing schedules, and determining for themselves how and by what timetable manga were made, were forced to work closely with editors to meet the deadlines for weekly manga magazines. The transition to producing weekly episodes for large companies has been described as a traumatic one. It was a hurdle which many famous manga artists of the 1960s, such as Tsuge Yoshiharu and Nagashima Shinji, could not or would not jump.

Artists' Production System

The majority of artists who succeeded in transferring to weekly production schedules did so by forming small production companies which mediated between themselves and editors employed in large publishing companies. Saitō Takao became 'Saitō Takao Pro', Tezuka Osamu became 'Mushi Pro', and Fujio-Fujiko became 'Akatsuka Fujiko and Fujio Pro'. Artists became self-employed: businessmen employing anything up to 20 assistants to work with them in their studio, which enabled them to increase their production capacity to meet weekly deadlines. Whereas a single manga artist could rarely produce more than 100 pages a month, under this 'production system' (*production seido*) best-selling artists increased their output by four or five times, and were able to

produce one or even two major series simultaneously for different weekly magazines.[2]

Independent studios helped artists to maintain autonomy from publishing companies and to maintain control over their production techniques. As the manga publishing industry expanded, however, the prevalence of the studio production system decreased in relative terms. The great majority of the approximately 4000 professional manga artists working for the range of 273 manga magazines published in 1997, were not famous and were unable to guarantee receiving enough work to establish a company and hired assistants on a permanent basis. These artists, the great majority, generally hired just a few assistants on a casual basis, and they frequently requested friends – who are also low-ranking manga artists – to help them meet their occasional deadlines. The studio production system became particularly strongly rooted amongst the first generation of manga artists of the 1960s, now referred to as the 'veterans', and amongst contemporary best-selling female manga artists such as Morizono Milk and Ide Chikae, who have relatively stable and reliable readerships. The operation of a separate production system within the artist's studio is seen in a negative light by publishing companies. Manga drawn in this way is described as mechanical, 'formulaic', and 'lacking in artistic value'. Perhaps as importantly, the production system also enabled individual artists to increase their power and independence from publishing companies.

Artists' Contracts

Publishing companies make initial contact with new artists through a system of manga competitions operated by the editorials of magazines. High-circulation magazines, put out by large publishing companies, offer the winners large cash prizes. Each magazine advertises a competition with a range of cash prizes held several times a year. In 1994 prizes given by best-selling magazines ranged between 150,000 yen (£1000) and 2 million yen (£13,300). Figure 2.1 shows an advertisement for an adult manga competition held in 1995. Every year several hundred new manga manuscripts are sent in to the editorial offices of each magazine by new artists searching for recognition, work and money.

The competition system originated in readers' competitions run in *Manga Boy* (monthly children's magazine) between 1947 and

Figure 2.1 'I wanna terrify the manga establishment': an advertisement for an adult manga competition in 1995. [Printed in *Morning* magazine © Kōdansha]

1955, later used in Tezuka Osamu's manga magazine, *COM*. During the 1960s 'competition' became integral to the structure of the manga industry. *Magazine*, *Sunday* and *King*, launched between 1959 and 1960, had already requisitioned and secured the time and talent of the best-known *gekiga* and manga artists. Magazines launched after the first wave of recruitment, such as *Jump*, launched by Shūeisha in 1968, were forced to find, recruit and train a new generation of artists to draw manga for their magazines.

Through the competition system editors are able to attract and organize new layers of artists around their offices; make regular reviews of the range of new work being produced; and establish supervisory (*tantō*) relationships with artists that they believe show commercial potential. The cash prizes of competitions are indirectly used as a retainer fee to enable artists in whom editors have an interest to be temporarily unemployed in order to practise and improve their skills in drawing manga. Though the magazines are obliged to some degree to publish the work of prize winners, editors may decide to keep in contact with either the winners or the losers of manga competitions for indefinite periods of time after this initial point of contact. For artists, becoming a manga competition prize-winner or having work published in a magazine, preferably a high-circulation magazine, is their universally acknowledged professional début (*debyū*).[3]

Contracts between manga artists and publishing companies are variable. Most large publishing companies, including Kōdansha and Shōgakukan, have not generally issued written contracts to artists. Arrangements made with artists to produce series have been made on a discretionary one-to-one basis maintained by mutual trust and convenience. Artists are discouraged from breaking 'spoken agreements' (*iihan keiyaku*) by the knowledge that they could become known as an unreliable artist and damage their reputation within the industry. On the other hand, Shūeisha publishing company has operated a unique system of 'exclusive contracts' (*senzoku keiyaku*) which forbids artists contracted to Shūeisha from working for any other publishing company. In exchange for entering into an exclusive contract Shūeisha pays artists a fixed sum of money described as a 'trainees research allowance', whether or not they were currently employed to produce series. While the same pool of artists may work interchangeably and simultaneously for Kōdansha, Shōgakukan, Kadokawa Shoten, Futabasha, Akita

Shoten, Jitsugyōno Nihonsha, and any other smaller publishers, the work of artists contracted to Shūeisha is an exclusive cultural product which can be found only in magazines published by Shūeisha. During the 1990s artists, in new organizations such as Manga Japan (which will be discussed in more detail in Chapter five), have insisted that companies must respect their copyrights, and this pressure has made written contracts, stipulating fees, royalties, and copyright arrangements, more common.

In the mid-1990s the standard fees for manga manuscripts were 8000 yen per page for unknown and new artists, 25,000 yen per page for middle-ranking artists, and between 800,000 and 100,000 yen per page (£500 to £700) for famous, best-selling artists. Artists generally received 10 per cent of the revenue from the sales of manga books in royalties, though it is likely that best-selling artists claimed a higher percentage through private agreements. The copyright (*hanken*) of each manga series' is shared equally between the publishing company and artist. In practice publishing companies have tended to sell the copyrights of manga works without the agreement or even the knowledge of the artists, though the increasing fees charged to foreign publishers, film, animation and advertising companies for the right to use manga stories and characters has encouraged artists to demand that publishers protect their copyrights more effectively, in the 1990s.

Conference between Editors and Artists

Serialized manga made on a weekly, bi-weekly (every two weeks) or monthly production cycle revolves around the interaction of an artist and an editor at its core. While the artist is based almost entirely in his own home or studio, and the editor is based in an editorial office, both are engaged in producing the same episode of manga. Within this partnership editors carry out mechanical and administrative tasks, and maintain liaisons between the artist, publishing company and various typesetting and printing companies. In essence editors align artists with business: the cultural economy. Editors supervise artists and take responsibility for meeting deadlines with publishers and printers. The separate tasks which the editor and the artist carry out are brought together through a series of 'conferences' (*uchiawase*) and copious communication and exchange by fax, telephone, and scripts delivered by courier.

Conferences take place in a variety of locations. New artists (*shinjin*) and relatively unsuccessful artists are often obliged to go to editorial offices themselves to meet their editors. This visit symbolizes the subordinate position these artists have in relation to their editors. Figure 2.2 shows a conference between a new manga artist with a chief editor in an editorial office. A great number of briefer meetings take place in cafes and bars near the main publishing companies in Otowa (Kōdansha) and Hitotsubashi (Shōgakukan and Shūeisha). In the case of best-selling artists neither the editor nor the artist is likely to have time to meet outside of the artist's studio. Editors travel to the studios of the majority of these artists several times a week, and conferences often merge into general supervision which can last anything up to several days.

Extended supervision sessions, in which editors oversee artists and insulate their charges from any possible distractions to producing work in time to meet deadlines, also take place in hotels where editors can more effectively 'can'(*kan-zume*) artists and seal them off from the rest of the world. Other artists live away from the centre of manga publishing in Tokyo, in areas as distant as Aichi prefecture or Osaka city. Well-established manga artists tend to work in detached residences or studios, often located in the Western

Figure 2.2 Conference between an artist and an editor. (1994)

suburbs of Tokyo, such as Kichijōji, Hachiōji, Ogikubo, Asagaya, and Chōfu. These areas, now located around the Chūō railway line, had previously been populated by large numbers of craftsmen and artists.

Stories about the intense, dependent and conflicting relationships which often develop between artists and editors brought together in these circumstances form the most enduring topics of gossip within the manga industry world (Ohizumi 1996; Schodt 1988:144). Figure 2.3 shows an idealized depiction, (depicted in a manga series about editing manga), of how an artist should work under the supervision of an editor.

Weekly Production Cycle

The editorial offices of weekly magazines generally organize the work of the editorial around a monthly schedule which indicates to editorial staff the number of pages a series will be allocated in the following four issues of the magazine. Episodes are completed between two and three weeks in advance of the publication date – one week prior to the publication being the last possible date at which the most flexible contemporary printing plants are likely to accept late work.

The weekly production cycle generally begins on Sunday night or Monday morning with a meeting or telephone conversation in which

Figure 2.3 'All right, I'll do it! ... manga is not just an artists' thing.' A good manga editor experiences the passion of an artist vicariously. [*Henshūō! Ashita no Joe* 1992, Vol. 1: 145–147 © Shōgakukan/Tsuchida Seiji]

the artist and editor discuss what will take place in the next weekly episode. For series which are written by a script-writer this discussion will be relatively straightforward as the artist is given a script worked out in advance by a script writer and an editor.[4] In this conference the plot, layout of the boxes, and contents of the speech bubbles (*serifu*) are discussed.

Generally the artist quickly drafts a rough pencil preview of the manuscript, mapping out the size and position of the boxes, and simple circles depicting the size and position of speech bubbles and characters' faces. Sentences representing the thoughts and utterances of characters are also filled in pencil at this early stage.

This part of script production is referred to as *nēmu*, a term distantly derived from the English word 'name'. It is the point of production when an editor is most likely to intervene and block (*dame dashi o suru*) the manga artist's execution of the story. When the editor and artist are satisfied with the rough pencil outline, the artist will begin pencilling in the actual pictures and speech bubbles into the boxes in more detail, sketching out how they will appear in ink. This task takes between two and three days. During this stage of production, which engages the imagination and graphic skills of the artist, editors or assistants may provide artists with research materials such as books and photographs. Editors who do supervise artists to a great extent are likely to stay with artists at this stage while the 'pencil manuscript' (*shitagaki*) is being completed. By supervising this work editors can continue to engage with artists about the contents and at the same time as put pressure on the artists to keep to the deadline.

Manga artists employing a large number of assistants are likely to pencil in only the heads or heads and bodies of the lead characters before passing the manuscript on to assistants to complete. Assistants fill in the background detail of the pictures according to either their own interpretation of the plot or in accordance with explicit instructions set by the artist. The precise division of labour employed within artists' studios varies according to the attitude of each artist to the manga they draw.

The pencil manuscript (*shitagaki*) is generally completed by Wednesday evening when it is checked by the editor. Editors are likely to request that anything up to half of the pages of the pencilled manuscript are 're-drawn' (*kakenaosu*). When the editor is entirely satisfied with the quality and contents of the pencil

manuscript, photocopies are retained by the editor, and the artist will return to their desk to begin the second major stage of their work, which consists of drawing in ink on top of the pencil manuscript. Artists' assistants are also engaged at this stage to ink in the background detail of the pictures and apply 'screentone'. 'Screentone' is the name given to large sheets of patterned transfer paper specifically produced for manga making, and often used to fill in large spaces with backdrops such as sky, sea, or hatching in areas of shadow. Inking in the manuscript takes about two days and is completed by about Friday evening.

Back in the office, the editor prepares an order of typeset lettering to place inside and outside of the speech bubbles, and on the title page of the episode. First of all editors check the spelling of the speech parts and correct mistaken or incorrectly written Chinese characters. Editors then measure the speech bubbles (*fukidashi*) and page-layout on their photocopy of the pencil manuscript (*shitagaki*) and estimate what print size and print font to order for each speech bubble or episode title. Editorial offices in large publishing companies such as Kōdansha and Shōgakukan may be wealthy enough to sub-contract this job (*moji heisei*) to manga editing companies such as Ginnansha, or else employ part-time staff, often young female college students, to carry out these tasks at desks situated within the editorial office itself – in which case these tasks may be referred to simply as 'desk'. Figure 2.4 shows part-time assistants working on manuscripts inside an editorial office.

One of the most commonly used print size and font combinations in adult manga in the 1990s was *20QA antique*. Editors type out the contents of the speech bubbles into clusters of vertical and horizontal sentences shaped to fit into the appropriate speech bubbles, on a word processor. This printed sheet of manga script accompanied with an order stipulating the required lettering size and font (*shashoku shitei*) is then faxed to a typesetting company. Magazine editorials tend to have long-term contractual relationships with specific typesetting companies which are familiar with the editorial's production cycle and expect to receive orders for lettering from editors at a certain time each week. Editors who are late for deadlines sometimes fax the pencil manuscripts directly to the typesetting company, forcing the latter to undertake the extra tasks of reading the pencil manuscript, making spelling corrections, and making judgements about which type of lettering is required, where this has not been properly

Figure 2.4 Part-time employees check the spelling of manga manuscripts at desks situated in the corner of a manga editorial office. (1994)

measured or indicated on the manuscript by the editor. This is a point of muted conflict between publishers and typesetting companies. Typesetting companies are determined that this aspect of manga editing will not become an unpaid part of their work.

Lettering companies, or departments, often operate for 24 hours a day, and orders take between 12 and 24 hours to carry out. Lettering ordered on a Wednesday arrives back in the editorial office, via courier, some time during the next day. Thursday is frequently a day of relative rest for manga editors. Completed ink manuscripts (*genkō*) are collected from the artist by an editor on Friday.

Editors or editorial staff cut out the separate pieces of manga script from whole sheets of typeset lettering delivered back to the editorial by the typesetting company. The lettering is then glued carefully into the speech bubbles of the completed ink manuscripts. Figure 2.5 shows speech parts being glued into a manuscript by an editor in an office. At this stage of production the editor and then the chief editor or vice-chief editor of the department both check the ink manuscripts for spelling mistakes, and sentence and picture quality.

Editors may have to re-order new sentences, or badly measured sentences which do not fit properly into speech bubbles from the

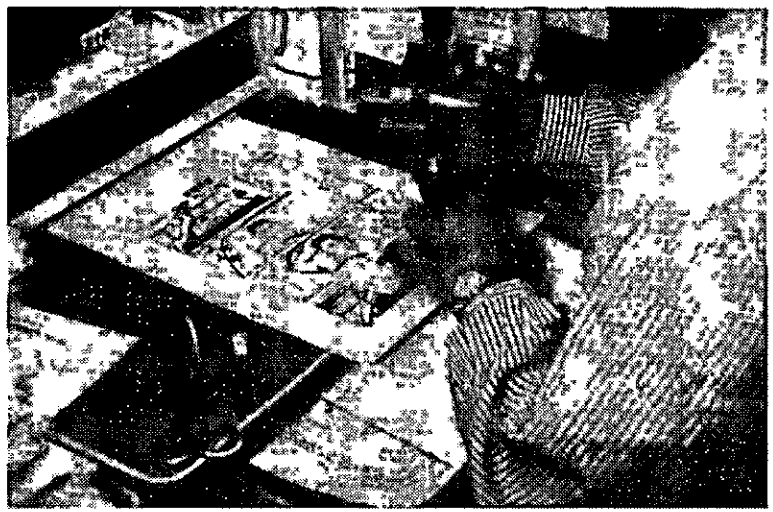

Figure 2.5 A manga editor carefully glues typeset lettering into speechbubbles. (1994)

typesetting company. Artists may also be requested to make minor alterations to the ink manuscript. When this checking procedure is complete, typically at some time on Saturday, the entire ink manuscript complete with lettering attached to each speech bubble is sent back to an art-work (*seihan*) department or company. Sunday tends to be the manga artists' day off, though most claim to sleep straight through it.

Art-work (*seihan*) companies or, more typically, art-work departments within large typesetting companies, arrange each manuscript within an industrially standard page-layout and make photographic proofs of the manga manuscript, referred to either as *aoyaki* or *sumiyaki*.[5] The proofs (*aoyaki*) are sent directly back to editors who examine them in the editorial office. At this stage editors may request once again that the typesetting company makes further and final changes to the lettering before the manuscripts are prepared for printing.

Industrial Reproduction

Even the largest of publishers are relatively small companies with several thousand employees which manufacture nothing at all

themselves, but subcontract almost all of the mechanical work of making books and magazines out to other companies.[6] Manga publishing in particular involves a range of subcontracting activity.

The four main stages of the industrial reproduction of manga are typesetting (*shashoku*), art-work and proofing (*seihan*), printing (*insatsu*), and cutting and binding (*seihon*). During the pre-war period, all of these functions were carried out as one industrial process by single enterprises. Under the Anti-Monopoly Law of 1947 these enterprises were forced to separate the task of printing from that of binding books and relocate them in separate and formally competitive enterprises. Throughout the first half of the post-war period printing and binding plants were owned by separate companies. Nevertheless, permanent contractual relationships were established between typesetting, art-work, printing, and binding companies. Typesetting companies tend to be the favoured subcontractors (*keiretsugaisha* or *kogaisha*) of large printing concerns, while art-work companies are often the favoured subcontractors of specific typesetting companies. Large publishing companies divide their various manga printing orders between the major competing printing companies, such as Tohan, Kyōdō, or Dai Nippon, in an attempt to prevent any one of these printing companies from establishing a monopoly position in the market, which could quickly be used to demand higher fees for printing from publishers. However, printing companies generally do insist that publishers placing an order also use the services of certain typesetting companies with which the printer has an established arrangement. Manga editorials using Dai Nippon printing company, for example, will be likely to also use the Hirayama lettering company beforehand.

Combined Printing Plants

In addition to these separate but contractually interdependent enterprises, an increasing number of medium-sized independent companies have begun to carry out the full process of reproducing manga, incorporating typesetting, art-work, printing, cutting and binding, in one plant. This has occurred since the growth of manga publishing in the 1960s. Medium-sized combined plants are able to offer manga publishers a faster service with greater flexibility in

carrying out late work and changed layout and lettering orders for severe deadlines.

One example of this type of combined plant is Chūō Seihan Insatsu, which became a combined plant in 1967, and has been located in an impoverished industrial suburb to the West of Tokyo since 1980. (During the late post-war period the Kita Koto area has become the centre of a variety of printing, binding, distribution and paper wholesale companies, which take orders from manga publishers.) Typical shop floor employees of Chūō and neighbouring printing companies are unskilled high-school graduates living locally in high-rise housing projects. The average age of regular Chūō employees is 47 years. Regular employees work in eight-hour revolving shifts with regular overtime of approximately two hours, at the end of each day or night shift.[7]

Before printing orders can be placed, publishers must select and buy paper and arrange for it to be transported to printing plants. Paper has been relatively expensive and its distribution quite inflexible in twentieth-century Japan. During paper shortages precipitated by the international oil crisis of 1973, for example, manga publishers were forced to make magazines with fewer pages. Despite using low-quality paper produced largely from cheap wood-pulp imported from Scandinavia, Russia, Malaysia and Australasia, paper nevertheless constitutes approximately one third of the total cost of having manga printed. Cheap paper used for high-circulation magazines is generally dyed to pastel colours in order to improve the lustre of its essentially grainy, dull appearance. Specialist manga printing paper (*comic yōshi*) is currently made in 10 different qualities and is brought from paper companies, such as Mitsubishi located in Nigata prefecture, in rolls up to 6 kilometres in length.

Within Chūō Seihan Insatsu typesetting, art-work, printing and binding plant, which caters particularly to manga publishers, the first stage of production consists of producing the typeset lettering for manga scripts (*shashoku*). Manga typesetting and manuscripts are processed in one large room equipped with two kinds of computer. One quarter of employees use large specialist *Saivert-P* word-processors to type-up and process orders for typeset lettering (*layout*). Another three-quarters of employees in this section are engaged in making corrections to manga scripts on *Macintosh* computers (*naoshi*). Figure 2.6 shows a shift at work in a manga typesetting (*shashoku*) room. Employees of this section are in the

Figure 2.6 Mass-culture: rows of computer terminals in a manga typesetting room. (1997)

habit of logging out of their industrial word-processors during the night shift and running Sony *Playstation* games on their computers instead.

The next stage of production is the preparation of manga manuscripts into camera-ready 'art-work' and making proofs. Manga manuscripts are scanned into computers and the layout of pages as they will actually appear in printed form is arranged on specialist design *Macintosh* machines. In fact some manuscripts are 'combined' (*gōsei*) with the lettering for speech bubbles at this stage. During the 1990s, typesetting, art-work and the production of proofs, began to fuse into one computerized process collectively referred to as *seihan* – which can, in this case, be equated with the job of 'origination' carried out in English printing companies. Figure 2.7 shows an employee creating the page-layout for a section of manga manuscript.

The next stage of the manga factory is to make proofs (*aoyaki*) of the manuscript. Each separate page of the manuscript after art-work is printed on to a specialist fine-grain, high-quality paper (*ingashi*). After checking the quality and layout of this print-out, it is photographed on large shop-floor cameras. Figure 2.8 shows an

Figure 2.7 A young male employee carries out 'art-work' and 'page layout' on a manga manuscript on a computer screen. (1997) Photograph: Akita Daisuke

Figure 2.8 Making manga negatives with an industrial camera. (1997) Photograph: Akita Daisuke

employee arranging a sheet of manga manuscript on to the glass plate of an FCS880 Camera. The industrial camera produces actual-size film negatives of the manga manuscript. Female employees examine the negatives over a light bed and remove small imperfections and white spots with dark cover-up fluid (see Figure 2.9). Corrected negatives are exposed to produce the proofs (*aoyaki*), which are sent back to publishing companies to be examined by editors. Proofs which return to the factory, with requests for a large number of changes or even with whole new pages of ink manuscript re-drawn by the artist, have to be processed from the computer layout stage again.

Corrected sets of negatives are exposed and reversed onto large aluminium sheets. When printing is ready to begin a second aluminium sheet, bearing an oil-based reverse impression of the manga manuscript, is mounted on to the roller of a printing machine. Manga magazines are printed on the same machines – very often these are German machines – as those used to print newspapers. Figure 2.10 shows an impression of the entire manuscript of a manga book mounted on the roller of a *Miller Bookomatic* printing machine. After passing through an automated

Figure 2.9 Manga manuscript negatives are touched-up by a middle-aged female employee. (1997) Photograph: Akita Daisuke

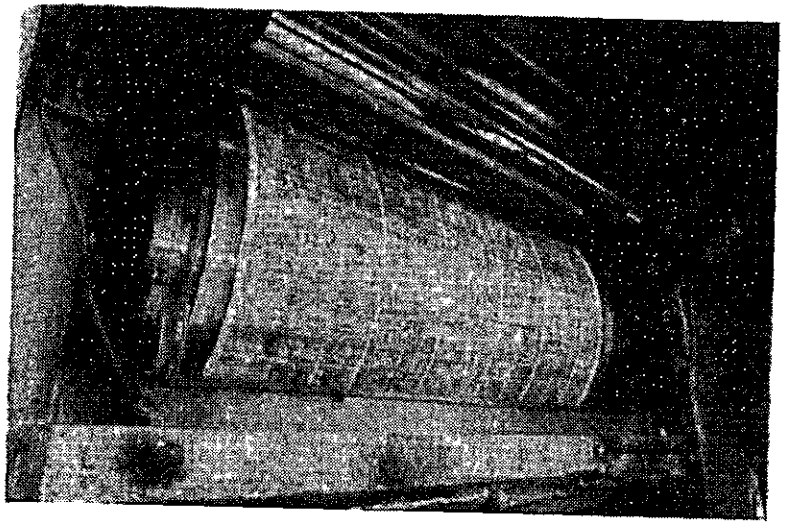

Figure 2.10 The manuscripts of one manga book on the roller of a printing machine. (1997) Photograph: Akita Daisuke

assembly line on which printed paper is dried, moisturised, cut, bound, glued, covered and aerated, stacks of manga books or magazines are packed on to crates ready for distribution.

Manga Distribution Network

The publishing distribution business is organized in a pyramidal network of interconnected and cooperative companies. The largest distributors (*toritsugiya*) receive packages of published material from book printers, binders, or their own depots located close by, and transport them to regional areas. At regional depots material is transferred to middle-sized distributors and taken to local depots. In local depots small distributors with local employees distribute manga to retail outlets in the area. In fact, as *all* the large national distributors deliver books and manga to *all* of the main regions of Japan, distribution is carried out through a series of differently shaped pyramidal networks overlaying one another.

Major distributors each have fixed contractual relationships with specific retail outlets to which they have manga regularly delivered. In 1994 seven distributors were delivering 80 per cent of manga

magazines and 98 per cent of all manga books. The two largest publishing distributors, Tohansha and Nippansha, took 80 per cent of Kōdansha's manga books and magazines to regional distribution points. Chūōsha, Taihansha, Ōsakaya, Kurita, Kyōwa, and Taiyōsha delivered a further eight per cent of Kōdansha manga.

Distribution represents a major obstacle for small publishing companies which tend to produce books by unknown authors or specialist manga with small readerships. Distributors may refuse to take deliveries on the basis of their own judgement about how many copies a book will sell. Minor companies, such as Seirindō, which published the low-circulation manga magazine *GARO*, have occasionally resorted to delivering their books and magazines by hand, or paying a larger publisher, such as Shūfu no Tomo ('Houseswives' Companion'), to deliver their magazines for them under their more powerful company name.

While publishers pay printing and binding companies for their services directly, distributors receive a fixed percentage of the total revenue of manga sold. Formally publishers sell all their manga stock to distributors, which distributors then sell to retail outlets. The percentages claimed by distributors and retailers are calculated from the total revenue of manga sold which is based on the actual retail price of books and magazines. Publishers prevent retail outlets from lowering the value of their books by printing the price in large characters on the front of magazines and on the back covers of manga books.

In the 1990s retail outlets took a cut of approximately 20 per cent of total manga revenue, distributors took a cut of between 5 and 7 per cent, and manga artists took a cut of 10 per cent in royalties. A further 10 per cent was paid directly to printers and binders, and approximately 5 per cent was used to purchase paper from paper wholesalers. Large manga publishers received between 50 and 60 per cent of total manga revenue. Powerful tensions exist between publishers, distributors, and retailers, each of which struggle to defend, maintain, or increase their share of manga profits, while at the same time remaining interdependent enterprises. During the early 1990s, distributors responding to falling circulation figures amongst manga magazines and rising percentages of returned stock, managed to force manga publishers to increase their share of the total revenue from 5.5 per cent to 6.5 per cent.

The majority of manga is sold in large, combined book, magazine and manga shops. Distributors prioritize delivery to large book shops, such as Kinokuniya or Zaiseidō, which have space to shelve a wide range of titles. In the 1990s an increasing amount of manga, particularly more expensive artistic manga books, were also sold in fashionable book retail outlets with specialist manga sections, located in luxury department stores such as Parco and Seibu. Twenty-four-hour convenience stores, such as the Seven Eleven, Family Mart, or Lawsons chains tended to sell disproportionate amounts of gag manga (humorous comic strips) and erotic manga. Convenience stores accounted for 10 per cent of total manga stock sold.

After an agreed length of time publishing companies are obliged to buy all unsold manga stock back from their retail outlets, via their distributors. This system of 'sale or return' (*itaku hambai*) necessitates a reverse service from distributors. In the mid-1990s increasingly high percentages of unsold stock (*hempin*) returning to haunt manga publishers and afflict the manga industry world, encouraged distributors to begin deducting extra charges from publishers to cover the cost of returning large volumes of unsold stock. The percentage of unsold manga stock returned to publishers peaked in 1995 at 24.4 per cent. By 1996 this figure had dropped slightly to 22.9 per cent under the streamlining influence of a more selective and brutal distribution service.

A small proportion of returned manga books (but not magazines) are re-wrapped in brand new dust jackets and reissued to retail outlets in the hope that the attractive new covers will attract more readers to buy the manga. Publishers encumbered with unsold magazines sell them to paper recycling plants where they are turned into toilet roll. One popular adult manga satire of the manga world published in 1991, suggested that the toilet paper manufactured from pulped manga magazines is used by male manga readers to masturbate neatly while reading subsequent issues of manga (Akihara and Takekuma 1991).