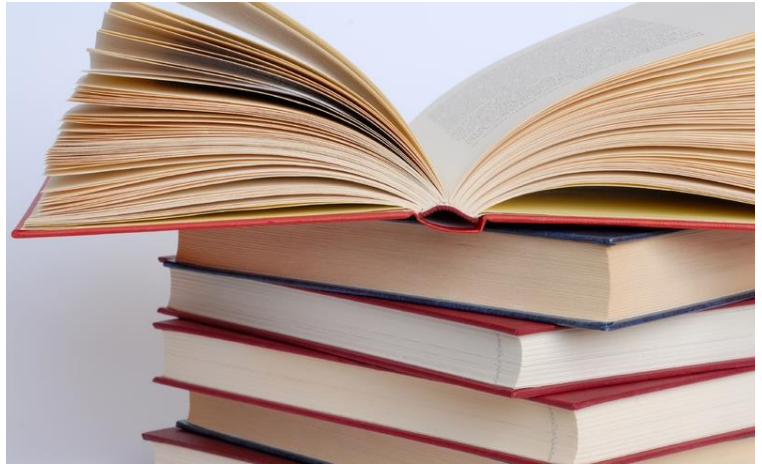


Freedonia Focus Reports  
US Collection



# PreK-12

# Instructional Materials: United States

August 2017



**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Introduction	4
Enrollment & Demographics	6
Policy & Funding	9
<b>3. Segmentation &amp; Forecasts</b>	<b>10</b>
Products	10
Basal Curriculum	13
Courseware	14
State-Level Tests	14
Digital Supplements	15
Print Supplements	15
Manipulatives	15
Trade Books	15
Video	16
Classroom Magazines	16
<b>4. Industry Structure</b>	<b>17</b>
Competitive Landscape	17
Houghton Mifflin Harcourt	18
McGraw-Hill Education	19
Pearson	21
<b>5. About This Report</b>	<b>23</b>
Scope & Method	23
Sources	23
Industry Codes	24
Resources	25

# List of Tables & Figures

---

Figure 1   Key Trends in the US PreK-12 Instructional Materials Market, 2016 – 2020	3
Table 1   Profile of US School Districts by Size, 2017	6
Table 2   Trends in Public School Enrollment, 2013 – 2014 to 2026 – 2027 (mil students)	7
Table 3   Trends in Private School Enrollment, 1995 – 1996 to 2025 – 2026 (mil students)	8
Table 4   Charter School Growth, 2004 – 2005 to 2014 – 2015	8
Figure 2   US PreK-12 Instructional Materials Sales by Product, 2015 – 2020 (US\$ mil)	10
Table 5   US PreK-12 Instructional Materials Sales by Product, 2015 – 2020 (US\$ mil)	11
Table 6   Market Share of Print & Digital Instructional Media Sold in US PreK-12 Schools, 2015 – 2017 (US\$ mil)	12
Table 7   Simba Information PreK-12 Instructional Material Segment Definitions	13
Figure 3   US PreK-12 Instructional Materials Sales by Product, 2015 – 2020 (%)	16
Table 8   Simba Information PreK-12 Performance Index, 2016 vs 2015 (US\$ mil)	18
Table 9   NAICS & SIC Codes Related to PreK-12 Instructional Materials	24

# About This Report

---

## Scope & Method

This report forecasts the US PreK-12 instructional material market for 2017-2020 in nominal US dollars. Total sales are segmented by product in terms of:

- basal curriculum
- courseware
- state-level tests
- digital supplements
- print supplements
- manipulatives
- trade books
- video
- classroom magazines

To illustrate historical trends, total sales and the various segments are provided for 2015 and 2016.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*PreK-12 Instructional Materials: United States* (FF25020) is based on [Publishing for the PreK-12 Market, 2017-2018](#) published by Simba Information. The industry analysis in this report is built on the nationwide research Simba Information conducts on an ongoing basis, including interviews with publishing industry executives, consultants, industry analysts, state education officials, and local school educators and education policy experts.

## About This Report

The results of these interviews – bolstered by Simba’s ongoing data research – were used to define and analyze segments and industry trends and were the basis for developing the projections for future growth.

Simba developed estimates and projections for individual companies, industry segments, and the overall market based on information from various sources, including some of those listed above, historical Simba data, and market trends, including economic trends, state and federal policies, and enrollment growth. Simba makes use of reported AAP sales figures specifically for the basal curriculum category, because they are the most reflective of actual basal sales. Simba incorporated company and state information to reach figures for the state test segment. For courseware, supplements, and the other categories, Simba incorporated sales data and selling patterns for a variety of products and companies.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 9 | NAICS & SIC Codes Related to PreK-12 Instructional Materials

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
323117	Books Printing	2731	Books: Publishing, or Publishing and Printing
323121	Tradebinding and Related Work	2732	Book Printing
424920	Book, Periodical, and Newspaper Merchant Wholesalers	2789	Bookbinding and Related Work
451211	Book Stores	5192	Books, Periodicals, and Newspapers
453310	Used Merchandise Stores	5932	Used Merchandise Stores
511130	Book Publishers	5942	Book Stores
512110	Motion Picture and Video Production	7812	Motion Picture and Video Tape Production
611710	Educational Support Services	8299	Schools and Educational Services, NEC

Source: US Census Bureau

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### Simba Information

*Publishing for the PreK-12 Market, 2017-2018*, August 2017

### The Freedonia Group

#### Freedonia Industry Studies

*Global Industrial & Institutional Cleaning Chemicals Market*, October 2017

*Converted Flexible Packaging Market in the US*, May 2017

*Global Protective Packaging Market*, May 2017

*Retail E-Commerce Packaging Market in the US*, November 2016

#### Freedonia Focus Reports

*Advertising Services: United States*

*Books: United States*

*Commercial Printing: United States*

*Demographics: United States*

*E-Commerce: United States*

*Education: United States*

*Internet Content & Search: United States*

*Newspaper Publishing: United States*

*Printing Machinery & Equipment: United States*

*Recovered Paper: United States*

#### Freedonia Custom Research

### Trade Publications

*American Printer*

*Book Business*

*Digital Book World*

*Education Week*

*Education World*

*PaperAge*

### Agencies & Associations

Association of American Publishers

A2Z Home's Cool

Center on Budget and Policy Priorities

Federal Communications Commission

Funds for Learning

MCH Strategic Data

## About This Report

National Alliance for Public Charter Schools  
National Association of State Budget Officers  
National Conference of State Legislatures  
National Education Policy Center (University of Colorado Boulder)  
National Institute for Early Education Research  
Nelson A. Rockefeller Institute of Government  
United States Department of Education