Freedonia Focus Reports
Global Collection
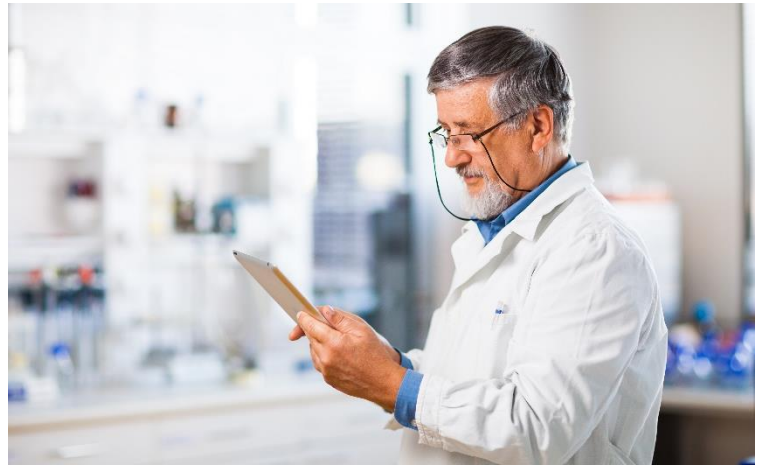
Global
Medical Publishing

September 2021

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About This Report

Scope

This report forecasts global sales of medical publishing by product in nominal US dollars for 2025. To illustrate historical trends, total sales and product segments are provided for 2018-2020. Product segments include:

- journals
- online content
- books
- other activities such as conferences, symposia, audiotapes, and video (and single-sponsored publications not included in medical journals) targeted at medical customer categories
- abstracting and indexing services

World regional shares of medical publishing sales for 2020 are provided for North America, Europe, Asia/Pacific, and the rest of the world.

Sales are global and include both print and electronic versions of publishing media. The market is overwhelmingly English language, but this report includes sales in all languages. The largest non-English markets are produced in Brazilian, Japanese, German, French, Spanish, and Chinese.

Freedonia 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.

A full outline of report items by page is available in the Table of Contents.

Sources

Global Medical Publishing (FW25022) is based on a comprehensive industry study published by Simba Information. The Simba team used a combination of secondary research and competitor interviews to gather financial data. The team obtains and analyzes secondary data (e.g., marketing material, company statements, press releases, mentions in

the press.) to gain a comprehensive understanding of each competitor. Simba also consults industry experts, such as editors/analysts who cover the professional publishing and content industry. Simba contacts various levels of management and product management at competitor organizations to get detailed product descriptions, pricing, sales figures, market share data, and delivery options, as well as strategic information they may provide.

When reported information was not available, estimates were based on historical trends, directional guidance by executives (weak, flat, etc.), size of competitors, relative size based on customer observations, number of titles, and library-spending studies for individual publishers. Simba also accessed its database of STM executives to gather intelligence on companies that did not publicly disclose financial data. In addition, Simba's research team has conducted searches of online news databases (including LexisNexis, Hoover's, and Google) to obtain some figures and estimates. Simba analyzes publishing output using Books In Print and Ulrichsweb databases. Market estimates from Kantar Media and IMS inform estimates related to the pharmaceutical industry. Additional information is collected at industry conferences focused on the professional publishing market, including the Association of American Publishers, STM International, The Society for Scholarly Publishing, and Health Information and Management Systems Society (HIMSS) annual conferences, book fairs, and publishing-related conferences.

Estimates of sales and projections are based on classification of revenue into component categories as well as geographic splits. Guidance from analysts, annual reports, 10-Ks, and industry insider observations of growth or weakness are then applied. Currency movements and merger and acquisition (M&A) activity also play an important role.

Simba's forecast methodology is like its approach to building actual global market size numbers. Simba discusses trends and insights with industry executives and researches secondary sources, analyst reports, and industry studies.

Principal drivers of the 2025 forecast are:
- extrapolation of recent publishing trends
- M&A activity
- global and national gross domestic product (GDP) forecasts
- industry forecasts
- company forecasts

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

Industry Codes

Table 3 | NAICS & SIC Codes Related to Medical Publishing			
NAICS/SCIAN 2017		**SIC**	
North American Industry Classification System		**Standard Industrial Classification**	
511120	Periodical Publishers	2721	Periodicals: Publishing, or Publishing & Printing
511130	Book Publishers	2731	Books: Publishing, or Publishing & Printing
511210	Software Publishers	2741	Miscellaneous Publishing
519130	Internet Publishing & Broadcasting & Web Search Portals	7372	Prepackaged Software

Source: US Census Bureau

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Resources

Simba Information

Global Medical Publishing 2021-2025

Global Scientific & Technical Publishing 2021-2025

Global Social Sciences & Humanities Publishing 2021-2025

Open Access Book Publishing 2020-2024

Open Access Journal Publishing 2020-2024

Scholarly & Professional E-Book Publishing 2020-2024

STM Online Services 2019-2023

The Freedonia Group

Freedonia Industry Studies

Disposable Medical Supplies in the US

Global Disposable Masks & Respirators: COVID-19 Impact Analysis

Global Disposable Medical Gloves: COVID-19 Impact Analysis

Global Disposable Medical Supplies

Global E-Commerce

Global E-Commerce Packaging

Global Housing

Global Industrial & Institutional Cleaning Chemicals

Global Industrial & Institutional (I&I) Disinfectants & Sanitizers: COVID-19 Impact Analysis

Global Nonwovens

Global Pharmaceutical Packaging

Global Protective Packaging

Medical Device Packaging

Pharmaceutical Packaging

Freedonia Focus Reports

Books: United States

Commercial Printing: United States

COVID-19 Market Impact Analysis

Deathcare: United States

Demographics: United States

E-Commerce: United States

Electronic Health Records: United States

Global Demographics

Global Healthcare

Global Macroeconomy
Healthcare Insurance: United States
Healthcare: United States
Medical Equipment & Supplies: United States
Medical Services: United States
Paper & Paperboard: United States
Printing Machinery & Equipment: United States
Pharmaceuticals: United States

Freedonia Custom Research

Trade Publications

Becker's Hospital Review
Drug Development & Delivery
Health Facilities Management
Medical Device & Diagnostic Industry
Modern Healthcare
Provider

Agencies & Associations

Association of American Publishers
Eurostat
Health Information and Management Systems Society
International Association of Scientific, Technical, and Medical Publishers
International Monetary Fund
National Information Standards Organization
Organisation for Economic Co-operation and Development
Society for Scholarly Publishing
World Bank
World Health Organization