



Freedonia Focus Reports
Global Collection

Global Scientific & Technical Publishing

July 2021



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About This Report

Scope

This report forecasts to 2025 global sales of scientific and technical (S&T) publishing by publishing activity in nominal US dollars. To illustrate historical trends, total sales and segments are provided for 2018-2020. Publishing activity segments include:

- journals
- online content
- books
- abstracting and indexing services
- other activities such as audiotapes and video content

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

Sales are global and include all media that fit the definition by subject and professional level. S&T publishing – particularly research and specialty journal publishing – is dominated by the English language. This report includes sales in all languages. Beyond English, significant S&T revenue is generated in Chinese, German, French, Spanish, and Japanese.

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 Scientific & Technical Publishing (FW25023) 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 obtained and analyzed secondary data (library surveys and reports, marketing material, company statements, press releases, mentions in the press, etc.) to gain a comprehensive

understanding of each market segment and each major player. Simba also consulted industry experts: editors/analysts that cover the professional publishing and content industry. Simba contacted various levels of 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 historic trends, directional guidance by executives, 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 conducted searches of online news databases (including Clarivate, LexisNexis, Factiva, Wall Street Journal Online, and Google) to obtain some figures and estimates. In addition, data was collected while attending industry conferences focused on the professional publishing market, including the Association of American Publishers' Professional & Scholarly Publishing annual conference, The Society for Scholarly Publishing annual conference, book fairs, and publishing-related seminars.

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

Simba's forecast methodology is akin to its approach to building actual global market size numbers. We discuss trends and insights with industry executives and research secondary sources, analyst reports, and industry studies such as the annual Publishers Communication Group (PCG) library survey.

Principal drivers of the 2021-2025 forecasts are: extrapolation of recent trends, M&A activity, global and national gross domestic product (GDP) forecasts, industry forecasts, company forecasts, and publishing trends.

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 Scientific & Technical Publishing

NAICS/SCIAN 2017 North American Industry Classification System		SIC 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 2019-2023

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

Global Adhesives & Sealants

Global E-Commerce

Global E-Commerce Packaging

Global Housing

Global Pressure Sensitive Tapes

Labels

Pressure Sensitive Tapes in the US

Freedonia Focus Reports

Books: United States

Commercial Printing: United States

COVID-19 Market Impact Analysis

E-Commerce: United States

Global Demographics

Global Macroeconomy

Paper Industry Machinery: United States

Paper & Paperboard: United States

Printing Machinery & Equipment: United States

Freedonia Custom Research

Trade Publications

Book Business

Digital Book World

Printing Impressions

Publishers Weekly

Agencies & Associations

American Association of the Advancement of Science

Association of American Publishers

Eurostat

International Association of Scientific, Technical, and Medical Publishers

International Monetary Fund

National Information Standards Organization

Society for Scholarly Publishing

World Bank