

Primary Education Market Forecasts to 2034 – Global Analysis By Institution Type (Public Primary Schools, Private Primary Schools, and International Primary Schools), Learning Mode (Classroom-Based Learning, Online Learning, and Hybrid Learning), Curriculum, Educational Resource, and By Geography

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Abstracts

According to Statistics MRC, the Global Primary Education Market is accounted for \$1386.0 billion in 2026 and is expected to reach \$2095.0 billion by 2034 growing at a CAGR of 5.3% during the forecast period. Primary education encompasses the first stage of formal education, typically serving children aged 5 to 11 years, providing foundational literacy, numeracy, and social skills essential for lifelong learning. The market includes public and private schools offering national curricula, international curricula, and alternative education programs, supported by textbooks, digital learning content, educational software, assessment tools, and interactive learning platforms. Rising global population, increasing government education spending, growing emphasis on early childhood development, and expanding private education sector are key drivers of market growth.

Market Dynamics:

Driver:

Increasing global population and government education initiatives

The growing global population, particularly in developing regions, continues driving primary education enrollment and infrastructure expansion. Governments worldwide are

increasing education spending to achieve universal primary education, with developing nations prioritizing school construction, teacher recruitment, and curriculum development. International organizations including UNESCO and UNICEF support education access through funding and policy guidance. Government initiatives promoting gender equality in education are expanding enrollment among girls in regions with historical disparities. As population growth continues and education access improves, primary education market expansion remains robust across both public and private sectors.

Restraint:

Unequal access to quality education in developing regions

Significant disparities in education quality and access represent major restraints for the primary education market, particularly in developing regions. Infrastructure challenges including inadequate school facilities, lack of clean water, and limited electricity affect learning environments. Teacher shortages and inadequate training compromise education quality. Geographic isolation prevents children in remote areas from accessing schools. Economic barriers including direct school costs and opportunity costs of child labor limit enrollment. Political instability and conflict disrupt education services. These disparities limit human capital development and perpetuate inequality, constraining overall market growth in underserved regions.

Opportunity:

Digital transformation of primary education delivery

Accelerating digital transformation in education presents significant opportunities for primary education market expansion. Digital learning content, educational software, assessment tools, and interactive learning platforms enhance teaching effectiveness and student engagement. EdTech adoption enables personalized learning, adaptive assessment, and real-time progress tracking. Government initiatives promoting digital infrastructure in schools create technology procurement opportunities. The COVID-19 pandemic accelerated digital learning adoption, with hybrid and online education models becoming standard across many regions. As technology access expands and digital literacy increases, EdTech solutions capture growing share of education spending, creating new market growth avenues.

Threat:

Teacher shortages and deteriorating education quality

Critical teacher shortages and deteriorating education quality threaten primary education market growth and effectiveness. Many countries face teacher recruitment and retention challenges, with low salaries, heavy workloads, and limited professional development opportunities. High student-to-teacher ratios compromise learning outcomes. Teacher absenteeism in some regions affects education continuity. Inadequate teacher training leaves educators unprepared for modern pedagogical demands including technology integration. Education quality decline reduces parental confidence in public education, potentially increasing private school enrollment but constraining overall market efficiency and effectiveness.

Covid-19 Impact:

The COVID-19 pandemic caused unprecedented disruption to primary education systems worldwide. Extended school closures affected over 1.5 billion students globally, with the quality and duration of learning loss varying significantly across regions. The shift to remote learning highlighted digital divides, with students in underserved communities lacking access to devices and internet connectivity. Education systems rapidly adopted digital learning platforms to maintain continuity. Post-pandemic, learning recovery initiatives are accelerating investment in remedial education, teacher training, and educational technology. The crisis has permanently elevated digital education adoption, with EdTech becoming integral to primary education delivery.

The National Curriculum segment is expected to be the largest during the forecast period

The National Curriculum segment is expected to account for the largest market share during the forecast period, driven by the prevalence of government-regulated education systems globally. National curricula are developed by education ministries to ensure standardized learning outcomes across regions, covering core subjects including language, mathematics, science, and social studies. Public schools, the majority of primary education institutions worldwide, follow national curriculum requirements. Government funding for textbooks, teacher training, and curriculum development ensures consistent demand for national curriculum resources. As education access expands across developing regions, national curriculum implementation drives the largest market segment.

The Digital Learning Content segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Digital Learning Content segment is predicted to witness the highest growth rate, fueled by rapid EdTech adoption, increasing device availability in schools, and growing demand for engaging, interactive learning resources. Digital learning content includes e-books, interactive videos, gamified lessons, and adaptive learning modules that enhance student engagement and personalization. Schools increasingly supplement traditional textbooks with digital content to address diverse learning needs. Educational technology investments are growing across public and private education sectors. Content providers are developing aligned resources for both national and international curricula. As digital infrastructure in schools expands, digital learning content becomes the fastest-growing educational resource segment.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by massive student populations across China, India, Indonesia, and other nations, along with rapid education infrastructure expansion. Government initiatives including India's National Education Policy 2020 and China's education modernization programs are driving substantial investment. Large public education systems create consistent demand for curriculum resources, teacher training, and assessment tools. Growing private education sector in urban areas adds market diversity. With the largest school-age population and ongoing education reforms, Asia Pacific maintains primary education market leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by continued population growth, expanding education access, and increasing education spending across emerging economies. Countries including India, Indonesia, Vietnam, and Bangladesh are increasing primary education enrollment while improving quality through technology integration. Government investments in digital education infrastructure create procurement opportunities. Increasing middle-class populations drive private education sector growth, including international curriculum schools. As economic development accelerates and education standards rise, Asia Pacific delivers the fastest primary education market growth globally.

Key players in the market

Some of the key players in Primary Education Market include Pearson plc, McGraw Hill LLC, Scholastic Corporation, Houghton Mifflin Harcourt Company, Cengage Learning Holdings II, Inc., Oxford University Press, Cambridge University Press & Assessment, Stride, Inc., PowerSchool Holdings, Inc., Instructure Holdings, Inc., Discovery Education, Inc., Renaissance Learning, Inc., Kahoot! ASA, Google LLC, Microsoft Corporation, BenQ Corporation, Promethean Limited, and D2L Corporation.

Key Developments:

In June 2026, Pearson celebrated the graduation of nearly 13,000 students from its Connections Academy network, a tuition-free online public K–12 school framework designed around career-connected pathways and flexible remote instruction.

In April 2026, Scholastic Corporation finalized its modified 'Dutch Auction' tender offer to repurchase shares of its common stock, successfully deploying proceeds from its recent asset-backed real estate sale-leaseback transactions.

In March 2026, Discovery Education unveiled its completely redesigned Science Techbook for the 2026–2027 school year, providing primary and middle school classrooms with approachable Tier 1 phenomena-driven instruction, slideshow lesson sequences, and embedded three-dimensional learning scaffolds.

In March 2026, McGraw Hill and Renaissance announced a nationwide data integration combining Renaissance Star Assessments directly with McGraw Hill's core mathematics and literacy franchises via a unified 'Standards and Skills Proficiency Graph' to streamline personalized lesson planning.

Institution Types Covered:

Public Primary Schools

Private Primary Schools

International Primary Schools

Learning Modes Covered:

Classroom-Based Learning

Online Learning

Hybrid Learning

Curriculums Covered:

National Curriculum

International Curriculum

Alternative Education Programs

Educational Resources Covered:

Textbooks

Digital Learning Content

Educational Software

Assessment Tools

Interactive Learning Platforms

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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12.4 Houghton Mifflin Harcourt Company

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12.6 Oxford University Press

12.7 Cambridge University Press & Assessment

12.8 Stride, Inc.

12.9 PowerSchool Holdings, Inc.

12.10 Instructure Holdings, Inc.

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