

**India Preschool/Child Care Market, By Facility (Full Day Care, After School Care), By Age Group (Less than 1Yr, 1-2Yrs, 2-4Yrs, Others), By Location (Standalone, School Premises, Office Premises), By Region, Competition, Forecast & Opportunities, 2020-2030F**

Market Report | 2024-11-25 | 81 pages | TechSci Research

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**Report description:**

India Preschool/Child Care Market was valued at USD 4.31 billion in 2024 and is anticipated to grow USD 8.01 billion by 2030 with a CAGR of 10.90% during forecast period. The preschool/child care market in India is experiencing significant growth and transformation, driven by several key factors. As the country's economy expands and urbanization increases, there is a growing awareness among parents about the importance of early childhood education and care. This awareness is fostering a demand for structured preschool programs that not only ensure the safety of children but also promote their holistic development. The market is characterized by a diverse range of providers, including standalone preschools, chain-operated centers, and services integrated within larger educational institutions. Government initiatives promoting early childhood education, such as the Integrated Child Development Services (ICDS) scheme, have further fueled growth by encouraging private sector participation and enhancing the quality of services offered.

Urban areas, particularly tier I and tier II cities, are witnessing the highest concentration of preschools/child care centers. These facilities typically offer a mix of educational curriculum, play-based learning, and developmental activities aimed at nurturing cognitive, social, emotional, and physical skills in young children.

**Key Market Drivers**

**Rising Urbanization and Dual-Income Households**

Urbanization in India has led to an increase in nuclear families and dual-income households where both parents work. This demographic shift has heightened the demand for structured early childhood education and reliable childcare services. With parents juggling professional responsibilities, there is a growing preference for preschools/child care centres that offer safe, educational environments for their children. Urban areas, particularly tier I and II cities, witness a higher concentration of such

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facilities to cater to the needs of working parents. For instances, in 2022, the average spending per child in India was reported at USD96.21, according to data from IBEF (India Brand Equity Foundation). These factors drivers the market growth.

#### Increasing Awareness of Early Childhood Education

There has been a noticeable shift in parental attitudes towards the importance of early childhood education. Parents are increasingly recognizing that early years are critical for a child's cognitive, social, emotional, and physical development. This awareness is driving the demand for preschools that offer structured educational programs designed to enhance various developmental skills through age-appropriate activities and play-based learning. Moreover, as education becomes increasingly valued as a pathway to future success, parents are willing to invest in quality early education for their children.

#### Government Initiatives and Policies

Government initiatives play a crucial role in shaping the preschool/child care market in India. The Integrated Child Development Services (ICDS), launched by the Government of India, aims to improve child health and nutrition and promote early childhood care and education. ICDS encourages private sector participation in providing preschool education, leading to the proliferation of private preschools/child care centres across the country. For instance, the Indian government has announced plans to establish 17,000 creches across the country to support working parents and enhance childcare infrastructure. This initiative, detailed by the Minister of Women and Child Development, aims to provide accessible and affordable childcare services nationwide, especially benefiting low-income families. These creches will offer safe environments where young children can receive care and early education while their parents work. Together, these efforts drive substantial growth in the preschool and child care market, making quality early education and care more accessible nationwide.

#### Increasing Disposable Income and Aspirations for Quality Education

India's economic growth has resulted in rising disposable incomes and aspirations among middle-class families. As a result, there is an increasing willingness among parents to spend on quality education and enrichment activities for their children from a young age. Preschools that offer not just basic care, but also holistic development programs are well-positioned to attract families seeking comprehensive educational experiences for their children. This trend is particularly pronounced in urban areas where parents prioritize early learning opportunities as foundational to their children's future academic success and overall well-being.

#### Key Market Challenges

##### Affordability and Accessibility

Affordability remains a significant challenge for many families seeking quality preschool education and child care services in India. While urban areas, particularly tier I cities, have a concentration of preschools/child care centers, the fees charged by these facilities can be prohibitively high for middle- and lower-income families. This disparity in affordability limits access to quality early childhood education, leading to inequalities in educational opportunities based on socio-economic status.

Moreover, in rural and semi-urban areas, access to preschools/child care facilities is limited. Infrastructure challenges, lack of trained educators, and inadequate funding contribute to the scarcity of affordable and accessible early childhood education options in these regions. Government initiatives aimed at improving accessibility, such as establishing Anganwadi centers under the ICDS scheme, are crucial but often face resource constraints and operational challenges.

##### Quality and Standardization of Education

Ensuring and maintaining high-quality education standards across preschools/child care centers is another pressing challenge in India. The quality of early childhood education can vary significantly due to differences in curriculum, teaching methodologies, teacher qualifications, and infrastructure among providers. While some preschools offer well-rounded developmental programs that prioritize holistic learning, others may focus solely on basic care without adequate emphasis on educational content and child development.

Standardizing educational practices and establishing regulatory frameworks that define minimum quality standards are critical steps towards improving overall educational outcomes in the sector. However, achieving consensus on standardized guidelines and implementing them uniformly across diverse educational settings remains a complex task. Furthermore, continuous teacher training and professional development are essential to ensure educators are equipped with the necessary skills and knowledge to deliver high-quality early childhood education effectively.

##### Regulatory and Compliance Challenges

The preschool/child care sector in India is subject to a complex regulatory environment that can pose challenges for providers,

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especially smaller operators and those in non-urban areas. Regulatory requirements related to licensing, safety standards, hygiene protocols, curriculum guidelines, and teacher qualifications vary across states and regions, creating compliance burdens and administrative complexities for preschool owners and administrators.

Moreover, while regulations are intended to ensure child safety and educational quality, enforcement mechanisms and oversight can be inconsistent. This variability in regulatory enforcement can lead to disparities in the quality of services offered by different preschools/child care centers, impacting parental trust and confidence in the sector. Streamlining regulatory processes, enhancing transparency, and providing support mechanisms for compliance could help mitigate these challenges and promote a more conducive operating environment for providers.

#### Parental Awareness and Expectations

While increasing awareness of the importance of early childhood education is a driver for market growth, it also poses challenges related to parental expectations and preferences. Parents today are more informed and discerning when selecting preschools/child care centers for their children, often prioritizing factors such as curriculum quality, teacher qualifications, safety measures, and facilities. This heightened awareness and demand for higher standards place pressure on providers to continuously innovate, improve service offerings, and meet evolving parental expectations.

Meeting diverse parental expectations while maintaining affordability and accessibility can be challenging for preschools/child care centers, particularly in competitive urban markets. Effective communication strategies, parent engagement initiatives, and transparency in educational practices are essential for building trust and fostering positive relationships with families. Addressing these challenges requires collaboration between educators, policymakers, and parents to ensure that every child has access to affordable, high-quality early childhood education and care services in India.

#### Key Market Trends

##### Integration of Technology in Early Learning

Technology is increasingly becoming integrated into early childhood education in India. Preschools/child care centers are leveraging digital tools, interactive learning apps, educational software, and smart devices to enhance teaching methodologies and engage young children effectively. According to a report by an NGO, government expenditure on Early Childhood Care and Education (ECE) accounts for only 0.1% of the Gross Domestic Product (GDP). These technologies facilitate personalized learning experiences, interactive storytelling, virtual field trips, and educational games, catering to different learning styles and enhancing overall learning outcomes.

Moreover, digital platforms enable better communication between educators and parents, providing insights into a child's progress and fostering collaborative learning environments.

##### Emergence of Hybrid Learning Models

The COVID-19 pandemic accelerated the adoption of hybrid learning models in preschools/child care centers across India. Hybrid models combine traditional in-person teaching with online or remote learning components, offering flexibility and continuity in education during disruptions such as lockdowns or health emergencies. These models involve the use of video conferencing for virtual classes, digital resources for home-based learning activities, and blended approaches that combine physical and digital interactions. As parents and educators recognize the benefits of hybrid learning, including increased accessibility and personalized learning experiences, hybrid models are likely to continue evolving and integrating into mainstream early childhood education practices.

##### Focus on Holistic Development and Well-being

There is a growing emphasis on holistic development and well-being in preschools/child care centers in India. Beyond academic skills, educators and parents recognize the importance of nurturing children's social-emotional competencies, physical health, creativity, and critical thinking abilities from a young age. Preschools are incorporating holistic development frameworks, such as socio-emotional learning (SEL) programs, mindfulness practices, arts-based activities, and outdoor play opportunities, to support children's overall growth and well-being. By fostering a supportive and inclusive learning environment, these practices aim to cultivate resilient, empathetic, and well-rounded individuals prepared for future academic and life challenges.

##### Diversity, Equity, and Inclusion (DEI) Initiatives

Preschools/child care centers in India are increasingly focusing on diversity, equity, and inclusion (DEI) initiatives to create inclusive learning environments that celebrate cultural diversity, promote equity, and respect individual identities. Educators are

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implementing curriculum enhancements, multicultural education programs, and inclusive teaching practices that acknowledge and embrace students' diverse backgrounds, languages, and abilities. DEI initiatives also extend to recruiting and training diverse educators, fostering partnerships with community organizations, and engaging families in culturally responsive practices. By prioritizing DEI in early childhood education, preschools aim to foster positive social attitudes, reduce biases, and promote a sense of belonging among all children and families.

#### Segmental Insights

##### Facility Insights

Full-day care is emerging as the fastest-growing segment in the India preschool/child care market due to shifting parental needs and societal trends. With increasing urbanization and more parents joining the workforce, there is a rising demand for comprehensive child care solutions that offer extended hours of supervision and educational activities for young children. Full-day care facilities typically provide a structured environment where children can engage in learning, play, and social interactions throughout the day, accommodating working parents' schedules.

This segment appeals to families seeking a balance between professional commitments and their children's developmental needs. Full-day care centers often integrate educational curricula, age-appropriate activities, nutritious meals, and nap times into their daily routines, promoting holistic development and ensuring children's well-being in a nurturing environment. As the demand for reliable, all-day child care options continues to grow, providers in this segment are expanding their offerings and enhancing service quality to meet the evolving expectations of families across urban and suburban areas in India.

##### Regional Insights

In the India preschool/child care market, the North region stands out as a dominating segment due to several key factors. The region encompasses major metropolitan areas such as Delhi-NCR, Chandigarh, and Jaipur, which have dense populations and high levels of urbanization. These urban centers are hubs of economic activity and employment, leading to a significant concentration of dual-income households where both parents often seek reliable child care solutions.

Furthermore, the North region is characterized by a robust infrastructure of preschools/child care centers, ranging from standalone facilities to chain-operated institutions and those integrated within educational complexes. This diversity of providers caters to a wide spectrum of parental preferences and budgets, offering a range of educational philosophies, curriculum options, and extracurricular activities.

Government initiatives and policies promoting early childhood education, combined with increasing parental awareness of its benefits, have also contributed to the region's dominance in the preschool/child care market. These factors collectively enhance accessibility to quality educational services for children in their early years, driving demand and growth in the North region compared to other parts of the country.

##### Key Market Players

- Zee Learn Limited (Kidzee)
- S.K. Educations Pvt. Ltd. (Bachpan)
- Lighthouse Learning Private Limited
- Shemrock
- Tree House Education & Accessories Ltd.
- Apple Kids Education Private Limited
- Hello Kids Education India Pvt. Ltd.
- Little Millennium Educational Private Limited
- Podar Education Network
- Triumphant Institute of Management Education Pvt. Ltd. (T.I.M.E.)

##### Report Scope:

In this report, the India Preschool/Child Care Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- India Preschool/Child Care Market, By Facility:
  - o Full Day Care

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- o After School Care
- India Preschool/Child Care Market, By Age Group:
  - o Less than 1Yr
  - o 1-2Yrs
  - o 2-4Yrs
  - o Others
- India Preschool/Child Care Market, By Location:
  - o Standalone
  - o School Premises
  - o Office Premises
- India Preschool/Child Care Market, By Region:
  - o North
  - o South
  - o East
  - o West

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Preschool/Child Care Market.

#### Available Customizations:

India Preschool/Child Care Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

- Detailed analysis and profiling of additional market players (up to five).

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