

Early Childhood Care and Education Industry in India 2020

<https://marketpublishers.com/r/E934B84DAC56EN.html>

Date: December 2020

Pages: 60

Price: US\$ 950.00 (Single User License)

ID: E934B84DAC56EN

Abstracts

The Early Childhood Care and Education (ECCE) scheme provides childhood care and education for children in the age-group of 0–6 years. The ECCE market has been experiencing steady growth since the past few years. During the FY 2016–FY 2020 period, the ECCE market expanded at a rate of 20.68%; it is expected to reach INR ~723.67 Bn by FY 2025. ECCE has gained popularity due to improved awareness of parents regarding preschools and child care centers, coupled with increased number of nuclear families and working women. Both children aged below three years and children aged 3-6 years segments are expected to contribute equally to the growth of the market during the forecast period. Major players operating in the ECCE market include Tree House Education & Accessories Ltd., Zee Learn Limited (Kidzee), EuroKids International Pvt Ltd, Hello Kids Education India Pvt., and Kangaroo Kids Education Ltd.

Impact of Covid-19

The pandemic and the prolonged lockdown have severely impacted the education system in India. The closure of preschools and other institutions that provide early education and childhood care continues to impede the holistic development of children. In view of the current circumstances, adoption of technology has become mandatory for preschools to continue imparting lessons. Teachers in preschools devise e-learning groups, live interactions, and several life skills and experiential learning to teach children remotely.

Market segment insights

In FY 2020, children aged 3-6 years held the highest share (~55.5%) in the ECCE market in India. However, children aged below three years segment is expected to

expand at a high CAGR during the forecast period. Among the types of ownership, privately supported preschools and child care centers together held a share of ~50.8% in the market in FY 2020.

Key growth drivers of the market

Improved awareness of parents on early childhood care and education has increased the demand for preschools and childcare centers in India. Working parents are bound to be occupied with their professions, thus they prefer to enrol their children in preschools or child care centers for holistic development. Preschools offer a reliable arrangement to ensure a child's physical and mental growth through various activities. Moreover, increased competition in almost every curricular field has compelled most parents to secure the best early learning and development opportunities for their children.

Rapid urbanization and increased disposable income have instilled brand consciousness among parents. This has led to the penetration of the international preschool culture in India.

Key deterrents to the growth of the market

The lack of professional staff and training facilities is a major challenge faced by preschools and child care centers. Furthermore, inadequate practical and interactive set of activities and curriculum leads to insufficient learning opportunities for students.

Companies covered

Tree House Education & Accessories Ltd.

Zee Learn Limited (Kidzee)

EuroKids International Pvt Ltd

Hello Kids Education India Pvt.

Kangaroo Kids Education Ltd.

Little Millennium Education PVT. LTD.

Podar Education Systems Pvt. Ltd. (Podar Jumbo kids)

Shemrock

S.K. Educations Pvt. Ltd. (Bachpan)

T.I.M.E. Kids

Contents

CHAPTER 1: EXECUTIVE SUMMARY

CHAPTER 2: SOCIO-ECONOMIC INDICATORS

CHAPTER 3: INTRODUCTION

- 3.1. Market definition and structure
- 3.2. Objective of the early childhood care and education market

CHAPTER 4: MARKET OVERVIEW

- 4.1. Early childhood care and education market overview
 - 4.1.1. Current market scenario

CHAPTER 5: MARKET SEGMENTATION

- 5.1. Early childhood care and education market segmentation
 - 5.1.1. Based on age-group
 - 5.1.2. Based on ownership

CHAPTER 6: IMPACT OF COVID-19

- 6.1. Effect of COVID-19 on the market

CHAPTER 7: GOVERNMENT INITIATIVES

- 7.1. Government initiatives

CHAPTER 8: MARKET INFLUENCERS

- 8.1. Market drivers
- 8.2. Market challenges

CHAPTER 9: MARKET TRENDS

- 9.1. Market trends

CHAPTER 10: COMPETITIVE LANDSCAPE

10.1. Tree House Education & Accessories Ltd.

- Company information
- Business description
- Products/services
- Key people
- Financial snapshot (in INR Mn)
- Key ratios
- Key financial performance indicator
- Key business segments
- Key geographical segments

Note: Financial information covered only for public companies

10.2. Zee Learn Limited (Kidzee)

10.3. EuroKids International Pvt Ltd

10.4. Hello Kids Education India Pvt.

10.5. Kangaroo Kids Education Ltd.

10.6. Little Millennium Education Pvt. Ltd.

10.7. Podar Education Systems Pvt. Ltd. (Podar Jumbo kids)

10.8. Shemrock

10.9. S.K. Educations Pvt. Ltd. (Bachpan)

10.10. T.I.M.E. Kids

CHAPTER 11: RECENT DEVELOPMENTS

CHAPTER 12: APPENDIX

12.1. Research methodology

12.2. About Netscribes

12.3. Disclaimer

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