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Industry Report On

Preschool Industry in India

2027 Industry Report: Market Size, Growth, Trends & Franchise Analysis



Prepared for investors, franchise operators and education-sector stakeholders

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We also acknowledge the research firms, government bodies and franchise brands whose published information supported this study. Their data and observations made it possible to examine the Indian preschool market from several angles, and to show where estimates differ rather than forcing them into one number.

IMARC Group	Indian pre-school and childcare market
Technavio	India preschool market
Research and Markets	India pre-school/childcare market
Ministry of Education	NEP 2020 and NCF Foundational Stage 2022
Kidzee, EuroKids, Bachpan	official franchise pages
Hello Kids, Little Millennium, SHEMROCK	official franchise pages

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1 Executive Summary

> **Quick answer**
>
> **The preschool industry in India is growing, driven by demand for early learning, daycare and organised childcare.** But for investors, the national market size is only part of the story. What matters on the ground is local demand, parent affordability, rent, enrolment potential and operating costs. In other words, **the right location and business model can matter just as much as the preschool brand.**

The headline market numbers need a little context. Because various research firms incorporate combinations of preschool, childcare, nursery and related services, they arrive at different market sizes. IMARC predicts that the Indian pre-school and childcare industry will be worth USD 12.0 billion by 2034, up from an estimated USD 5.1 billion in 2025. Technavio puts the 2025 India preschool market at USD 2.31 billion and forecasts 9.7% CAGR through 2030, using a narrower market definition.

The national market figure is just the beginning for someone thinking about opening a preschool franchise. Everything revolves around a small area known as the “catchment area”—the number of nearby young families, their income levels, the cost of rent, the number of competing centres, the anticipated enrolment, and the services that parents actually desire. While after-school and creche programs can increase income, they also increase operational and staffing needs.

Large franchise networks, regional chains, and independent centres make up the organised segment. The market is competitive because of this mix, but it also means that no one operating formula is applicable everywhere. The financials of a premium centre in a big city's catchment area are drastically different from those of a lean centre in a smaller town.

From that pragmatic vantage point, the report examines the industry. Included are topics such as the market's structure, consumer demand, big franchise networks, investment models, operational costs, unit economics, regulatory factors, risks, and questions an entrant should ask themselves before setting up shop. Instead of attempting to force all of the publicly available data into a single estimate, the report makes note of instances where there is no direct comparison.

Source: IMARC Group — Indian Pre-School/Childcare Market Size & Forecast 2026–2034
Source: Technavio — India Preschool Market Growth Analysis 2026–2030
Source: Research and Markets — India Pre-School/Childcare Market Growth Analysis 2025–2034

2 Market Definition and Segmentation

2.1 Market Definition

There is no single definition of the Indian preschool market. For this report, the core commercial market means organised preschool and early-childhood services delivered through branded or independent centres. Depending on the operator, that can include preschool education, daycare and other services for young children.

The wider early-childhood ecosystem is much larger. It also includes Anganwadi services, government programmes, home-based care and informal childcare. Those areas are important when looking at early childhood in India, but they should not automatically be counted as commercial preschool revenue.

This distinction explains why market reports can produce very different numbers. One study may include childcare and daycare; another may focus mainly on preschool education. Rather than blending those figures, this report keeps each research firm's definition attached to its estimate.

2.2 Segmentation by Service Type

A big part of the market is full-day care. IMARC says that in 2025, it made up 64.5% of the Indian pre-school and childcare market. Technavio's research on preschools in India also shows that full-day care is the most popular type and that this market will be worth USD 1.68 billion by 2024.

Full-day care can make better use of the same space for operators outside of preschool hours. It can also make the value proposition stronger for parents who work. There is a clear trade-off: longer business hours require more staff, supervision, and day-to-day management.

2.3 Segmentation by Age Group

IMARC says that kids ages 2 to 4 will make up 48.5% of its 2025 market estimate, making them the largest age group. The exact mix of ages varies from study to study because some have a wider range of child care services.

Age mix is important in real life. A centre that mostly works with kids ages two to four will need to have different staffing and programming than one that also works with younger kids or offers extended daycare. So, it's a good idea to look at the age range of the local audience before deciding on the format.

2.4 Segmentation by Geography

The 2025 study by IMARC says that North India makes up 32.8% of the regional market and Delhi-NCR makes up 24.5% of the major city market. It also covers Bengaluru, Hyderabad, Chennai, Mumbai, and Kolkata, which are all big cities.

You can use those numbers to figure out where the bigger markets are, but a preschool is still a small business in the neighbourhood. There can be big differences in fees, rents, types of families, and competitive pressure between two places in the same city. There's more to a good location study than just the name of the city.

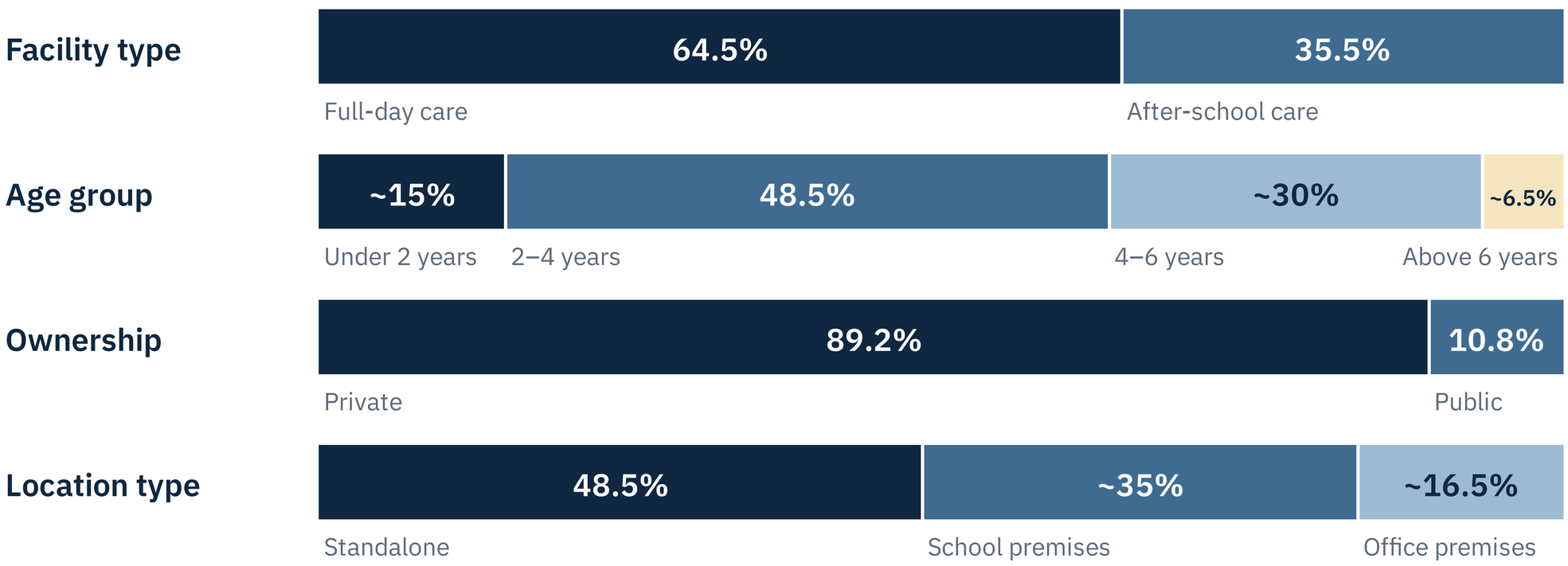
2.5 Segmentation by Price Tier and Positioning

A useful commercial way to look at the market is through three broad positioning bands: premium, mid-market and budget/value. These are working categories for analysis, not official industry classifications. The boundaries also move from city to city.

Positioning	Typical characteristics	Investor implication	Examples
Premium	Higher fees; stronger facilities or a larger centre	Higher setup and property costs; needs a suitable affluent catchment	Kangaroo Kids, Podar Jumbo Kids, Klay*
Mid-market	Established brand with structured systems and moderate fee positioning	A broader addressable market, with economics still driven by the site	Kidzee, EuroKids, Little Millennium*
Budget/value	Lean format and lower fee point	Lower entry cost can help, but price sensitivity is higher	Hello Kids, SHEMROCK*

Note: *Examples are illustrative, not a ranking. Current investment figures and format availability should be verified with each franchisor before publication or investment.

Indian preschool market segmentation, 2025



~ indicates an approximate share as shown in the source segmentation.

Figure 1: Indian preschool market segmentation (2025). Source: IMARC Group; see source note and methodology.

Source: IMARC Group — Indian Pre-School/Childcare Market Size & Forecast 2026–2034

3 Competitive Landscape

3.1 Market Structure

The market is broken up. The competitive set includes large national chains as well as regional brands and independent preschools, and the competitive set varies from one locality to another. Technavio also describes the Indian preschool market as fragmented.

Parents tend to compare a number of things at the same time: curriculum, teacher quality, safety, location, fees, facilities, communication and, where relevant, nursery. Branding will help with awareness and operating systems but it does not remove the need for a good local catchment.

3.2 Major Players

The table below uses current public information from selected brands. Network counts and investment figures come from different reporting dates and should not be read as a market-share table. The purpose is to show the range of franchise formats and published entry points.

Brand	Public network reference	Published investment	Royalty / fee	Positioning / note
Kidzee	2,500+ centres; 600+ cities/towns	₹15–16 lakh*	Verify current agreement	Large national franchise network
EuroKids	2,000+ preschools; 550+ locations	₹15–20 lakh*	Verify current agreement	Structured franchise and operating support
Bachpan	1,200+ preschools; 400+ cities	₹15 lakh+*	Verify current agreement	Established national franchise network
Hello Kids	1,100+/1,200+ public brand references	₹3.1–7.1 lakh*	No royalty; fixed annual brand fee	Lean format; no-royalty structure published
Little Millennium	National network	₹15–30 lakh*	Verify current agreement	Established brand with structured curriculum and support
SHEMROCK	650+ branches	₹3–7 lakh* (brand-published)	Verify current agreement	Long-running preschool franchise network

Note: *Published by the brand and subject to location, format and commercial terms. These figures are not independent estimates and do not constitute a ranking.

Source: Kidzee official franchise page
Source: EuroKids official franchise page
Source: Bachpan official franchise opportunity page
Source: Hello Kids official FAQ
Source: Little Millennium official franchise page
Source: SHEMROCK official franchise page

3.3 Franchise Dynamics

A typical preschool franchise involves the local operator investing capital and managing the centre while the franchisor provides a structured operating system. The brand's system may include curriculum, centre design, training, technology,

marketing, admissions support, and academic guidance. The package depends on the deal.

FOFO arrangements are common, but brand financial models vary. A brand without a percentage royalty may charge an annual fee or other recurring fees. Only by mapping each fee from opening day to contract term can models be properly compared.

3.4 Barriers to Entry

Buying furniture and teaching materials is rarely the hard part of opening a preschool. The real challenges are to find the right location, acquire a suitable property, employ reliable staff, gain the confidence of parents and ensure enough admissions are secured before the initial cash reserve is exhausted.

Property prices can soon change the picture. A centre with low fees may struggle if it is in an expensive area, but the same type of centre could do well in a cheaper area with enough young families and not too much competition.

4 Market Size and Growth

4.1 Current Market Size

What is the size of the preschool market in India? There's no one number that everybody uses. The reasons are illustrated in the current published estimates below: the figures vary with the definition and research methodology.

Source	Base year	Published market value	Forecast	Growth	Scope
IMARC Group	2025	USD 5.1B	USD 12.0B by 2034	9.16% CAGR, 2026–2034	Pre-school/childcare market
Research and Markets	2024	USD 5.06B	USD 13.73B by 2034	10.50% CAGR, 2025–2034	Pre-school/childcare market
Technavio	2025	USD 2.31B	USD 3.66B by 2030*	9.7% CAGR, 2026–2030	India preschool market; narrower scope

Note: *Technavio reports a USD 1.3549 billion market opportunity for 2026–2030; the approximately USD 3.66 billion endpoint shown here is derived by adding that reported opportunity to the 2025 market value. It should be treated as a derived reference, not a separately published 2030 market-size figure.

Source: IMARC Group — Indian Pre-School/Childcare Market Size & Forecast 2026–2034
Source: Research and Markets — India Pre-School/Childcare Market Growth Analysis 2025–2034
Source: Technavio — India Preschool Market Growth Analysis 2026–2030

Published India preschool and childcare market estimates

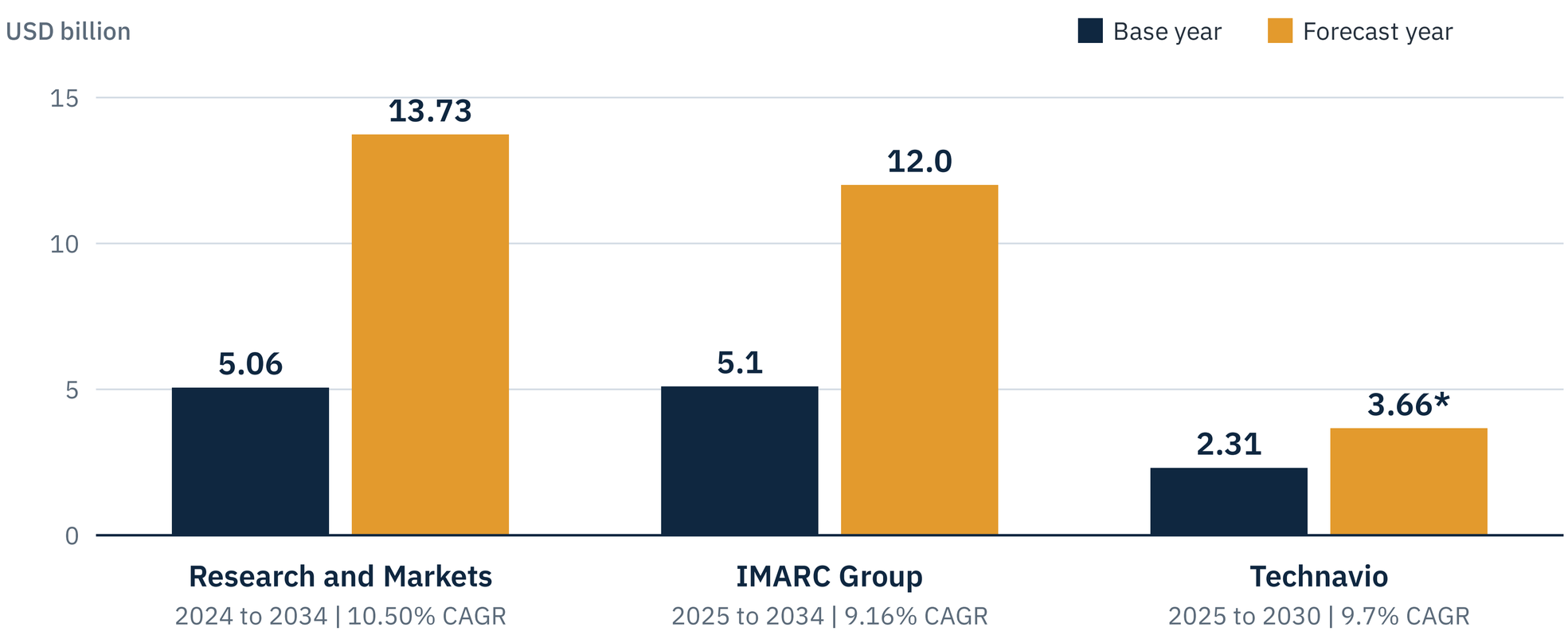


Figure 2: Selected published India preschool/childcare market estimates. Different research firms use different market definitions; values are not directly interchangeable. *Derived figure, see note above.

4.2 Growth Projections

Published research shows that the market is growing at a healthy rate. Research and Markets says the CAGR for 2025–2034 will be 10.50%, while IMARC says it will be 9.16%. There are different ways to define a market, but ranges are usually in the

high single digits to low double digits.

Demand themes like early learning awareness, urbanisation, nuclear families, reliable child care, and changing work schedules are always brought up in the research. That growth does not make every new centre commercially viable. Rent, staff availability, compliance costs and local competition can all affect how quickly an individual centre grows.

4.3 Regional Growth Trends

The biggest major-city segment in the IMARC 2025 analysis is Delhi-NCR, whereas the biggest regional segment is North India. That's useful market context, not a short cut to site selection. It still makes sense to have a smaller city if the local family base and fee levels, property costs and competitive supply align.

For a Tier-2 or Tier-3 location, the practical test is simple: is the catchment able to support the proposed fee and enrolment target? The calculation should take into account child population, household income, new housing, nearby schools, competing preschools, commuting routes and rent.

Geographic distribution of the Indian preschool market

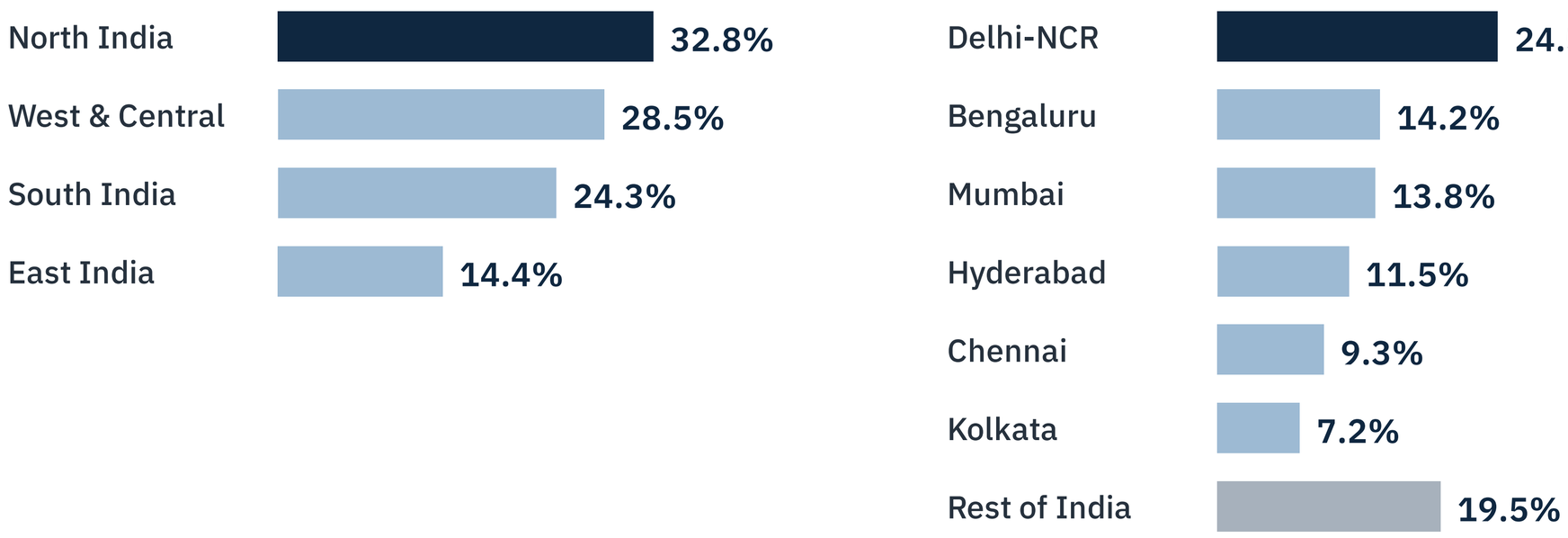


Figure 3: Geographic distribution of the Indian preschool/childcare market (2025). Source: IMARC Group.

5 Consumer Demographics and Demand Drivers

5.1 Parent Demographics

The customer is not simply a parent looking for a preschool seat. Families are balancing education, childcare, safety, convenience, commute time and monthly affordability in one decision.

Working households can place particular value on full-day programmes and dependable childcare. Parents also compare teacher quality, safety practices, communication, facilities, reviews and operating hours. Proximity still matters, but it is only one part of the decision.

That is why a catchment study should look at households rather than just population. A neighbourhood can have plenty of young families and still be difficult if the fee is too high for the area or if several established centres are already competing for the same admissions.

5.2 Key Demand Drivers

- **Urbanisation and smaller family structures** are also increasing the need for organised early learning and childcare.
- Particularly when both parents maintain demanding schedules, **working households** may prioritise consistent, extended-hour childcare.
- Parents are increasingly concerned with **the overall experience, safety, communication, and learning outcomes** provided by a centre.
- The policy focus on **early childhood care and education**, including play- and activity-based learning, has been bolstered by the National Curriculum Framework for the Foundational Stage and NEP 2020.
- **Nursery, transportation, meals, enrichment, and after-school programs** can expand the service mix; however, each addition incurs its own operational expenses.
- Parent updates, fee collection, and centre administration are simplified through the use of **digital communication and applications**. They are beneficial instruments; however, they are incapable of substituting for competent educators or sound safety protocols.

5.3 Urban vs. Rural Dynamics

Urban locations can support higher fees but they typically have higher rents and more competition. Occupancy costs might be lower in smaller cities, but the limiting factors could be affordability of fees, staffing and local awareness.

Instead of replicating a metro format in all locations, a better approach is to adapt the centre to the market. A smaller, well-run centre, at the right fee point, can work better than an expensive format that is hard to fill.

6 Franchise Model and Operations

6.1 Franchise Structure

How does a preschool franchise work in India? Usually, the franchisee invests in and manages the centre while the franchisor provides a brand system and some combination of curriculum, training, site support, marketing and operating guidance. What the franchisee actually receives depends on the brand and the contract.

Model	Who operates?	Economic implication	Investor note
FOFO	Centre run by franchisee under lease or ownership of site	Franchisor has less capital at centre-level. Local operator has day-to-day responsibility	Common in preschool
COCO	Company owns and operates the centre	More corporate capital and direct operating control	Often used for company-led or flagship centres
Hybrid / support-led	Franchisee operates with a deeper franchisor support system	Economics depend on the actual contract and service package	Terms vary by brand
Zero-royalty model	No percentage royalty, but other fixed or recurring charges may apply	The ongoing cost structure needs to be compared in full	Must examine all fees

6.2 Investment Requirements

Publicly available brand figures show a wide spread. Hello Kids currently publishes ₹3.1–7.1 lakh depending on location and setup size; SHEMROCK publishes a ₹3–7 lakh starting range; Kidzee states a minimum investment of ₹15–16 lakh; EuroKids publishes ₹15–20 lakh; Bachpan states ₹15 lakh onwards; and Little Millennium publishes investment starting in the ₹15–30 lakh range on the cited page. These are brand-published figures, not independent cost estimates.

Franchise investment ranges, selected brands

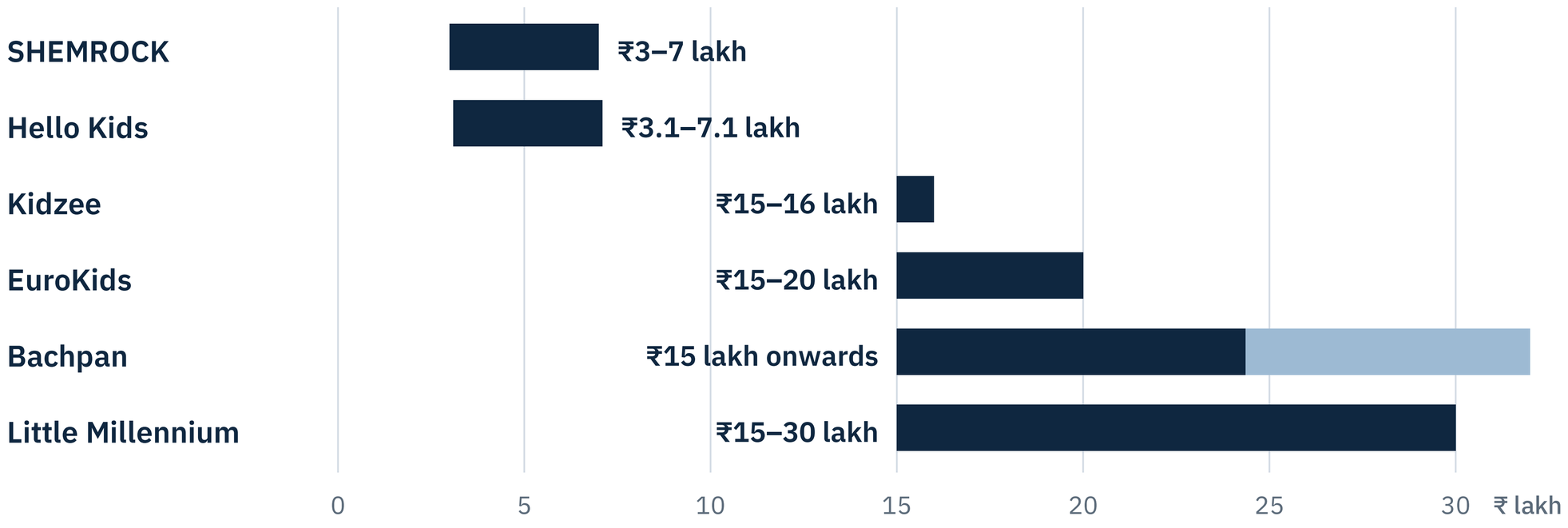


Figure 4: Selected preschool franchise investment starting points from current brand-published information. Figures are indicative and not directly comparable. Bachpan publishes a starting figure only.

The headline franchise figure is not the same thing as the cash required to open and stabilise a centre. Property deposits, fit-out differences, licences, recruitment, pre-opening marketing and working capital can add materially to the initial requirement.

6.3 Support and Training

Support packages commonly include site evaluation, centre design, curriculum, teaching material, staff training, operating manuals, marketing and technology. Some brands also provide admissions support or ongoing academic reviews. The important point is to compare the actual deliverables, not just the word 'support' in a brochure.

EuroKids, for example, describes its EDGE360 programme as covering areas such as infrastructure and ambience design, furniture and equipment, curriculum, teacher training, business management and lead management. Other brands publish different packages. The comparison becomes meaningful only when the promised services are written into the commercial terms.

6.4 Unit Economics

The basic numbers come down to enrolment, fees collected, occupancy, rent, staff costs, marketing and how quickly admissions build. Add-on services increase family revenue but complicate operations.

Illustrative break-even framework

Monthly break-even revenue = fixed operating costs ÷ contribution margin. With a monthly fixed cost of ₹1.2 lakh and a 60% contribution margin after variable costs, the break-even revenue is around ₹2 lakh. This is an example, not a preschool brand prediction.

7 Regulatory and Compliance Overview

7.1 National Policy Framework

The Foundational Stage of the 5+3+3+4 structure, according to NEP 2020, covers children aged 3-8. It describes the stage as five years, three years of Anganwadi/pre-school and two years of primary school, with learning built around play, activity and developmentally appropriate experiences. The National Curriculum Framework for the Foundational Stage 2022 gives further guidance on how that stage can be approached.

These documents provide national policy direction, but are not a single central operating licence for every private preschool. State and local authority differ in recognition, local permissions, building and fire requirements, labour rules and other practical obligations.

Source: National Education Policy 2020 — Ministry of Education, Government of India
Source: National Curriculum Framework for Foundational Stage 2022 — Ministry of Education

7.2 Licensing and Registration

There is no uniform national check-list for all private pre-schools across India. Depending on the location and format, an operator has to deal with entity registration, land-use or zoning questions, fire and building safety, Shops and Establishments requirements, labour compliance, sanitation and water standards, signage and other local permissions.

It makes sense to have the proposed site checked against the requirements that apply in that particular city and state before taking a lease or signing a franchise agreement. The franchisor may help with the process, but the agreement should state who is responsible for each approval.

7.3 Safety and Quality Standards

Safety must be integrated into daily operations. This entails explicit child pick-up protocols, staff vetting, emergency contact information and drills, first-aid provisions, fire safety protocols, adequate sanitation, age-appropriate apparatus, and a recorded procedure for incident management.

The Protection of Children from Sexual Offences Act, 2012 constitutes a component of India's child safeguarding system. The particular responsibilities relevant to a preschool are contingent upon the institution, personnel, and context, thus operators ought to seek professional legal counsel instead of depending on a standard online checklist.

Source: Protection of Children from Sexual Offences Act, 2012 — India Code

7.4 Staffing Requirements

Staffing standards and qualification requirements can vary by state, centre format and the age groups served. In practical terms, a centre needs appropriately trained educators and support staff, background verification, clearly assigned safeguarding responsibilities and a record of ongoing training.

The NCF for the Foundational Stage puts the teacher in the role of facilitator, supporting play, exploration, interaction and development. In a franchise business, that makes staff quality more than an HR issue; it is closely tied to parent experience and the consistency of the centre.

8 Costs and Profitability

8.1 Startup Costs

How much does it cost to start a preschool franchise in India? Public brand figures range from low single-digit lakh amounts for some lean formats to ₹15 lakh or more for several established branded centres. The amount actually needed can be higher once property, fit-out, deposits, licences, staffing and working capital are included.

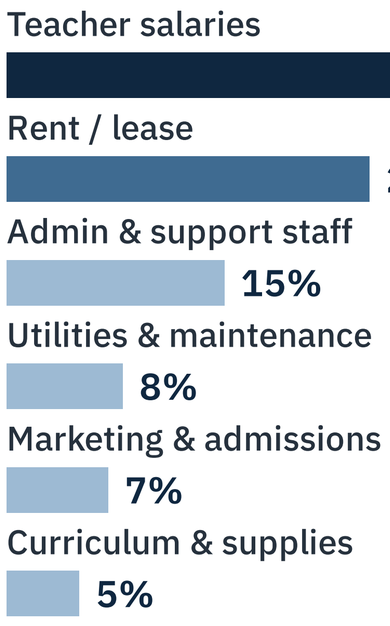
Cost component	Indicative treatment	What to verify
Franchise / brand charges	₹3–16L+ depending on brand and model	Check whether the advertised figure already includes this amount
Interiors and fit-out	Variable	Cost depends heavily on the property and brand specifications
Furniture / teaching equipment	Variable	Check equipment lists and approved-vendor rules
Curriculum / kits / technology	Variable	Separate one-time purchases from recurring charges
Pre-opening marketing	Variable	Allow for the admission campaign before opening
Property deposit / advance rent	Variable	Often sits outside the headline franchise figure
Working capital	Variable	Plan for the period before enrolment reaches a stable level

8.2 Operating Cost Structure

Rent, utilities, marketing, instructional materials, and administration are typically part of the recurring cost base. Because the mix can vary greatly depending on city and centre format, the cost visual in this report is more useful as a guide for planning than as a standard for the industry as a whole.

Cost structure and unit economics

Typical operating cost structure



Unit economics by city tier (₹ lakh per month)

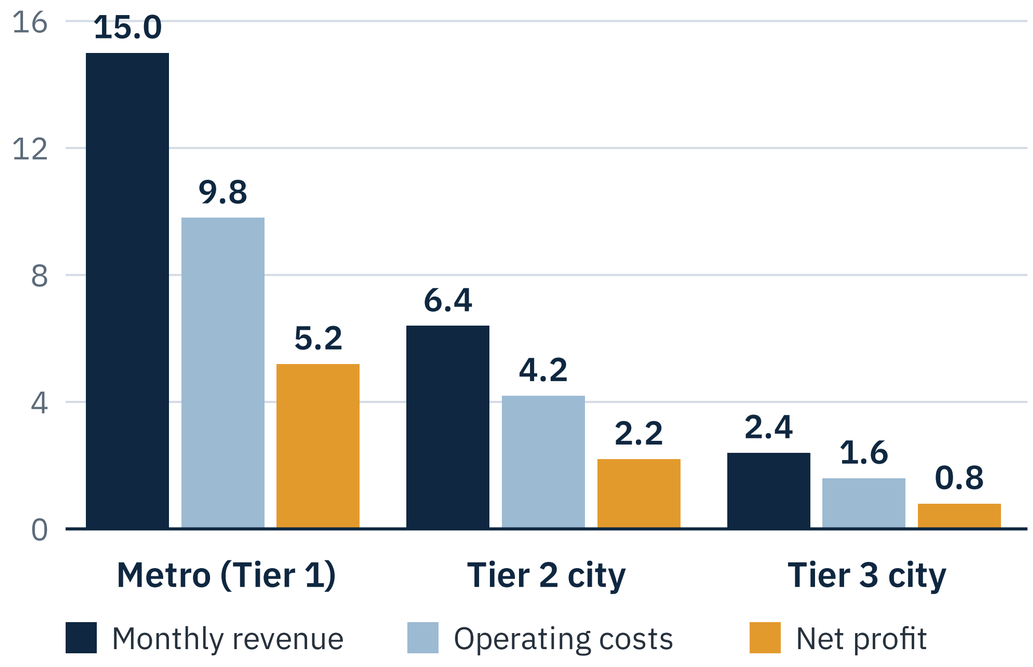


Figure 5: The unit-economics framework and the cost structure. The percentages and amounts shown are for illustration only and should not be used as industry standards.

At the very least, a financially sound model should include a base case scenario, slower enrolment, and stronger occupancy. Everyone must factor in rising expenses associated with rent, salaries, advertising, taxes, maintenance, and the cash required for the admission ramp-up.

8.3

Revenue and Profitability

Typically, the primary source of income is tuition. Daycare, transportation, lunches, summer programs, enrichment and after-school services are all possible at some centres.

In the preschool sector, there is no one “industry margin” that pays off. Centers with low property and staffing costs and high enrolment can appear very different from one another. A more complete view of the fundamental economics is provided by contribution margin, occupancy, collections, retention, and fixed-cost coverage.

Data such as batch enrolment, seat occupancy, average fee per child, monthly collections, outstanding fees, staff cost, rent, marketing spend, retention, and available cash can be monitored with ease using an operational dashboard. In most cases, those figures convey the story more quickly than a headline ROI statistic.

8.4

Return on Investment

How long does a preschool franchise break even? No dependable industry-wide answer exists. Some franchisors publish ROI or payback expectations based on admissions, fees, rent, and operating costs.

According to EuroKids, many partners see ROI within two to three years. Little Millennium publishes an expected ROI but notes that returns vary by location, market, and franchisee performance. Please read these statements as brand projections, not promises.

Source: EuroKids official franchise page
Source: Little Millennium official franchise page

9 SWOT Analysis

The Indian preschool business has some durable demand drivers, but the economics are highly local. The SWOT below brings together the main strengths, weaknesses, opportunities and threats discussed in the report.

S Strengths

- Steady demand for early learning and childcare
- Established franchise systems
- Several centre formats
- Scope for add-on services
- Strong national policy focus on ECCE

W Weaknesses

- Enrolment drives revenue
- Educator hiring and retention can be difficult
- Location has a major effect on economics
- State-level compliance can differ
- Working capital is important during the ramp-up

O Opportunities

- Tier-2 and Tier-3 expansion
- Daycare and after-school services
- Employer-linked childcare
- Better parent communication through technology
- Distinct curriculum and enrichment offerings

T Threats

- More local competition
- Rising property costs
- Fee sensitivity
- Safety or reputation incidents
- Regulatory changes

Figure 6: SWOT analysis of the Indian preschool industry.

10 Risks and Mitigations

10.1 Pandemic and Health Risks

The COVID-19 period showed how exposed centre-based early education can be to prolonged closures and changes in parent behaviour. A centre cannot eliminate that risk, but it can prepare with clear communication procedures, sanitation practices, financial reserves and a workable contingency plan.

10.2 Regulatory Changes

The regulatory environment combines national policy with state and local implementation. Changes in curriculum expectations, childcare rules, building safety, labour requirements or local permissions can affect both costs and the way a centre operates.

A practical response is to keep a compliance calendar, watch relevant state and local notifications, renew documents on time and take professional advice when a requirement is unclear.

10.3 Labour Market Risks

Finding and retaining good educators is one of the operational challenges of the sector. Frequent turnover can affect classroom continuity, parent confidence and training costs. Structured induction, regular training, clear responsibilities, career development and competitive local pay can help reduce the disruption.

10.4 Competition and Market Saturation

Competition is particularly visible in established urban catchments, while independent centres may compete aggressively on price. The strongest differentiators are usually tangible ones: safety, educator quality, a clear curriculum, reliable communication, convenient hours and consistent service.

11 Strategic Recommendations for Entrants

11.1 Franchise Viability Assessment

Evaluate a preschool franchise following a review of the existing contract and overall project expenses. Scrutinise the assistance package, territorial entitlements, renewal conditions, exit clauses, ongoing charges, and the premises underlying any fiscal forecasts. Engaging with existing franchisees can provide valuable insights regarding actual admissions, staffing, and daily assistance.

11.2 Differentiation Strategies

A centre can stand out through curriculum positioning, extended daycare, enrichment, parent communication, nutrition, transport, inclusion, facility design or local partnerships. Technology can make administration smoother, but it works best as a support layer rather than the main selling point.

11.3 Geographic Strategy

Metro markets can support higher fees, but also have higher rents and entrenched competition. The cost structure can be different in Tier-2 and Tier-3 markets but the fee point must be aligned with local purchasing power. A location study should consider the child population, household income, competitor density, rent, visibility, access and future residential development.

11.4 Operational Excellence

The day-to-day basics matter most: hire carefully, train people well, keep safety systems current, follow enrolment and collections closely, watch occupancy and fixed costs, and communicate with parents consistently. New services are worth adding only when there is clear local demand and the numbers still work after the extra staffing and operating cost.

12 Data Sources and Methodology

12.1 Data Sources

This updated report retains the structure and analytical framework of the original report, while updating selected market and franchise numbers from current public sources. The key market references are IMARC Group, Technavio and Research and Markets. The policy references include Ministry of Education's NEP 2020 and National Curriculum Framework for Foundational Stage 2022. Figures at the brand level are from relevant official franchise pages where cited.

Source: IMARC Group — Indian Pre-School/Childcare Market Size & Forecast 2026–2034

Source: Technavio — India Preschool Market Growth Analysis 2026–2030

Source: Research and Markets — India Pre-School/Childcare Market Growth Analysis 2025–2034

Source: National Education Policy 2020 — Ministry of Education, Government of India

Source: National Curriculum Framework for Foundational Stage 2022 — Ministry of Education

Source: Kidzee official franchise page

Source: EuroKids official franchise page

Source: Bachpan official franchise opportunity page

Source: Hello Kids official FAQ

Source: Little Millennium official franchise page

Source: SHEMROCK official franchise page

12.2 Methodology

Market estimates are shown separately rather than blended into one synthetic number. IMARC, Research and Markets and Technavio use different scopes and segmentation methods, so combining them would create a false sense of precision.

Brand investment figures are identified as brand-published. Any operating example or break-even calculation is labelled as illustrative. The report does not treat a franchisor's ROI, profit or payback claim as a guaranteed result.

The purpose of the strategic sections is to give an entrant a practical way to think through the business and the questions to ask. They are not intended to rank brands or recommend one franchise over another.

12.3 Limitations

There are a few things to keep in mind when reading the numbers in this report. The Indian preschool market is not measured in exactly the same way by every research firm. Some estimates include daycare and wider childcare services, while others focus more narrowly on preschool education. That is why two credible reports can arrive at noticeably different market sizes. The figures in this report have therefore been kept separate rather than combined into one number.

Franchise information can change just as quickly. Investment amounts, outlet counts, fees and support packages are not fixed industry figures, and brands may update them or quote different amounts for different formats and locations. The numbers included here are useful for understanding the broad investment range, but they are not a substitute for a current commercial proposal from the brand.

Location is another variable that can change the picture considerably. A preschool that works well in one part of Bengaluru, Delhi-NCR or Pune may have very different economics in another neighbourhood. Rent, family income, competing centres, enrolment potential and local fees all have a bearing on the final numbers. For that reason, the market data in this report should be treated as context rather than a prediction for any particular centre.

The regulatory side also needs to be checked locally. Preschool requirements can vary depending on the state, city, property and services being offered. Building and fire-safety requirements, staffing, registrations and other permissions may not look the same everywhere, and rules can change over time. Anyone moving from research to an actual investment should verify the requirements applicable to the proposed location.

Finally, industry growth does not automatically translate into returns for an individual franchisee. A strong market can still contain centres that struggle with admissions, high rent, staff turnover or weak cash flow. Likewise, a smaller market can work well for an operator with the right location and cost structure. The forecasts and financial figures in this report are therefore best used to understand the opportunity and build a business case—not as a promise of future performance.

> **Report basis**
>
> The report uses public information checked in 2026 and presents it with a 2027 investor perspective. Brand figures, market estimates and local requirements should be rechecked before making an investment decision.

Key Statistics & Summary

USD 5.1B to 12.0B	**India pre-school and childcare market** IMARC estimate for 2025, forecast to 2034 at 9.16% CAGR (2026–2034).
USD 2.31B	**India preschool market, narrower scope** Technavio 2025 estimate, forecast at 9.7% CAGR through 2030.
64.5%	**Share of full-day care** IMARC, 2025. The largest service type in the market.
48.5%	**Share of children aged 2 to 4** IMARC, 2025. The largest age group.
32.8% North India	**Largest region; Delhi-NCR leads cities at 24.5%** IMARC, 2025 regional and major-city analysis.
₹3–30 lakh	**Brand-published franchise investment range** From Hello Kids and SHEMROCK at the lean end to Little Millennium at ₹15–30 lakh.
2–3 years	**ROI window cited by EuroKids** A brand projection, not a guaranteed result.



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