



# **China Education and Training Industry Report, 2010-2011**

**Mar. 2011**

## ***This report***

- ◆ **Analyzes the status quo and development environment of education and training industry.**
- ◆ **Focuses on the development of non-government funded education, vocational education, IT training, foreign language training and infant/child training in the education industry in China.**
- ◆ **Highlights the operation and development of key enterprises in education and training industry in China.**

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## Abstract

In 2010, the education and training industry of China developed rapidly, accompanying a series of investment and financing activities; a total of eight venture capital investments worth USD27.43 million and two private equity investments worth USD62.74 million in China's education industry were disclosed; five Chinese education and training enterprises went public in the United States in 2010; by the end of the year, the market value of all the listed enterprises in the education industry of China had surpassed USD9.2 billion.

New Oriental saw its net operating income increase by 56.3% to USD95.7 million in the second fiscal quarter of FY2011 (September-November 2010). With a new school established in Henan and 24 teaching centers set up in 20 cities in the second fiscal quarter, New Oriental accelerated its outlet expansion in 2010.

## Investment Cases in Education and Training Industry, 2004-2011 (US\$M)

2008	Riverdeep International Education	Beijing	EMPGI	30.00
2008	Oriental Cambridge Education Group	Beijing	Qiming Venture Partners, Ignition	16.00
2008	GAMFE	Beijing	KPCB	10.00
2008	Ambow Education	Beijing	Actis Capital LLP, Avenue Capital Group	100.00
2008	Haoyue Education	Beijing	Carlyle Group	50.00
*****	*****	*****	*****	*****
*****	*****	*****	*****	*****
2009	FasTracKids	Shanghai	iD TechVentures, DT Capital Partners, CID Venture Management	8.00
2009	Haitian Education	Beijing	iD TechVentures	5.00
2009	Everlearn International Group	Shanghai	DT Capital Partners, CID	8.00
2009	New Dynamic Education Group	Shanghai	Matrix Partners China, WI Harper	10.00
2009	TAL Education Group	Beijing	Tiger Global Management, KTB	40.00
*****	*****	*****	*****	*****
*****	*****	*****	*****	*****
2011	Wanxue	Beijing	DCM, Sequoia Capital, Legend Capital	20.00
2011	Global Vocational Education	Changsha	Seavi Advent Private Equity	10.08

TAL Education Group saw its net revenue increase by 47.7% year on year to USD24.06 million in the third fiscal quarter of FY2011 (September-November 2010). As of 2010, TAL Education Group had 109 teaching centers across China, 80 or 73.4% of which are located in Beijing.

Xueda Education Group saw its net revenue increase by 99.7% year on year to USD154.1 million in 2010. By the end of 2010, it had a total of 207 learning centers in 53 cities of China, an increase of 76 and 50 compared with the end of 2009 and the end of H1 2010 respectively.

Global Education & Technology Group saw its net operating income increase by 40.4% year on year to USD52.40 million in 2010. By the end of 2010, Global Education & Technology Group had 351 learning centers in 119 cities across China; among the learning centers, 34 were added in 2010, while 82 or

23.4% are directly owned and operated by Global Education & Technology Group.

This report elaborates on the status quo, policy environment and prospect of non-government funded education, vocational education, IT training, foreign language training and infant/child training in the education industry of China, and focuses on leading enterprises including New Oriental, Noah Education Holding, ChinaCast Education, ChinaEdu Corporation, ATA, China E-learning Group LTD, China Distance Education Holdings Ltd., China Education Alliance Inc., Ambow Education, Global Education & Technology Group, TAL Education Group and Xueda Education Group.

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