



China Kindergarten Industry Report, 2013

Aug. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

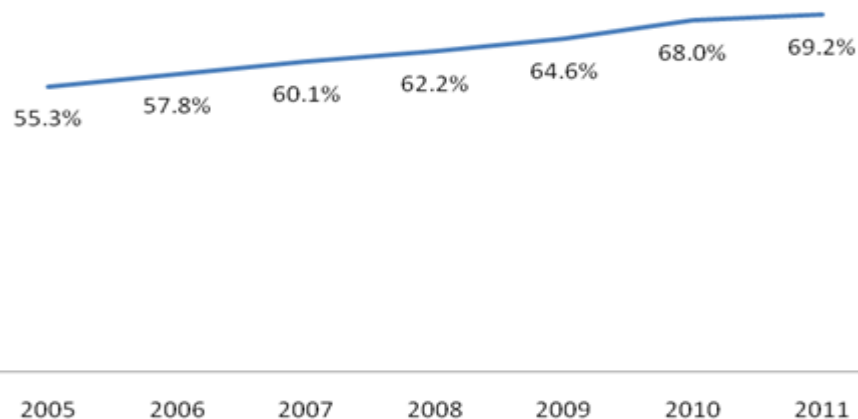
INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2011, there were 166,750 kindergartens in China, 115,404 of which were non-state/private ones. Starting from 2005, private kindergartens in China rose from 68,835 to 115,404 at a compound growth rate of 8.99%, with the overall proportion up 14 percentage points from 55.3% to 69.2%.

Proportion of Private Kindergartens in China, 2005-2011



Source: Ministry of Education of the People's Republic of China
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According to statistics of the Ministry of Education, through the implementation of the three-year action plan, more than 90,000 kindergartens across the country will be newly built, renovated or expanded over the next three years, over five million kindergarten enrollments will be added. The pre-school education development goals for the national 12th Five-Year Plan are expected to be completed ahead of schedule.

Despite the fast development, there still exist “cannot enter public kindergartens”, “cannot afford private kindergartens” and other Phenomena in first-tier cities such as Beijing, Shanghai and Guangzhou. For now, public kindergarten still belongs to scarce resources, unable to meet most children's admission requirements, and private kindergartens still usher in great room for development.

While kindergartens are mushrooming, kindergarten teachers are in short supply. In future 3-5 years, the tremendous gap of kindergarten teachers in China will be an indisputable fact, and the government will increase the teacher supply through the manners as strengthening the training of teachers. The situation will remain for that the children enrollment grows sharply, and the teacher supply fails to be enhanced effectively.

China Early Childhood Education (Kindergarten) Industry Report, 2013 of ResearchInChina mainly covers the followings:

- An overview of kindergarten development in China, mainly including the number, enrollment, graduation and number of classes of kindergartens, the number of kindergartens, number of classes by region (city, township and rural areas), enrollment by age, etc.
- Development characteristics, business models, investment and financing market, and development trend of private kindergartens in - China;
- An in-depth analysis of the development status of kindergarten teachers in China, and an insight into the development features and future demand for kindergarten teachers in China based on statistics;
- Development status and teacher supply & demand of bilingual kindergartens and daycare kindergartens in China;
- An introduction of the current development and development trend of kindergartens in major provinces and cities as well as some kindergartens
- An introduction of the development, kindergarten distribution, courses and profit models of nine early childhood education groups.

1. Education & Training Development Environment

- 1.1 Macro-Economy Environment
- 1.2 China's Population Development
- 1.3 Resident's Income and Expenditure
- 1.4 National Investment in Education

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 - 2.1.1 Overall Situation
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 - 2.1.3 By Age
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 - 2.2.2 Opinions of the State Council on Current Development of Preschool Education
 - 2.2.3 Interim Measures on Charging Management of Kindergartens
 - 2.2.4 Main Points of Kindergarten Development in China in the 12th Five Year (2011-2015)
 - 2.2.5 Implementation Opinions on Encouraging and Guiding Private Capital into the Field of Education to Promote Healthy Development of Private Education
 - 2.2.6 Twelfth Five-Year Plan on National Education Development
 - 2.2.7 Key Tasks of the Ministry of Education (MoE) in Preschool Education in 2013

3. Overview of Private Kindergarten in China

- 3.1 Development Characteristics
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 - 3.1.2 Small and Medium-sized Private Kindergartens Occupy the Majority
 - 3.1.3 Excellent Kindergartens Are Mostly From Preschool Group
- 3.2 Business Model
- 3.3 Investment and Financing Market
- 3.4 Development Trend
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 - 3.4.2 Government support policies will be further introduced, but it still takes some time to sync with public schools.
- 3.5 Development Potential

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 - 4.1.3 Kindergarten Teachers With Junior College And Senior High School Education Background Occupy A Lion's Share, And Those With Bachelor Degree Are On A Rise

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- Number of Schools, Learning Centers and Book Stores of New Oriental Education & Technology Group in Chinese Cities, FY2012
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- Charging Standard of Tomorrow Kindergarten Group (Take Beijing Yiyou Tayuan Campus as Example)
- Directly-managed Kindergartens under Beijing Golden Cradle Potential Education Institution
- Profile of Major Training Course of Golden Cradle

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