

An aerial photograph of a city skyline, likely Chicago, featuring numerous skyscrapers and a large body of water (Lake Michigan) in the background under a cloudy sky. The text is overlaid on the right side of the image.

Mapping the Canadian Landscape of For-Profit Child Care

Atkinson Centre for Society and
Child Development, 2026



An important stipulation of the CWELCC agreements is that newly created spaces be primarily non-profit or public, though jurisdictions operationalized this differently. For example, some committed to exclusively non-profit growth, while others set percentage-based targets for the share of non-profit spaces.^{1,2,3}

For-profit expansion often follows stronger markets, leaving underserved communities with fewer child care options.

If CWELCC prioritizes non-profit growth, what does the for-profit child care landscape in Canada actually look like today?

Share of Child Care **Spaces** for 0–5-Year-Olds by Province and Auspice (Q3, 2025)



Note: All licensed child care spaces in the Northwest Territories and Nunavut are non-profit. Data for Yukon were not available. Source: Canadian Centre for Policy Alternatives - Childcare Licensing and Accessibility by Region (CLAR) database.

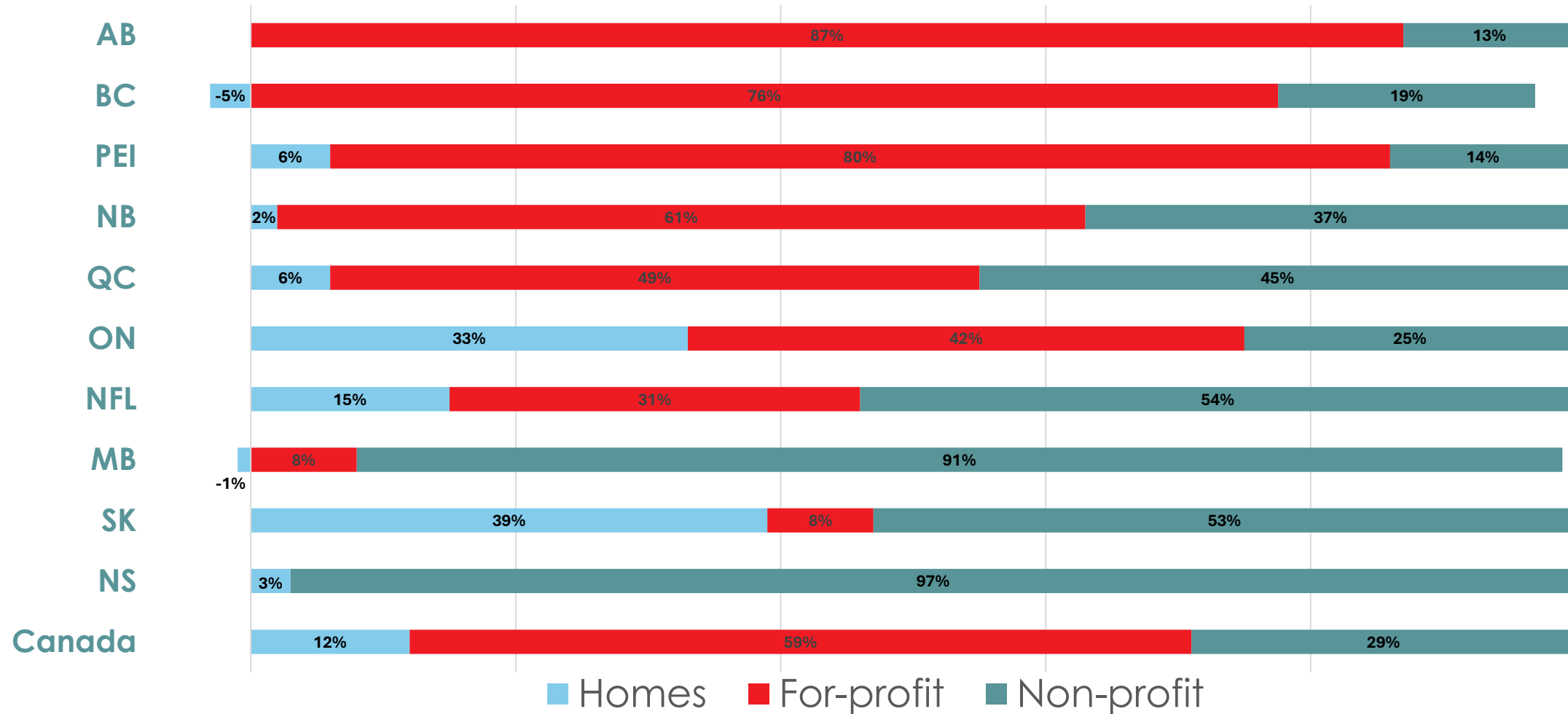
Share of Child Care **Centres** for 0–5-Year-Olds by Province and Auspice (Q3, 2025)



Note: All licensed child care spaces in the Northwest Territories and Nunavut are non-profit. Data for Yukon were not available. Source: Canadian Centre for Policy Alternatives - Childcare Licensing and Accessibility by Region (CLAR) database.

Licensed Space Expansion by Ownership Type

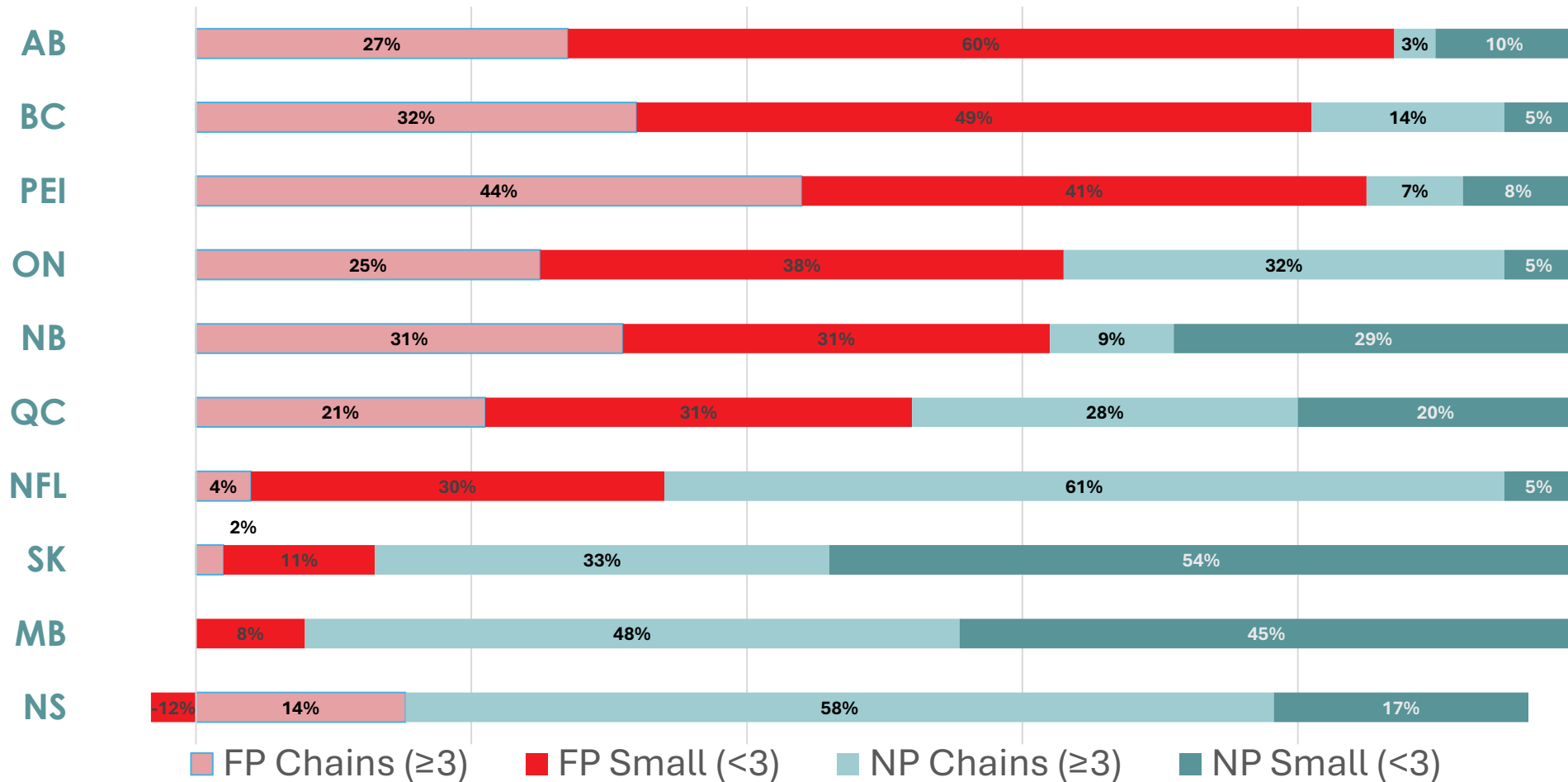
Q4 2022 to Q1 2025



Note: Non-profit also includes public spaces like those run by municipalities, Indigenous governing bodies, school boards, and cooperatives. Source: Macdonald, D. (2025, August 21). *Cash cow: Assessing child care space creation progress*. Canadian Centre for Policy Alternatives.

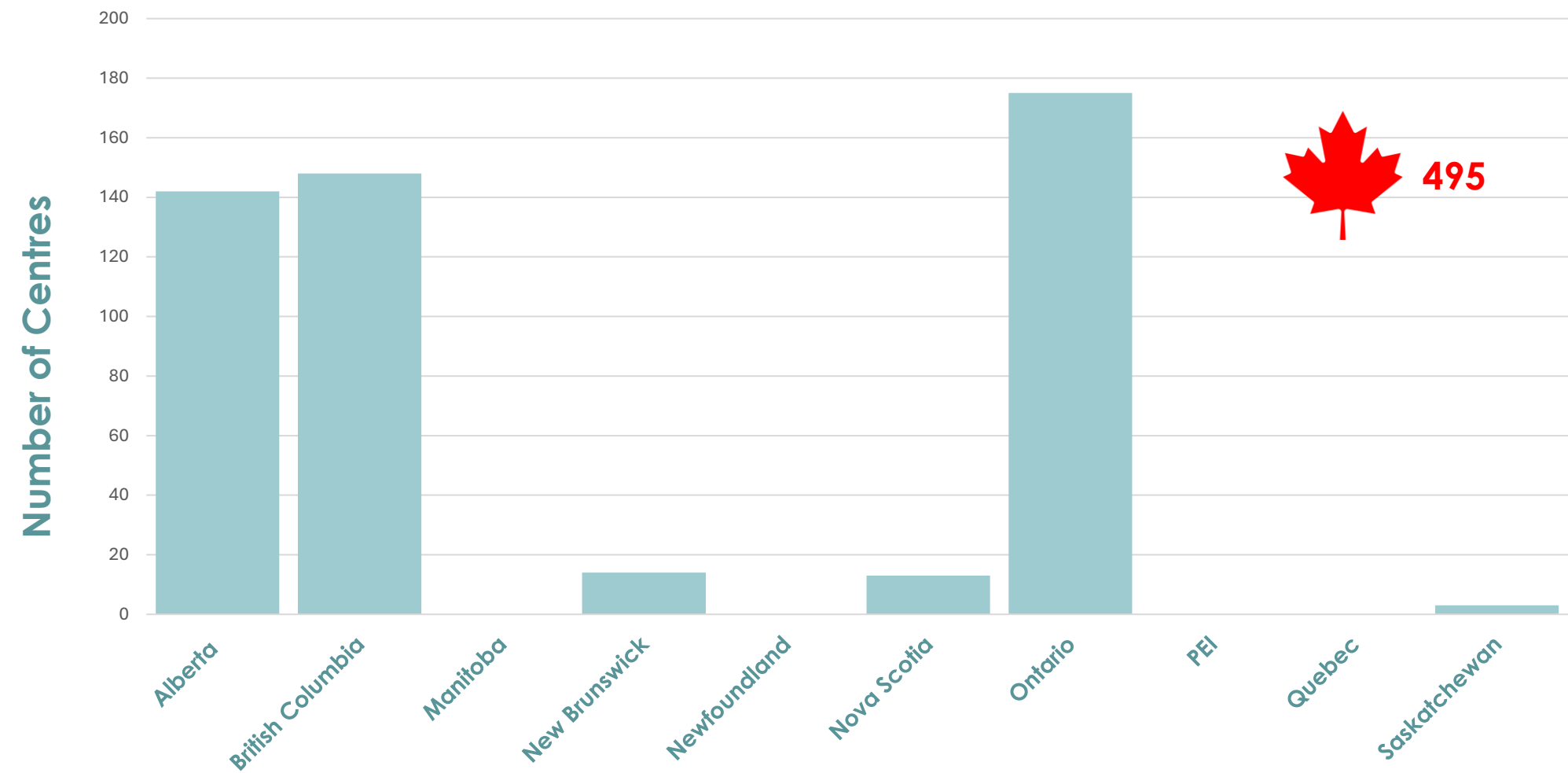
Licensed Space Expansion in Centres by Ownership Type and Chains

Q4 2022 to Q1 2025



Note: Excludes home child care. Non-profit also includes public spaces like those run by municipalities, Indigenous governing bodies, school boards, and cooperatives. Source: Macdonald, D. (2025, August 21). *Cash cow: Assessing child care space creation progress*. Canadian Centre for Policy Alternatives.

Number of Centres Operated by Large Chains, by Province (Q3, 2025)



Note: Data for Yukon were not available. Large chains include S BGC, BrightPath, CEFA, Fueling Brains Academy, Kids & Company, Preschool Canada Academy, Tiny Hoppers, Willowbrae, Lullaboo Limited Inc. Source: Canadian Centre for Policy Alternatives - Childcare Licensing and Accessibility by Region (CLAR) database.

Growing Prevalence of Chains and Private Equity

Kids & Company (over 150 centres", 109 in Canada as of March 2026: 36 in ON, 33 in AB, 32 in BC, 1 in MB, 7 in NS. Unknown # in U.S)

Busy Bees (83 Canadian centres in 2024; 159 in the U.S.)

CEFA (48 locations, 39 in BC, 5 in AB, 4 in ON; unclear source of private capital financing)

Lullaboo (17 locations in GTA; unclear source of private capital financing)

Most growth through buying existing capacity (mergers & acquisitions), not adding new capacity (franchise or greenfield)

Canada does not require companies to publicly disclose ownership structures, limiting transparency and making it difficult to track consolidation, private equity activity, and the true pace of market growth.

Source: Yalnizyan. (May 17, 2024). Profitization of Childcare.

References

1. Government of Canada. (2025, July 29). *Early learning and child care agreements*. <https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories.html>
2. Government of Canada & Government of British Columbia. (2021, July 8). *Canada-British Columbia Canada-wide Early Learning and Child Care Agreement – 2021 to 2026*. Government of Canada. <https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories/british-columbia-canada-wide-2021.html>
3. Government of Canada & Government of Ontario. (2022, May 9). *Ontario Canada-wide Early Learning and Child Care Agreement*. Government of Canada. <https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories/ontario-canada-wide-2021.html>