

A top-down view of children's hands playing with colorful modeling clay on a white surface. One child's hand is visible on the left, wearing a blue sleeve, using a pink mold. Another child's hands are on the right, wearing a red sleeve, rolling a piece of red clay. Various other pieces of clay in red, green, blue, and orange are scattered around.

Who is Building Canada's Child Care?

CWELCC by the numbers



2021

Launch of the
Canada-Wide Early
Learning and Child
Care (CWELCC) Plan



\$27 Billion

In federal funding
over five years



\$10-a-day

Child care fees



250.000

New public/non-profit
spaces



2031

Year agreements
extended, except
Alberta and Ontario



\$5.8 Billion

Added 2027-29

Canada Early Learning and Child Care Act (2025) directs funding "in particular" to public and non-profit operators

**Yet for-profit providers accounted for 72%
of net new spaces and 93% of net
new operators between
2022 and 2026**



Source: Canadian Centre for Policy Alternatives (CCPA), Childcare Licensing and Accessibility by Region (CLAR) Database



New Child Care Spaces for Children 0-5 Years by Type of Ownership, 2022–2026

87,000

New spaces

71.7%



For Profit

Note: Non-profit operators includes co-operatives, Indigenous governing bodies, municipalities, non-profit organizations, public post-secondary institutions, and school boards. Excludes home child care. Figures represent net change between Q4 2022 and Q1 2026.

Source: Canadian Centre for Policy Alternatives (CCPA), Childcare Licensing and Accessibility by Region (CLAR) Database



% new operators
by ownership
2022-2026

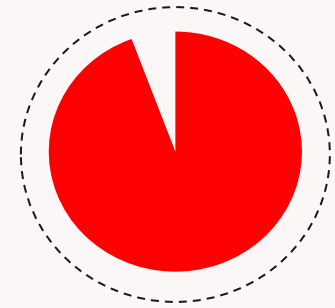


CANADA-WIDE

561

New operators

93.4%

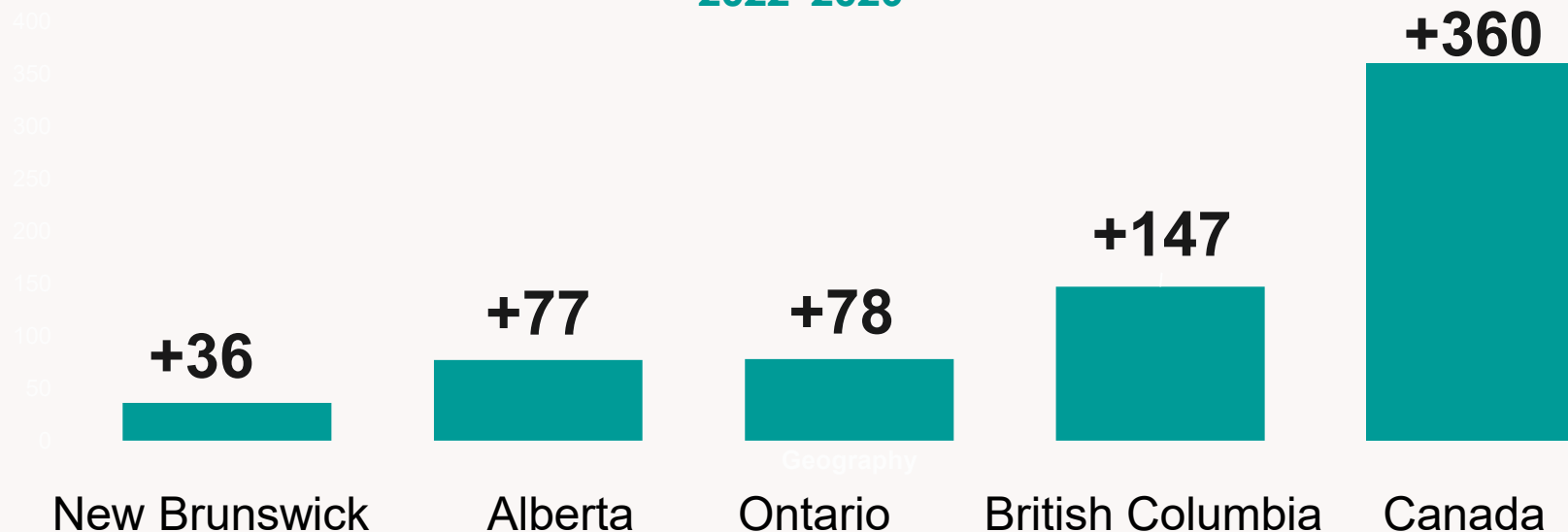


For Profit

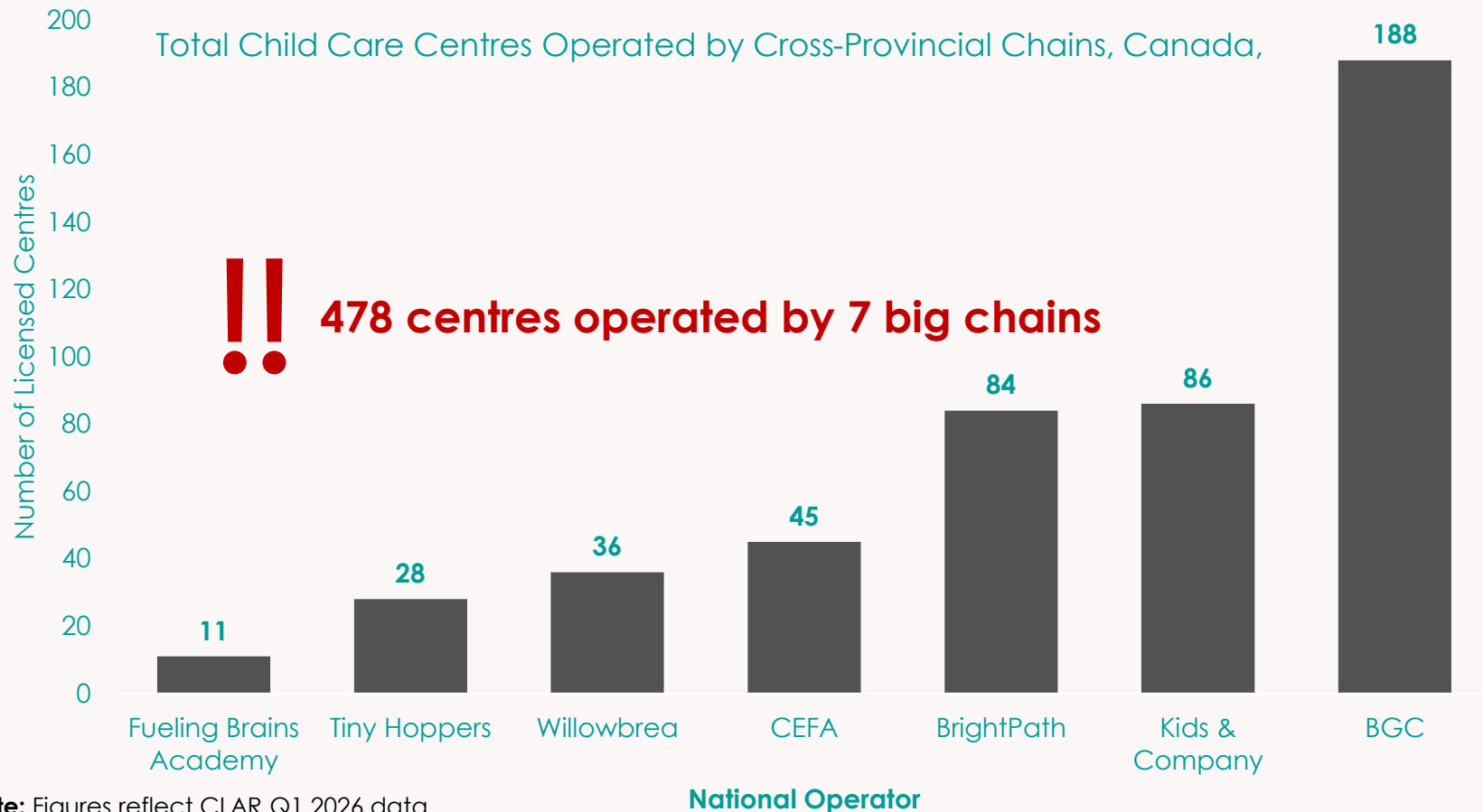
Note: Non-Profit operators include co-operatives, Indigenous governing bodies, municipalities, non-profit organizations, public post-secondary institutions, and school boards. Excludes home child care. **Operators** refer to the organizations or companies that operate child care services. One operator may operate multiple centres. Figures represent net change between Q4 2022 and Q1 2026. Source: CLAR 2026

Large chains driving for-profit growth

New For-Profit Child Care Centre Growth by Chains with 6+ Locations, by Province
2022–2026



Child care chains with national presence



Note: Figures reflect CLAR Q1 2026 data.

Total centres operated by 7 big cross-provincial chains, 2026

Big chains concentrated
in three provinces

Alberta
144

Ontario
146

British
Columbia
151

PEI
4

NB
14

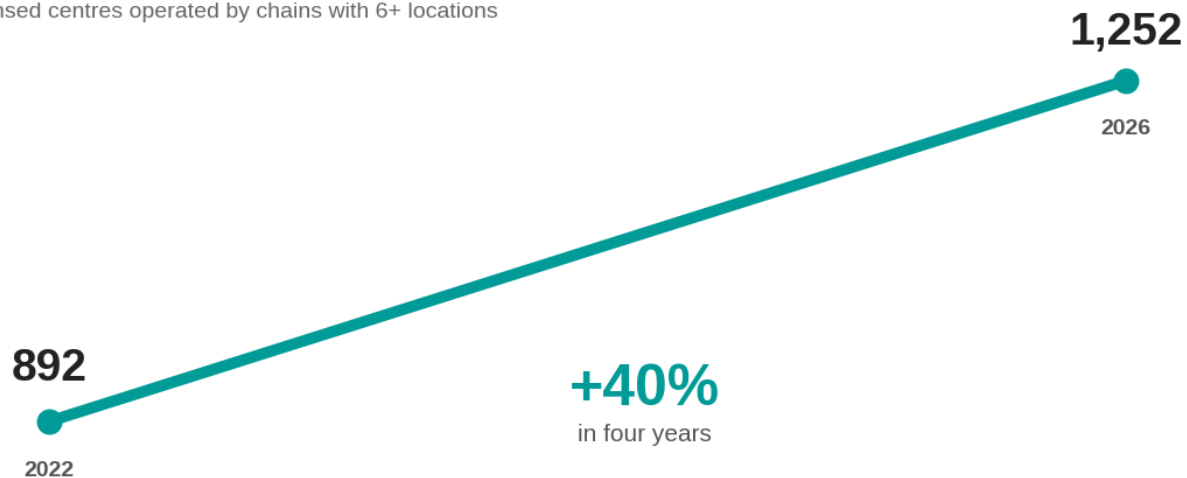
SK
4

NS
15

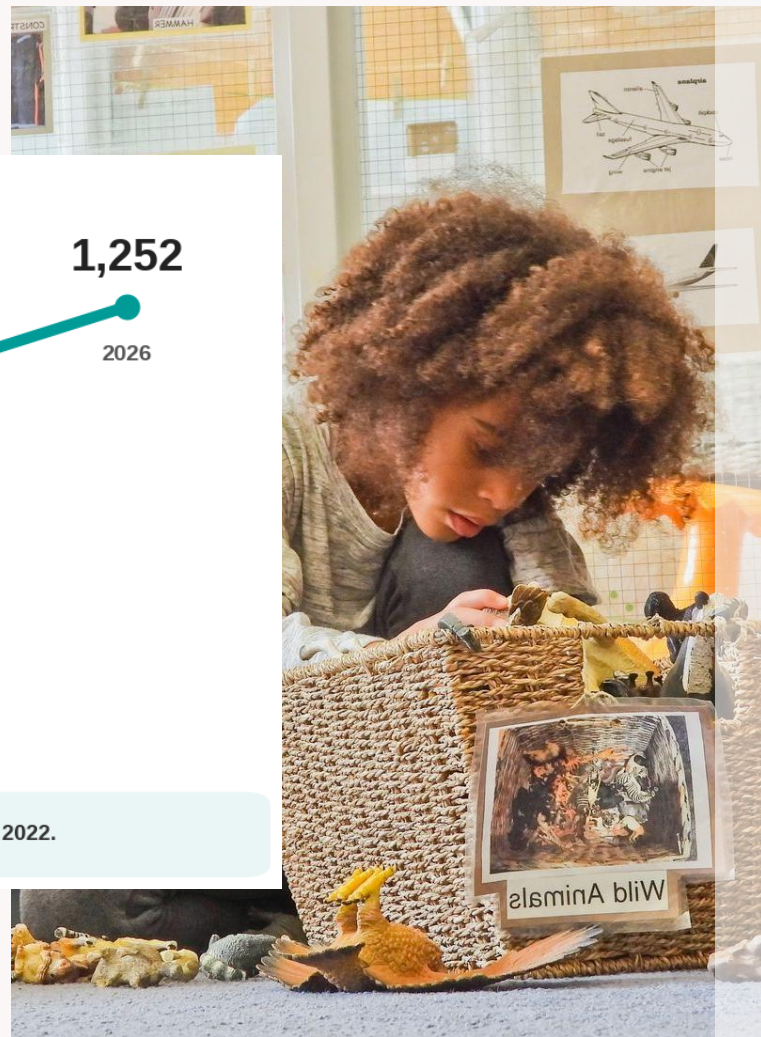
Note: Data include only the following operators: BGC, BrightPath, CEFA, Fueling Brains Academy, Kids & Company, Tiny Hoppers, and Wollowbrae. Figures reflect Q1 2026. CLAR 2026

Large for-profit child care chains are growing

Licensed centres operated by chains with 6+ locations



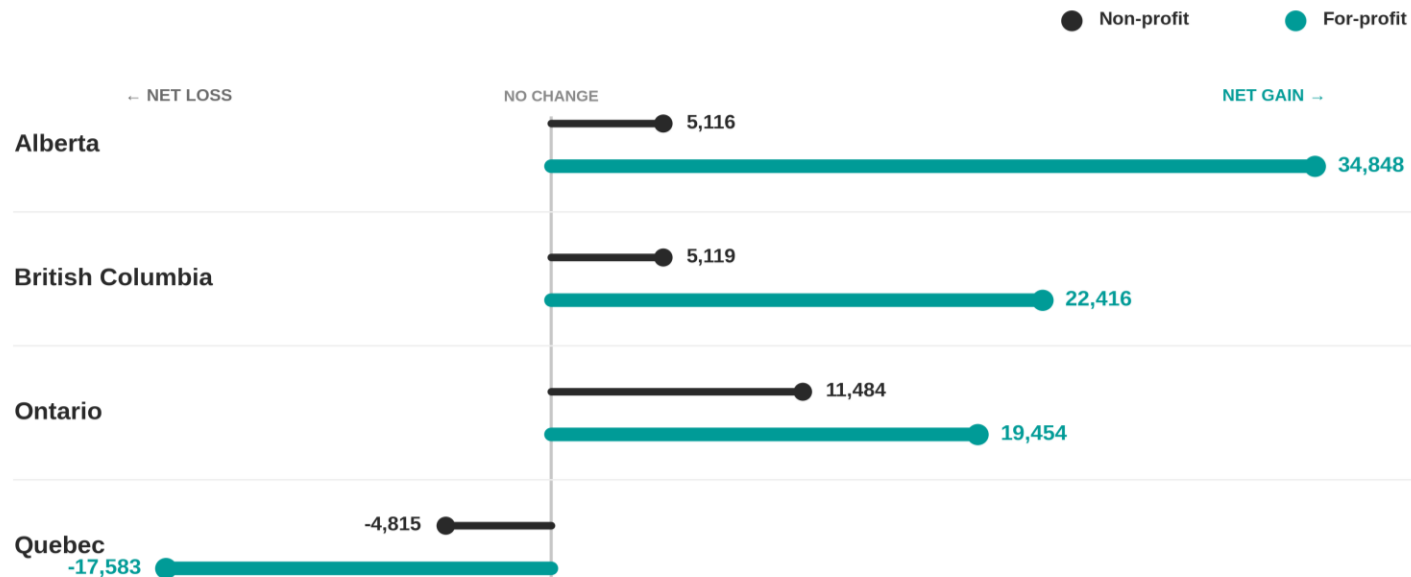
Large for-profit chains operated 360 more licensed child care centres in 2026 than in 2022.



National story masks major provincial differences



Net change in child care spaces by ownership, 2022–2026



ALBERTA

For-profit growth is nearly 7× the non-profit increase.

QUEBEC

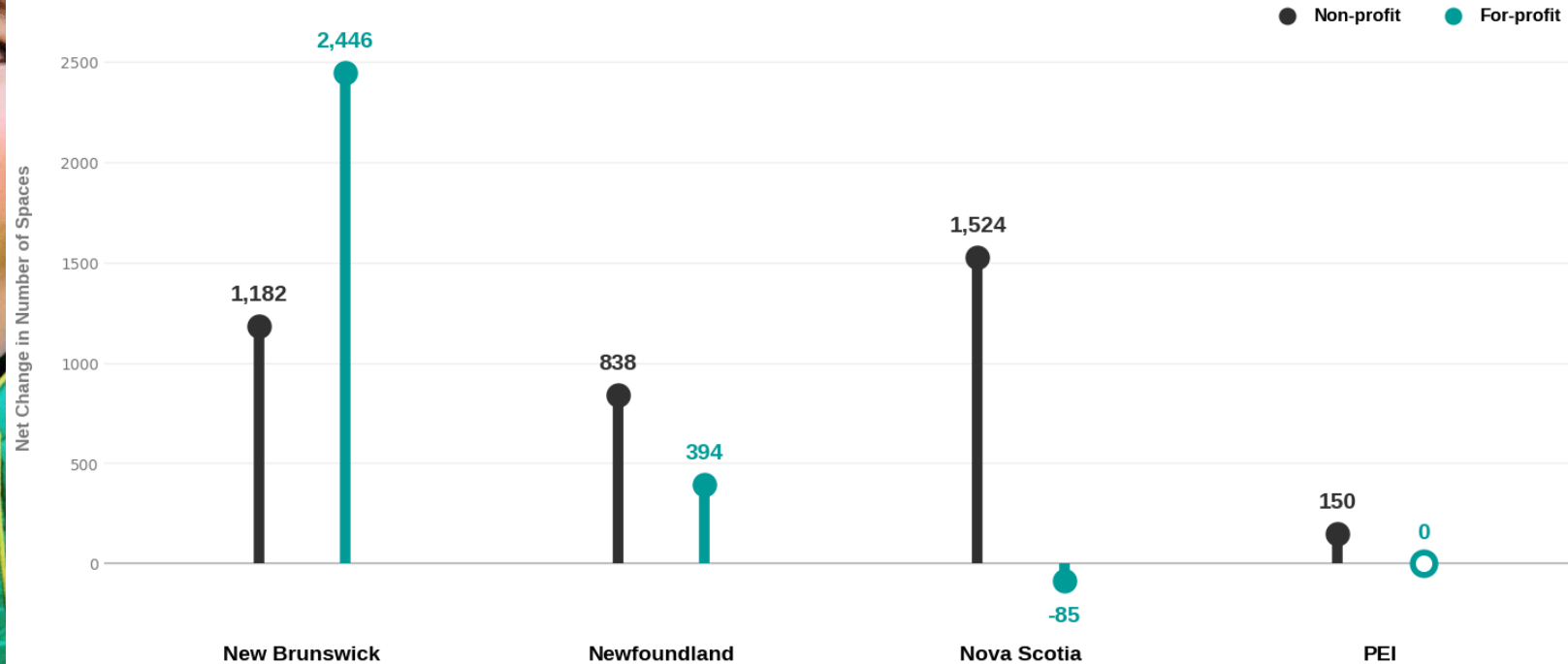
The direction reverses: both ownership types decline.

Bars show the net change in the number of spaces—not the total number of spaces.

Source: CLAR 2026

Atlantic Canada new space ownership

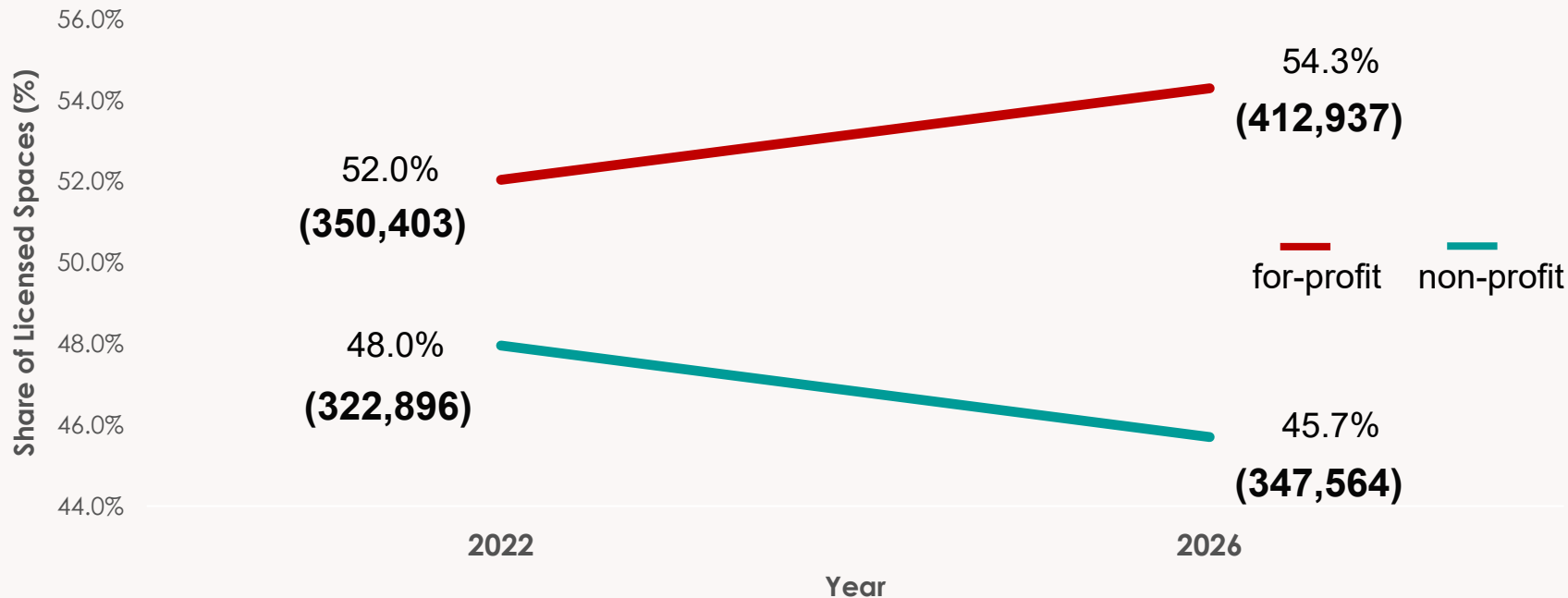
New Spaces 2022–2026



Source: CLAR 2026

The balance of ownership is shifting

Percentage Share of All Child Care Spaces for Children 0-5,
by Type of Ownership, 2022-2026



Non-Profit operators includes co-operatives, Indigenous governing bodies, municipalities, non-profit organizations, public post-secondary institutions, and school boards. Excludes home child care. Figures represent net change between Q4 2022 and Q1 2026. CLAR 2026

Distribution of Federal ELCC Transfers 2022-2026

Estimated Federal Transfers

Total: \$22.7 billion

\$22.7B

TOTAL

non-profit

for-profit



■ \$10.6 billion
45.7%

■ \$12.1 billion
54.3%

Federal commitments signed since 2021 exceed \$58 billion, including funding committed for future years

What does this mean?



More Capacity

Canada added more than 87,000 net licensed spaces for children aged 0–5.



Growth is Concentrated

About 72% of net new spaces and 93% of the net increase in centres were for-profit.



Larger chains are becoming more prominent

Centres operated by for-profit chains with six or more locations increased by 360.

Data source & methodology notes

Canadian Centre for
Policy Alternatives
(CCPA), Childcare
Licensing and
Accessibility by Region
(CLAR) Database.

Analysis compares Q4 2022
with Q1 2026.

Includes licensed centre-
based child care for
children aged 0–5.
Licensed home child care is
excluded from the analysis.
The territories are not
included because
comparable CLAR data
were not available for the
analysis.

Changes in centres,
operators and
spaces are reported
as net change
between the two
quarters, not the
total number of
openings. This
means openings and
expansions are offset
by closures and
reductions over the
same period.

For this analysis, a
chain is an operator
with six or more
licensed child-care
centre locations.

Source

Scope and
comparison

How change is
measured

Definition of
chains

Thank you

Atkinson Centre for Society and Child Development
OISE | University of Toronto



With thanks to the Margaret and Wallace McCain Family Foundation, Inc.

Data Source: Canadian Centre for Policy Alternatives (CCPA), Childcare Licensing and Accessibility by Region (CLAR) Database

Sources

Employment and Social Development Canada. (2026, September 15). *Toward \$10-a-day: Early learning and child care*. Government of Canada. <https://www.canada.ca/en/employment-social-development/campaigns/child-care.html>

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Government of Canada. *Canada Early Learning and Child Care Act*, S.C. 2024, c. 2. Retrieved from: https://laws-lois.justice.gc.ca/eng/AnnualStatutes/2024_2/FullText.html

Government of Canada, *Public Accounts of Canada*, annual transfer-payment tables.



CLAR

- Childcare Licensing and Accessibility by Region (CLAR) Database is a proprietary database developed by David Macdonald, Senior Economist at the Canadian Centre for Policy Alternatives.
- The database tracks licensed child-care spaces across Canada, including both centre-based programs and licensed family child-care homes. It includes information on licence types, ownership structures, and geographic location.
- Data are currently available for several time points, between Q4 2022 and Q1 2026.

Suggested reference: Canadian Centre for Policy Alternatives (CCPA), Childcare Licensing and Accessibility by Region (CLAR) Database