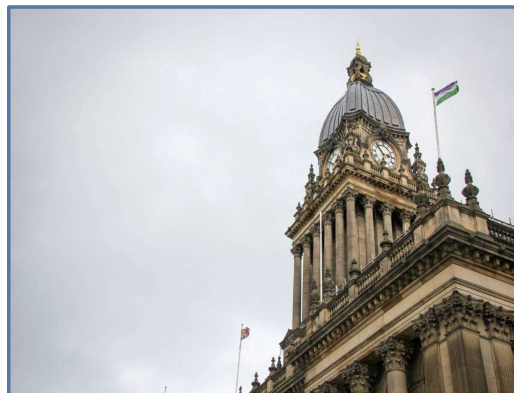




Leeds

Childcare Sufficiency Assessment

Summer 2026



Part 1

Introduction

Purpose of the CSA

The Childcare Act 2006 places a statutory duty on local authorities to make sure there is sufficient childcare to support working parents. Councils meet this duty by regularly assessing local childcare provision and identifying where there are gaps or pressures, usually through a Childcare Sufficiency Assessment.

The Childcare Sufficiency Assessment (CSA) considers whether families in Leeds can access the childcare they need. It looks at information like how many children live in the city and how many childcare places are available, to help make sure provision meets local needs.

The assessment offers elected members, Early Years providers, families and others an overview of the childcare available across Leeds.

Leeds has recently seen changes to the childcare market, with significant expansion programmes under way.

These include the development of wraparound care, the growth of Funded Early Education Entitlement places, and the expansion of school-based nursery programmes, all of which contribute to the local childcare landscape and influence patterns of demand and provision across the city.

Part 1

The role of the Sufficiency Team

Slide 2

About us

The Learning Infrastructure – Sufficiency Team, part of the Children and Families directorate at Leeds City Council, leads the local authority's statutory responsibility to ensure there are enough high-quality, local learning places for all children and young people aged 0–19, and up to 25 for those with additional needs.

The team draws on detailed analysis of demographic trends, housing growth and wider local intelligence, working collaboratively with education and childcare providers, neighbouring local authorities and other key partners to plan and secure the right number and mix of learning places across the city.

In addition to place planning, the team oversees a range of strategic programmes, including DfE-directed academisation processes, school-based nursery capital projects, and the management of major DfE grant initiatives such as the National Wraparound Expansion Programme and the extension of the Funded Early Education Entitlement.

Contact Us

Please get in touch if you have any comments or questions.
educ.school.organisation@leeds.gov.uk
0113 378 5945

We are happy to help with queries regarding Childcare Sufficiency including:

- Funded Early Education Entitlement
- Wraparound Care Provision
- School place planning - primary and secondary
- School Based Nursery Schemes

Part 1

Childcare Sufficiency Assessment (CSA) and how to use it

[Link to part 2](#) 

[Link to part 3](#) 

Slide 3

What is in the CSA?

The CSA brings together a range of information, data, and analysis on the current childcare market in Leeds, and provides information on both current and forthcoming national childcare strategies.

It outlines key developments such as changes to childcare entitlements, the rollout of the National Wraparound Care Expansion Programme, the Funded Early Education Expansion Programme, the Free Breakfast Club Expansion, the School-Based Nursery Scheme, and Best Start in Life. The assessment includes links to policy and strategy information for anyone who wishes to explore these in more depth.

In addition, the assessment highlights upcoming policy and strategy changes and ongoing initiatives, including School Age Childcare, enhanced support for SEND provision within wraparound settings, and School-Based Nursery Phase 3.

The assessment helps build a clear picture of childcare in Leeds. It looks at how many families currently access childcare, what types of provision are available in different parts of the city, and the quality of that

provision. This helps show how well current childcare meets local needs and where improvements may be needed.

Part 1 explains the Local Authority's response to recent changes to entitlement to funded childcare and gives updates on current and upcoming national programmes.

Part 2 includes data and information about supply and demand of childcare across Leeds and information on the type and quality of provision in Leeds.

Part 3 gives an indication of next steps in Early Years sufficiency planning. These will be reviewed when the next CSA is published.

Part 1

National Early Years priorities - Best Start in Life

National priorities

Nationally, the Best Start in Life strategy aims to help children reach a Good Level of Development, building school readiness and long-term wellbeing. High-quality childcare is a key part of early learning and healthy development. We assess the availability of childcare places through the Childcare Sufficiency Assessment.

Best Start in Life

- Early support during pregnancy and early childhood.
- Focus on health, wellbeing, and development.
- Strong foundation for learning and growth.

Best Start and Beyond

- Support from conception to school age.
- Joined-up approach across services.
- Promotes healthy child development.

Family Hubs & Best Start Family Hubs

- One place to access multiple family services.
- Coordinated local support offers.
- Easier pathways for parents and carers.

Support for Families

- Health & wellbeing support.
- Early learning and parenting help.
- Speech & language development support.

More Children Ready for School

- Builds confidence and independence.
- Strengthens early learning skills.
- Supports positive early school experiences.

Higher Good Level of Development (GLD)

- Children meeting expected milestones.
- Strong communication, literacy, and maths skills.
- Better long-term learning outcomes.



Part 1

Funded childcare entitlements

Slide 5

Changes to funded childcare

From September 2025, the government changed the childcare entitlements to make childcare more affordable and available so that parents could work or access training, whilst also aiming to improve children's early development and school readiness.

Eligible working parents and carers can now access up to 30 hours of funded childcare a week, for at least 38 weeks a year, for children aged 9 months to 4 years.

Some 2-year-olds may also qualify for the "Early Learning for 2-year-olds" offer, which provides 15 hours of funded childcare a week for 38 weeks a year. This used to be known as Families in Receipt of Additional Support (FRAS).

All 3- and 4-year-olds can receive 15 hours of funded childcare each week. Working parents and carers who meet the eligibility criteria can access a further 15 hours, giving 30 hours a week in total.

Age groups	Entitlement (38 weeks per year or equivalent)
Children who qualify as Early Learning 2-year-olds	Up to 15 hours per week
Children aged 9 months to 4 years who qualify for the working family entitlement	Up to 30 hours per week
Children aged 3-4 who do not qualify for the working family entitlement (universal offer)	Up to 15 hours per week

For further details about all the above schemes and eligibility criteria, please visit

[View All Schemes - Best Start in Life](#)



Part 1

School age childcare

Slide 6

School age childcare (SAC) policy

Updated DfE guidance on school age childcare was published on 1 April 2026. This sets out the types of support that might be available once children reach school age and helps families and providers understand what is relevant to them.

“School age childcare” refers to the range of options that help families manage life around the school day and during school holidays, including:

- Breakfast clubs (both paid and free), offering children a calm and organised start to the day.
- After-school clubs that provide safe, enjoyable activities until parents finish work.
- Wraparound childcare, where schools or community organisations offer a combination of before- and after-school care
- Holiday clubs delivering structured, engaging activities outside term time.

- HAF (Holiday Activities and Food Programme), which provides funded holiday activities and meals for eligible children, supporting families during longer breaks.

Bringing these schemes together is intended to make the childcare system easier to navigate. By aligning programmes such as HAF with the wider childcare offer, families can see all available options in one place and make informed choices that best meet their needs. For further information on this policy please visit the following link.

[School-age childcare guidance](#)



Part 1

National Early Years priorities - National Wraparound Expansion programme

Slide 7

National Wraparound Expansion programme

The National Wraparound Childcare Programme was established by the Department for Education to make before and after school childcare more accessible, reliable, and high quality for working families. It's funded through a multi-year grant that runs until March 2027, helping to create more wraparound childcare places across the country.

The ambition is to significantly increase the number of wraparound places available so that families have a full, consistent option they can rely on. Funding is being used in Leeds to help schools, private providers and childminders to either set up or expand their wraparound offer.

Providers have been encouraged to apply for support through capital schemes to improve or upgrade their physical spaces, as well as apply for revenue funding to help with staffing, training, transport hire, equipment, and resources. This investment is designed to help settings grow sustainably while delivering high-quality wraparound childcare for families across the city.

In Leeds, as of March 2026, an additional 1,600 places have already been created through this programme, with another 400 expected to be available by September 2026.

Our approach includes a focussed ambition to enhance SEND places, alongside a training offer that supports providers to improve quality and strengthen long-term sustainability.

Feedback from providers

"It's been a huge success, our setting is full and we have had great feedback from parents and children."

"(We have been) able to strengthen our offer and activity choices for children, and create flexibility for parents to book what they need when they need it."

Part 1

National Early Years priorities - Funded Early Education Entitlement Grant expansion

Slide 8

Funded Early Education Entitlement (FEEE) Grant expansion

The Early Years Expansion Grant, delivered between April 2025 and March 2026, was part of the national rollout of the government's expanded childcare offer. Its purpose was to support the creation of additional, high-quality childcare places for children aged 9 months to 4 years, ensuring that local authorities were able to meet the increased demand generated by the new entitlements.

Through this programme, Leeds was supported to strengthen its Early Years infrastructure, expand provision for younger children, and improve access for families across the city. The grant formed a key element of the wider national strategy to enhance early education, reduce barriers to childcare, and ensure that children could benefit from high-quality early learning opportunities. **Through this expansion programme we have created over 600 additional funded early years places in Leeds.**

As part of the ongoing national strategy and commitment to Giving Every Child the Best Start in Life, we aim to increase the

take up of entitlement, especially those who qualify for the Early Learning for 2-year-olds scheme, formally entitled Families Requiring Additional Support (FRAS).

For more information on FEEE from the Leeds City Council website please visit

[Funded childcare \(9 months to 4 years\)](#)



Part 1

National Early Years priorities - free breakfast clubs

Free breakfast clubs

Free Breakfast Clubs (FBC) are being introduced nationally from April 2026 to help children start their school day feeling nourished, settled, and ready to learn. Schools taking part provide at least 30 minutes of free before-school childcare alongside a healthy breakfast. The free offer can run alongside paid provision.

In Leeds, eight schools joined the programme last year. A further eleven schools are joining in the first official phase of the roll out from April 2026. Up to 30 more schools will join as part of Phase 2 from September 2026, reflecting strong local engagement and a shared commitment to supporting children's wellbeing.

The programme is already having a positive impact on families, easing morning routines, reducing financial pressure, and helping children arrive at school calm, fed, and ready to learn. Schools have reported improvements in punctuality, attendance, and overall wellbeing — and children themselves have been clear about what the breakfast clubs mean to them:

Feedback from pupils

"It makes my mum feel less stressed as she has to get to work as it's an hour away."

"I feel happy cos I get to eat breakfast."

"Coming to the breakfast club makes me feel happy and excited because most days my friends are here."

"When I get to class, I feel sad because I have to leave breakfast club."

Part 1

National Early Years priorities - School Based Nurseries

Slide 10

School Based Nurseries programme (SBN)

The School-Based Nursery (SBN) programme is a multi-phase government initiative designed to give every child the Best Start In Life by making quality childcare more accessible and affordable. The programme is about more than just adding classrooms; it's a strategic push to bridge gaps for families. Its core aims include:

- Boosting School Readiness: Helping children reach a good level of development by the end of Reception to improve long-term life chances.
- Targeting Disadvantaged Areas: Prioritising funding for "cold spots" where families struggle most to find or afford nursery places.
- Helping Parents Work: Supporting the wider rollout of 30 hours of funded childcare to make it easier for parents to remain in employment.
- Early SEND Support: Identifying children with special educational needs earlier to ensure they have the right support as they transition through school.

- Phase 1 (Launched Oct 2024): Focused on using surplus space in 300 primary schools to create 6,000 places by September 2025.
- Phase 2 (Late 2025): Invited primary and maintained nurseries to bid for funding to build or remodel spaces for the 2026–27 academic year.
- Phase 3 (2027–2030): Shifts to a regional model where local authorities submit long-term plans to create nursery places through to 2030.

In Leeds, seven school-based nurseries were created or expanded in Phase 1 and up to another eight will be created in Phase 2. Arrangements for Phase 3 have not yet been agreed at the time of publication.

More information can be found by following this link -

[Establishing school-based nursery provision](#)

Part 2

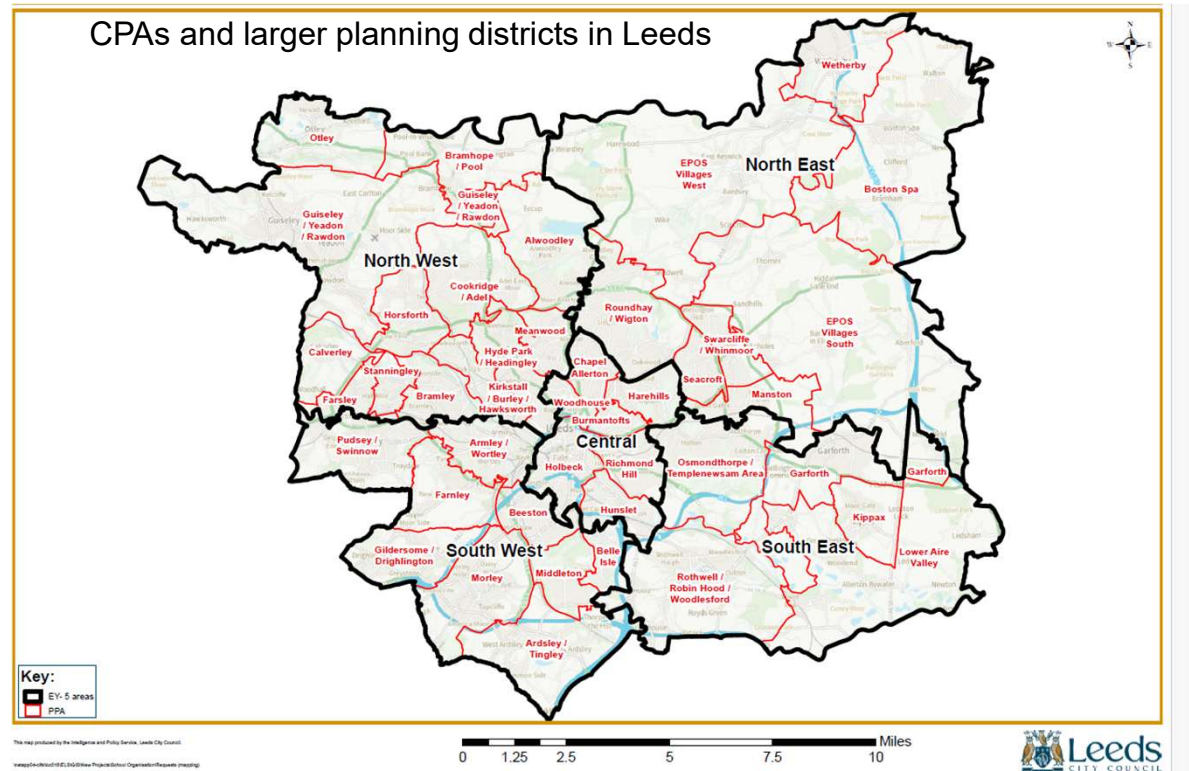
Early Years sufficiency planning

Early Years planning by area

There are 42 Childcare/Primary Planning Areas (CPAs/PPAs) in Leeds. For the purposes of Early Years planning, CPAs have been grouped into 5 larger geographical districts as shown on the map below.

Please refer to the appendix for details about which CPAs are in each Ward.

Early Years sufficiency work includes looking at the number of children living in each area by age to get an overall picture of demographic changes. The number of claims for FEEE by area and age group (demand) is then mapped against the estimated number of available Early Years places (supply) to calculate potential surplus and shortfall.



Part 2

Summary of Early Years provision

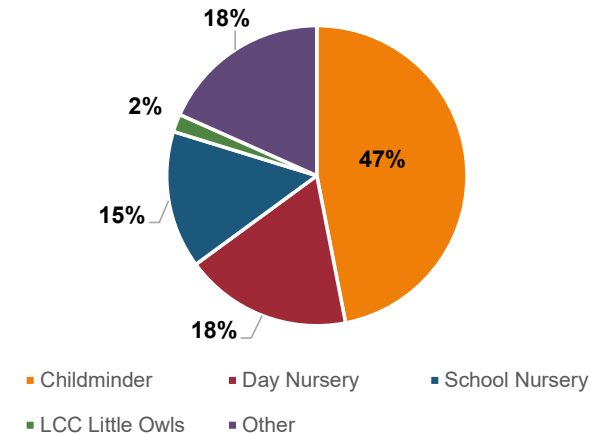
Slide 12

Early Years provision in Leeds

City Wide Provision by type	
Childminder	487
Day Nursery	187
School Nursery	154
LCC Little Owls	19
Other	190*
TOTAL	1038

* Includes other forms of childcare such as Out of school Clubs, playschemes, playgroups and creches.

City wide provision by type



The childcare market in Leeds

There is a rich mix of different types of Early Years provision across Leeds including:

- Full day care, which is typically open all year round and can be delivered by nurseries and preschools, childminders and Leeds City Council run provision (LCC Little Owls).
- Sessional care which is usually term time only and is offered for less than 8 hours per day.

- School nurseries which are part of an infant or primary school.
- Before and after school childcare which may be offered on the school site or elsewhere.
- School breakfast clubs.
- Holiday playschemes offering provision for Early Years and school aged children in some or all of the school holidays.
- Other, for example creches that provide care for less than 2 hours per day and are not Ofsted registered.

Part 2

Early Years provider breakdown by area - Central

Slide 13

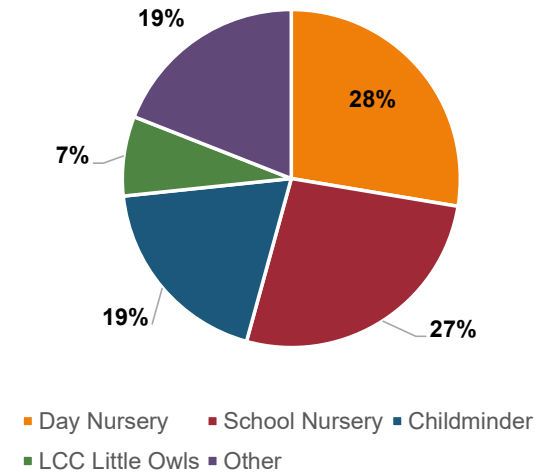
Early Years provision in Central

A breakdown of provision in the Central district of Leeds can be seen here.

Areas covered in this district are:

Central district CPAs
Burmantofts
Chapel Allerton
Harehills
Holbeck
Hunslet
Richmond Hill
Woodhouse

Central district by provision type



Central district by provision type

Day Nursery	29
School Nursery	28
Childminder	20
LCC Little Owls	8
Other	20
TOAL	105

Part 2

Early Years provider breakdown by area - North West

Slide 14

Early Years provision in North West

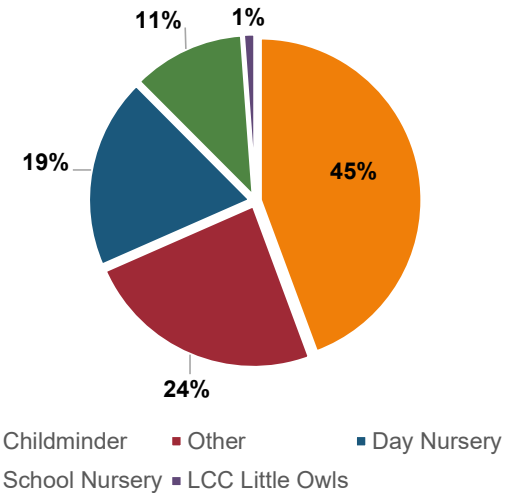
A breakdown of provision in the North West district of Leeds can be seen here.

Areas covered in this district are:

North West district CPAs

Alwoodley
Bramhope / Pool
Bramley
Calverley
Cookridge / Adel
Farsley
Guiseley / Yeadon / Rawdon
Horsforth
Hyde Park / Headingley
Kirkstall / Burley / Hawksworth
Meanwood
Otley
Stanningley

North West district by provision type



North West district by provision type

Childminder	153
Other	83
Day Nursery	66
School Nursery	39
LCC Little Owls	4
TOTAL	345

Part 2

Early Years provider breakdown by area - North East

Slide 15

Early Years provision in North East

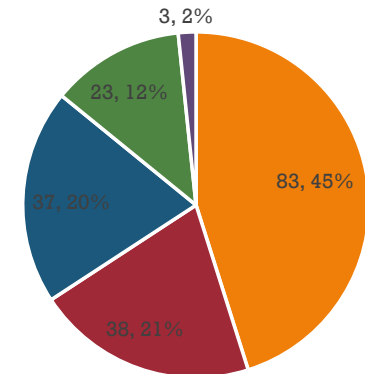
A breakdown of provision in the North East district of Leeds can be seen here.

Areas covered in this district are:

North East district CPAs

Boston Spa
EPOS Villages South
EPOS Villages West
Manston
Roundhay / Wigton
Seacroft
Swarcliffe / Whinmoor
Wetherby

North East district by provision type



Childminder Day Nursery Other
School Nursery LCC Little Owls

North East district by provision type

Childminder	83
Day Nursery	38
Other	37
School Nursery	23
LCC Little Owls	3
TOAL	184

Part 2

Early Years provider breakdown by area - South West

Slide 16

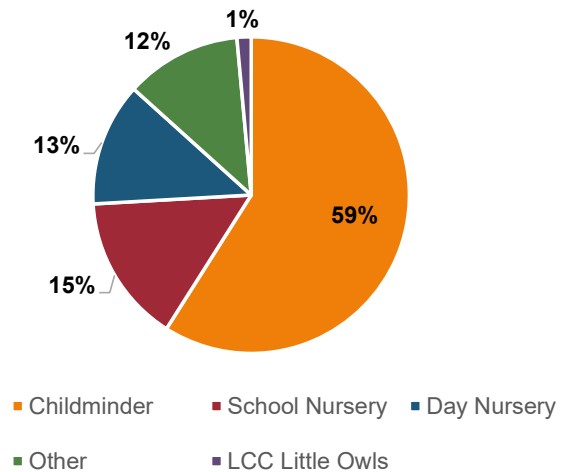
Early Years provision in South West

A breakdown of provision in the South West district of Leeds can be seen here.

Areas covered in this district are:

South West district CPAs
Ardsley / Tingley
Armley / Wortley
Beeston
Belle Isle
Farnley
Gildersome / Drighlington
Middleton
Morley
Pudsey / Swinnow

South West district by provision type



South West district by provision type

Childminder	164
School Nursery	42
Day Nursery	35
Other	33
LCC Little Owls	3
TOAL	278

Part 2

Early Years provider breakdown by area - South East

Slide 17

Early Years provision in South East

A breakdown of provision in the South East district of Leeds can be seen here.

Areas covered in this district are:

South East district CPAs

Garforth

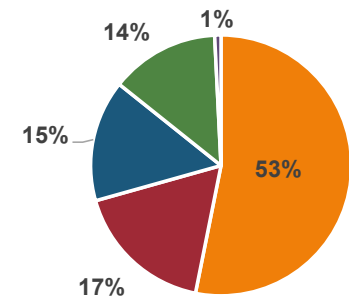
Kippax

Lower Aire Valley

Osmondthorpe / Templenewsam

Rothwell / Robin Hood / Woodlesford

South East district by provision type



Childminder School Nursery Day Nursery
Other LCC Little Owls

South East district by provision type

Childminder	67
School Nursery	22
Day Nursery	19
Other	17
LCC Little Owls	1
TOTAL	126

Part 2

Early Years provision - quality

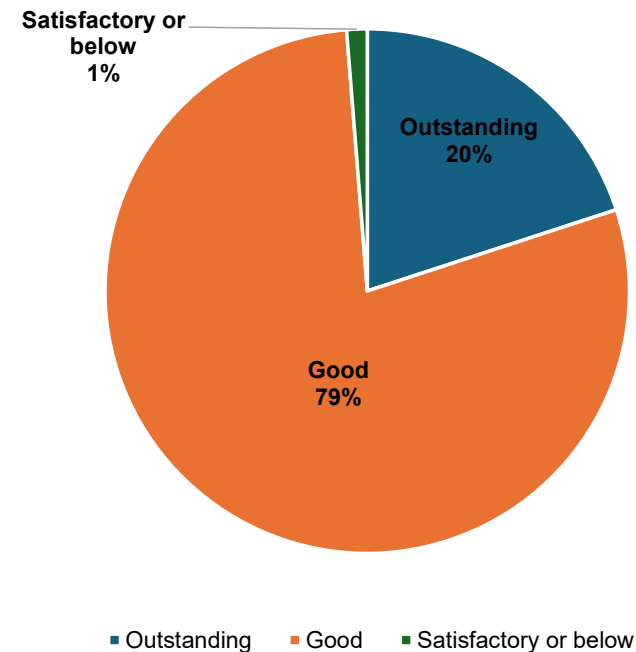
Slide 18

Early Years and Ofsted

The chart below shows the percentage of providers in Leeds and their most recent Ofsted inspection rating. This data is accurate as of March 2025.

The chart does not take into account the changes to the Ofsted inspection framework introduced in November 2025; these changes will be reflected in future CSA documents.

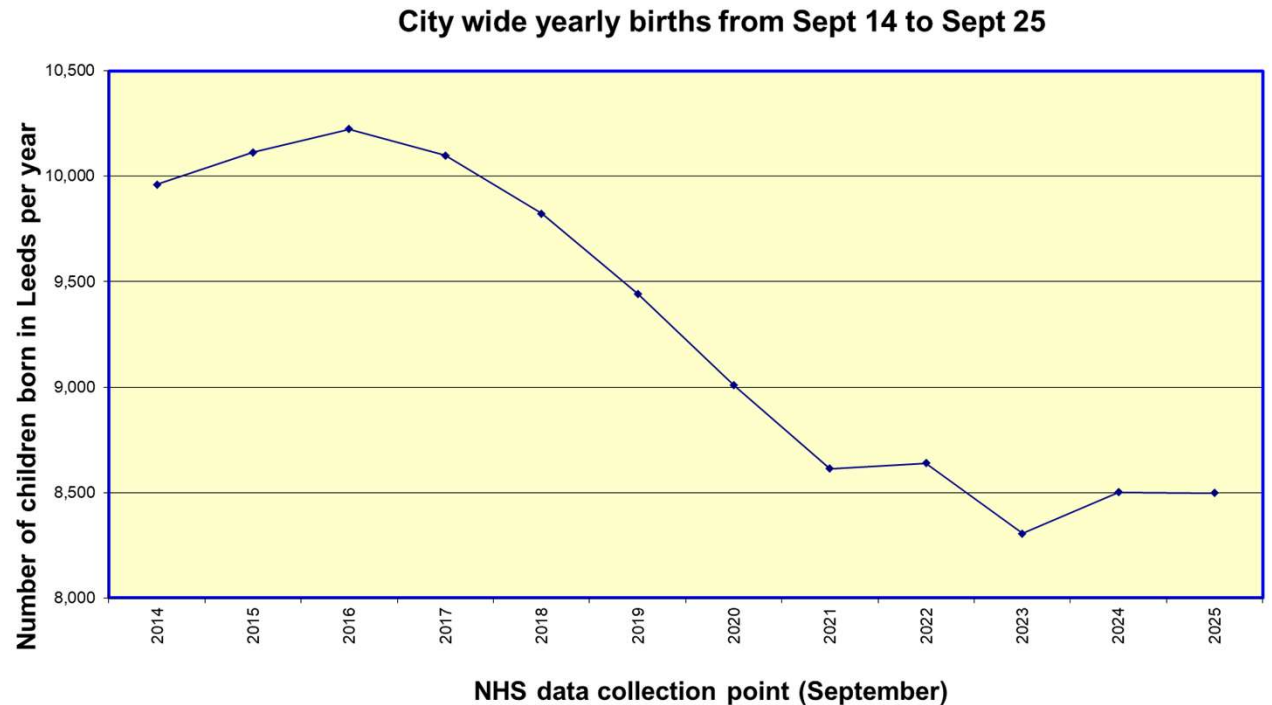
Early Years Providers Ofsted rating at last inspection



Part 2

City wide births

Demographic trends



As shown in the chart above, the birth rate in Leeds has changed significantly over recent years from highs of over 10,000 annually to around 8,500 in recent years.

This pattern reflects similar regional and national trends. In Leeds, many primary schools have seen the number of children entering Reception reduce recently.

Part 2

Demand for Early Years places – age groups

Estimating the number of Early Years children by age group

The number of children in each Early Years age group can be estimated using annual under 5s data (NHS data), however, the actual number of children living in each area of the city varies all the time as families move in and out. Estimating future numbers can also be difficult due to the age of the children. For example, some under 2s who will be eligible to claim before the next annual data is available will not have been born yet.

Early Years age groups also vary in terms of the timespan they cover. The following terminology is used to describe these:

- **Under 2s** are children aged 9 months to 2 years. It is estimated that the number of these children living in Leeds has decreased slightly from Autumn 2025 onwards.
- **2 Year Olds** are entitled to claim FEEE on this basis from the term after they turn 2 to the term after they turn 3. The size of this cohort is following the same trend as the birth rate in Leeds.

- **3-4 Year Olds** can claim FEEE from the term after they turn 3 until they start school. Depending on when their birthday is they can claim for 3, 4 or 5 terms as 3-4 Year Olds. The number of children in this cohort is estimated to be declining city-wide which is consistent with changes seen in the birth rate.



Part 2

Demand for Early Years places - claims

Claims data

As described in Part 1, some families are entitled to funded childcare depending on the age of their child(ren) and other circumstances. If they take up this offer, they will be claiming FEEE (funded early education entitlement). Local Authorities collect FEEE claims data regularly, and this information can be used as an indicator of demand for Early Years places.

Around 40% of families with children aged under 2 are currently claiming FEEE and this proportion appears to be rising, which may be linked to recent changes to entitlement in this age group. Typically, around 60% of all children aged 2 are accessing FEEE, and this proportion appears to be increasing, most likely due to more working families taking up their entitlement. The proportion of 3-4 year olds accessing FEEE is typically over 90%.

Estimating Early Years demand

Using methodology supported by the Department for Education (DfE), the most recently available FEEE claims data has been used in this assessment to give an estimate of current demand for Early Years places.

Claims data is produced annually for children aged 3 to 4, so the Summer 2025 dataset has been used for this age group. For children aged 2 and under, claims data is produced termly, so figures from Autumn 2025 have been used.

The Autumn 2025 claims set is the first one covering the extended entitlement where working families of children aged 9 months to 4 years can claim up to 30 hours FEEE per week for 38 weeks per year.

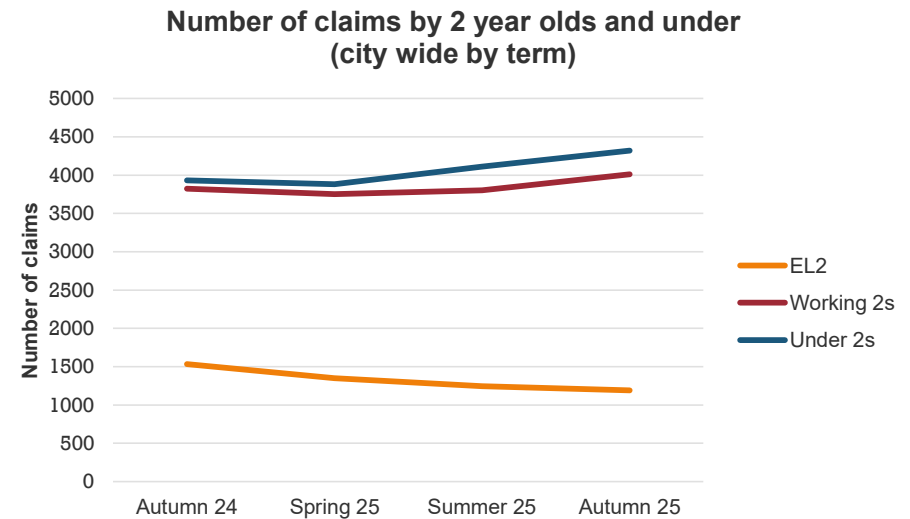
Demand has been estimated using claims based on where children live. While some families use provision outside their local area, grouping smaller areas together provides a reliable picture of overall demand. This analysis groups the 42 CPAs into five larger districts.

There are other limitations with using FEEE claims data to estimate demand including that some children in Early Years settings do not qualify for or claim FEEE. Also, some children attend more than one setting.

Part 2

Demand for Early Years places - trends

Trends in FEEE claims data



Number and percentage of FEEE claims

As the extended entitlement has become embedded there have been changes in the number of FEEE claims for children aged 2 and under in Leeds. The graph above shows that over the period from Autumn 2024 to Autumn 2025, the number of claims by working families with children aged 2 and under have increased. Over the same period, the number of claims by Early Learning 2-year-olds has declined.

The number of Early Learning 2-year-olds changes from term to term, so the percentage take up of entitlement is also important. The DfE has recently issued all local authorities with a scorecard for this, and for Leeds the figure for Autumn 2025 was 63.8%. The mean take up by local authorities in the Yorkshire and Humber region was 73.6%. An ongoing priority in Leeds is to increase the percentage of Early Learning 2-year-olds taking up their entitlement.

Part 2

Supply of Early Years places – capacity

Slide 23

Provider capacity information

Having an accurate understanding of the supply of Early Years places requires up to date and detailed information about provider capacity. A survey was undertaken in December 2025 / January 2026 to gather this information, and we are grateful to the 340 providers who shared information about their settings as part of this process.

Typical barriers to gathering accurate provider capacity information include the complexities around describing vacancies (age of children attending / potentially attending), staffing limitations meaning that physical capacity and operating capacity

might be different and natural variations in how many children are present.

Although the capacity information gathered recently has been useful, we have also referred to Ofsted registration information to produce a meaningful estimate of the supply of Early Years places by area. We acknowledge that this may not be accurate in all cases as providers may be operating with fewer or more places than stated on their Ofsted registration.

An ongoing priority for us is to develop processes to gather detailed provider capacity information on a regular basis.

Results from provider capacity survey (Dec 25/Jan 26)

Capacity across all types of setting

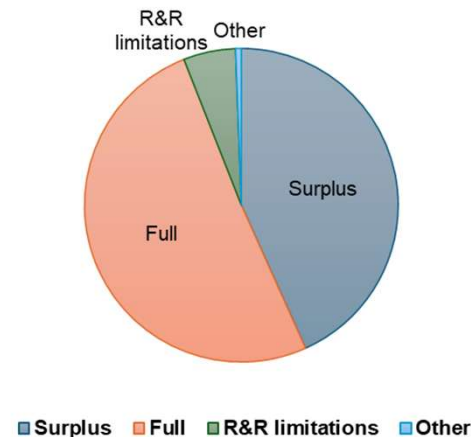


Chart labels / provider responses

- Surplus – setting potentially has more capacity than is currently being used.
- Full – no spare capacity.
- R&R limitations – the supply of places is restricted by staff recruitment and retention.
- Other – various.

Part 2

Supply of Early Years places - survey

Slide 24

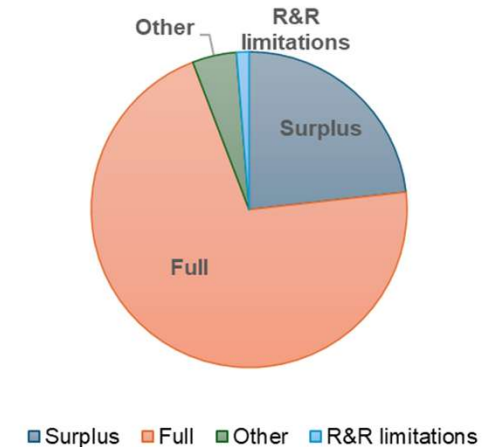
Provider capacity survey (December 25/January 26)

These charts show the proportion of survey respondents who reported having surplus places, were full or have limitations to capacity due to recruitment and retention issues.

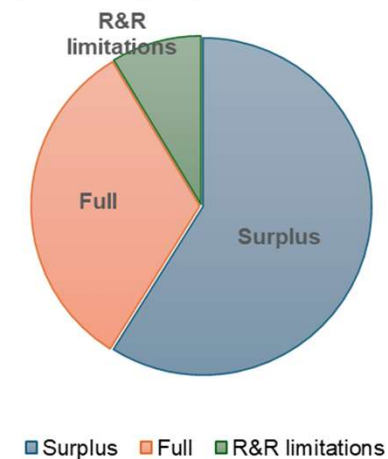
Chart labels/provider responses

- Surplus – setting potentially has more capacity than is currently being used.
- Full – no spare capacity.
- R&R limitations – the supply of places is restricted by staff recruitment and retention.
- Other – various.

Capacity of 155 Childminding settings



Capacity of 185 group based/school settings



Part 2

Comparing demand with supply

Slide 25

Sufficiency of Early Years places in Leeds

City wide summary

District (see map on slide 11)	Estimated surplus / shortfall in Early Years places for Summer 2026
Central	37.70%
North East	8.60%
North West	22.00%
South East	-2.30%
South West	4.30%
Total	15.90%

City wide analysis

Analysis of supply and demand has produced an estimate of the surplus /shortfall in Early Years places by age group for the summer term 2026.

Although there is some shortfall in the number of places for under 2s, there is surplus for 2-year-olds and 3-4 year olds. Overall, it is estimated that there will be **15.9%** surplus places for Summer 2026. Whilst one district, South East is showing a slight shortfall, there is surplus in neighbouring districts and no sufficiency

issues have been reported. Further work will be undertaken to understand more about supply and demand in this area.

Taking account of variability in Early Years place supply across Leeds and recognised lags in the data available, the evidence at the time of writing – including recent analysis and feedback from families – suggests that overall supply is broadly keeping pace with demand. This position is supported, in part, by the expansion of the funded early education entitlement (FEEE).

Part 3

Current Early Years priorities and actions

Slide 26

Looking ahead – Early Years Sufficiency

Priorities*	Actions
Best Start in Life Strategy	• Have a clear focus across all Early Years sufficiency work on school readiness and measurable Good Levels of Development (GLD).
School-Age Childcare (SAC)	• Deliver additional wraparound childcare places with an ambition to support children with SEND to access these places. • Support expansion and awareness of Free Breakfast Clubs. • Develop links between breakfast clubs, wraparound care and HAF. • Collect and analyse SAC data to identify gaps in provision.
Increase uptake of the Early Learning entitlement for 2-year-olds	• Improve the availability of places to support take-up of early education entitlements, for example through the School Based Nursery 3 scheme.
Development of the CSA	• Undertake regular provider capacity surveys. • Develop methodology for estimating future demand. • Produce and publish area summary sheets for Early Years. These will complement summary sheets that are already available as part of our primary and secondary place planning work. • Undertake regular parent/carer surveys to aid understanding of childcare needs.

*These represent indicative areas for development and remain subject to funding certainty, workforce capacity and wider system pressures.

Part 3

Contact us

Contact us

Please get in touch if you have any comments or questions.

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0113 378 5945

Thank you for reading.

Slide 27

