ValuingTools

Teaser

Youth English Institute

Opportunity for transfer

Children's and youth language education center with international methodology

Appreciation	
Enterprise value	+ 750,000 €
Net Financial Debt	- 36,400 €
Equity value	**= 713,600 €**
EBITDA Multiple	5.6x

KPIs	2025
Turnover	1.0M €
EBITDA	130k €
Liquid Result	65K €

- ❑ Educational operation dedicated to teaching English to children and young people, integrated in an international network with its own methodology, structured pedagogical content and consolidated experience in the segment.
- ❑ The activity is developed through three centers in operation, with a constituted team, an active student base and a practical, participatory teaching model adapted to different learning profiles.
- ❑ The business is aimed at families who value the early development of language skills, benefiting from a differentiated educational proposal and a demand with the potential for recurrence throughout the students' school career.

1. Investment thesis

- ✓ The opportunity allows immediate entry into the specialized education segment, through the acquisition of three units already in operation, with a pedagogical and administrative team constituted, an active portfolio of students and installed capacity.
- ✓ The operation benefits from integration into an international education network, with structured pedagogical methodology, its own materials, defined processes and recognition among families looking for differentiated learning solutions for children and young people.
- ✓ In addition, the business has growth potential through greater commercial dynamism, strengthening of the digital presence, development of local partnerships with schools, colleges and study centers, and better use of the existing capacity in the units.

2. Other indicators 2025

Net Margin	FCFF	Payment Term	Receipt Deadline	CAGR
6.6%	73,415€	106 days	65 days	6.84%

Note: The values presented were prepared based on the information provided by the company, and may reflect final or provisional data at the date of their sharing.

3. Opportunity

The opportunity allows it to acquire a multi-unit operation already tested in the market, with a team, an active student base and operational processes in operation. For a buyer, the main potential lies in the professionalization of the commercial component, in the reinforcement of the occupation of existing units and in the development of local partnerships that increase the attraction and retention of students.

As it is an operation that has already been implemented, the project allows for the acceleration of entry or expansion in the children's and youth language education segment, with less operational risk compared to the opening of centres from scratch.

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Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Revenue	**1,025,671**	**1,076,954**	**1,130,802**	**1,187,342**	**1,246,709**
growth (%)	*2.5%*	*5.0%*	*5.0%*	*5.0%*	*5.0%*
Cost of goods sold	-203,083	-213,237	-223,899	-235,094	-246,848
Gross profit	822,588	863,717	906,903	952,248	999,861
Gross margin %	*80.2%*	*80.2%*	*80.2%*	*80.2%*	*80.2%*
Payroll expenses	-259,000	-271,950	-285,548	-299,825	-314,816
Supplies and external services	-395,909	-415,704	-436,490	-458,314	-481,230
Other operating income	18,462	19,385	20,354	21,372	22,441
Other operating expenses	-44,104	-46,309	-48,624	-51,056	-53,608
EBITDA	142,037	149,139	156,596	164,426	172,647
EBITDA margin %	*13.8%*	*13.8%*	*13.8%*	*13.8%*	*13.8%*
Depreciation & amortization expenses	-17,661	-18,286	-14,647	-2,187	-2,812
EBIT	124,376	130,853	141,949	162,238	169,834
EBIT margin %	*12.1%*	*12.2%*	*12.6%*	*13.7%*	*13.6%*
Financial expense	-13,303	0	0	0	0

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Income statement estimated (€)

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	2026E	2027E	2028E	2029E	2030E
EBT	111,073	130,853	141,949	162,238	169,834
EBT margin %	*10.8%*	*12.2%*	*12.6%*	*13.7%*	*13.6%*
Tax expense	-23,325	-27,479	-29,809	-34,070	-35,665
Net Income	**87,748**	**103,374**	**112,139**	**128,168**	**134,169**
Net income margin %	*8.6%*	*9.6%*	*9.9%*	*10.8%*	*10.8%*

Cash-flow statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Net income	87,748	103,374	112,139	128,168	134,169
(+) Depreciation & amortization expenses	17,661	18,286	14,647	2,188	2,813
Δ to net working capital	-2,565	-5,202	-5,512	-5,787	-6,077
Operational cash-flow	**102,844**	**116,458**	**121,275**	**124,568**	**130,905**
Δ other liabilities	0	0	0	0	0
Δ long-term financial investiment	0	0	0	0	0
CAPEX	-5,000	-5,000	-5,000	-5,000	-5,000
Cash-flow after investment	**97,844**	**111,458**	**116,275**	**119,568**	**125,905**
Δ short-term debt	-27,903	0	0	0	0
Δ long-term debt	-17,367	0	0	0	0
Δ equity	0	0	0	0	0
Cash-flow after financing	**52,574**	**111,458**	**116,275**	**119,568**	**125,905**
Cash balance	61,437	172,894	289,169	408,737	534,642

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