

## PRESS RELEASE

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### LÜNENDONK LIST: TEMPORARY STAFFING BUSINESSES CONTINUE TO GROW IN 2022

- **Top 25 temporary staffing businesses increased their revenue by 13.5 per cent in 2022**
- **Leading companies employed 4.2 per cent more temporary workers**
- **Ranking shaped by several takeovers**
- **New Lünendonk List now available for free**

**Mindelheim, 16 May 2023** – The leading 25 temporary staffing businesses in Germany grew by an average of 13.5 per cent in 2022, a significantly faster rate than the overall German economy. The staffing service providers simultaneously expanded their temporary staffing pools by 4.2 per cent. The demand for flexible staffing thus remains at a high level, despite the uncertain economic situation. The differing revenue and staffing rates point to the impact of wages on the figures, due in part to an increase in the minimum wage in October 2022. The result was a 14.8 per cent uplift for pay group 1 alone compared with the applicable minimum wage for temporary work in the previous year.

These are the initial findings of the Lünendonk Survey 2023 *Temporary Staffing Businesses in Germany*. As a pre-release, the Lünendonk List of the twenty-five leading providers in the market is now available to download free of charge from [www.luenendonk.de](http://www.luenendonk.de).

**Top 10 in detail**

Market leader Randstad increased its revenues by 6.3 per cent. With earnings of €2,014.0 million, it returned to 2019 levels. Second-placed Adecco recorded the strongest growth of the twenty-five companies in the List in absolute terms, with takings up 35.7 per cent. Its revenues of €1,651.0 million (+€434.0 million) saw the company earn more than twice as much as third-placed Persona Service (2022: €781.8 million, +5.7 %).

House of HR Germany (€ 734.9 million, +9.8 %) improved its ranking, including via acquisitions of Solcom and Docstr, overtaking ManpowerGroup (€503.0 million, -7.5 %) and for the first time taking fourth place in the Lünendonk List. House of HR also acquired fellow List company Pluss in 2023 (rank 20; 2022: €158.5 million), with the latter's figures to be included in House of HR's from next year.

Dekra Arbeit held on to sixth place, increasing revenues by 23.2 per cent to €465.7 million and widening the gap to Nuremberg's I.K. Hofmann, the latter earning €412.5 million in 2022. Hays generated income of €393.0 million (+26.1 %), again trading places with Tempton, now in ninth place. New in tenth place is RGF Staffing Germany, with growth of 26.1 per cent to €348.4 million, moving ahead of Augsburg-headquartered Orizon in the rankings (eleventh place; €332.7 million, +48.2 per cent).

**Further changes in the rankings**

While previously only PEAG Personal was included in the Lünendonk List, this year the entire holding company has been featured, resulting in the firm taking sixteenth place. The business generates the majority of its revenues of €251.3 million from agency staffing.

AIDe (ranked 21) and Studitemps (ranked 23) make it into the top 25 for the first time. AIDe recorded the strongest growth in relative terms among List companies at 56.4 per cent. The firm reported its dramatic growth as largely being organic, although the acquisition of the insolvent CiP businesses also contributed. AIDe has already announced the further acquisition in 2023 of Argo GmbH.

A sub-ranking has also been added this year, listing companies that are relevant to the market but which do not meet the inclusion criteria of the main ranking. In addition to predominantly captive providers such as AutoVision and DB Zeitarbeit, a number of highly specialised companies also feature here. Doctari, Felten and Pacura med are personnel service providers for the healthcare sector each generating revenues of more than €150 million.

### **Trend towards consolidation**

Yet again in the 2022 financial year the temporary staffing market was shaped by a number of acquisitions, including those of Akka, Solcom and diwa. This momentum is continuing: the acquisition of Pluss by House of HR and of Runtime by Synergie were among those announced in the opening months of 2023. Another two List firms, then, are expected to be consolidated into other companies in the coming year.

Lena Singer, Project Manager and Consultant at Lünendonk & Hossenfelder, comments: 'The acquisitions of the last few years show that staffing service providers are growing via takeovers and increasingly tapping into new skillsets. They are thus broadening their portfolios to be able to offer their customers flexibility as total service providers in times of labour shortages.'

**Related publication**

The new Lünendonk List 2023 *Leading Temporary Staffing Businesses in Germany* is available now for free download from [www.luenendonk.de](http://www.luenendonk.de).

Lünendonk's detailed Survey is expected to be published at the end of June 2023 and features extensive segmental and long-term analysis. The comprehensive survey covers 81 service providers operating in Germany. It can be pre-ordered now at a price of €2,400 (plus VAT) from [www.luenendonk.de](http://www.luenendonk.de).

**You can find this press release on the Internet at:**

<https://www.luenendonk.de/presseinformationen/>

**Company profile****Lünendonk: background information**

Lünendonk & Hossenfelder, based in Mindelheim (Bavaria), has been analysing the European business-to-business (B2B) services markets since 1983. Their market researchers focus on the digital & IT and business consulting sectors, the audit, tax & advisory market as well as real estate services and the staffing industry (temporary employment, IT workforce).

The company's portfolio include surveys, publications and benchmarks as well as consultancy on trends, pricing, positioning and contracting procedures. The large pool of data at Lünendonk's disposal means the firm's recommendations to clients are based on unique insights. The market research and consulting company has now been publishing the Lünendonk® Lists and Surveys, regarded as market barometers, for decades.

With years of experience, deep understanding, a brilliant network and a passion for people and market research, Lünendonk and its consultants are sought-after among service providers, their customers and indeed journalists for their expertise. Each year, Lünendonk partners with a jury from the media to honour deserving companies and entrepreneurs with the Lünendonk Service Awards.

**Further information**

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