



LÜNENDONK „

Lünendonk®-Survey 2025

Temporary Staffing in Germany

Revenue • Markets • Structures • Trends

A Survey by Lünendonk & Hossenfelder

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Foreword

Dear Readers,

These remain challenging times for the temporary staffing industry, as clearly shown by the latest Lünendonk Survey. The market for temporary staffing market contracted for the second consecutive year in 2024, with its volume declining by 3.1 per cent compared to the previous year. However, there is an important glimmer of hope: despite the challenging environment, nearly three-quarters of the companies surveyed stated that they consider themselves well positioned for the future.

Another remarkable finding of the survey is that the overwhelming majority of staffing service providers cite staff shortages as the main reason for the current situation, rather than bureaucracy or excessive regulations. It is therefore completely incomprehensible that the coalition agreement of the new federal government does not mention opening up temporary work to foreign skilled workers from non-EU countries at all. In view of the demographic change and its consequences for German companies, the lifting of the employment ban is long overdue. Small and medium-sized companies in particular often lack both the expertise and the resources to successfully recruit urgently needed employees from non-EU countries themselves. By unleashing temporary work in this way, staffing service providers could make an important contribution with their expertise in staff recruitment in order to effectively support the German economy in securing skilled labour.

The fact is: to revitalise the sluggish German economy, staffing service providers are needed more urgently than ever. After all, an upswing is not possible without sufficient staff. For this reason, it is essential that the framework conditions for staffing service providers are significantly improved. This includes opening up temporary work to people from non-EU countries, granting equal access to funding opportunities from the Federal Employment Agency for the temporary work sector, and abolishing existing sector-specific restrictions — particularly in the construction and meat processing industries. Additional bans, whether in healthcare or logistics, must be avoided. Otherwise, any potential recovery risks being stifled at a critical juncture.



Florian Swyter
GVP Managing Director



FOREWORD

Temporary Staffing in Germany

One thing is absolutely clear: as the central industry association, the General Association of Personnel Service Providers will continue to campaign vigorously in the current legislative period to finally resolve these key issues for our industry so that it can play an even stronger key role in the modern working world of the future.

I wish you a stimulating read.

Yours, Florian Swyter,
GVP Managing Director



Management Summary

- In the 25th Lünendonk® survey on temporary staffing in Germany, 87 staffing service providers were included.
- The market volume of the German temporary staffing market fell by 3.1 per cent compared to the previous year and stands at 31.9 billion euros.
- Adecco achieved first place in the Lünendonk list for the first time, with revenues of 1.747 billion euros.
- Top 25 generate a total domestic revenue of 10.2 billion euros in 2024 and employ a total of 163,462 temporary staff.
- 76 per cent of all service providers recorded a decline in revenue.
- The weak economy is the biggest obstacle to success for over two thirds of all respondents.
- The industry sector remains the most important customer group, accounting for an average of 54 per cent of total revenue.
- For 2025, the survey participants forecast an average revenue growth of 5.9 per cent.

31.9 Billion €

Market volume declines again by 3.1 per cent

4 Per cent

Top 25 record revenue decline -few players with revenue growth

6.8 %

Average change of internal employees in compared to the previous year

AI

46 per cent of all respondents already use AI regularly



Introduction

THE SUFFERING OF THE TEMPORARY STAFFING INDUSTRY CONTINUES – OUTLOOK FOR 2025 BRINGS HOPE

The trend of declining market volume, which saw a 3.1 per cent drop in the previous year, is set to continue into 2024. According to Lünendonk calculations, the approximately 728,000 people employed in temporary staffing will generate a market volume of 31.9 billion euros in 2024. This means that the total volume of the German market for temporary staffing continues to decline. The number of personnel has also been declining since 2022 and has reached a low point.

IN THE FIRST HALF OF 2024, AN AVERAGE OF 727,874 PEOPLE WERE EMPLOYED IN TEMPORARY WORK – 93 PER CENT OF THEM WERE SUBJECT TO SOCIAL SECURITY CONTRIBUTIONS

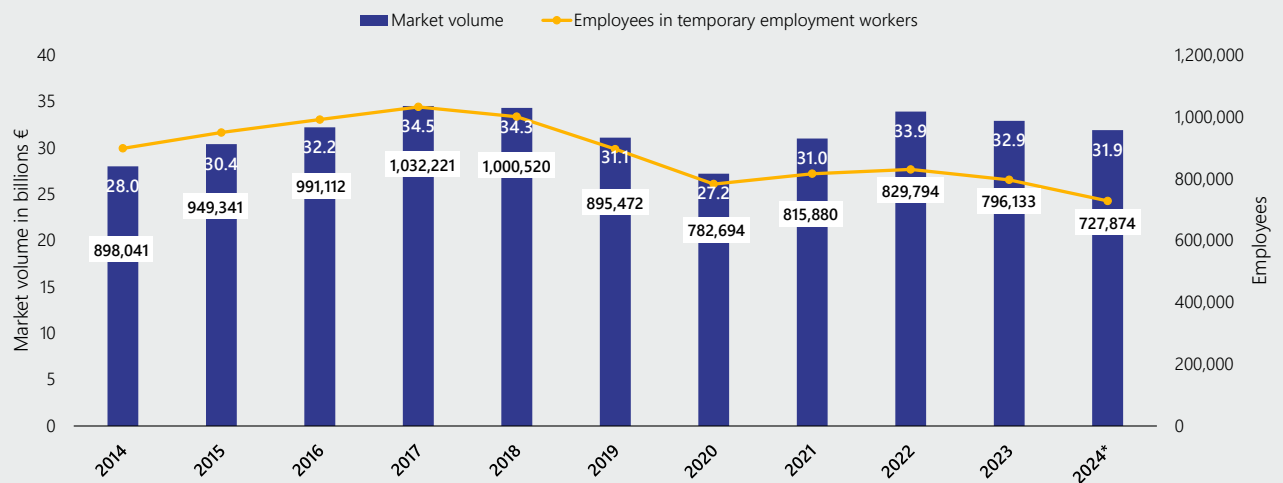


Fig. 1: Number of employees in temporary work in Germany, annual average 2014 to 2024; source: Federal Employment Agency/GVP statistics, data as at 30/06/2024.

Market volume with temporary staffing in Germany in billions of euros; calculation by Lünendonk & Hossenfelder GmbH

CLASSIFICATION OF SURVEY PARTICIPANTS ACCORDING TO DOMESTIC REVENUE

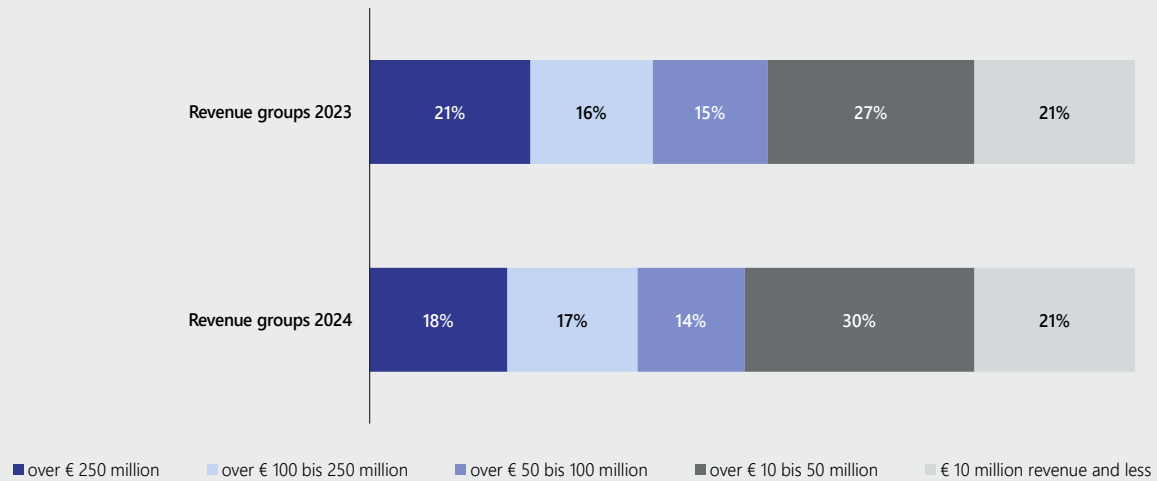


Fig. 2: Domestic revenue classes 2024 and 2023; consolidated revenue for corporate groups; all companies; frequency distribution; n = 87

RELIABLE FIGURES, DATA AND FACTS

Lünendonk has always placed particular importance on the quality of its data. Therefore the data is collected using structured questionnaires rather than online questionnaires. A key element of Lünendonk® surveys is a detailed review of the questionnaires to ensure the reliability and comparability of the data. In addition, Lünendonk validates the company information using publicly available information. The information provided by survey participants is treated confidentially by Lünendonk & Hossenfelder GmbH. In this survey, the participants' responses are therefore not presented in relation to specific companies, but only as statistical overall evaluations. Only revenue and employee figures are published company-related.

Information from expert discussions, evaluations of media and publicly accessible databases, as well as other publications such as the Lünendonk Economic Index Temporary Staffing, trend surveys or information services are also included in the survey in order to supplement the data from the survey (January to April 2025) in a meaningful way. Together with the General Association of Personnel Service Providers, Lünendonk wishes you an interesting read.

Yours sincerely, Jörg Hossenfelder,
Managing Partner, Lünendonk & Hossenfelder



Artificial Intelligence

ARTIFICIAL INTELLIGENCE AS ADDED VALUE FOR THE TEMPORARY STAFFING INDUSTRY

In recent years, artificial intelligence has raised high expectations, particularly in human resources, but also across the economy as a whole. In the temporary staffing industry, characterised by high transaction volumes, large amounts of data and repetitive processes, AI has the potential to significantly improve efficiency, quality and differentiation. While many companies are still in the orientation phase, initial application examples and pilot projects demonstrate that AI is not just a future subject – it can generate concrete added value today.

Just under half of the survey participants (46 %) already use AI applications. A total of 39 per cent is still in the experimental phase, but 13 per cent – more than one in ten – have no AI experience whatsoever. It can be assumed that these figures will increase relatively quickly due to the wide range of potential applications. These areas of value creation are discussed in more detail below.

ALMOST HALF OF COMPANIES ALREADY USE AI ONLY TWO PER CENT DO NOT PLAN TO USE AI

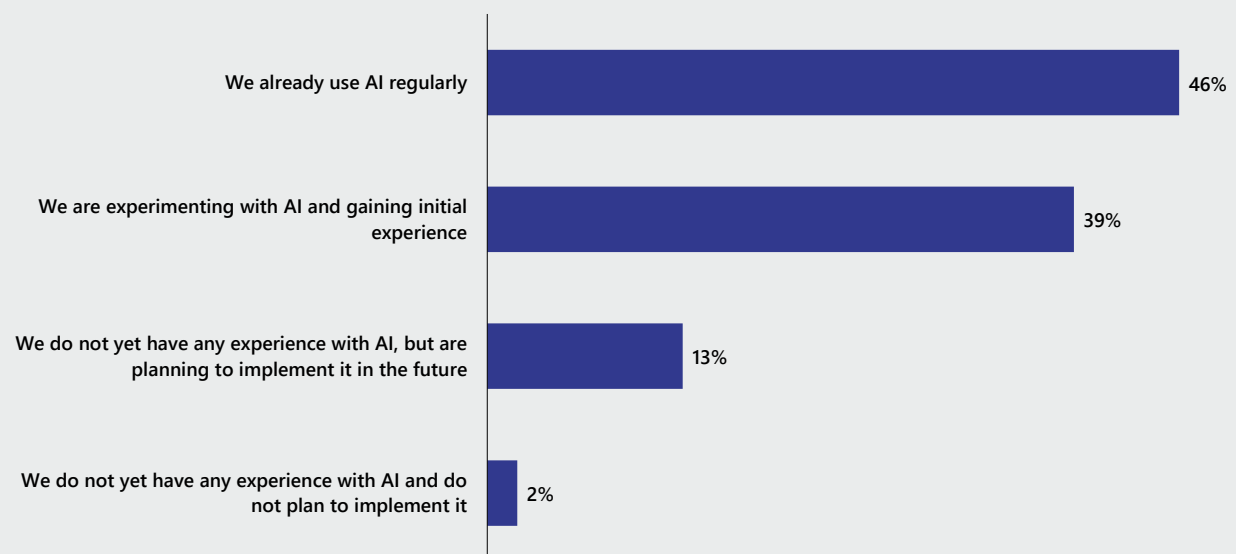


Fig. 57: To what extent does your company use AI?; all companies; frequency distribution; n = 46



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ABOUT LÜNENDONK & HOSSENFELDER

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

The portfolio includes surveys, publications, benchmarks and consulting on trends, pricing, positioning, or contracting procedures. The large data pool enables Lünendonk to derive insights with a view to making recommendations for taking action. For decades, the market research and consulting company has published the "Lünendonk® Lists and Surveys", which are regarded as market barometers.

Many years of experience, in-depth know-how, an excellent network and, by no means least, a passion for market research and people make the company and its consultants sought-after experts for service providers, their customers, and journalists. Every year, Lünendonk and a media jury honour deserving companies and personalities with the Lünendonk B2B Service Awards.



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