



Global



Market Information and Forecasts

Largest Global Staffing Firms 2021

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Key Findings

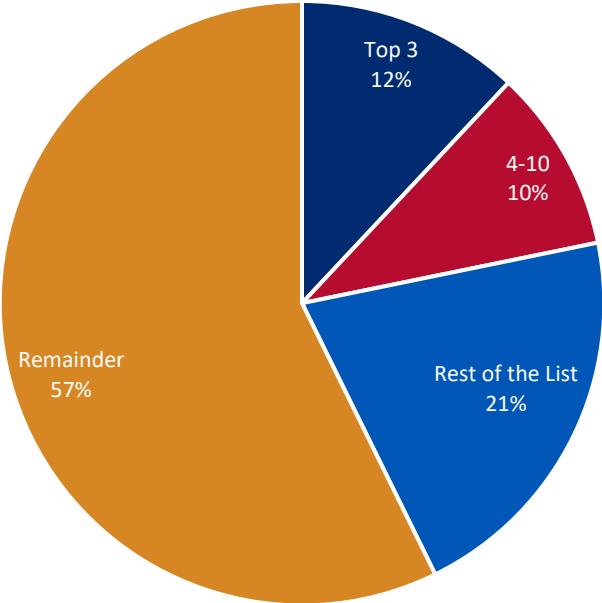
- The 100 firms on our list of the world's largest staffing firms had combined revenue (see page 12) of \$ 206.2 billion (€ 180.6 billion) in 2020.
- The order of the top 3 ranked firms is unchanged this year. With Randstad, as the world's largest staffing firm, followed by Adecco Group and ManpowerGroup. Their combined market share of just under 12% is slightly down from last year (14%).
- The top 10 firms account for almost 22% of total revenue, less than last year (25%). The top 100 firms represent 43% of the total market, just below the previous year (45%).
- Thirty-eight staffing firms on this list are headquartered in EMEA, while 41 are headquartered in North America and 21 in Asia (page 4).
- Seven companies no longer make the list because their revenue is no longer large enough, and two firms from last years list have now merged (page 5). Five firms specialise in executive search/headhunting (page 6). Overall, 40 firms are listed, including two headhunters.
- The complete list can be found from page seven onwards. Finally, our definition of staffing, place & search, and this report's methodology can be found on page twelve.
- We have ranked companies by revenue for staffing and place & search combined according to industry custom. However, this ranking should not be taken to imply that a firm with a higher rank necessarily provides better service to customers or more value to its stakeholders.
- Staffing firms vary in degree of financial transparency, and even when forthcoming with information, in some cases, data provided was adjusted for greater accuracy and consistency. Therefore, for all firms in this report, revenue shown should be considered an estimation by Staffing Industry Analysts.
- This report is best read in conjunction with our [Global Staffing Market Estimates & Forecast](#)

Understand where your suppliers or competitors are positioned and the structure of the global marketplace.

Market Composition – Top 10 Largest Staffing Firmss

- We estimate that the global staffing market was worth approximately \$482.5 billion (€423.3 billion) in 2020*. The 100 firms on our Largest Global Staffing Firms List had total revenues of \$ 206.2 billion (€ 180.6 billion) in 2020, representing 43% of total global revenue.
- Randstad is the world’s largest staffing firm, although it only has a global market share of 4.5%, showing how staffing remains a highly fragmented industry. Adecco is in second place with a market share of 4.1%, and Manpower is third with a market share of 3.4%. The combined market share of this top 3 is a little under 12%, which is slightly down from last year.
- Japanese-listed firm Recruit Holdings is in 4th place, and Allegis Group, the world’s largest privately-owned staffing company, is in 5th. For the 3rd year in a row, these two companies are in the same places.
- UK-listed Hays and Japanese-listed Persol maintain their 6th and 7th places, respectively. Kelly Services has moved up one place to 8th, and Robert Half down one place to 9th. Japanese firm Outsourcing has moved up one spot to claim 10th place.
- Overall, the top 10 firms have a 22% market share. Below 7th place, no company has more than a 1% global market share. A total of 47 companies on our list have revenue of over \$1 billion (the same number as last year).

Market Composition 2020



Source: Staffing Industry Analysts

* see SIA’s [Global Staffing Market Estimates & Forecast](#)

Market Composition - Geography

- The companies in our list are headquartered in one of 15 countries. The US is home to the largest number at 41 (last year was 36), followed by the UK with 14 (18). This year we have identified 14 companies in Japan and 8 in France, both the same number as last year.
- In total, there are:
 - 38 companies headquartered in EMEA (43 last year).
 - 41 companies headquartered in the Americas, all in the United States (36 last year).
 - 21 companies headquartered in APAC (same last year).
- Most of the companies in our list operate in multiple countries—as many as 80+ in the case of ManpowerGroup. However, a few have grown exclusively in one market, mainly in Japan and the US.
- We have been trying to penetrate the opaque Chinese market. The data for Beijing FESCO (27th), CIIC (12th) and Shanghai FSG (21st) are our best estimates. Beijing FESCO has had a joint venture with Adecco since 2010. While in 2020, FSG invested in Singapore based TG Human Resource Services and now has a “services network” in nine countries outside China, including Hong Kong, Taiwan and Macau.

Country Breakdown

Country for HQ	Number of Staffing Firms
USA	41
Japan	14
UK	14
France	8
China	4
Netherlands	4
Italy	3
Belgium	2
Germany	2
Switzerland	2
India	2
Australia	1
Austria	1
Ireland	1
South Africa	1

Market Composition – Added/Deleted/Acquired

- There are eight new companies in this year’s report, the same number as last year. One firm is in France, and the remaining seven are in the US. The highest new entrant is Workrise (53rd), which focuses on the construction, energy and defence sectors. The company states its “goal is to revolutionize the industry, using technology to streamline everything from recruiting to payments”. The French firm Triangle is just behind (56th). It has 250 branches across Europe and has grown in part by acquiring firms such as Presto Travail Temporaire in Luxembourg and Selectiva en Espagne in Portugal.
- The following companies have fallen out of the largest 100 because of the size of their revenue: Cordant (51^{st*}), Sanderson Solutions (88^{th*}), Agilitas (89^{th*}), RGP (Resources Connection) 90^{th*}, DEKRA Arbeit (91^{st*}), Strategic Workforce Solutions (98^{th*}) and Aquent (100^{th*}). The ranking was their place last year (marked with an *)
- NES Fircroft (24th) now appears as one company following the merger of NES Global Talent (28^{th*}) and Fircroft (45^{th*}). In [November 2020](#), Outsourcing Inc. (10th), the third-largest staffing firm in Japan, announced that it had agreed to acquire Irish recruitment firm CPL Resources (75th). Their combined revenue of \$4086.8 billion would have put the group in 8th place.

Highest new entrants

workrise [™] formerly
RigUp

 **Triangleintérim**
Solutions RH



Executive Search Firms

- Five Executive Search Firms are included in our ranking of the Top 100 largest global staffing firms (see table).
- Egon Zehnder is still the highest ranked executive search firm and the largest privately-owned headhunter. It also increased its place in the rankings this year. Spencer Stuart and Russell Reynolds also moved up the rankings by 3 and 8 places respectively.
- However, the two listed staffing firms Korn Ferry listed on the New York Stock Exchange and Heidrick & Struggles, listed on the NASDAQ, saw their rankings fall.

Rankings for executive search firms

Executive Search	Rank 2021	Rank 2020
Egon Zehnder	67	70
Spencer Stuart	73	76
Korn Ferry	79	71
Russell Reynolds Associates	86	94
Heidrick & Struggles	90	81

Largest Global Staffing Firms based on 2020 revenues

Rank	Company	Company Website	HQ Country	2020 Revenue €m	2020 Revenue \$m	Market Share %	Rank in prior year	Listed
1	Randstad	www.randstad.com/	NL	19,133.8	21,842.6	4.5%	1	Y
2	The Adecco Group	www.adecco.com/	CH	17,151.7	19,580.0	4.1%	2	Y
3	ManpowerGroup	www.manpowergroup.com/	US	14,358.2	16,391.0	3.4%	3	Y
4	Recruit	www.recruit.co.jp/	JP	9,887.8	11,287.7	2.3%	4	Y
5	Allegis Group	www.allegisgroup.com/	US	9,388.7	10,717.9	2.2%	5	
6	Hays	www.haysplc.com/	UK	6,384.6	7,288.5	1.5%	6	Y
7	Persol Holdings	www.persol-group.co.jp/	JP	5,833.9	6,659.8	1.4%	7	Y
8	Kelly Services	www.kellyservices.com/	US	3,562.6	4,067.0	0.8%	9	Y
9	Robert Half International	www.roberthalf.com/	US	3,370.3	3,847.4	0.8%	8	Y
10	Outsourcing	www.outsourcing.co.jp/	JP	3,009.9	3,436.1	0.7%	11	Y
11	Express Employment Professionals	www.expresspros.com/	US	2,837.3	3,239.0	0.7%	10	
12	CIIC	www.ciic.com.cn	CN	2,619.2	2,990.0	0.6%	26	
13	ASGN	www.asgn.com	US	2,598.4	2,966.3	0.6%	13	Y
14	EmployBridge Holding Company	www.employbridge.com/	US	2,519.5	2,876.2	0.6%	12	
15	Proman	www.proman-emploi.fr/	FR	2,421.8	2,764.6	0.6%	14	
16	Gi Group	www.gigroup.it/	IT	2,340.6	2,672.0	0.6%	17	
17	Insight Global	www.insightglobal.net/	US	2,267.3	2,588.2	0.5%	18	
18	Synergie	www.synergie.com/	FR	2,190.3	2,500.4	0.5%	15	Y
19	Impellam	www.impellam.com/	UK	2,062.1	2,354.1	0.5%	16	Y
20	AMN Healthcare	www.amnhealthcare.com/	US	1,875.9	2,141.4	0.4%	20	Y

Largest Global Staffing Firms based on 2020 revenues (continued)

Rank	Company	Company Website	HQ Country	2020 Revenue €m	2020 Revenue \$m	Market Share %	Rank in prior year	Listed
21	Shanghai FSG	www.fsg.com.cn/	CN	1,753	2,001	0.4%	21	Y
22	House of HR	www.houseofhr.com/	BE	1,618	1,848	0.4%	24	
23	Groupe Crit (People link)	www.groupe-crit.com	FR	1,527	1,743	0.4%	19	Y
24	NES Fircroft	www.nesfircroft.com/	UK	1,501	1,714	0.4%	36/45	
25	TrueBlue	www.trueblue.com/	US	1,477	1,686	0.3%	22	Y
26	PageGroup	www.page.com/	UK	1,467	1,675	0.3%	23	Y
27	Beijing FESCO	www.fesco.com.cn/	CN	1,445	1,650	0.3%	30	
28	Pasona Group	www.pasonagroup.co.jp/	JP	1,385	1,581	0.3%	28	Y
29	CHG Healthcare Services	www.chghealthcare.com/	US	1,372	1,566	0.3%	25	
30	Sthree	www.sthree.com/	UK	1,355	1,546	0.3%	27	Y
31	Aya Healthcare	www.ayahealthcare.com/	US	1,308	1,494	0.3%	86	
32	Technopro	www.technoproholdings.com/	JP	1,285	1,467	0.3%	32	
33	Harvey Nash	www.harveynash.com/	UK	1,238	1,414	0.3%	35	
34	Kforce	www.kforce.com/	US	1,224	1,398	0.3%	33	Y
35	Jackson Healthcare	www.jacksonhealthcare.com/	US	1,197	1,366	0.3%	38	
36	Reed	www.reed.com/	UK	1,119	1,277	0.3%	34	
37	Actual Leader group	www.actual-leader.com/	FR	1,093	1,248	0.3%	31	
38	Robert Walters	www.robertwaltersgroup.com/	UK	1,055	1,205	0.2%	29	Y
39	Medical Solutions	www.medicalsolutions.com/	US	1,021	1,165	0.2%	43	
40	Will Group	www.willgroup.co.jp	JP	967	1,104	0.2%	44	Y

Largest Global Staffing Firms based on 2020 revenues (continued)

Rank	Company	Company Website	HQ Country	2020 Revenue €m	2020 Revenue \$m	Market Share %	Rank in prior year	Listed
41	Staffline	www.staffline.co.uk/	UK	959	1,094	0.2%	37	Y
42	Pertemps Network	www.pertemps.co.uk/	UK	945	1,079	0.2%	42	
43	Analysts (ACS Group)	www.acsicorp.com/	US	924	1,055	0.2%	55	
44	UT Group	www.ut-g.co.jp/	JP	917	1,047	0.2%	52	Y
45	Morson	www.morson.com/	UK	914	1,043	0.2%	41	
46	Groupe Adéquat	www.lejobadequat.com/	FR	896	1,023	0.2%	39	
47	Brunel International	www.brunelinternational.net/	NL	893	1,019	0.2%	40	Y
48	Quess Corp	www.uesscorp.com/	IN	869	992	0.2%	50	Y
49	Maxim Healthcare Services	www.maximhealthcare.com/	US	821	937	0.2%	95	
50	Workpac	www.workpac.com/	AU	820	936	0.2%	47	
51	ActOne Group	www.act1group.com/	US	810	925	0.2%	46	
52	Meitec	www.meitec.co.jp/	JP	802	916	0.2%	54	Y
53	Workrise	www.workrise.com/	US	788	900	0.2%	New	
54	Volt Workforce Solutions	www.volt.com/	US	771	880	0.2%	53	Y
55	Nikken Total Sourcing	www.nikken-totalsourcing.jp/	JP	764	872	0.2%	61	
56	Triangle	www.triangle.fr/	FR	760	868	0.2%	New	
57	Elwood Staffing	www.elwoodstaffing.com/	US	759	867	0.2%	49	
58	Cross Country Healthcare	www.crosscountryhealthcare.com/	US	732	836	0.2%	60	Y
59	BeNext (formally Trust Tech)	www.benext.co.jp/	JP	725	828	0.2%	69	Y
60	Adcorp	www.adcorp.co.za	ZA	723	826	0.2%	56	Y

Largest Global Staffing Firms based on 2020 revenues (continued)

Rank	Company	Company Website	HQ Country	2020 Revenue €m	2020 Revenue \$m	Market Share %	Rank in prior year	Listed
61	System One	www.systemoneservices.com/	US	722	824	0.2%	64	
62	Acacium	www.acaciumgroup.com/	UK	714	815	0.2%	59	
63	Human Holdings	www.athuman.com:443/	JP	705	805	0.2%	68	Y
64	Airswift	www.airswift.com/	UK	697	796	0.2%	48	
65	World Staffing	www.wsff.co.jp/	JP	682	779	0.2%	74	
66	Collabera	www.collabera.com/	US	657	750	0.2%	72	
67	Egon Zehnder	www.egonzehnder.com/	CH	635	725	0.2%	70	
68	Vaco	www.vaco.com/	US	621	709	0.1%	83	
69	Umana	www.umana.it/	IT	610	696	0.1%	63	
70	Samsic Emploi	www.samsic-emploi.fr/	FR	609	695	0.1%	58	
71	Hito Communications	hitocom.co.jp/	JP	596	681	0.1%	82	Y
72	Artech	www.artech.com/	US	584	667	0.1%	75	
73	Spencer Stuart	www.spencerstuart.com/	US	576	658	0.1%	76	
74	Nisso Group	www.nisso.co.jp/	JP	574	655	0.1%	80	
75	CPL Resources	www.cpljobs.com/ie/	IE	570	651	0.1%	84	Y
76	Persona Service	www.persona.de	DE	557	636	0.1%	65	
77	Beacon Hill Staffing Group	www.beaconhillstaffing.com/	US	557	636	0.1%	87	
78	Timing Holding	www.timing.nl/	NL	535	610	0.1%	62	
79	Korn Ferry	www.kornferry.com/	US	534	610	0.1%	71	Y
80	Addison Group	www.addisongroup.com	US	530	605	0.1%	79	

Largest Global Staffing Firms based on 2020 revenues (continued)

Rank	Company	Company Website	HQ Country	2020 Revenue €m	2020 Revenue \$m	Market Share %	Rank in prior year	Listed
81	Tradesmen International	www.tradesmeninternational.com/	US	526	600	0.1%	77	
82	Actief Interim	www.actief.be/	BE	514	587	0.1%	78	
83	Gattaca	www.matchtech.com/	UK	513	585	0.1%	67	Y
84	Openjobmetis	www.openjobmetis.it/	IT	512	584	0.1%	85	Y
85	Teamlease	www.teamlease.com/	IN	507	579	0.1%	73	Y
86	Russell Reynolds Associates	www.russellreynolds.com/	US	504	575	0.1%	94	
87	YoungCapital	www.youngcapital.nl/	NL	502	574	0.1%	92	
88	Trenkwalder	www.trenkwalder.com/	AT	500	571	0.1%	57	
89	I.K. Hofmann	www.hofmann.info/	DE	499	569	0.1%	66	
90	Heidrick & Struggles	www.heidrick.com/	US	495	565	0.1%	81	Y
91	Rose International	www.roseint.com/index.html	US	477	544	0.1%	New	
92	US Tech Solutions	www.ustechsolutions.com	US	466	532	0.1%	New	
93	Yoh	www.yoh.com/	US	458	522	0.1%	93	
94	Career International	www.careerintlinc.com/	CN	454	518	0.1%	99	Y
95	Favorite Healthcare Staffing	www.favoritestaffing.com/	US	454	518	0.1%	New	
96	HealthTrust Workforce Solutions (HCA)	www.healthtrustjobs.com	US	449	513	0.1%	97	Y
97	Integrity Staffing Solutions	www.integritystaffing.com/	US	434	496	0.1%	New	
98	Partnaire	www.partnaire.fr/	FR	429	490	0.1%	96	
99	The Onin Group	www.oningroup.com/	US	427	488	0.1%	New	
100	The Execu Search Group	www.execu-search.com/	US	415	473	0.1%	New	

Disclaimer, Methodology & Notes

- Our list features the 100 largest staffing firms in the world based on sales generated in the calendar year 2020. The ranking has been created using data from third-party sources, feedback directly from the companies, and/or estimates based on our research and calculations. The revenue figures represent SIA’s best estimate based on available information at the time of publication. The accuracy of estimation may vary depending on multiple factors, including firms’ willingness to provide or confirm information about their operations. As such, our ranking offers the best possible overview of the global staffing market at this stage, given the availability of data. We would be pleased to correct any of these estimates in future editions of this list, and we invite our readers to contact us with any questions on our revenue estimates. We welcome feedback or additional data to assist us in our research coverage and improve our revenue estimates related to the companies featured in this report.
- We define “staffing” revenue as revenue generated from the provision of temporary workers to business clients, as well as from “place & search” services (direct hire/permanent placement and retained search). We also include revenue from “temp-to-hire” conversions. Other types of revenue (e.g. outplacement, consulting, MSP, VMS, payrolling, etc.) have not been included in our estimates.
- Exchange rates were based on average annual rates for the full year 2020 (Source: www.oanda.com) as follows: AUD:USD= 0.690591, CNY:USD= 0.144993, EUR:USD= 1.141575, INR:USD= 0.013523, JPY:USD= 0.00937, ZAR:USD= 0.061102, USD:EUR= 0.875982743 and GBP:EUR= 1.125107.
- If your firm is listed in the report, we would be happy to send you a logo, shown below, to add to your website and marketing material. If you have any comments, criticisms, or suggestions, please also get in touch. In either case, don't hesitate to get in touch with apode@staffingindustry.com.




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