



Global



*Market Information and Forecasts*

# Largest Global Engineering Staffing Firms

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## Largest Global Engineering Staffing Firms

### Key Findings

- We estimate the global engineering staffing market in 2018 to be worth \$34.0 billion. Added together, the top 20 firms generated \$13.2 billion in revenue, accounting for 39% of the market, by our estimates. The complete list of 20 firms can be found on pages five and six of this report.
- Staffing Industry Analysts project revenue in the global engineering staffing market to grow by 4% in 2019, following 4% increase in 2018. However, there will be many variations by region and by occupation.
- In this market share report, we have ranked companies in order of revenue size, according to industry custom, but this ranking should not be taken to imply that a firm with a higher rank provides better service or more value to its shareholders.
- Staffing firms varied in degree of financial transparency, and even when forthcoming with information, we reserve the right to adjust data for the sake of consistency. Therefore, for all firms in this report, revenue shown should be considered an estimation by Staffing Industry Analysts. Market share percentages in this report were calculated by dividing each company's revenue figure by our estimate of \$34.0 billion for the global engineering staffing market in 2018.
- Overall, we believe that this list is accurate and can be used appropriately to get a “big picture” reading of the global engineering staffing industry landscape. However, as transparency and availability of information from staffing companies can vary from one year to the next, this year's estimates may not be comparable to those of previous years in all cases. For that reason, we did not display prior-year revenue estimates in this report.
- Additional details on the methodology of this report are provided on page seven.
- This report should be read in conjunction with SIA's '[Engineering Growth Assessment Globally](#)' report.

*This list will help you understand the structure and size of the marketplace.*

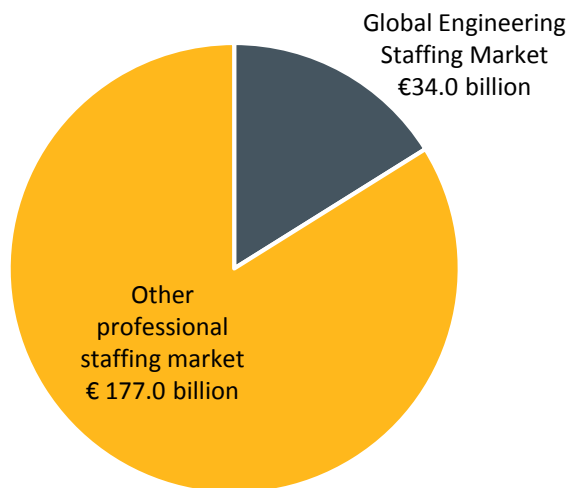
*Recognise how the players are positioned.*

*Identify competitors, suppliers or M&A targets.*

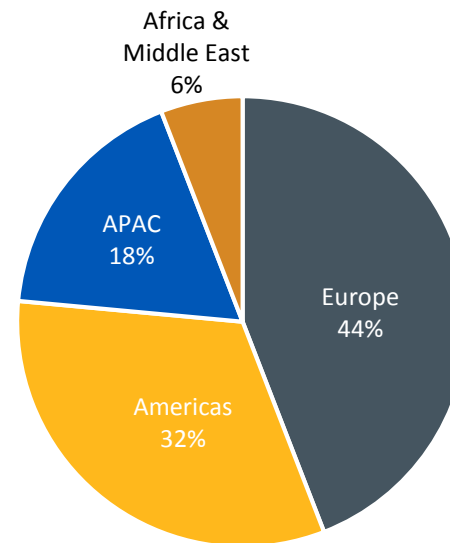
## Market size and composition

- Europe and the Americas account for 75% of global engineering staffing revenue. This high figure is to be expected given the advanced economies and the more developed staffing markets in both regions. APAC and Africa & Middle East have smaller shares of the global engineering staffing market, but we forecast their stake to increase as the staffing markets in both regions mature.
- Staffing Industry Analysts project revenue in the global engineering staffing market to grow by 4% in 2019, following 4% increase in 2018. However, there will be many variations by region and by occupation.
- Within the professional staffing category, engineering represents the second largest portion of the global market (behind IT), accounting for 16% of total revenue.

*Global market size for engineering staffing as a % of total professional staffing market size, 2018*



*Engineering staffing revenue by region, 2018*



## Global – Market size for engineering staffing

- According to our estimates, the top 20 firms in terms of engineering staffing revenue generated a collective revenue of \$13.2 billion in 2018, accounting for 39% of the global market. The top 20 firms are listed on the next page.
- The global engineering staffing market is relatively consolidated. The table to the right shows that the top 3 firms accounted for 11% of market revenue.
- Over half of the top 20 firms were headquartered in the UK (12). The remaining were headquartered in the US (5), the Netherlands (2) and Switzerland (1).

*Cumulative market share of the largest firms by global engineering revenue, 2018*

	2018 Market Share (%)
<b>Top 3</b>	11%
<b>Top 5</b>	18%
<b>Top 10</b>	29%
<b>Top 15</b>	35%
<b>Top 20</b>	39%

Source: SIA

## Largest Engineering Staffing Firms

*Ranked by estimated 2018 global engineering staffing revenue*

	Company	Country HQ	Website	Global Engineering Staffing Revenue 2018 (USD Million)	Percentage of Global Engineering Staffing Market	Listed
1	Aerotek (Allegis Group)	US	<a href="http://www.aerotek.com">www.aerotek.com</a>	1,566.2	4.6%	Y
2	The Adecco Group	CH	<a href="http://www.adecco.com">www.adecco.com</a>	1,175.1	3.5%	Y
3	NES Global Talent <sup>1</sup>	UK	<a href="http://www.nesgt.com">www.nesgt.com</a>	1,128.0	3.3%	N
4	Brunel International	NL	<a href="http://www.brunel.net">www.brunel.net</a>	1,080.1	3.2%	Y
5	Fircroft	UK	<a href="http://www.fircroft.com">www.fircroft.com</a>	1,063.3	3.1%	N
6	Morson Group	UK	<a href="http://www.morson.com">www.morson.com</a>	1,026.9	3.0%	N
7	Randstad	NL	<a href="http://www.randstad.com">www.randstad.com</a>	925.9	2.7%	Y
8	Airswift	UK	<a href="http://www.airswift.com">www.airswift.com</a>	858.0	2.5%	N
9	Gattaca	UK	<a href="http://www.matchtech.com">www.matchtech.com</a>	616.3	1.8%	Y
10	System One	US	<a href="http://www.systemoneservices.com">www.systemoneservices.com</a>	526.3	1.5%	N

1.. Includes revenue from acquisition of Bedrock Petroleum Consultants in 3Q18.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

## Largest Engineering Staffing Firms

*Ranked by estimated 2018 global engineering staffing revenue*

	Company	Country HQ	Website	Global Engineering Staffing Revenue 2018 (USD Million)	Percentage of Global Engineering Staffing Market	Listed
11	Page Group	UK	<a href="http://www.page.com">www.page.com</a>	461.4	1.4%	Y
12	TRS Staffing Solutions	UK	<a href="http://www.trsstaffing.com">www.trsstaffing.com</a>	421.9	1.2%	N
13	Kelly Services	US	<a href="http://www.kellyservices.com">www.kellyservices.com</a>	393.0	1.2%	Y
14	Orion Group	UK	<a href="http://www.orionjobs.com">www.orionjobs.com</a>	387.1	1.1%	N
15	Experis (ManpowerGroup)	US	<a href="http://www.manpowergroup.com">www.manpowergroup.com</a>	350.0	1.0%	Y
16	Impellam Group	UK	<a href="http://www.impellam.com">www.impellam.com</a>	294.2	0.9%	Y
17	Rullion	UK	<a href="http://www.rullion.co.uk">www.rullion.co.uk</a>	276.7	0.8%	N
18	Aleron Group <sup>2</sup>	US	<a href="http://www.aleroninc.com">www.aleroninc.com</a>	256.2	0.8%	N
19	Belcan	UK	<a href="http://www.belcancorporation.com">www.belcancorporation.com</a>	238.3	0.7%	N
20	Primat Recruitment	UK	<a href="http://www.primatrecruitment.com">www.primatrecruitment.com</a>	225.9	0.7%	N
<b>Top 20 firms</b>				<b>13,271</b>	<b>39.0%</b>	

2.. Superior Group rebranded as Aleron Group in 1Q18.

The revenue figures above represent SIA's best estimation based on available information at the time of publication. The accuracy of estimates may vary depending on multiple factors, including firms' willingness to provide or confirm information about their operations.

## Additional notes and explanation of methodology

- For 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. We exclude revenue generated from other services offered by staffing companies: consulting services where billing is based on deliverables; process outsourcing (MSP, RPO, HRO); PEO and payrolling; outplacement; VMS; online staffing and “human cloud” services.
- We define “engineering” staffing as the furnishing of temporary workers in engineering occupations. Examples include mechanical, civil, electrical, industrial, petroleum, environmental, process and other engineers (but not software engineers which fall into what we define as our information technology (IT) segment.)
- To the extent that we are able, the 2018 staffing revenue estimates shown in this report include the full-year (“pro forma”) 2018 revenue of any staffing companies acquired during 2017. We do this to more accurately reflect the annual market share of the acquiring firm moving forward. Revenue estimates reflect the calendar year 2018. Revenue estimates include gross staffing revenue generated by franchises.
- Due to the complexity involved with producing the staffing revenue estimates in this report, the presence of acquisition revenue, and variability from one year to the next in the transparency and availability of revenue data from staffing companies, comparisons of revenue estimates from last year’s report and this year’s report do not necessarily provide a reliable measure of revenue growth at a particular company or for a particular segment.
- Regarding the data sources used for this report, we invited staffing firms in February to complete a detailed Excel-based application form indicating 2018 staffing revenue by country and occupational segment. Nearly half of the companies appearing in this report supplied revenue information via the application form, which was then validated by comparison with other publicly available data. For companies that chose not to supply revenue information, we made staffing revenue estimates based on publicly available information and our industry knowledge. Revenue estimates were sent to company management for review, and in many cases feedback received resulted in more accurate final estimates. Companies reporting revenue in Euros or British Pounds have been converted to US Dollars using the average annual exchange rates for 2018 of 0.847 Euro to 1 US Dollar and 0.750 Pound Sterling to 1 US Dollar based on the annual exchange rate according to Oanda.
- We invite our readers to contact us with any questions on our revenue estimates and we welcome feedback or additional data that will assist us in our research coverage and improve our revenue estimates related to the companies featured in this report.





## About SIA (Staffing Industry Analysts)

Founded in 1989, SIA is the global advisor on staffing and workforce solutions. Our proprietary research covers all categories of employed and non-employed work including temporary staffing, independent contracting and other types of contingent labour. SIA's independent and objective analysis provides insights into the services and suppliers operating in the workforce solutions ecosystem including staffing firms, managed service providers, recruitment process outsourcers, payrolling/compliance firms and talent acquisition technology specialists such as vendor management systems, online staffing platforms, crowdsourcing and online work services. We also provide training and accreditation with our unique Certified Contingent Workforce Professional (CCWP) program.

Known for our award-winning content, data, support tools, publications, executive conferences and events, we help both suppliers and buyers of workforce solutions make better-informed decisions that improve business results and minimize risk. As a division of the international business media company, Crain Communications Inc., SIA is headquartered in Mountain View, California, with offices in London, England.

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