



Americas



*Market Information and Forecasts*

# Largest Staffing Firms in Canada: 2019 Update

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## Largest Staffing Firms in Canada: 2019 Update

### Key Findings:

- We estimate that 25 firms generated at least CAD 50 million in Canadian staffing revenue in 2018. Added together, these firms generated CAD 5.5 billion in such revenue, accounting for 58% of the market, by our estimates. The complete list of 25 firms can be found on page four of this report.
- 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, 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.
- Market share percentages in this report were calculated by dividing each company's revenue figure by our estimate of CAD 9.4 billion for the Canadian 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 Canadian 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.
- Two firms are included in this year's ranking that did not appear in last year's report: BOWEN Group and IS2 Workforce Solutions.
- Additional details on the methodology of this report are provided on page five.

*All of the companies included in this report were invited to provide their revenue numbers via online survey in February 2019. For firms that did not participate in the survey, revenue estimates were based on company reports, company websites and other sources. Our market share reports are of strong interest to staffing buyers and we hope those listed will benefit from the increased buyer awareness. Firms not on this list that feel they should have been included are encouraged to contact Staffing Industry Analysts, as we will be releasing a follow-up briefing for any late additions. Many thanks to the staffing firms who offered their encouragement and assistance in this year's report process.*

## Observations on the largest staffing firms in Canada

- The Canadian staffing industry continues to be a fragmented industry characterized by a multitude of competitors. No company on the list held more than an 8% market share.
- The four largest staffing firms in Canada—Allegis Group, Adecco, Randstad and ManpowerGroup—also happen to be the four largest global staffing firms by revenue, although not in the same order.
- Six companies in this year's report are publicly traded, and they generated a combined CAD 2.4 billion in staffing revenue last year (or 25% of the market.) The firms are Adecco, Randstad, ManpowerGroup, Robert Half International, Kelly Services, and TrueBlue.
- Looking at the country headquarters of the firms in this report, we note that 12 firms have headquarters in Canada, 11 have headquarters in the United States, and two firms have headquarters in Europe (Adecco and Randstad.)



# Largest Staffing Firms in Canada

*Ranked by estimated 2018 Canadian staffing revenue*

Rank	Company	2018 Canadian Staffing Revenue (CAD million)	Market Share	Headquarters Country
1	<b>Allegis Group</b>	777	8%	USA
2	<b>Adecco</b>	771	8%	Switzerland
3	<b>Randstad</b>	728	8%	Netherlands
4	<b>ManpowerGroup</b>	415	4%	USA
5	<b>Procom</b>	366	4%	Canada
6	<b>Agilus (Design Group Staffing)</b>	302	3%	Canada
7	<b>Robert Half International</b>	265	3%	USA
8	<b>S.i. Systems<sup>1</sup></b>	225	2%	Canada
9	<b>TES (The Employment Solution)</b>	180	2%	Canada
10	<b>Tundra Technical Solutions</b>	178	2%	Canada
11	<b>Kelly Services</b>	160	2%	USA
12	<b>Eagle Professional Resources</b>	136	1%	Canada
13	<b>Express Employment Professionals</b>	120	1%	USA
14	<b>Johnson Service Group</b>	111	1%	USA
15	<b>Drake International</b>	100	1%	Canada
16	<b>The Ian Martin Group</b>	87	1%	Canada
17	<b>BOWEN Group</b>	77	1%	Canada
18	<b>EmployBridge Holding Company</b>	74	1%	USA
19	<b>TEEMA Solutions Group</b>	71	1%	Canada
20	<b>Quantum Management Services</b>	70	1%	Canada
21	<b>Airswift</b>	67	1%	USA
22	<b>Aleron Group<sup>2</sup></b>	62	1%	USA
23	<b>IS2 Workforce Solutions</b>	53	1%	Canada
24	<b>Act•1 Group</b>	50	1%	USA
24	<b>TrueBlue</b>	50	1%	USA
<b>Total</b>		<b>5,495</b>	<b>58%</b>	

1. Includes revenue from acquisition of Integricon in 3Q18.

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 the purposes of 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 all other services offered by staffing companies such as consulting services where billing is based on deliverables; process outsourcing (MSP, RPO, HRO); VMS; PEO and payrolling; and outplacement.
- The “staffing” revenue figures found in this report conform to the above definition to facilitate consistency and comparability across companies. This alignment allows us to calculate the market share for each listed company by dividing its staffing revenue by our 2018 Canadian staffing industry market size estimate of CAD 9.4 billion.
- 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 2018. We do this to more accurately reflect annual market share of the acquiring firm moving forward.
- Revenue estimates reflect calendar year 2018 and 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. For insight on revenue growth trends in the Canadian staffing industry, we recommend our Canadian Staffing Industry Outlook report.
- 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. A majority of the companies appearing in this report supplied revenue information, 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 own research. Revenue estimates were sent to company management for review, and in many cases feedback received resulted in more accurate final estimates.
- 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 Staffing Industry Analysts (SIA)

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 labor.

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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