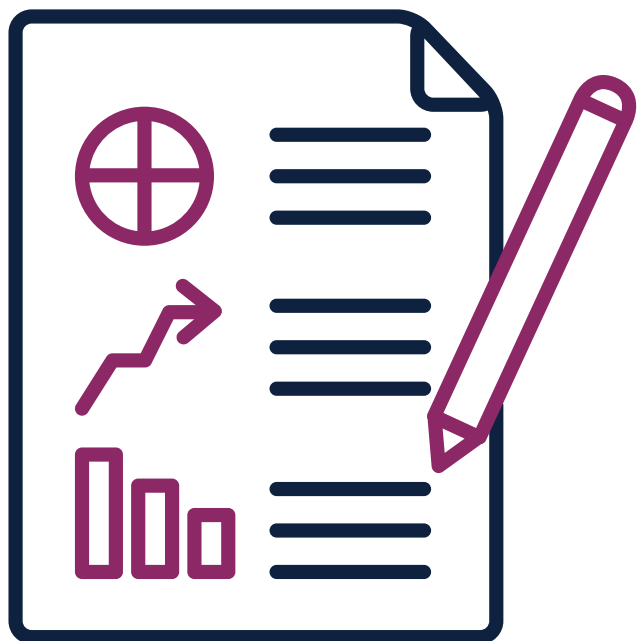


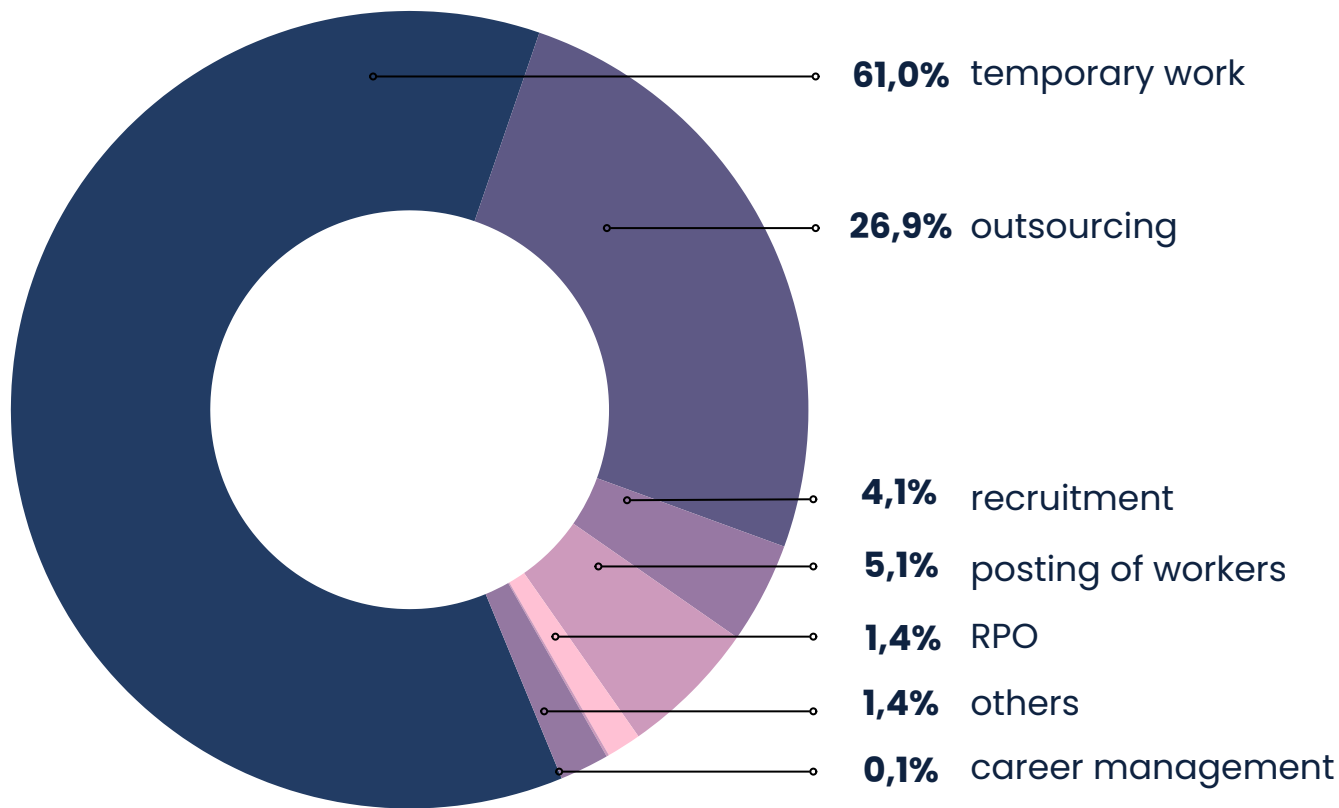
# The HR Service Market 2Q2025



The data presented in the report refers to the results of 33 entities affiliated with the Polish HR Forum (PFHR) achieved in the second quarter of 2025 (2Q2025). As an affiliated entity may be a capital group, the data concerns a total of 74 companies.

# The value of the HR services market 2Q2025

## Total turnover of PFHR members by service



**1 835  
mln PLN**

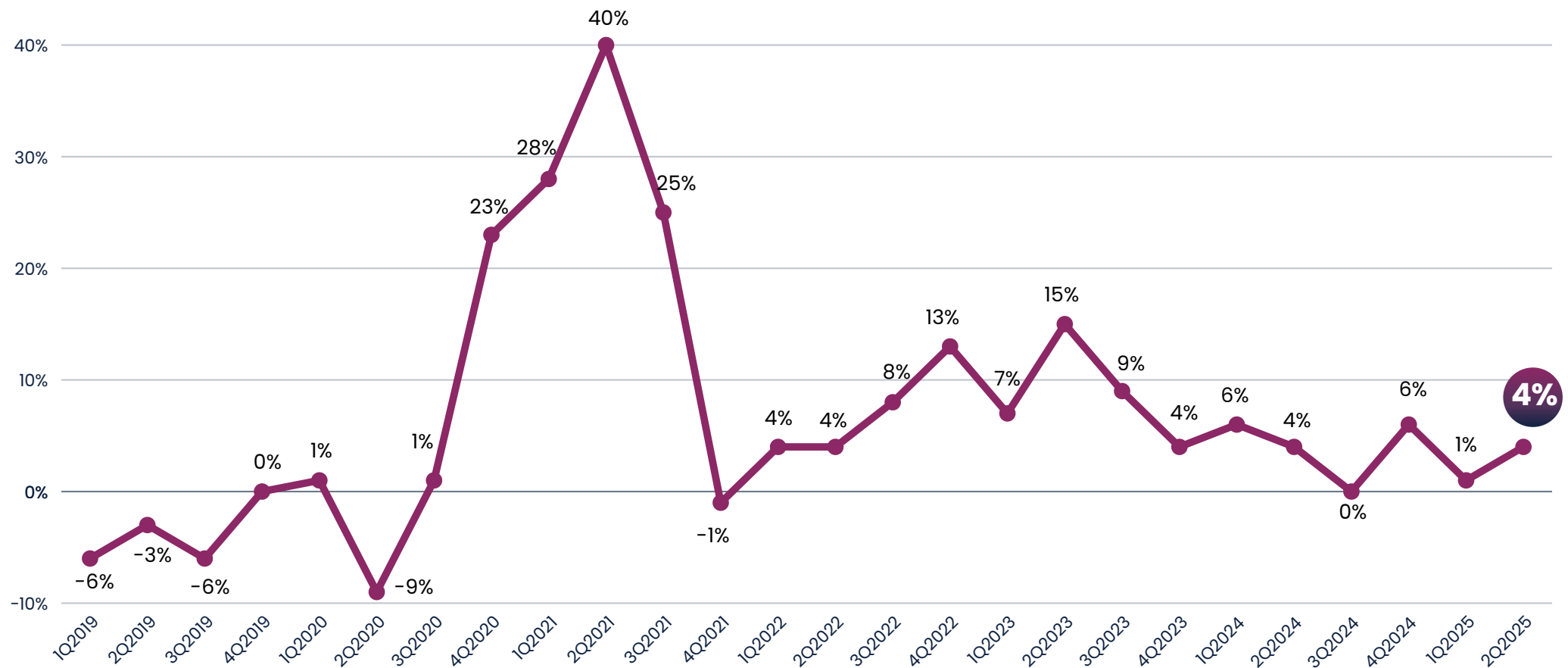
total turnover of PFHR  
members in 2Q2025

**↑ 4%**

year-on-year increase

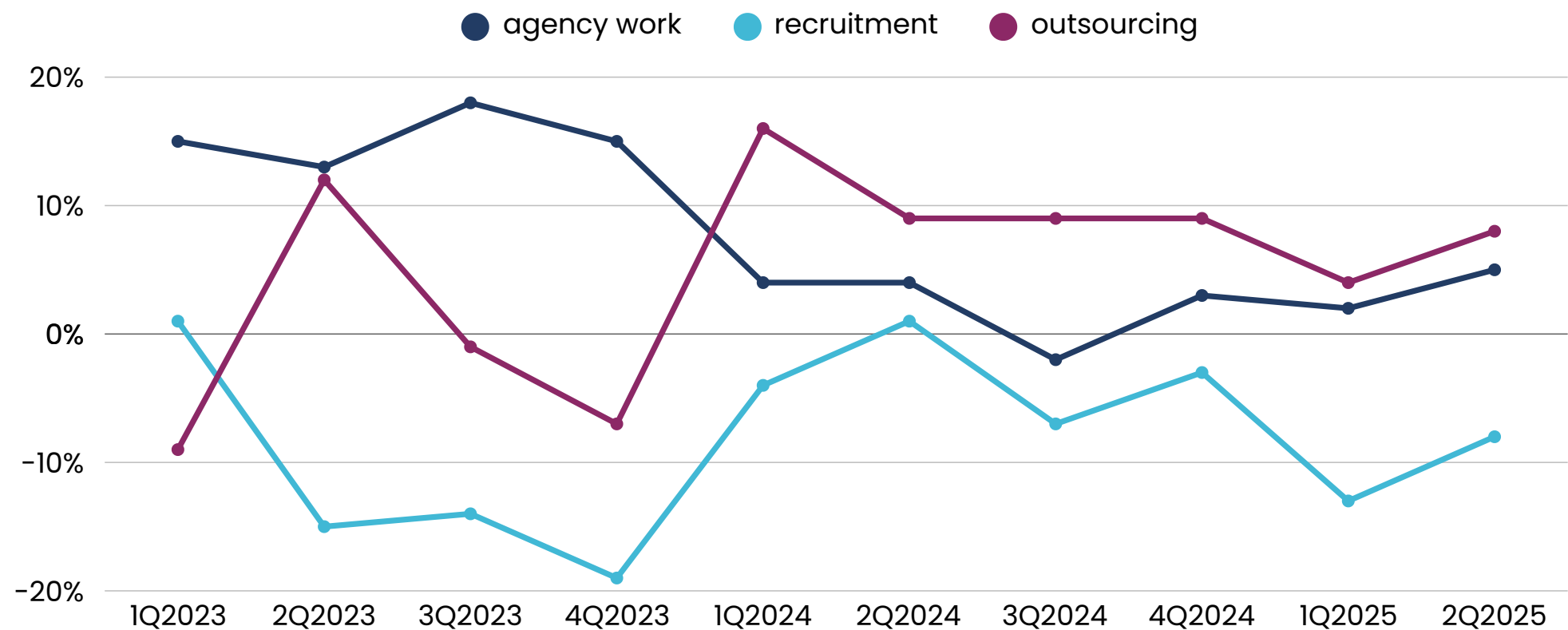
# Market growth/decrease

## Increase/decrease in total turnover compared to the same quarter of the previous year



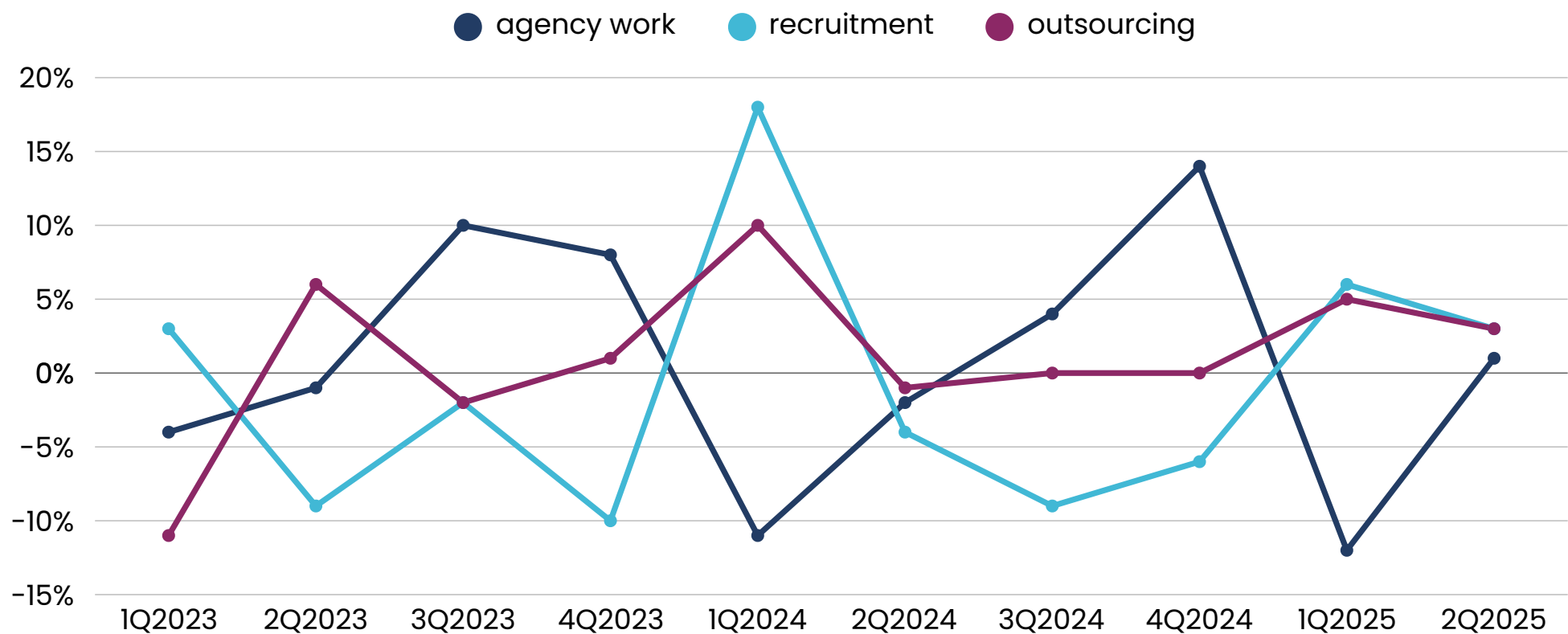
# Year-on-year market dynamics

## Year-on-year increase/decrease in turnover



# Quarter-on-quarter market dynamics

## Quarter-on-quarter increase/decrease in turnover



# Ranking of the largest PFHR companies in 2Q2025

Total turnover	Agency work	Recruitment	Outsourcing
1. ★ Randstad	1. ★ Randstad	1. ★ Gi Group Holding	1. ★ Exact x Forestall
2. ManpowerGroup	2. ManpowerGroup	2. Michael Page	2. Hays
3. Gi Group Holding	3. Grupa Adecco	3. Randstad	3. Devire
4. Grupa Adecco	4. Gi Group Holding	4. Hays	4. Randstad
5. Hays	5. Hays	5. Antal	5. Antal
6. Exact x Forestall	6. Trenkwalder	6. Devire	6. Grupa Adecco
7. Trenkwalder	7. Job Impulse	7. ManpowerGroup	7. ManpowerGroup
8. Interkadra by Synergie	8. OTTO Work Force	8. Grupa Adecco	8. Interkadra by Synergie
9. OTTO Work Force	9. Interkadra by Synergie	9. Talent Place	9. Gi Group Holding
10. Contrain	10. JAGA Recruitment	10. IDES	10. People

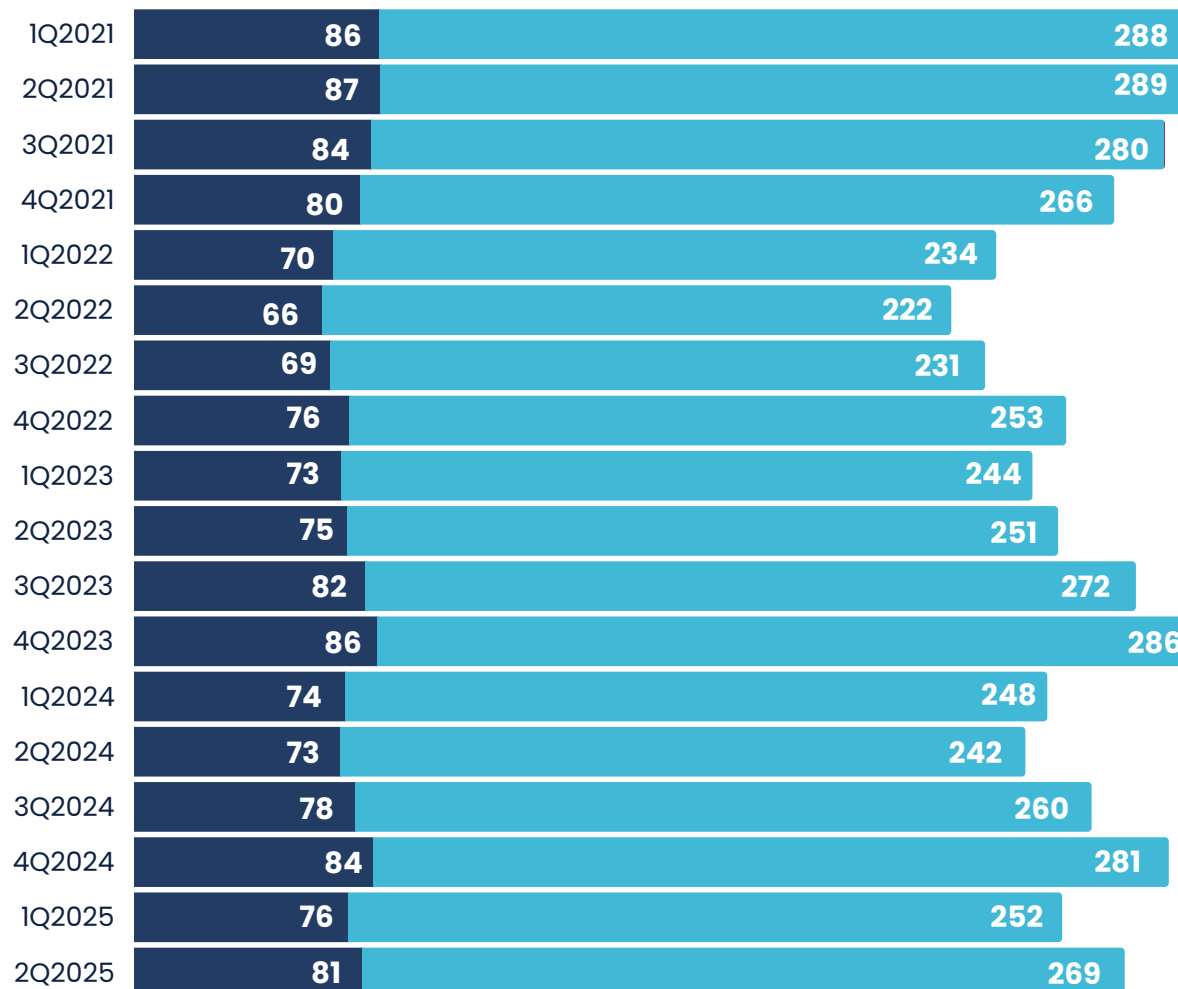
# Ranking of the largest PFHR companies in 2Q2025

Posting of workers	RPO	International recruitment	Career management
1. ★ Contrain	1. ★ ManpowerGroup	1. ★ OTTO Work Force	1. ★ Randstad
2. Flowwork (IPF Group)	2. Randstad	2. Michael Page	2. ManpowerGroup
3. Interkadra by Synergie	3. Hays	3. Work Force	3. Hays
4. Trenkwalder	4. GI Group Holding	4. 24/7 DRIVE	
5. Job Impulse	5. Yabimo	5. Talent Place	
6. Randstad	6. Antal	6. Antal	
	7. Devire	7. Interkadra by Synergie	
	8. Talent Place	8. Flowwork (IPF Group)	
	9. Trenkwalder	9. Ahoy Career	
	10. Flowwork (IPF Group)	10. Orienta	



# Number of temporary workers

## Number of temporary workers (in thousands)



↑ **11%**

year-on-year increase

↑ **7%**

quarter-on-quarter  
increase



**82%**

percentage of employment  
contracts concluded by PFHR  
member companies with  
temporary workers

Poland (estimation)

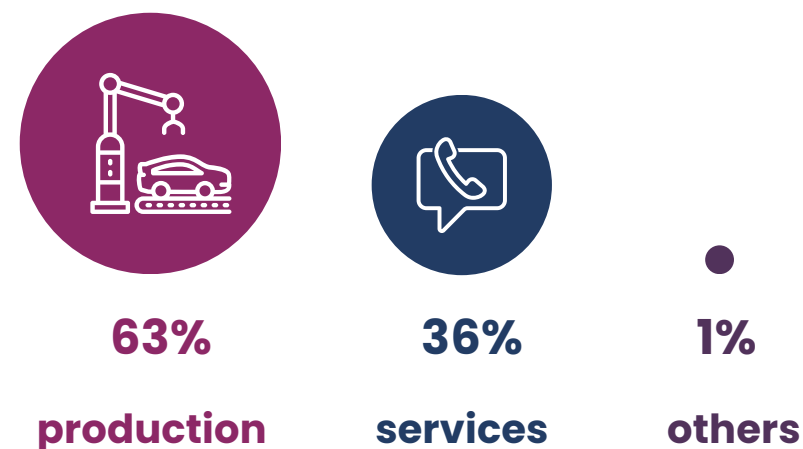
PFHR

# Temporary workers profile

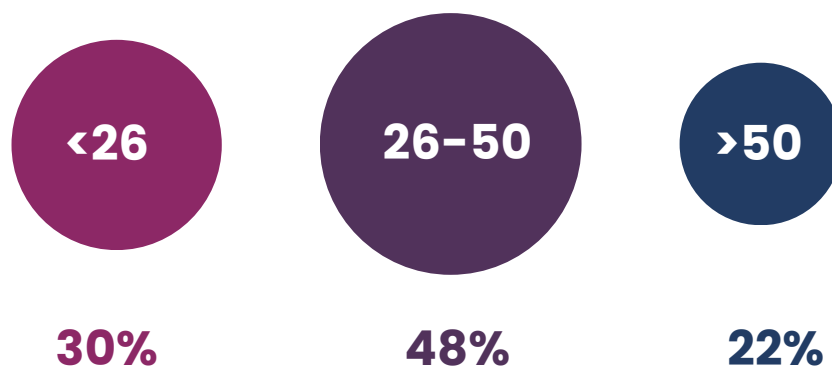
## GENDER



## SECTORS

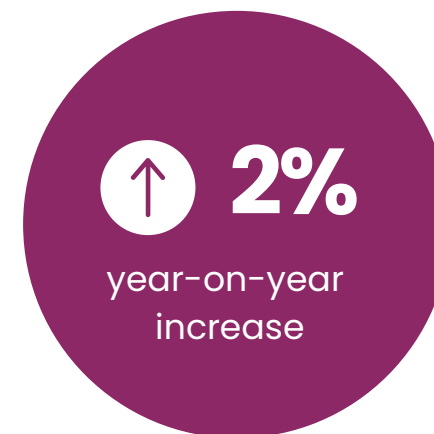
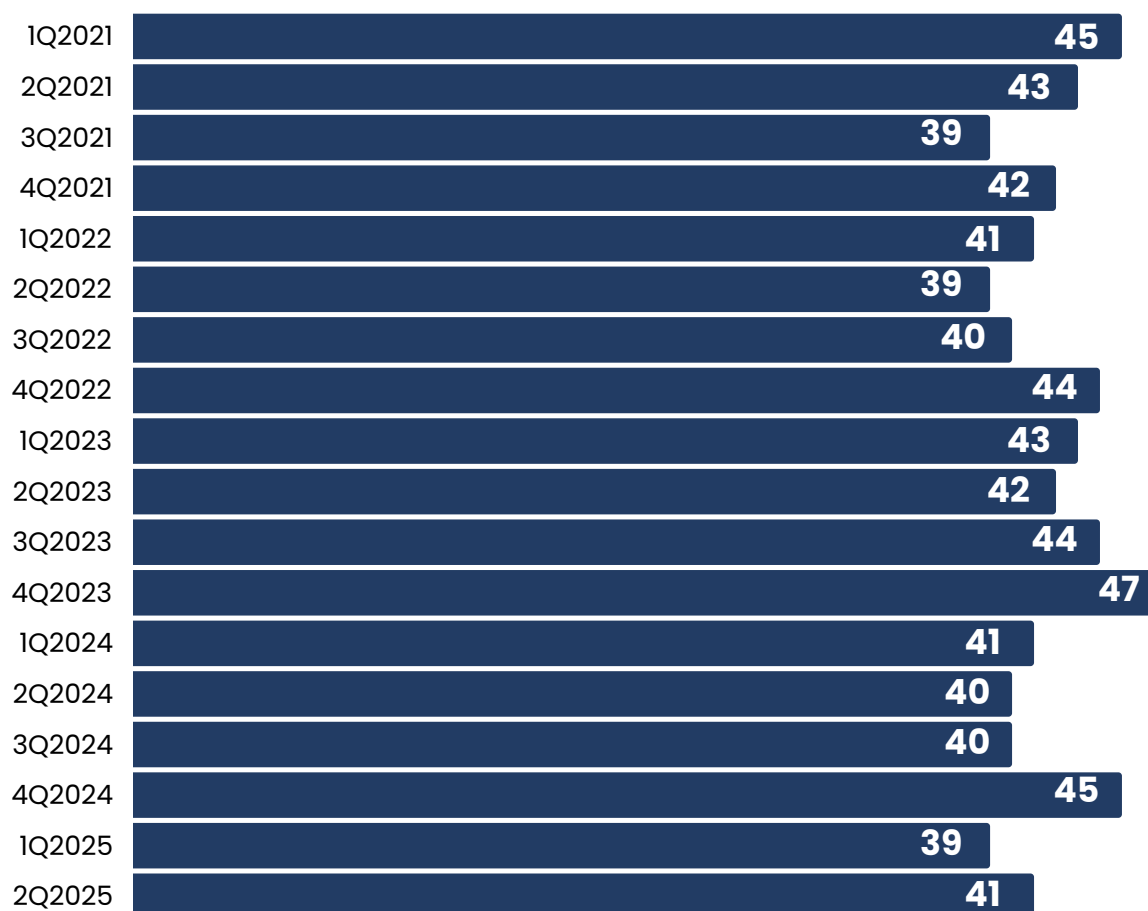


## AGE



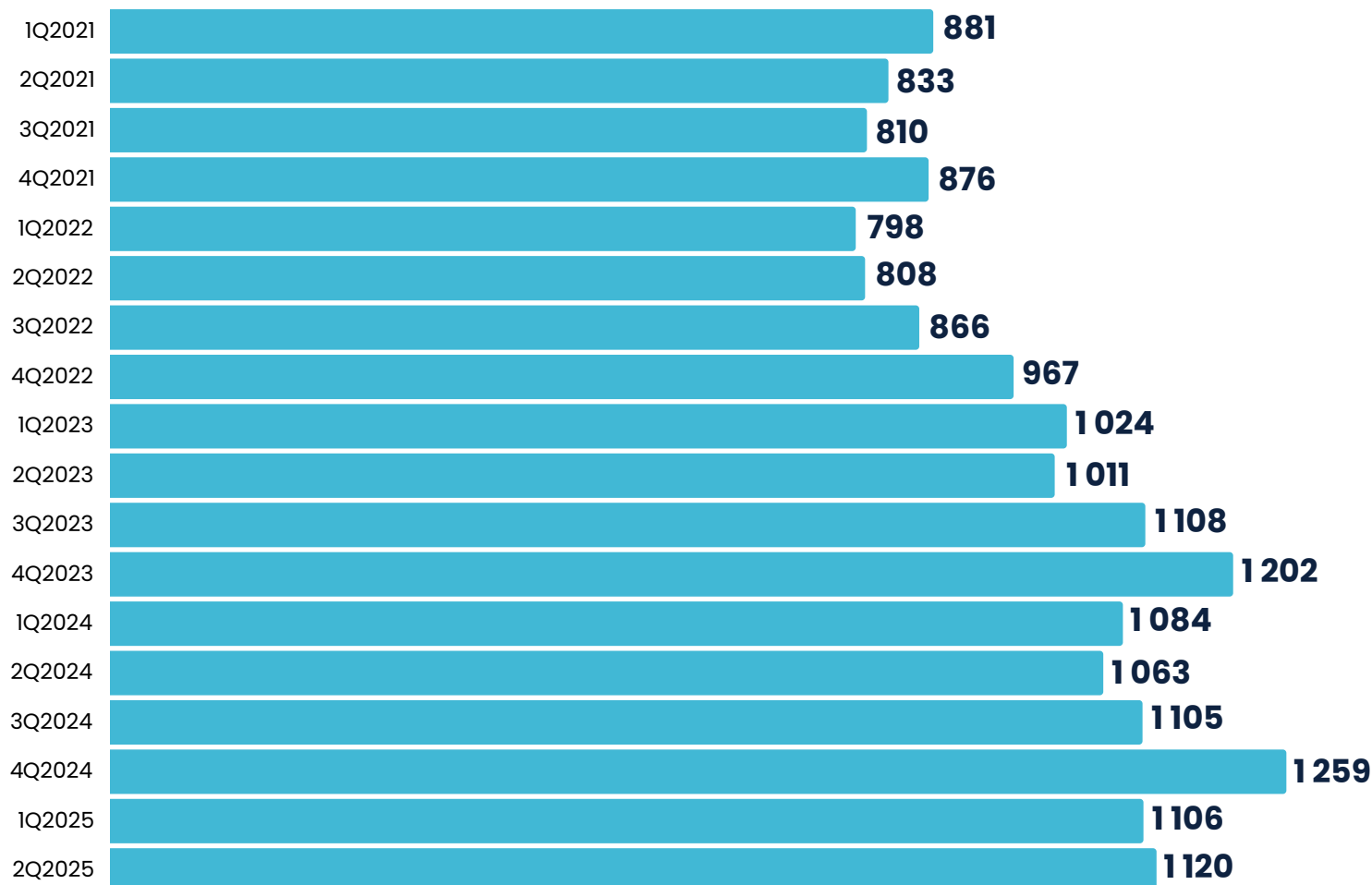
# Temporary work – FTE

## FTE in PFHR – full time equivalent (thous.)



# Value of the temporary work

## Temporary work turnover of PFHR member companies (in millions PLN)



↑ **5%**

year-on-year  
increase

↑ **1%**

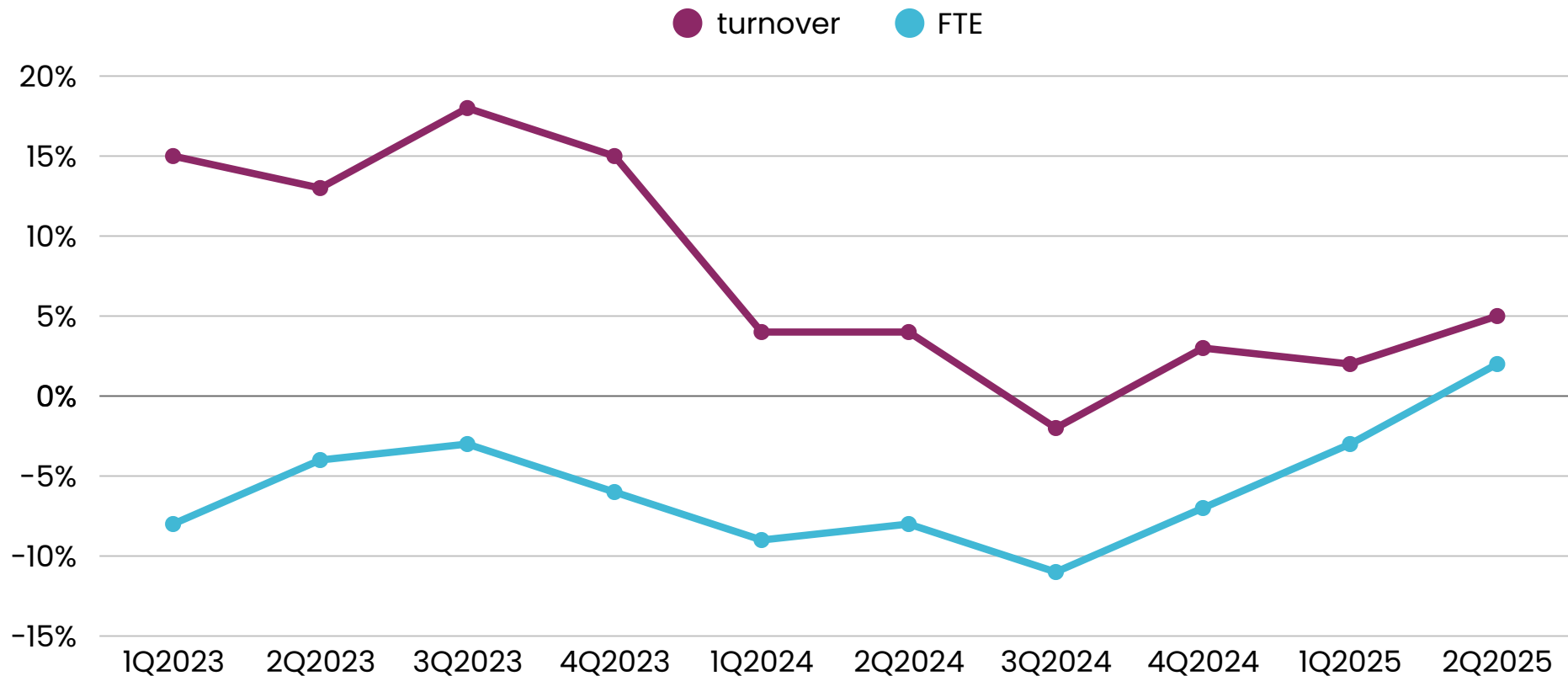
quarter-on-  
quarter increase

**1,9**  
**mld PLN**

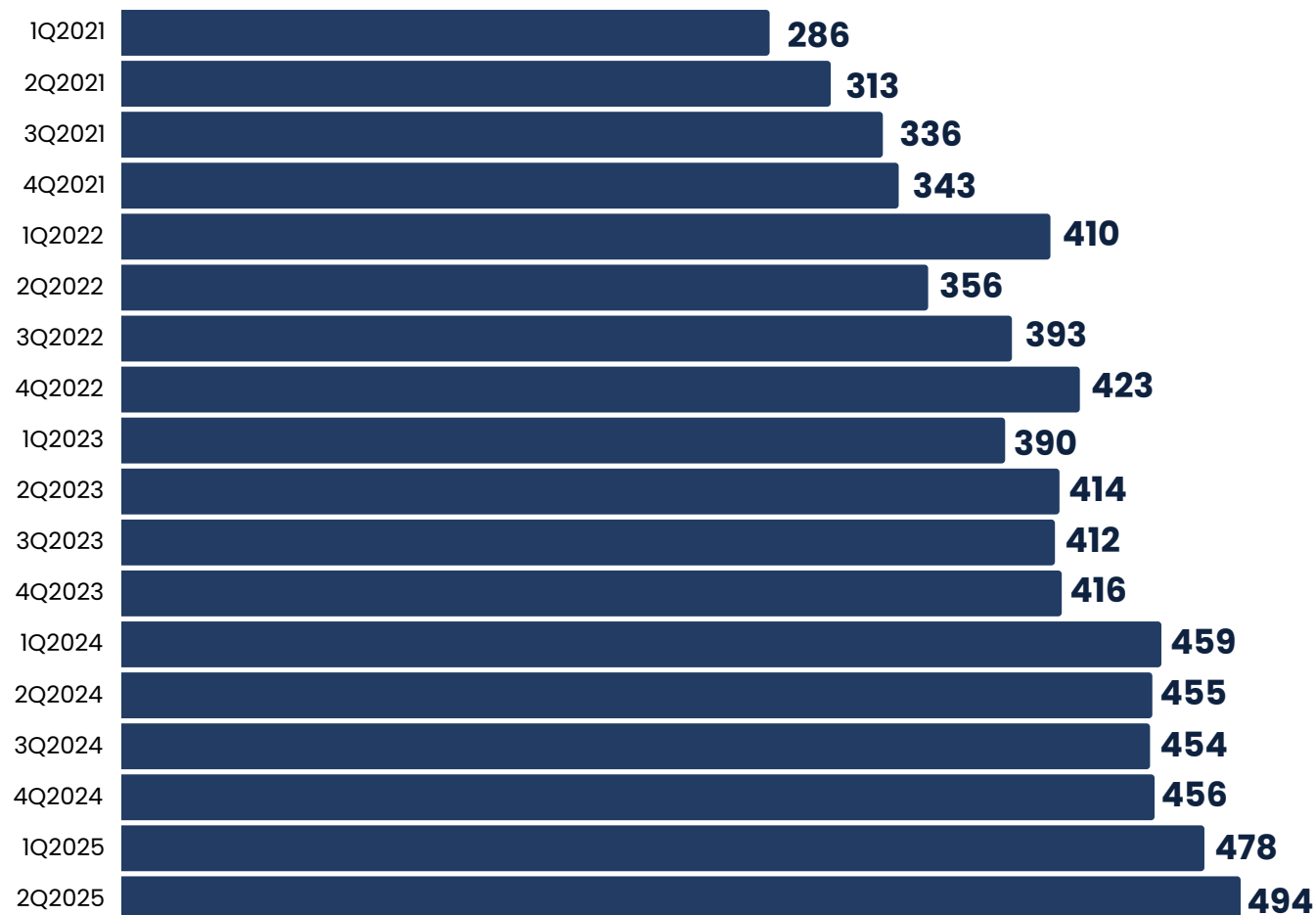
estimated value of  
the temporary work  
market in Poland in  
2Q2025

# Temporary work – year-on-year changes

**Increase/decrease in turnover and FTE compared to the same quarter of the previous year**



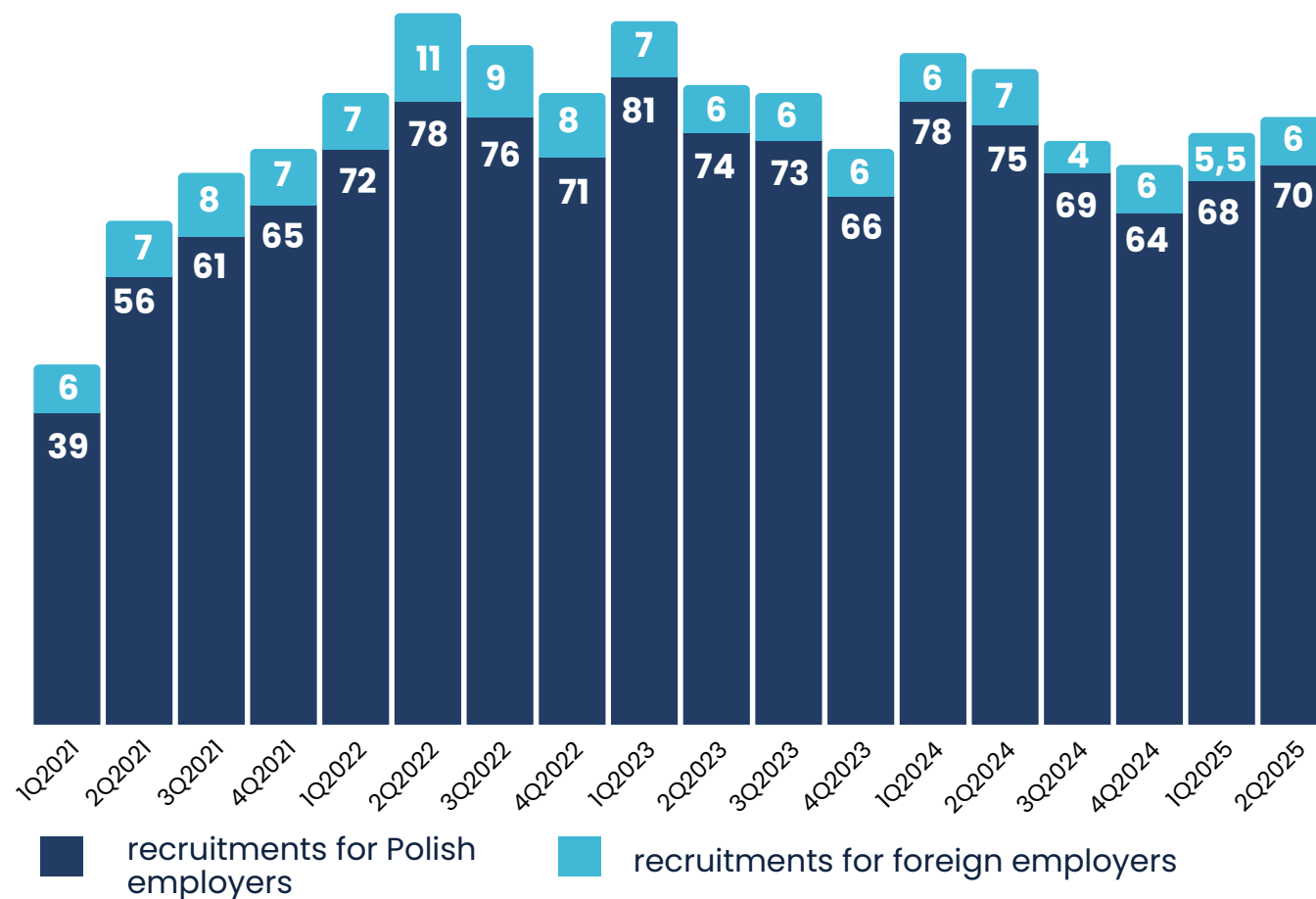
## Turnover of PFHR member companies in outsourcing (in millions PLN)



↑ **8%**  
year-on-year  
increase

↑ **3%**  
quarter-on-  
quarter increase

## Turnover of PFHR member companies in recruitment services (in millions PLN)



↓ 8%

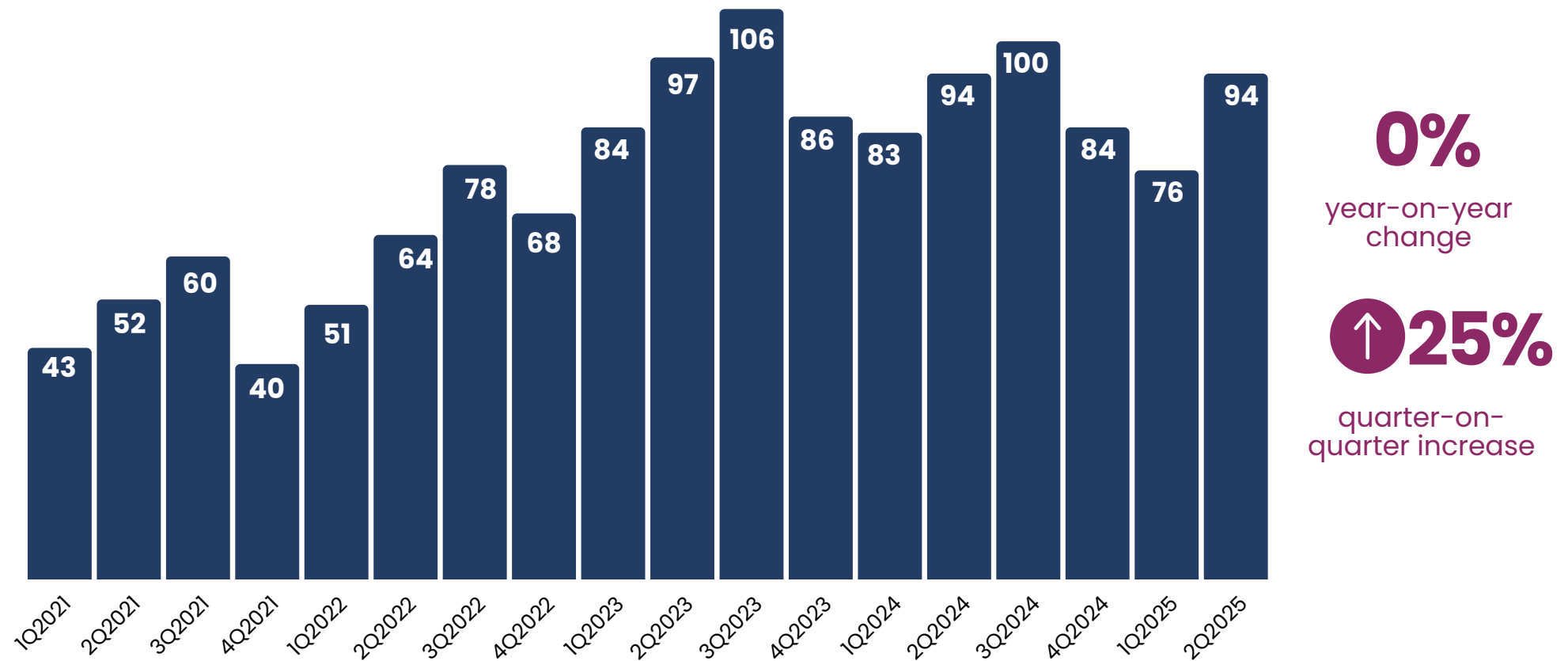
year-on-year decrease  
in the value of the  
recruitment market for  
Polish employers

↓ 11%

year-on-year decrease in  
the value of the  
recruitment market to  
foreign employers

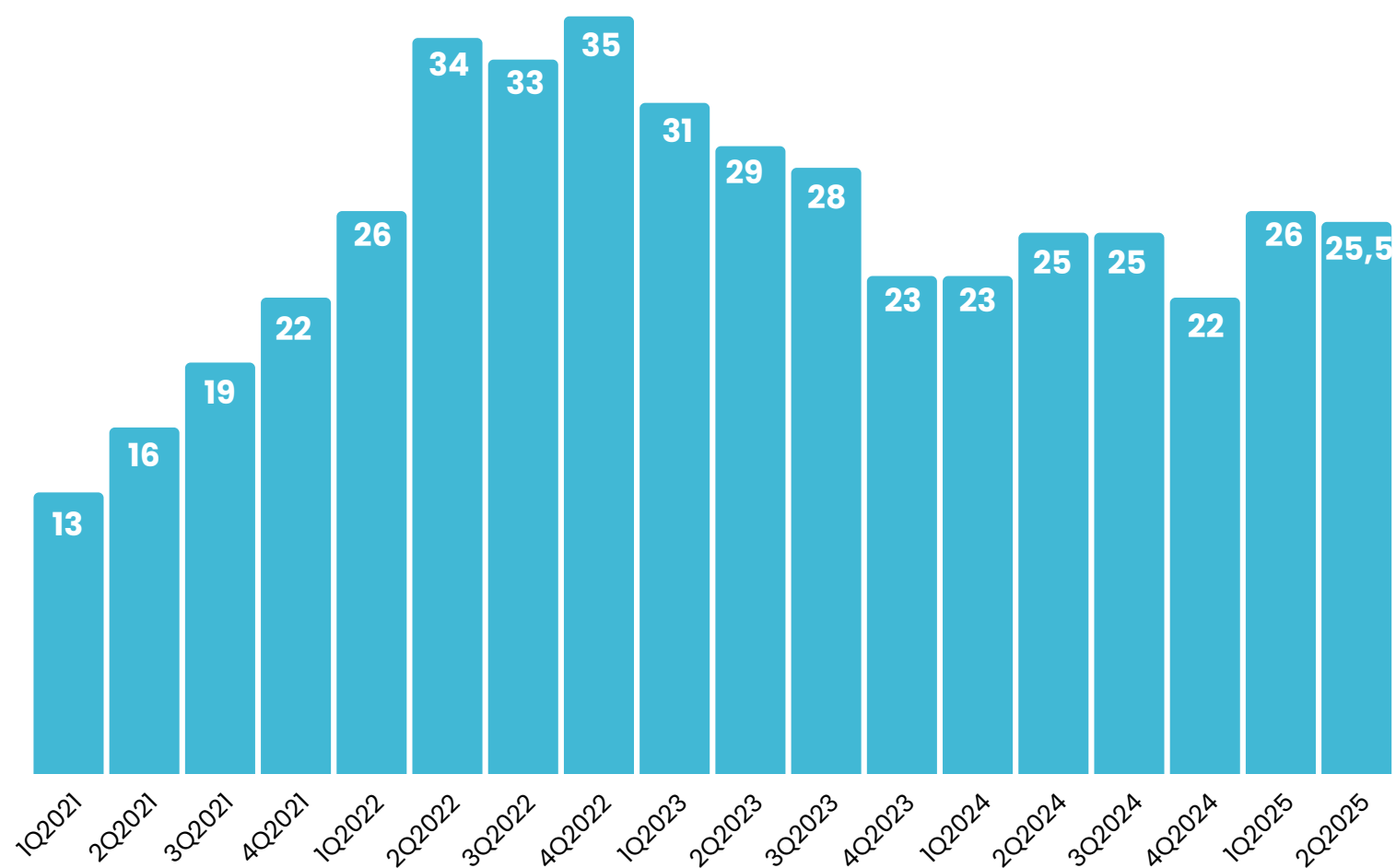
# Posting of workers

## Turnover of PFHR member companies for the posting of workers (in millions PLN)





## Turnover of PFHR member companies for the RPO (in millions PLN)



↑ **2%**

year-on-year  
increase

↓ **1%**

quarter-on-quarter  
decrease

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