

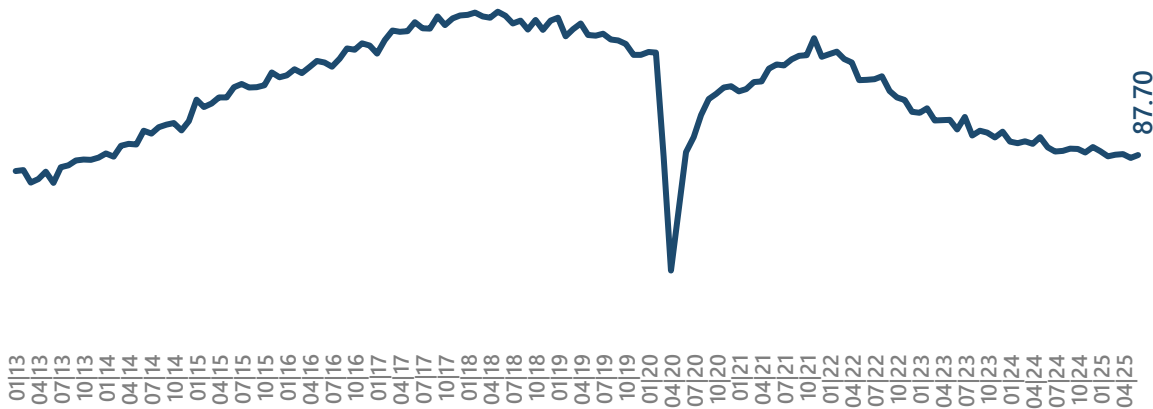
Market Update 06/2025

JUNE WITNESSES A SLIGHT UPTICK IN TEMPORARY STAFFING ACTIVITY DESPITE ANNUAL DECLINE

FEDERGON INDEX

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“

Temporary agency work showed a slight recovery in June from the sharp tick in May. Nevertheless, the level of activity remains almost 2% lower than a year ago, indicating persistently challenging cyclical and labour market conditions.

”

This Index reflects the level of business in the month concerned in comparison with the situation in January 2007 (base 100), on the basis of seasonally adjusted data.

REGIONAL EVOLUTION

“Compared to the same period last year, the industry activity is -1.94% lower. Seasonally adjusted figures indicate an increase of the TAW activity (+0.68%) on a monthly basis.”



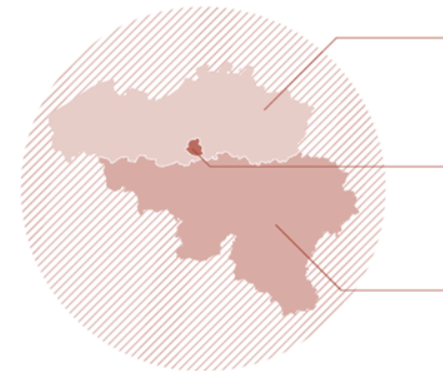
White collar

M/M-1: **+0.64%**
M/M-12: **-4.41%**



Blue collar

M/M-1: **+0.68%**
M/M-12: **-0.15%**



M/M-1	M/M-12
+0.56%	-3.16%
M/M-1	M/M-12
+3.45%	+9.70%
M/M-1	M/M-12
-0.57%	-3.10%

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BELGIUM						
YEARLY GROWTH (M/M-12)			MONTHLY GROWTH (M/M-1)			
	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>
January 2025	-4.11%	-1.87%	-2.86%	-1.45%	-0.23%	-1.00%
February 2025	-5.53%	-1.11%	-3.02%	-2.61%	0.24%	-1.17%
March 2025	-5.20%	-2.21%	-3.51%	1.13%	-0.13%	0.39%
April 2025	-4.44%	0.82%	-1.47%	-0.61%	1.27%	0.17%
May 2025	-8.58%	-3.38%	-5.64%	-2.00%	-1.07%	-0.95%
June 2025	-4.41%	-0.15%	-1.94%	0.64%	0.68%	0.68%
FLANDERS						
YEARLY GROWTH (M/M-12)			MONTHLY GROWTH (M/M-1)			
	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>
January 2025	-8.22%	-2.99%	-5.15%	-3.1%	-0.26%	-1.60%
February 2025	-9.42%	-1.44%	-4.63%	-2.6%	0.31%	-1.05%
March 2025	-7.75%	-1.62%	-4.08%	0.9%	0.55%	0.86%
April 2025	-7.15%	1.78%	-1.83%	-0.9%	1.03%	0.22%
May 2025	-10.47%	-3.24%	-6.11%	-1.2%	-1.09%	-1.00%
June 2025	-8.31%	0.05%	-3.16%	-0.2%	1.10%	0.56%
WALLONIA						
YEARLY GROWTH (M/M-12)			MONTHLY GROWTH (M/M-1)			
	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>
January 2025	-1.26%	1.98%	0.66%	-2.6%	0.05%	-1.35%
February 2025	-3.77%	-0.20%	-1.60%	-2.7%	-1.04%	-1.66%
March 2025	-7.08%	-2.18%	-4.14%	-0.3%	-1.03%	-0.80%
April 2025	-4.81%	-0.83%	-2.41%	-1.6%	-0.02%	-0.59%
May 2025	-10.28%	-3.40%	-6.24%	1.0%	-0.20%	0.03%
June 2025	-4.78%	-2.01%	-3.10%	-1.3%	-0.76%	-0.57%
BRUSSELS						
YEARLY GROWTH (M/M-12)			MONTHLY GROWTH (M/M-1)			
	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>	<u>White collar</u>	<u>Blue collar</u>	<u>Total</u>
January 2025	5.87%	-8.22%	1.93%	3.5%	-0.20%	6.11%
February 2025	5.09%	-2.08%	3.21%	0.4%	-2.50%	-0.25%
March 2025	6.49%	-10.39%	1.83%	0.6%	-2.74%	0.16%
April 2025	5.74%	-2.89%	3.46%	-0.6%	2.34%	0.35%
May 2025	0.80%	-5.42%	-0.87%	-2.4%	-2.74%	-3.08%
June 2025	9.72%	9.67%	9.70%	4.8%	3.08%	3.45%



More figures?

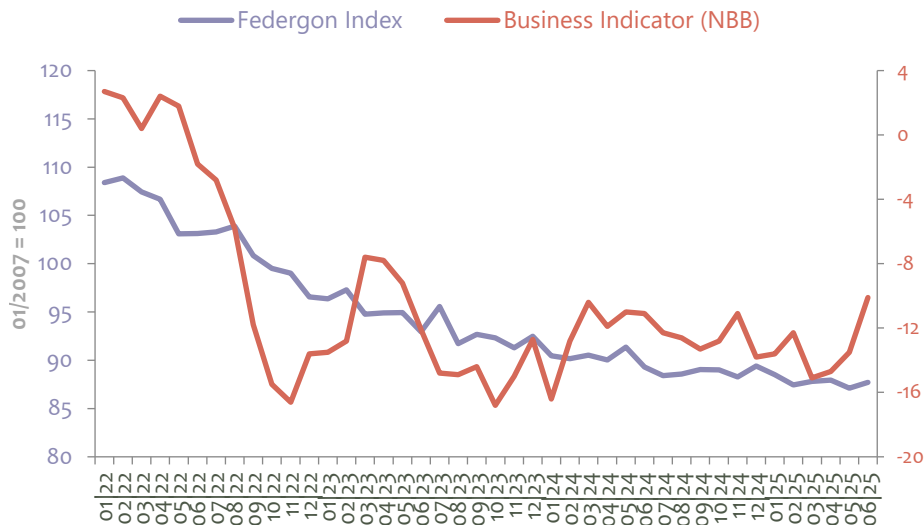
[Kenniscentrum](#)

[Centre de connaissances](#)

[European Employment Barometer by
SIA and WEC](#)

Market Update 06/2025

BELGIAN BUSINESS INDEX



“Business confidence continues to rise in June”

- The business confidence indicator rose for the third consecutive month in June.
- Both the manufacturing industry and the business-related services sector saw strong improvements in business confidence this month. On the contrary, confidence declined in the trade sector and the building industry.

The manufacturing industry reported a strong recovery in business confidence this month. In addition to an improved assessment of order books and more positive expectations for employment, demand expectations were significantly brighter.

There was also a powerful rebound in the business-related services sector. Business leaders assessed their current level of activity more positively, with activity and market demand expectations also improving markedly.

The building industry experienced a decline in confidence, as was the case in the trade sector. The recent assessment of order books and equipment use was revised downwards. However, demand expectations were more positive.

In the trade sector, unlike in the building industry, the decline in business confidence was mainly due to more negative demand expectations.

The overall synthetic curve remains unchanged from last month..

(source: NBB)

Visit our Expertise Center for more figures related to the Temporary Agency Work industry in Belgium:

NL: <https://federgon.be/kennis-centrum/cijfers>

FR: <https://federgon.be/fr/centre-de-connaissances/centre-de-connaissances>

METHODOLOGICAL NOTE:

The monthly structural survey is conducted among a fixed sample of 38 Federgon members accounting for 68.25% of the temporary agency work industry in Belgium in 2024.

- All figures in this monthly report relate to daily averages in order to neutralize the differences in number of working days per month
- The year-on-year evolution is calculated from gross figures.

• The month-on-previous-month changes are calculated from seasonally adjusted figures (the seasonal adjustment is performed by the Surveys Department of the National Bank of Belgium using the Demetra+ method).

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