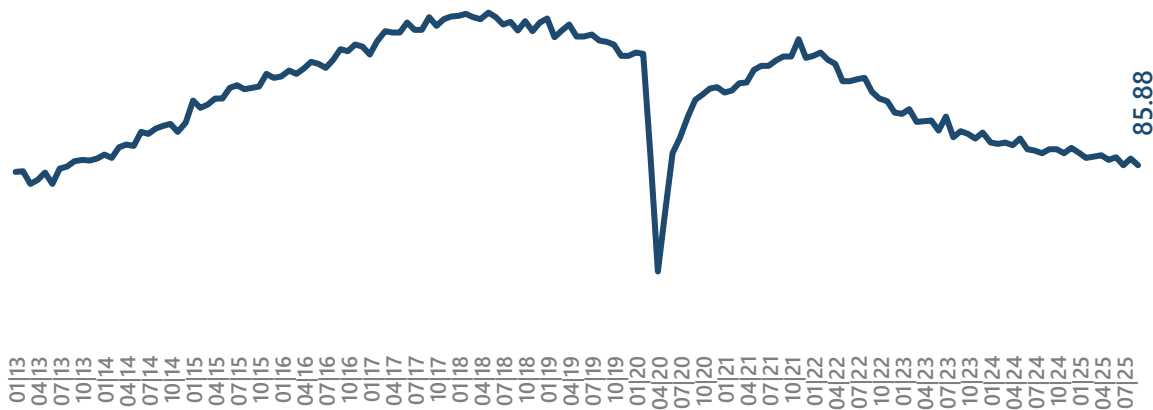


Market Update 09/2025

WEAK LEVEL OF TEMPORARY STAFFING ACTIVITY IN SEPTEMBER

FEDERGON INDEX



“

Temporary agency work fell again in September, with a significant decline among white-collar workers and a moderate drop in blue-collar segments. After two months of slight recovery, the labour market shows renewed weakness, reflecting persistent uncertainty.

”

REGIONAL EVOLUTION

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.

“Compared to the same period last year, the industry activity is -4.71% lower. Seasonally adjusted figures indicate a decrease of the TAW activity (-1.46%) on a monthly basis.”



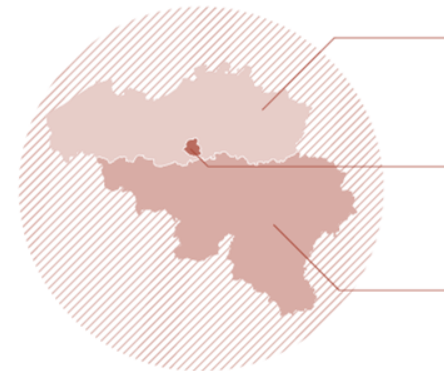
White collar

M/M-1: **-1.67%**
M/M-12: **-8.41%**



Blue collar

M/M-1: **-2.13%**
M/M-12: **-1.98%**



M/M-1	M/M-12
-1.93%	-4.46%
M/M-1	M/M-12
-0.89%	+4.56%
M/M-1	M/M-12
-0.70%	-8.52%

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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>
April 2025	-4.44%	0.82%	-1.47%	-0.62%	1.40%	0.25%
May 2025	-8.58%	-3.38%	-5.64%	-2.13%	-1.23%	-1.04%
June 2025	-4.41%	-0.15%	-1.95%	0.46%	0.55%	0.64%
July 2025	-1.83%	1.70%	0.12%	-1.95%	-1.72%	-1.95%
August 2025	-2.06%	3.33%	0.94%	0.72%	1.42%	1.52%
September 2025	-8.41%	-1.98%	-4.71%	-1.67%	-2.13%	-1.46%
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>
April 2025	-7.90%	1.78%	-2.13%	-1.22%	1.28%	0.19%
May 2025	-11.28%	-3.24%	-6.43%	-1.28%	-1.24%	-1.08%
June 2025	-8.31%	0.05%	-3.16%	0.28%	1.18%	0.80%
July 2025	-5.20%	2.44%	-0.74%	-0.98%	-1.75%	-1.61%
August 2025	-4.45%	5.74%	1.51%	0.43%	3.22%	2.20%
September 2025	-10.42%	-0.63%	-4.46%	-1.69%	-2.44%	-1.93%
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>
April 2025	-4.81%	-0.83%	-2.41%	-1.60%	-0.07%	-0.61%
May 2025	-10.28%	-3.40%	-6.24%	0.66%	-0.32%	-0.14%
June 2025	-4.78%	-2.01%	-3.10%	-1.27%	-0.83%	-0.64%
July 2025	-3.15%	-1.17%	-2.01%	-3.01%	-2.28%	-2.79%
August 2025	-5.54%	-2.67%	-3.90%	0.82%	-0.52%	0.23%
September 2025	-12.45%	-6.01%	-8.52%	-1.55%	-0.17%	-0.70%
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>
April 2025	8.39%	-2.89%	5.41%	0.99%	2.25%	1.61%
May 2025	3.61%	-5.42%	1.19%	-2.28%	-2.99%	-3.07%
June 2025	9.69%	9.58%	9.66%	2.93%	3.19%	1.87%
July 2025	14.04%	8.45%	12.62%	-1.73%	-0.10%	-2.10%
August 2025	14.66%	3.73%	11.62%	0.68%	-1.77%	-0.11%
September 2025	4.58%	4.50%	4.56%	-1.05%	-5.53%	-0.89%



More figures?

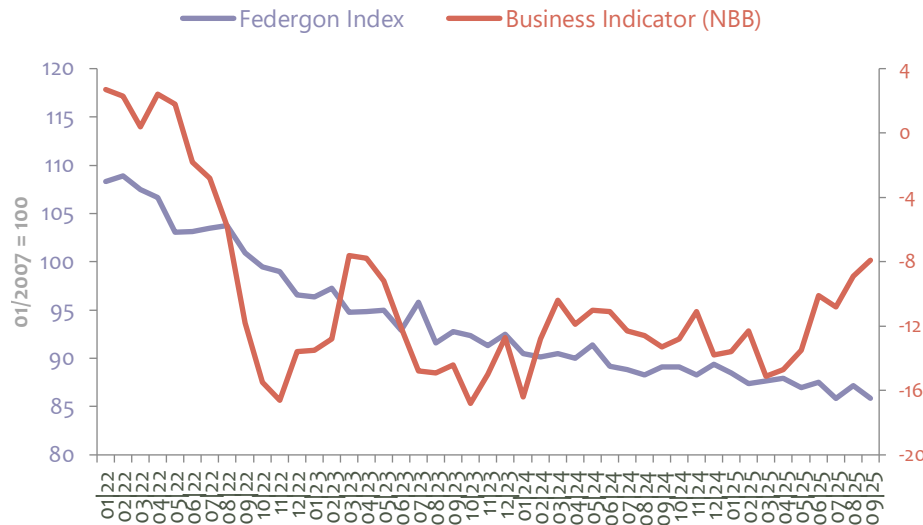
[Kenniscentrum](#)

[Centre de connaissances](#)

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

Market Update 09/2025

BELGIAN BUSINESS INDEX



“Business confidence continues to rise in September”

- Following the renewed optimism shown by business leaders last month, the business confidence indicator continued to climb in September.
- Confidence has grown in all sectors, most markedly in the building industry and to a lesser extent in the manufacturing industry.

In the building industry, the business climate improved for the third consecutive month. There was continued growth in orders and assessments of order book levels were considerably more favourable, taking into account the season.

The strongest gains were seen in residential construction.

In the manufacturing industry, the confidence indicator climbed for the second consecutive month, albeit only marginally, driven by upward revisions of expectations concerning both demand and employment. However, in contrast to last month, business leaders in this sector assessed their stock levels more negatively.

In the business-related services sector, a significantly less favourable assessment of the current level of activity was more than offset by more optimistic expectations for business activity and overall market demand.

In the trade sector, confidence grew thanks to improved expectations regarding orders to suppliers.

The overall synthetic smoothed curve, which reflects the underlying economic trend, continued on an upward trajectory.

(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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