

Market Update 06/2026

TEMPORARY AGENCY WORK SLOWS IN JUNE

FEDERGON INDEX



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Temporary agency work activity remains under pressure. Monthly developments send negative signals across segments and regions, while year-on-year trends confirm persistent weakness, particularly in white-collar activities. At the same time, we notice mixed signals in terms of business confidence, with a deterioration in the manufacturing industry and improvements in construction, trade and business-related services.

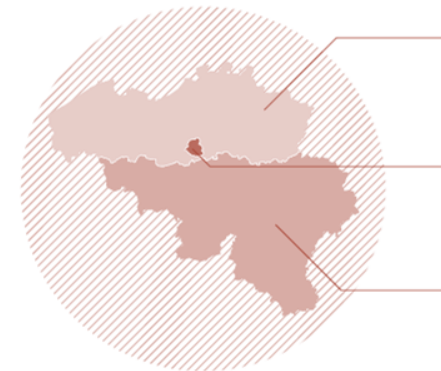


"Compared to the same period last year, the industry activity is -7.29% lower. Seasonally adjusted figures indicate a decrease of the TAW activity (-0.89%) on a monthly basis."



	White collar	Blue collar
M/M-1:	-1.55%	M/M-1: -1.09%
M/M-12:	-7.92%	M/M-12: -6.85%

REGIONAL EVOLUTION



M/M-1	M/M-12
-0.21%	-7.54%
M/M-1	M/M-12
-4.47%	-10.54%
M/M-1	M/M-12
-1.41%	-5.47%

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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 2026	-6.08%	-1.11%	-3.28%	-2.67%	-1.32%	-1.70%
February 2026	-3.92%	-3.44%	-3.64%	1.31%	-0.67%	-0.03%
March 2026	-8.81%	-5.03%	-6.64%	-1.90%	-0.70%	-1.10%
April 2026	-6.29%	-4.80%	-5.43%	1.02%	0.64%	0.25%
May 2026	4.06%	1.66%	2.67%	1.46%	0.86%	1.31%
June 2026	-7.92%	-6.85%	-7.29%	-1.55%	-1.09%	-0.89%
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 2026	-6.29%	-0.52%	-2.82%	-2.44%	-2.63%	-2.62%
February 2026	-2.94%	-2.99%	-2.97%	1.42%	-0.70%	0.14%
March 2026	-9.50%	-5.13%	-6.81%	-2.45%	-0.51%	-1.29%
April 2026	-7.87%	-5.09%	-6.15%	-0.70%	0.02%	-0.35%
May 2026	0.82%	0.64%	0.71%	0.83%	0.27%	0.56%
June 2026	-7.91%	-7.34%	-7.54%	-0.05%	-0.45%	-0.21%
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 2026	-5.02%	0.36%	-1.79%	3.46%	2.10%	2.39%
February 2026	-5.38%	-1.00%	-2.68%	-0.86%	-0.71%	-0.65%
March 2026	-9.37%	-2.09%	-4.90%	-2.39%	-0.91%	-1.41%
April 2026	-5.11%	-0.68%	-2.40%	1.64%	1.11%	1.14%
May 2026	4.97%	6.57%	5.94%	1.58%	1.30%	1.38%
June 2026	-11.81%	-1.47%	-5.47%	-2.59%	-0.90%	-1.41%
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 2026	-6.88%	-17.63%	-9.59%	-8.19%	5.50%	-3.21%
February 2026	-4.90%	-25.04%	-9.91%	4.79%	-9.24%	0.95%
March 2026	-5.99%	-22.49%	-10.00%	0.37%	0.17%	0.51%
April 2026	-3.05%	-26.74%	-8.83%	2.14%	-3.02%	2.63%
May 2026	12.48%	-14.71%	5.68%	9.09%	9.74%	4.59%
June 2026	-2.74%	-33.66%	-10.54%	-5.23%	-19.44%	-4.47%



More figures?

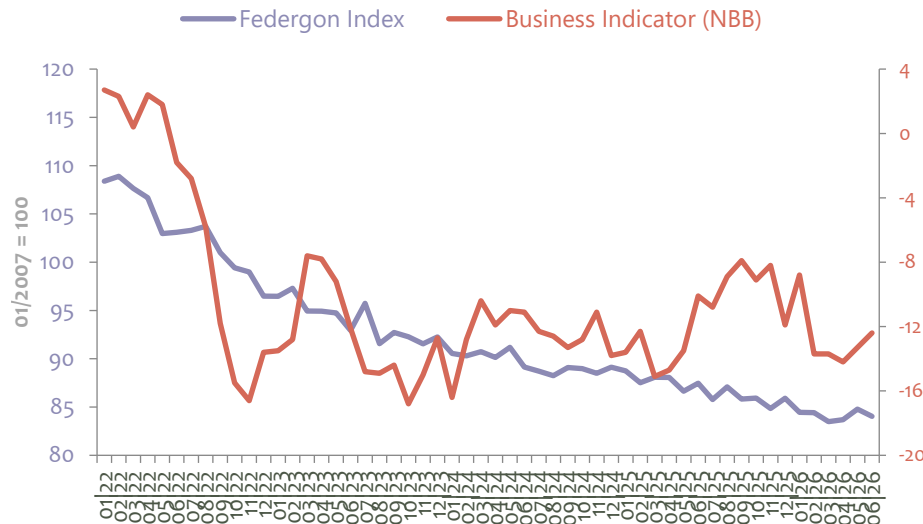
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[European Employment Barometer
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BELGIAN BUSINESS INDEX



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

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

METHODOLOGICAL NOTE:

The monthly structural survey is conducted among a fixed sample of 38 Federgon members, representing 65.95% of the temporary agency work industry in Belgium in 2025.

- 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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“Business confidence rises again in June”

- The business barometer rose in June, confirming the modest recovery that began last month.
- The business climate is improving significantly in the building industry and the trade sector and, to a lesser extent, in business-related services.
- For the second month running, business confidence in the manufacturing industry declined slightly.

In the building industry, last month's optimism increased further. Business leaders assessed their strengthened order books considerably more favourably and expect demand to pick up sharply over the next three months.

In the trade sector, as well, business leaders expressed very optimistic demand expectations. They also expect to employ more staff over the coming three months but anticipate a reduction in orders placed with suppliers.

In business-related services, where a slight improvement was recorded, business leaders are particularly more optimistic about their activity prospects. However, as was the case last month, they assessed their current level of activity less favourably.

Business sentiment in the manufacturing industry fell for the second consecutive month. Business leaders assessed their total order position more negatively and, like the previous month, are more pessimistic about current stock levels. By contrast, they expect a somewhat limited increase in both demand and employment over the next three months.

The general synthetic smoothed curve, which reflects the underlying economic trend, remains virtually stable. *(source: NBB)*

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