



US Contingent Talent and Strategic Solutions PEAK Matrix[®] Assessment 2024 – Industrial

September 2024: Complimentary Abstract / Table of Contents

PEAK
MATRIX[®]

Contingent Staffing

 Everest Group[®]

Our research offerings

This report is included in the following research program(s):

Contingent Staffing

- ▶ Advanced SciTech
- ▶ Amazon Web Services (AWS)
- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Asset and Wealth Management
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ CXM Technology
- ▶ Cybersecurity
- ▶ Cyber Threat Detection and Response
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Research and Development
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Crime and Compliance
- ▶ Financial Services Technology (FinTech)
- ▶ Forces & Foresight
- ▶ GBS Talent Excellence
- ▶ Global Business Services
- ▶ Google Cloud
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Excellence
- ▶ IT Talent Excellence
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Value and Quality Assurance (VQA)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

Learn more about
our custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk,
technologies

Locations: costs, skills, sustainability,
portfolios

Contents

5	Introduction and overview	24	Characteristics of Leaders, Major Contenders, and Aspirants
6	Research methodology	25	Characteristics of Star Performers
7	Key information on the report	27	Provider capability summary dashboard
8	Background of the research		
9	Objective of the research		
10	Focus of the research		
		31	Enterprise sourcing considerations
11	Summary of key Messages	31	Leaders
12	Summary of key messages	32	Adecco
		34	Aerotek
13	Provider landscape	36	Express Employment
14	Provider landscape summary	38	Kelly
15	Provider landscape by overall market share	40	Manpower
16	Provider landscape by job family	42	PeopleReady
17	Leaders versus others: performance on key parameters	44	Randstad
		46	Major Contenders
19	US Industrial Contingent Talent and Strategic Solutions Peak Matrix® characteristics	47	Elwood Staffing
20	PEAK Matrix® framework	49	Integrity Staffing Solutions
23	US Industrial Contingent Talent and Strategic Solutions PEAK Matrix® 2024	51	MAU Workforce Solutions
		53	Önin Staffing
		55	Partners Personnel
		57	ProLogistix

For more information on this and other research published by Everest Group, please contact us:

Priyanka Mitra, Vice President

Varun Malik, Practice Director

Dileep Amanchi, Senior Analyst

Shreya Chawla, Senior Analyst

Copyright © 2024 Everest Global, Inc.

We encourage you to share these materials internally in accordance with your license. Sharing these materials outside your organization in any form – electronic, written, or verbal – is prohibited unless you obtain the express, prior, and written consent of Everest Global, Inc. It is your organization's responsibility to maintain the confidentiality of these materials in accordance with your license of them.

Contents

46	Major Contenders (continued)
59	ResourceMFG
61	Select Staffing
63	Staffmark
65	Surge Staffing
67	Tradesmen International
69	Aspirants
70	Labor Finders
72	Lyneer Staffing Solutions
74	Nesco Resource
76	Appendix
77	Glossary
78	Research calendar

Background of the research

The industrial staffing and strategic solutions market in the US faced a downturn in 2023 due to challenges in industrial sectors stemming from reduced consumer demand, lower production activity, and pressures on costs and margins amid an economic slowdown. Additionally, recent labor regulations have added further complexity to the industrial staffing sector. Despite the overall market deceleration, there are growth opportunities in sectors such as advanced manufacturing in electric vehicles and semiconductors, renewable energy, and e-commerce. These segments are expected to drive future demand for industrial staffing, especially in high-skilled and in-demand roles. Providers succeeding in this market are investing in developing capabilities in these growth and resilient segments. They are focusing on enhancing associate benefits, safety training, upskilling opportunities, adopting digital staffing approaches, offering onsite solutions, and more.

This report explores the dynamics of the industrial contingent staffing provider landscape in the US and its impact on the market in 2023. It provides an overview of the market and analyzes how industrial staffing service providers differentiate themselves using the comprehensive Everest Group PEAK Matrix®.

In this research, we focus on:

- Everest Group's US Industrial Contingent Talent and Strategic Solutions PEAK Matrix® evaluation, a comprehensive assessment of 21 contingent talent and strategic solutions providers in the US operating in the industrial skill segment
- Remarks on key strengths and limitations for the industries of each contingent staffing provider
- Service provider landscape

This report includes the profiles of the following 21 leading providers featured on the US Industrial Contingent Talent and Strategic Solutions PEAK Matrix®:

- **Leaders:** Adecco, Aerotek, Express Employment, Kelly, Manpower, PeopleReady, and Randstad
- **Major Contenders:** Elwood Staffing, Integrity Staffing Solutions, MAU Workforce Solutions, Onin Staffing, Partners Personnel, ProLogistix, ResourceMFG, Select Staffing, Staffmark, Surge Staffing, and Tradesmen International
- **Aspirants:** Labor Finders, Lyneer Staffing Solutions, and Nesco Resource

Scope of this report

Geography: The US

Industry: Coverage across 20+ US industrial contingent staffing and strategic solutions providers

Services: Contingent staffing

Overview and abbreviated summary of key messages

Overview

This report examines the US Industrial contingent talent and strategic solutions provider landscape and its impact on the market. It focuses on provider position, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key provider profiles. It also identifies the key implications of the research findings for buyers and providers.

Some of the findings in this report, among others, are:

Market and service provider landscape

- The US industrial contingent talent and strategic solutions market spans six key segments: logistics, manufacturing, construction, facilities, hospitality, and retail
- The market is fragmented, with no single player dominating, despite size differences among providers. Provider offerings vary by job roles—Aerotek, Express Employment, and PeopleReady have diverse portfolios, while others such as ResourceMFG, ProLogistix, and Tradesmen International specialize in one or two industrial skill areas
- The market is highly competitive, with Leaders capturing significant revenue and outperforming others in impact, vision, and capability

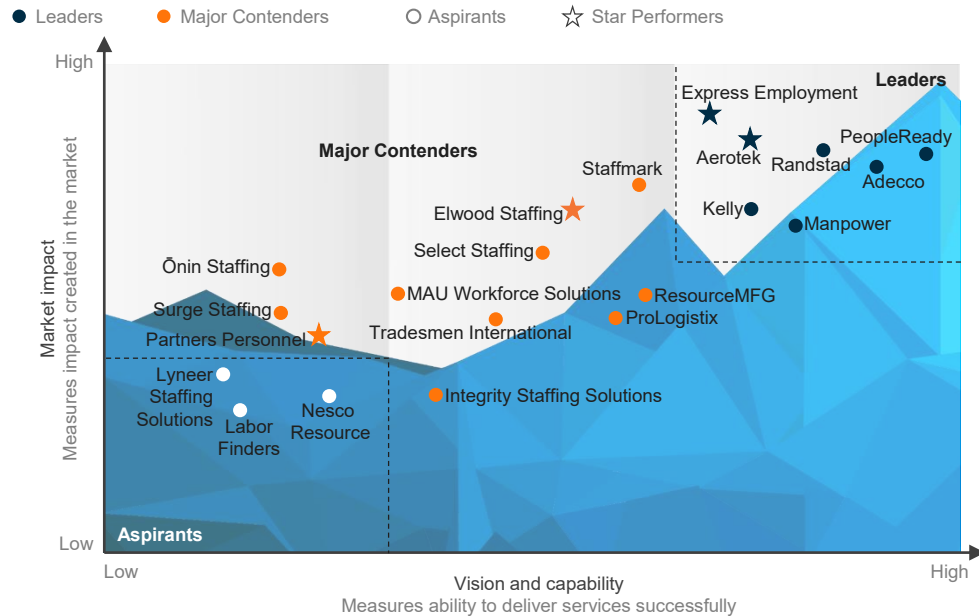
US Contingent Talent and Strategic Solutions PEAK Matrix® 2024 - Industrial

- Based on Everest Group’s comprehensive evaluation framework, the PEAK Matrix®, the 21 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Adecco, Aerotek, Express Employment Professionals, Kelly, Manpower, PeopleReady, Randstad
 - **Major Contenders:** Elwood Staffing, Integrity Staffing, Lyneer Staffing Solutions, MAU Workforce Solutions, Ōnin Staffing, Partners Personnel, ProLogistix, ResourceMFG, Select Staffing, Staffmark, Tradesmen International
 - **Aspirants:** Labor Finders, Nesco Resource, Surge Staffing
 - Everest Group also identified the following providers as **Star Performers** based on their YoY movement on the PEAK Matrix® (in alphabetical order): Aerotek, Elwood Staffing, Express Employment, and Partners Personnel

This study offers five distinct chapters providing a deep dive into key aspects of the US industrial contingent talent and strategic solutions market market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix® Assessment 2024

Everest Group US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024 – Industrial^{1,2,3}



1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Adecco, Kelly, Manpower, Partners Personnel, PeopleReady, and Randstad
 2 ProLogistix, ResourceMFG, and Select Staffing were assessed as distinct brands under EmployBridge. This evaluation was conducted in 2023, prior to EmployBridge's recent 2024 brand consolidation efforts
 3 The assessment of Lyneer Staffing Solutions is from 2023, and therefore is before its acquisition by Atlantic International (SeqLL Inc) in 2024
 Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	●	●	●	●	●	●	●	●	●
Provider 2	●	○	●	●	●	○	●	○	●
Provider 3	●	●	●	●	●	●	●	●	●
Provider 4	○	○	●	●	○	○	●	●	●
Provider 5	●	●	●	●	●	●	●	●	●
Provider 6	○	○	●	○	●	○	○	●	○

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	●	●	●	●	○	○	○	●

Strengths

- Provider 1 has vast experience in catering to clients from energy and utilities sector. It has developed robust capabilities to source for skilled trades, especially in renewable energy
- It is one of the few providers to invest in developing capabilities in industrial managed capacity and managed services. It currently offers these services in manufacturing and maintenance

Limitations

- While Provider 1 has a strong on-ground presence overall, its branch network in the Midwest US is smaller compared to its competitors
- It lacks a digital staffing ecosystem to streamline shift filling and improve stakeholder engagement

Research calendar

Contingent Staffing

	Published	Current release	Planned
Reports title	Release date		
Contingent Talent and Strategic Solutions State of the Market 2023 – Elevating Efficiency and Experience to Navigate Uncertain Times			December 2023
Internal Talent Mobility			January 2024
Avionté Acquires SimpleVMS: Forging an End-to-End Integrated Platform for Contingent Talent Acquisition and Management			January 2024
Talent Demand Trends India IT Services – H2 2023			February 2024
Steering into the Wind: Future-proofing Your Talent Strategy for the BFSI Industry			March 2024
Technology Talent Playbook for IT Service Providers – Key Game Changers to Drive Next-generation IT Talent Readiness			March 2024
Introduction to the Skills Intelligence Technology Landscape			April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Management			April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Acquisition			May 2024
Staffing Software Spotlight: Exploring the Prominent Staffing Software (ATS) Providers			July 2024
US Professional Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024			July 2024
US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024 – Industrial			September 2024
UK Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024			Q3 2024
Workforce as a Service: Emergence of Online Staffing Platforms			Q4 2024
Contingent Staffing State of the Market 2024			Q4 2024
Talent Providers to Strategic Partners: Redefining the Role of Contingent Staffing Providers			Q4 2024

Note: [Click](#) to see a list of all of our published Contingent Staffing reports

Stay connected

Dallas (Headquarters)

info@everestgrp.com

+1-214-451-3000

Bangalore

india@everestgrp.com

+91-80-61463500

Delhi

india@everestgrp.com

+91-124-496-1000

London

unitedkingdom@everestgrp.com

+44-207-129-1318

Toronto

canada@everestgrp.com

+1-214-451-3000

Website

everestgrp.com

Blog

everestgrp.com/blog

Follow us on



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

Notice and disclaimers

Important information. Please review this notice carefully and in its entirety. Through your access, you agree to Everest Group's terms of use.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use/, is hereby incorporated by reference as if fully reproduced herein. Parts of these terms are pasted below for convenience; please refer to the link above for the full version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulatory Authority (FINRA), or any state or foreign securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity.

All Everest Group Products and/or Services are for informational purposes only and are provided "as is" without any warranty of any kind. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon any Product or Service. Everest Group is not a legal, tax, financial, or investment advisor, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Products and/or Services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to an Everest Group Product and/or Service does not constitute any recommendation by Everest Group that recipient (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group Product and/or Service is as of the date prepared, and Everest Group has no duty or obligation to update or revise the information or documentation. Everest Group may have obtained information that appears in its Products and/or Services from the parties mentioned therein, public sources, or third-party sources, including information related to financials, estimates, and/or forecasts. Everest Group has not audited such information and assumes no responsibility for independently verifying such information as Everest Group has relied on such information being complete and accurate in all respects. Note, companies mentioned in Products and/or Services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.