



APSCo Global:

USA Board Briefing June 2026
Sample Whitepaper

Introduction from Ann Swain, APSCo Global CEO

With an estimated value approaching \$190 billion, the US market offers substantially greater revenue opportunities than any other. Higher salary levels and markups also translate into stronger profit margins, meaning UK firms that successfully replicate proven models can achieve materially enhanced financial performance. For organisations considering entry into the USA, or already operating there, this six-monthly US Market Board Briefing offers a concise overview of data, expert commentary, and trends drawn from key global and international partners.

Following a post-pandemic expansion phase, the sector experienced a downturn between 2023 and 2025, marked by double-digit declines and widespread cost reduction. In 2026, the market is showing early signs of recovery and stabilisation, transitioning from contraction to modest growth, within key sectors for our members, reflecting underlying economic resilience despite continued global uncertainty.

As HSBC highlights, businesses are operating in a “less stable, less predictable” macroeconomic environment. However, the US outlook remains comparatively steady, with GDP growth forecast at approximately 2.1% in 2026 and 2.0% in 2027. Short-term volatility persists, driven by inflation, geopolitical risks, and policy uncertainty, shaping hiring behaviour and investment decisions.

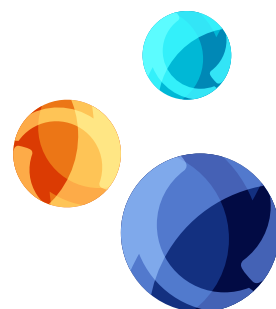
Demand is increasingly focused on flexible, contingent workforce models, reinforcing the importance of staffing firms that deliver agility. Growth remains uneven, with resilience in IT and tech driven by digital transformation and AI, alongside strength in healthcare, engineering, life sciences, and professional services.

This document is an extract of the full resource. The complete version is available exclusively to organisations with an active APSCo membership.

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Ann Swain
Global CEO, APSCo



The US offers significant opportunity alongside operational complexity. A key challenge is navigating an increasingly fragmented regulatory landscape across federal, state, and local levels. This paper highlights key compliance and legislative issues including:

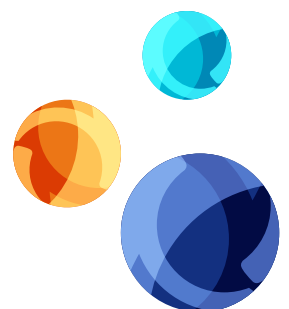
- **Pay transparency legislation** – expanding rapidly, with varying scope and disclosure requirements
- **Worker classification** – heightened enforcement risk and financial penalties, with inconsistent federal and stricter state-level rules
- **Joint employer liability** – evolving definitions impacting contract structures and risk
- **Employee benefits regulation** – complex, state-specific requirements
- **EEOC oversight and DEI scrutiny** – increased monitoring of hiring practices and equal opportunity compliance
- **Wage and overtime regulations** – varying thresholds and rules across jurisdictions
- **AI in recruitment** – emerging regulatory scrutiny alongside growing adoption
- **Tax structures and entity selection** – critical early-stage considerations for market entry

Success in the US market depends on balancing compliance with commercial agility, aligning with sector growth and adopting a phased expansion strategy. As Agile Partnering highlight, much depends on getting the 'big trend' right and making timely and well-informed investment decisions.

And remember - APSCo and our partners are here to support you at every stage in your US journey.

“2026 has brought multiple and long-awaited signs of growth across many segments of the industry...an extremely dynamic time for the US industry as staffing firms invest heavily in AI technology and also face a rapidly changing compliance environment”

– SIA



Growth opportunities emerge in the US staffing industry

Timothy Landhuis, Senior Vice President of Research, Staffing Industry Analysts (SIA).

After three years of “winter” conditions in the US staffing market, 2026 has brought multiple and long-awaited signs of growth across many segments of the industry. After the post-pandemic boom years of 2021 and 2022, the US staffing industry experienced double-digit market declines in 2023 and 2024 and a modest decrease in 2025, forcing many staffing agencies to conduct multiple rounds of staff layoffs to try and “rightsize” their operations.

Nevertheless, like most economic and labour market cycles, some sort of bottom would eventually need to be reached, and so far in 2026 the data is suggesting much firmer demand and many indicators suggest a return to year-over-year growth. In SIA’s most recent US industry forecast, published in March, we projected a modest 1% year-over-year growth in 2026 for a market size of \$180.2 billion. Since then, industry data points have shown notable strength, with our weekly SIA | Bullhorn Staffing Indicator showing 4% year-over-year growth in US temporary staffing hours for the week ending May 23rd, 2026.

Temp staffing was up 10% year-over-year for industrial occupations, up 2% for IT occupations, and down 8% for Office/Clerical occupations. Positive momentum was also evident in our [May US Pulse Survey](#) which showed a net 45% of staffing firms saw an increasing trend in new orders. In addition, sales difficulty fell to an average of 3.3, the lowest level observed since early in 2023, and another bullish signal.

Looking at growth trends by segment, according to our [forecast analysis](#), many segments are benefitting from a resumption of projects that had been put on hold and also a shift back to more traditional levels of contingent workers after several years of focused cost cutting. This is the case in IT staffing, where many projects related to AI readiness and AI implementation are moving forward. This is also the case in industrial staffing, which is benefitting from some recovery in demand from manufacturing clients and strong need for skilled trades workers related to data center construction and power grid adaptation. In healthcare staffing, growth areas include demand for physicians and advanced practitioners in the locum tenens market, as well



as demand for therapists at schools. Other segments seeing more prominent growth include engineering, life sciences, and retained search.



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Timothy Landhuis
VP of Research, SIA

In terms of growth opportunities by geography, we note several states reported above average growth in Employment Services employment in Q1 2026. As a positive outlier, Texas reported 6.7% year-over-year growth representing an increase of 19,700 jobs. Other large states showing substantial growth include Arizona (+6.4% y/y) and Pennsylvania (+4.0% y/y), along with the medium sized states Kentucky (+7.9% y/y) and Nevada (+11.9% y/y).

Lastly, we note that 2026 represents an extremely dynamic time for the US industry as staffing firms invest heavily in AI technology and also face a rapidly changing compliance environment brought by hundreds of new state laws on pay transparency, sick leave, use of AI, and other topics. While these technology and regulatory challenges remain daunting and complex, those staffing firms that are able to deliver strong solutions to their clients will be able to demonstrate an expanded value proposition and achieve a durable competitive advantage.

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