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The Top 100 Language Service Providers

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This brief presents the world's leading providers of translation, localization, and interpreting services. We also size the market based on reported revenue data, and present our projections for the next five years. Due in part to the growth of the industry, we expanded this year's ranking to include the 100 largest providers of language services and technology ([see Table 1](#)). Because there were several instances of companies reporting identical revenue, the list includes three ties, resulting in 104 companies claiming or sharing the top 100 spots. The two-letter country codes listed correspond to [ISO 3166-1 alpha 2](#), the most commonly used abbreviations.

	Company	HQ Country	2011 Revenue in US\$M	Employees	Offices	Status
1	Mission Essential Personnel	US	\$725.50	8,300	20	Private
2	Lionbridge Technologies	US	\$427.86	4,500	45	Public
3	HP ACG	FR	\$418.00	4,200	15	Public
4	TransPerfect / Translations.com	US	\$300.60	1,763	74	Private
5	SDL	UK	\$282.85	2,700	70	Public
6	STAR Group	CH	\$148.00	890	43	Private
7	euroscript International S.A.	LU	\$133.71	1,400	27	Private
8	ManpowerGroup	US	\$113.00	350	11	Public
9	RWS Holdings PLC	UK	\$105.06	529	10	Public
10	Welocalize, Inc.	US	\$82.20	615	12	Private
11	CLS Communication	CH	\$81.52	550	19	Private
12	Honyaku Center Inc.	JP	\$70.14	254	5	Public
13	thebigword Group	UK	\$65.12	440	9	Private
14	Yamagata Intech Corporation	JP	\$60.42	800	15	Private
15	Semantix	SE	\$56.46	240	13	Private
16	Logos Group	IT	\$51.75	200	7	Private
17	Moravia Worldwide	CZ	\$44.30	469	8	Private

	Company	HQ Country	2011 Revenue in US\$M	Employees	Offices	Status
18	Cyacom International, Inc.	US	\$43.74	692	4	Private
19	hiSoft Technology International Ltd.	CN	\$40.80	1,020	21	Public
20	ONCALL Language Services Pty Ltd	AU	\$36.39	92	5	Private
21	Hogarth Worldwide	UK	\$36.10	350	7	Private
22	Pacific Interpreters	US	\$35.15	400	5	Private
23	Crestec, Inc.	JP	\$33.62	2,000	26	Private
24	Merrill Brink International	US	\$32.00	100	4	Private
25	AAC Global	FI	\$30.40	432	13	Public
26	Skrivanek Group	CZ	\$29.02	295	44	Private
27	CSOFT International, Ltd.	CN	\$28.60	400	14	Private
28	Alpha CRC	UK	\$28.56	348	15	Private
29	Language Services Associates	US	\$28.00	160	3	Private
30	Språkservice Sverige AB	SE	\$27.78	40	2	Private
31	CBG Konsult AB	SE	\$27.47	190	9	Private
32	LanguageWire	DK	\$27.11	95	8	Private
33	Concorde Group	NL	\$24.65	110	1	Private
34	PTSGI	TW	\$24.61	290	5	Private
35	Jonckers Translation & Engineering s.a.	BE	\$24.23	171	10	Private
36	Telelingua	BE	\$23.06	220	7	Private
37	TRANSN Information Technology Co., Ltd.	CN	\$23.00	550	19	Private
38	Transvoice Sweden AB	SE	\$22.50	85	4	Private
39	TextMinded, EEIG	BE	\$21.97	115	12	Private
40	SeproTec Multilingual Solutions	ES	\$21.11	279	17	Private
41	Sajan	US	\$20.90	125	6	Public
42	ALAYA INC.	JP	\$20.72	137	7	Private
43	Verztec Consulting PTE LTD	SG	\$19.84	155	7	Private
44	TOIN Corporation	JP	\$19.23	90	6	Private
45	Amesto Translations	NO	\$19.00	80	5	Private

	Company	HQ Country	2011 Revenue in US\$M	Employees	Offices	Status
46	Xplanation Language Services NV	BE	\$17.97	76	5	Private
47	Applied Language Solutions	UK	\$17.07	145	9	Private
48	Chizai Corporation	JP	\$16.51	79	4	Private
49	SYSTRAN	FR	\$14.76	80	2	Public
50	Global LT, Inc.	US	\$13.40	75	3	Private
51	Human Science Co., Ltd.	JP	\$12.80	95	1	Private
52	Certified Languages International	US	\$12.51	60	2	Private
53	Janus Worldwide Inc.	RU	\$11.92	172	9	Private
54	beo Gesellschaft für Sprachen und Technologie mbh	DE	\$11.84	65	5	Private
55	Arancho Doc	IT	\$11.77	96	10	Private
56	EGO Translating Company	RU	\$11.41	207	9	Private
57	OMNIA S.r.l.	IT	\$11.32	41	8	Private
58	Fasttranslator.com / Snelvertaler BV	NL	\$10.85	54	6	Private
59	Wordbank	UK	\$10.67	80	2	Private
60	4-Text Software-Lokalisierung und technische Übersetzungen GmbH	DE	\$10.59	55	1	Private
61	itI AG	DE	\$10.45	90	6	Private
62	APOSTROPH AG	CH	\$10.08	74	1	Private
63	Interpreters Unlimited	US	\$10.00	28	4	Private
64	Logrus Group	RU	\$9.92	150	6	Private
65	ABBYY Language Services	RU	\$9.80	118	5	Private
66	Woods Media Group	FR	\$9.75	20	2	Private
67	Global Language Solutions	US	\$9.50	34	4	Private
68	mt-g medical translation GmbH & Co KG	DE	\$9.48	49	1	Private
69	Transline Deutschland Dr. Sturz GmbH	DE	\$9.47	80	5	Private
70	Neotech	RU	\$9.46	188	3	Private
71	LanguageWorks	US	\$9.40	35	1	Private

	Company	HQ Country	2011 Revenue in US\$M	Employees	Offices	Status
72	Lingo24	UK	\$9.31	166	8	Private
73	Elanex, Inc.	US	\$9.15	58	7	Private
74	Lingsoft Group	FI	\$8.23	50	2	Private
74	CTS LanguageLink	US	\$8.23	68	2	Private
75	Lemoine International, Inc.	US	\$8.10	68	6	Private
76	Geneva Worldwide	US	\$7.90	25	1	Private
76	VITS LANGUAGELINK	AU	\$7.90	15	1	Government-owned
77	CPSL (Celer Pawlowsky SL)	ES	\$7.79	40	3	Private
78	arvato technical information	DE	\$7.66	420	14	Private
79	TranslateMedia / Central Translations	UK	\$7.58	45	6	Private
80	nlg GmbH	DE	\$7.52	42	2	Private
81	ENLASO Corporation	US	\$7.00	43	2	Private
82	Translate Plus Limited	UK	\$6.63	47	10	Private
83	Cintra Ltd.	UK	\$6.55	26	1	Non-profit
83	eurocom Translation Services GmbH	AT	\$6.55	30	1	Private
83	text & form	DE	\$6.55	45	2	Private
84	Aspena, s.r.o.	CZ	\$6.35	70	8	Private
85	AVB Vertalingen / AVB Translations	NL	\$6.34	23	2	Private
86	Tetras GmbH	DE	\$5.93	40	5	Private
87	Cogen	BE	\$5.85	32	2	Private
88	HL TRAD	FR	\$5.43	20	3	Private
89	U-TRAX	NL	\$5.34	22	4	Private
90	Ofilingua S.L.	ES	\$5.32	180	2	Private
91	Mc LEHM Language Services	ES	\$5.26	27	3	Private
92	Sandberg Translation Partners / STP Nordic	UK	\$5.12	41	1	Private
93	Transatlantic Translations	US	\$5.10	24	6	Private
94	Jensen Localization BV	NL	\$4.87	27	3	Private
95	Translation Empire	UK	\$4.81	25	5	Private

	Company	HQ Country	2011 Revenue in US\$M	Employees	Offices	Status
96	LIDEX	PL	\$4.77	58	4	Private
97	ida Corporation	JP	\$4.75	40	2	Private
98	IDEST Communication SA	BE	\$4.74	16	1	Private
99	Lyric Labs	IN	\$4.38	41	5	Private
100	Intrawelt	IT	\$4.18	16	4	Private

Table 1: The Top 100 Global Language Service Providers in 2012

Source: Common Sense Advisory, Inc.

Observations on the Top 100 Global LSPs in 2012

How have the top-ranked companies changed since last year? This year, there are several important developments worth highlighting:

- Most of the largest players grew by leaps and bounds.** At the very top of the list, we see U.S. military contractor Mission Essential Personnel, which added more than US\$100 million in revenue compared to the previous year. Lionbridge grew by more than US\$20 million, TransPerfect increased by US\$50 million, and SDL added more than US\$40 million. All in all, it was a lucrative year for most of the top-ranked providers. With a decrease in revenue, HP ACG dropped one spot in the list.
- Other top firms also reported growth.** Also at the top of the list, we find STAR, euroscript, ManpowerGroup, and RWS. Each of these companies reported increases in 2011 as well, with euroscript and RWS growing by nearly US\$10 million. Welocalize vaults to the top 10 largest companies this year, jumping up eight spots since last year and adding more revenue than most firms in its size range.
- Companies in the top fifth of the ranking post solid numbers.** CLS had a banner year, adding more than US\$10 million in revenue, while Honyaku grew by US\$14 million, pushing past fellow Japanese competitor Yamagata, which reported a slight decrease. Semantix added a noteworthy US\$8 million over the past year, while firms like thebigword, Moravia, Logos Group, and hiSoft all posted smaller but respectable increases. This year's Top 20 also sees a telephone interpreting provider, Cyracom, which grew by around US\$6 million. Australian provider ONCALL also hits near the top of the list, adding US\$8 million since last year.

The Size of the Language Services Market in 2012

Our market sizing exercise draws on multiple sets of data. The first dataset is our global directory of language service providers (LSPs) that we maintain and update on a continuing basis throughout the year. At the time of publication, our directory contained 26,104 LSPs – that is, companies with two or more employees. Our second dataset consists of the respondents to our annual survey of suppliers. This year, we had 1,119 respondents in total. Finally, we use a subset of the survey respondents who report their exact revenue to us for purposes of collective analysis or for inclusion in global or regional rankings.

The vast majority of LSPs are privately owned – 94.18%, according to this year’s survey. Because they do not generally publish financial data, these firms submit their revenue and other financial data to us confidentially. This year, we had 672 LSPs that provided us with their actual revenue data. While many language service providers are reluctant to share this, enables us to reveal even more detailed information about the market itself, including its regional and sector-specific breakdowns.

Common Sense Advisory calculates that the market for outsourced language services is worth US\$33.523 billion in 2012.

To derive this estimate, we measured actual financial activity for the fiscal year most recently completed (2011). According to the year-to-year changes in revenue and the expected earnings reported by the LSPs we surveyed, we calculate that the language services market is growing in 2012 at an annual rate of 12.17%.

As of 2012, Common Sense Advisory calculates that the language services market is growing at an annual rate of 12.17%.

The current growth rate is positive news. Prior to 2010, our estimates showed stable double-digit growth rates for the language services industry, even during 2008 and 2009, when the global economy took a tumble. In 2010, the market fell to a slightly lower rate of more than 13%. However, in 2011, the growth rate dropped significantly to just 7.41%. While overall growth has not yet returned to its pre-recession rates, it appears that 2011 was a much better year for the market than 2010, and on par with the growth experienced in 2009.

Last year, we estimated that the market would reach US\$31.44 billion in 2011. The actual reported data from 2011 shows that the number was actually US\$29.89 billion instead. Why the shortfall? Our estimated growth rate uses a weighted average of the actual reported growth rate for the prior year and suppliers’ projected growth rates for

the year ahead. LSPs do not always perfectly estimate how much they will earn in the year to come. For this reason, we look backward at the amount of revenue suppliers actually reported in the prior year, so that we can fine-tune our adjustments for the next five-year period. Our prior estimate for 2012 showed that the market would reach US\$33.77 billion, while this year's estimates show that it will reach US\$33.52 billion. In other words, our 2012 estimates are highly consistent with the projected estimates for 2012 we issued last year.

North America Shrinks While Europe and Asia Grow

To divide up the world, we follow the classifications developed by the [United Nations](#). How much revenue does each part of the world receive from language services? Europe (49.38%) makes up the largest region this year, followed by North America (34.85%) and Asia (12.88%) (see [Table 1](#)). The smallest geographic tier consists of Oceania (2.00%), Latin America (0.63%), and Africa (0.27%). Because Europe is such a large market, we divide it up into four main parts. This gives us a total of nine major regions (see [Figure 1](#)).

Region	Market Share	2011 US\$ M	2012 US\$ M	2013 US\$ M	2014 US\$ M	2015 US\$ M
Africa	0.27%	81	91	102	114	128
Asia	12.88%	3,849	4,318	4,843	5,433	6,094
Europe	49.38%	14,757	16,553	18,569	20,830	23,365
Europe - Eastern	4.39%	1,312	1,472	1,651	1,852	2,077
Europe - Northern	18.86%	5,636	6,322	7,092	7,956	8,924
Europe - Southern	3.44%	1,028	1,153	1,294	1,451	1,628
Europe - Western	22.69%	6,781	7,606	8,532	9,571	10,736
Latin America	0.63%	188	211	237	266	298
North America	34.85%	10,415	11,683	13,105	14,700	16,490
Oceania	2.00%	598	670	752	844	946
TOTALS	100.00%	29,885	33,523	37,604	42,182	47,317

Table 2: Language Services Market Share by Region

Source: Common Sense Advisory, Inc.

Let us look at the recent historical and current market shares for each area of the world for each of the years for which we have collected data in our most recent format (see [Table 2](#)). We can observe several important changes in the geographic composition of the market from 2011 to 2012:

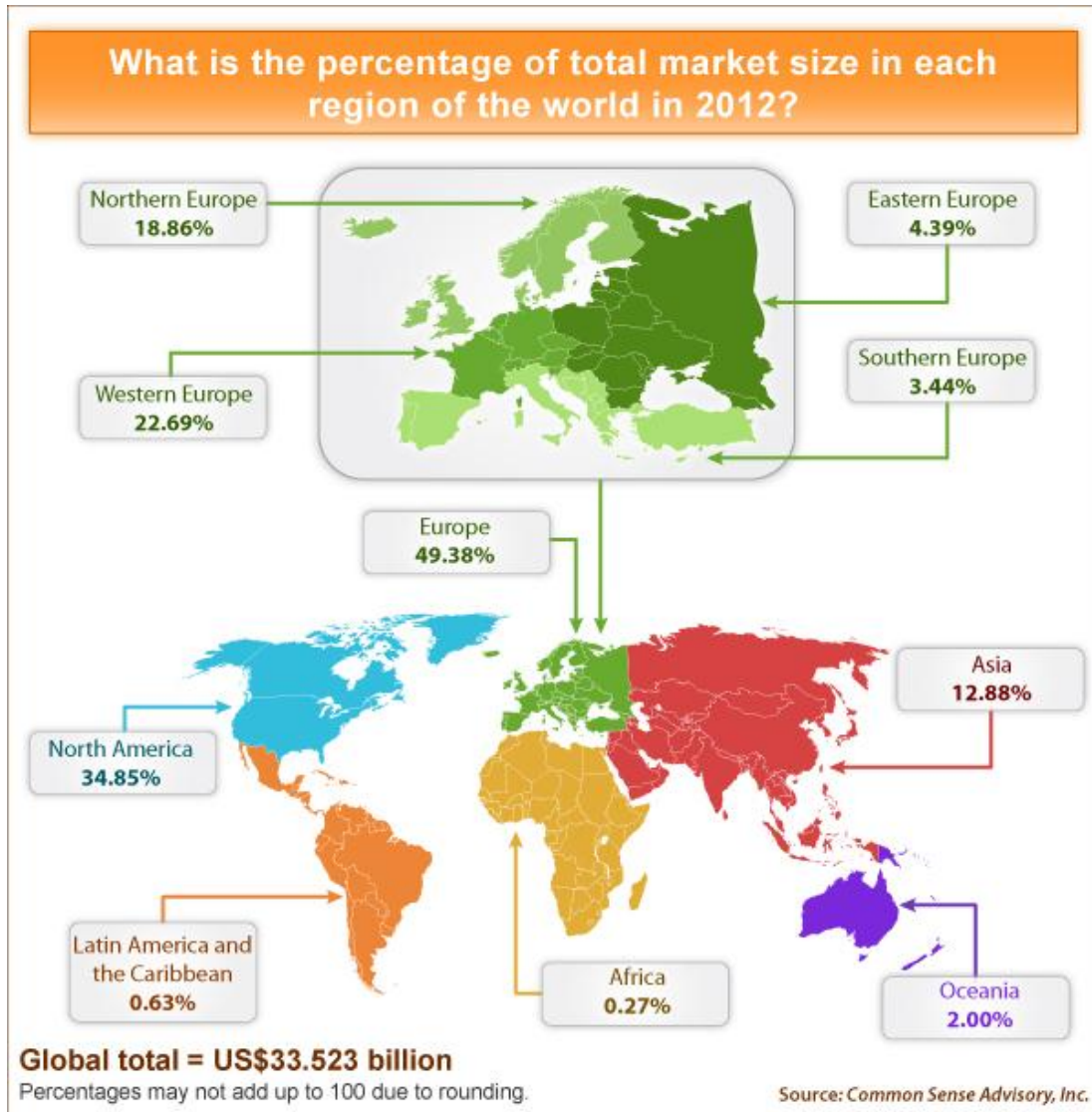


Figure 1: Global Language Services Market Share by Region
 Source: Common Sense Advisory, Inc.

- North America cuts spending.** As the U.S. has reduced its military involvement in Afghanistan and Iraq, the total amount spent on language services in North America appears to have decreased. In the private sector, businesses have been cautious with their spending and many have attempted to slow or reduce their expenditures on translation (see "[Understanding Your Customer's Translation Performance](#)," Dec11.)

Region	Market Share 2010	Market Share 2011	Market Share 2012
Africa	0.13%	0.26%	0.27%
Asia	8.59%	7.43%	12.88%
Europe	42.26%	42.07%	49.38%
Europe - Eastern	4.49%	2.84%	4.39%
Europe - Northern	11.10%	12.71%	18.86%
Europe - Southern	7.67%	5.39%	3.44%
Europe - Western	19.00%	21.13%	22.69%
North America	48.50%	49.25%	34.85%
Oceania	0.35%	0.66%	2.00%
Latin America	0.18%	0.32%	0.63%
Totals	100.00%	100.00%	100.00%

Table 3: Historical Change in Market Share by Region

Source: Common Sense Advisory, Inc.

- Asia gains significant ground.** Asia lost language services market share slightly in 2011 when compared with other regions, but appears to be gaining in 2012, fueled largely by China. This is the first year in our study that Asia reaches a double-digit percentage of total market share, an important milestone for this part of the world.
- Western and Northern Europe keep climbing.** Led by France, Germany, and the United Kingdom, these two sub-regions of Europe show impressive increases in market share. Southern Europe continued to lose out on market share overall, while Eastern Europe returned to the same share it had two years prior.

Our survey sample, with 1,119 LSPs out of 26,104 companies globally, represents 4.29% of the total population. This year, we collected exact revenue from 672 companies that contributed a total of US\$4.92 billion to the market in 2011. According to our calculations based on the exact revenue provided, the 2011 market was US\$29.885 billion. In other words, our sample made up 4.29% of language service providers worldwide that accounted for 14.30% of global revenue.

What about the remaining 25,432 LSPs in our directory? Most of them contribute much smaller amounts, but their revenue accounts for the majority of the market. On average, each of these companies earns less than US\$1 million annually. However, the scope ranges tremendously in size. There are LSPs we are aware of in this group that earn tens or even hundreds of millions of dollars – including some military contractors for the U.S. government. This group also includes LSPs in low-cost locations that might employ dozens of workers but take in less than US\$10,000 per year, reflecting once again the highly fragmented nature of the market.