

# Monthly Market Update

April 2026

## Trend Summary

- AI adoption is significantly reshaping hiring and talent needs in large Japanese companies. Over half report changes in mid-career hiring.
- Mynavi Survey shows Japan's mid-career recruitment remains strong but more selective.
- Japan is accelerating investment in "physical AI" using its acute labour shortage as a real-world proving ground.

## Highlights Overview

### Market Data

1. HRog reports: full-time job, monthly salary at 292,342 yen.
2. En Inc: average temp hourly wage for Tokyo/Nagoya/Osaka: 1,709 yen.
3. Persol DODA job-to-applicant ratio was 2.40, -0.17pt MoM.
4. The latest MHLW job-to-applicant ratio is 1.19, Tokyo 1.73 & Osaka 1.14, full-time 0.99.
5. Association of Job Information of Japan reports that job ads in February totalled 2,262,216, +3.0% up from the previous month and down 15.6% YoY.

### Market Trend

1. Japan's acute labour shortage is driving rapid investment in 'physical AI', while broader AI adoption reshapes hiring priorities and mid-career recruitment becomes increasingly selective.
2. AI adoption is significantly reshaping hiring and talent needs in large Japanese companies.
3. AI adoption is fundamentally reshaping mid-career hiring, with over 75% of companies reporting changes in the type of talent they seek.
4. In 2025, 92.9% of companies achieved their hiring targets—a record high—largely due to downward revisions in planned headcount rather than eased labour shortages.

### West Japan Expansion

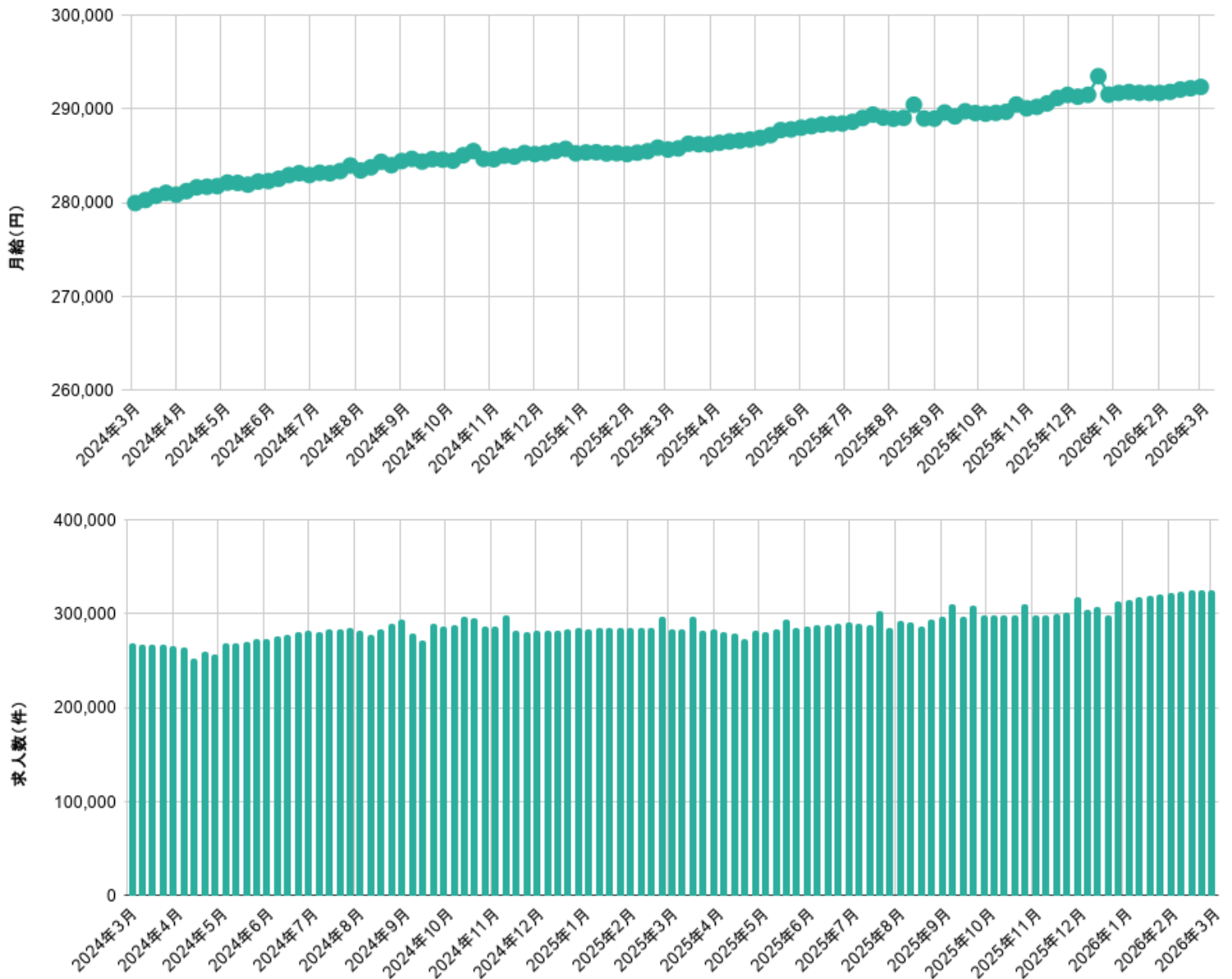
1. RelyEZ, a Chinese battery system, is expanding in Japan and now has a RelyEZ Energy Japan office in Osaka.
2. Marriott expansion continues, opens Sugata Hotel Osaka Shinsaibashi.
3. Central Group, a Thai hotel group, opens Centara Life Namba Osaka.
4. Musinsa, a Korean fashion brand, will open its 2nd offline store in Nagoya after Tokyo.

# Market Highlights

## April 2026

### Market Data

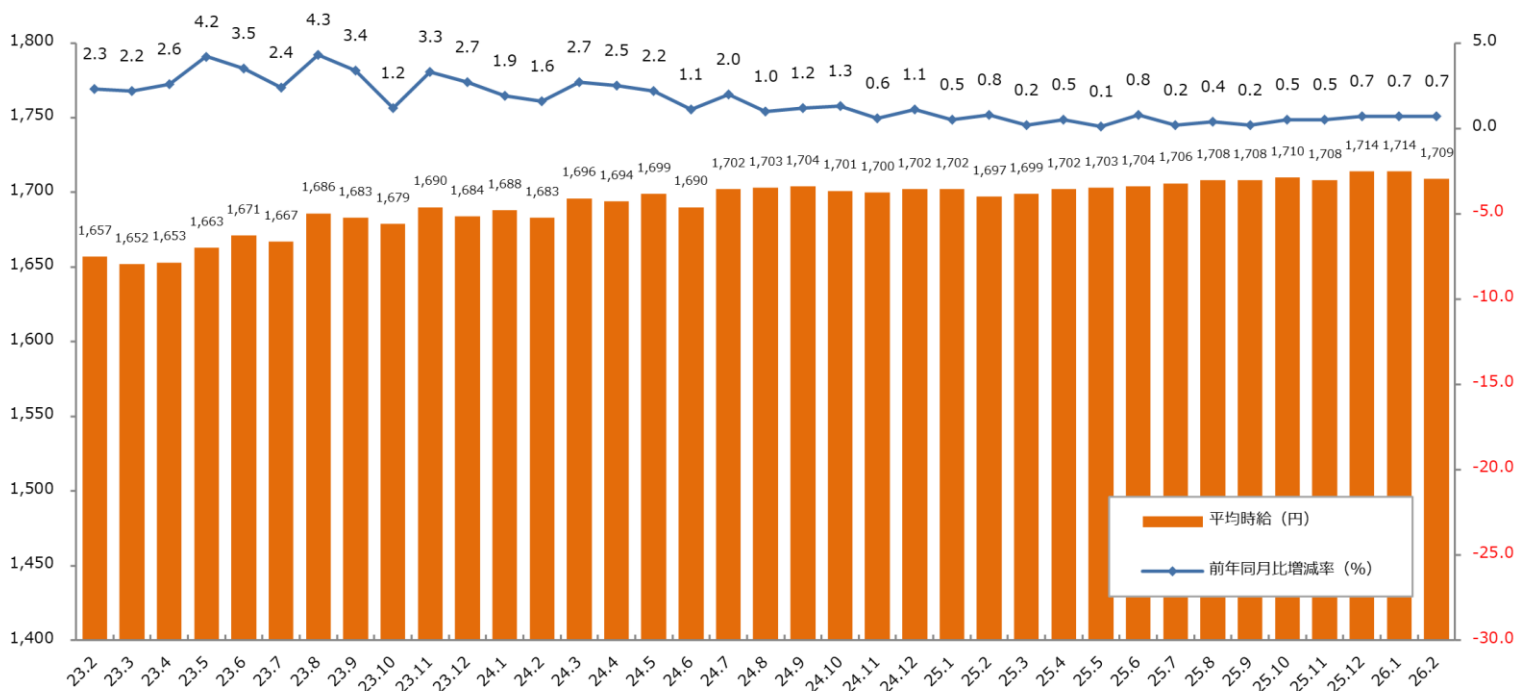
**HRog (HRog Co., Ltd.)** reports the March 2026 average salary for full-time employees and vacancies. Average salary is 292,342 yen, +0.22% (+644 yen) MoM, +2.34% (+6,515 yen) YoY, with 325,339 vacancies, which is +0.79% (+2,565 jobs) MoM/ +14.89% (+42,170 jobs) YoY.



# Market Highlights

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**En Inc** reports the average hourly wage of three major metropolitan areas was 1,709 yen in February, +0.7% YoY. Marking the 41<sup>st</sup> consecutive month of YoY growth. While office-related wages dipped slightly due to an influx of lower-paid election-related roles, medical and caregiving jobs saw notable increases, with some positions exceeding 1,900 yen amid strong demand.

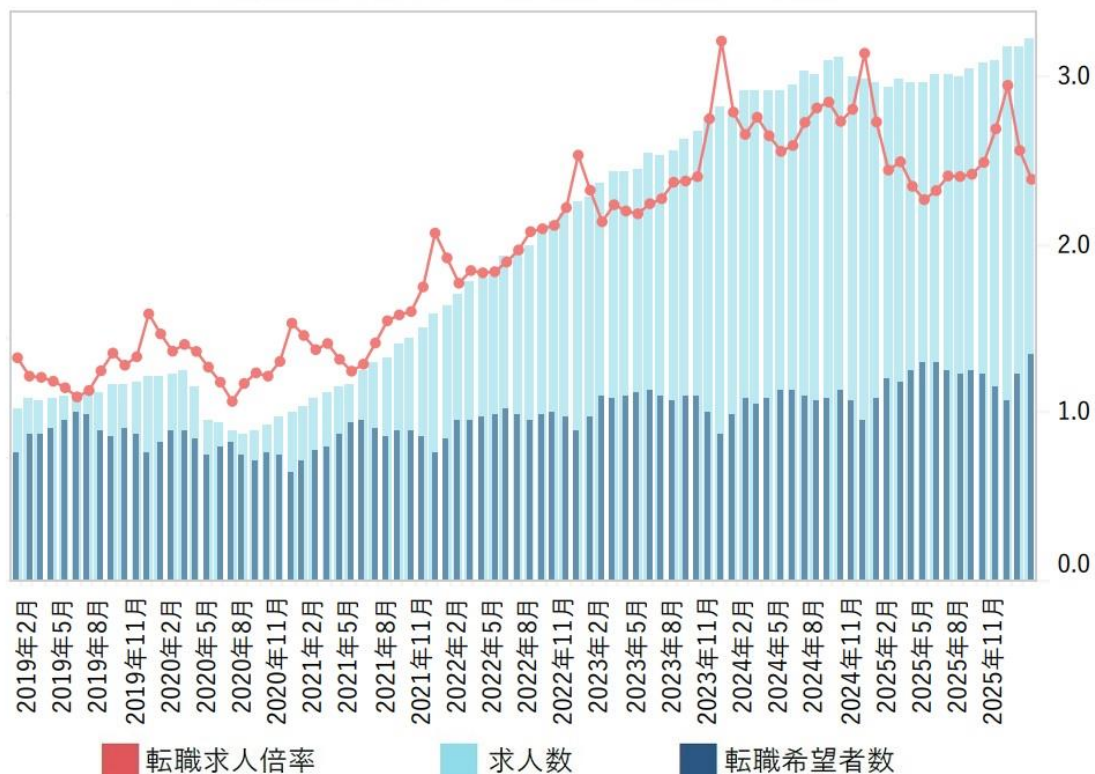


# Market Highlights

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Persol DODA reports their February mid-career job-to-Applicant ratio was 2.40, -0.17pt MoM/-0.06pt YoY. Vacancies +1.4% MoM/+9.7% YoY, job seekers +8.7% MoM/+12.2% YoY. Job postings increased modestly, while the number of job seekers rose more sharply, leading to the decline. Employment demand remained strong overall, particularly in retail, IT, and administrative roles, indicating a still-tight labour market despite short-term softening.

doda転職求人倍率・求人数・転職希望者数



(Red: job-to-applicant ratio, pale blue: number of vacancies, blue: number of job seekers)

# Market Highlights

April 2026

	転職求人 倍率	前月差	前年 同月差	求人数 前月比	転職 希望者数 前月比		転職求人 倍率	前月差	前年 同月差	求人数 前月比	転職 希望者数 前月比
全体	2.40	↓-0.17	↓-0.06	101.4%	108.7%	全体	2.40	↓-0.17	↓-0.06	101.4%	108.7%
IT・通信	6.55	↓-0.29	↓-0.54	102.4%	106.9%	営業	2.69	↓-0.18	↓-0.18	101.4%	108.3%
メディア	3.41	↓-0.31	↓-0.22	100.5%	109.5%	企画・管理	2.82	↓-0.22	↓-0.48	100.9%	108.6%
金融	2.54	↓-0.20	↓-0.04	100.6%	108.7%	エンジニア（IT・通信）	11.11	↓-0.72	↓-0.28	100.9%	107.5%
メディカル	0.91	↓-0.08	↓-0.10	99.0%	108.2%	エンジニア（機械・電気）	5.21	↓-0.47	↓-0.43	100.9%	110.0%
メーカー	2.72	↓-0.24	↓-0.29	100.8%	109.6%	専門職（メディカル）	0.55	↓-0.06	↓-0.12	98.7%	109.3%
商社	1.54	↓-0.17	↓-0.09	101.9%	113.0%	専門職（化学・食品）	1.46	↓-0.14	↓-0.10	100.5%	110.3%
小売・流通	0.72	↓-0.04	↑0.08	103.2%	108.6%	専門職（建設・不動産）	5.30	↓-0.48	↑0.12	102.0%	111.2%
レジャー・外食	0.75	↓-0.06	-0.00	101.5%	109.2%	専門職（コンサル・金融）	5.31	↓-0.53	↓-0.68	100.6%	110.6%
エネルギー	2.34	↓-0.26	↓-0.15	97.8%	108.5%	クリエイター	1.09	↓-0.07	↓-0.04	101.3%	108.1%
建設・不動産	4.93	↓-0.39	↓-0.02	101.6%	109.6%	販売・サービス	0.71	↓-0.03	↑0.04	103.5%	108.3%
コンサルティング	8.07	↓-0.54	↑1.04	100.0%	106.8%	事務・アシスタント	0.53	↓-0.01	↑0.08	106.1%	108.3%
人材サービス	8.51	↓-0.46	↑0.66	102.1%	107.6%	その他	0.05	-0.00	-0.00	97.5%	106.9%
その他	0.24	↓-0.01	↓-0.02	101.7%	107.9%						

Top items from left: Job to applicant, MoM, YoY, number of vacancies MoM, number of job seekers MoM.

Left table: By sector breakdown: total, ICT, Media, FS, Medical, Manufacturing, Trading firm, retail/distribution, leisure/dining, energy, construction/real estate, Consulting, HR services, others.

Right table: by job type breakdown: total, sales, planning/management, engineer (ICT), engineer (mechatronics), specialist (medical), specialist (chemical/food), specialist (construction/real estate), specialist (consulting/FS), creator, sales/services, administration/assistant, others.

# Market Highlights

April 2026

## LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF FEBRUARY 2026

**1.19**  
+0.01 MoM

**Total National average**

**0.99**  
0.00 MoM

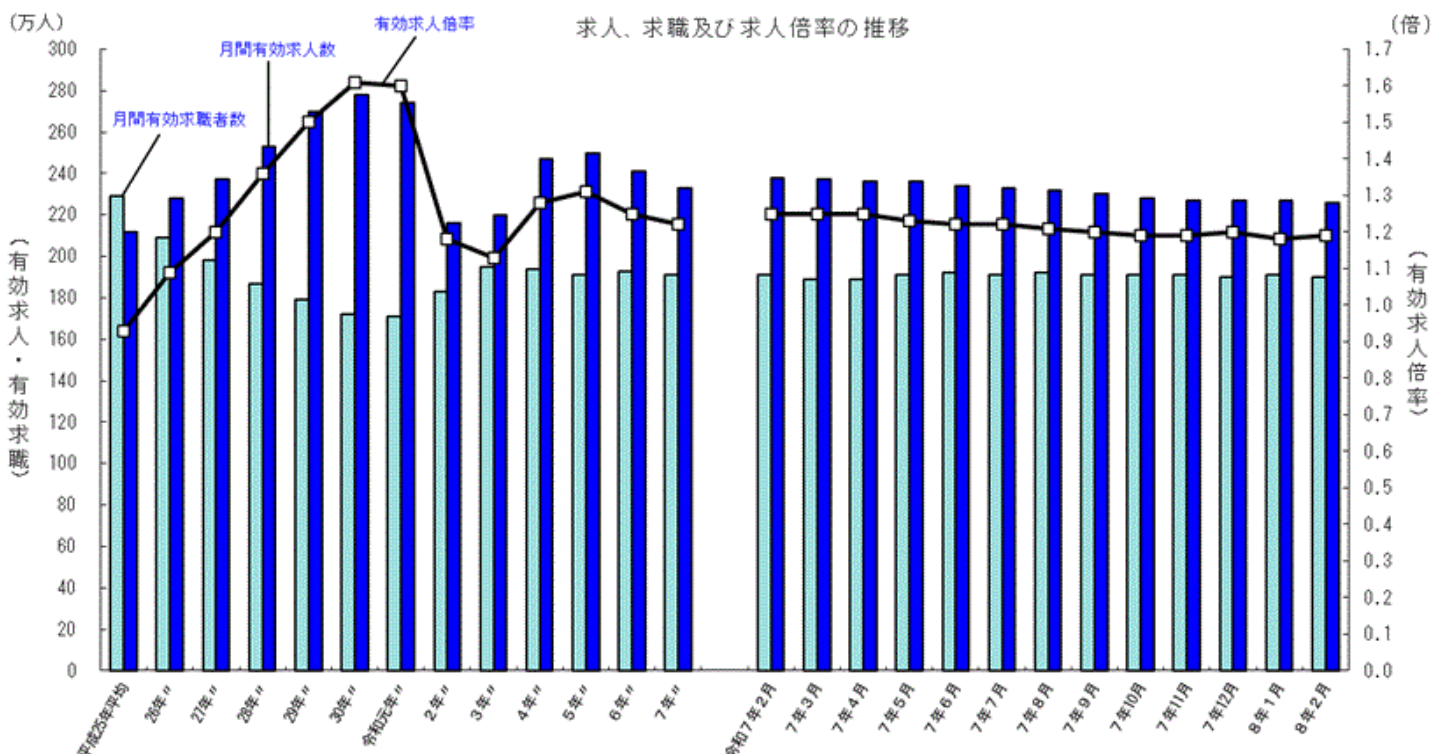
**Full time**

**1.73**  
0.00 MoM

**Tokyo**

**1.14**  
-0.01 MoM

**Osaka**



Line: job-to-applicant ratio, blue: number of vacancies, pale blue: number of job seekers, Left: annual trend, right: monthly trend for the latest 12 months, Unit: 10,000 people.

# Market Highlights

April 2026

全国計

Breakdown by jobs (regular jobs excluding part-time jobs)

常用 (除パート) 8年2月

	新規求人	有効求人	新規求職	有効求職	紹介件数	就職件数	新規求人 倍率	有効求人 倍率
職業計	435,487	1,334,513	220,391	1,104,523	193,323	41,646	1.98	1.21
管理的職業従事者	1,872	5,690	1,013	5,334	1,050	116	1.85	1.07
専門的・技術的職業従事者	114,287	353,041	35,602	177,825	27,915	7,143	3.21	1.99
製造技術者 (開発)	4,617	14,645	1,070	6,279	955	139	4.31	2.33
製造技術者 (開発を除く)	3,633	11,540	2,302	12,210	991	211	1.58	0.95
建築・土木・測量技術者	18,394	56,705	1,688	8,044	1,760	457	10.90	7.05
情報処理・通信技術者	15,534	49,618	4,678	31,298	5,197	391	3.32	1.59
その他の技術者	1,750	7,242	285	1,495	408	109	6.14	4.84
医師、歯科医師、獣医師、薬剤師	1,831	5,500	409	2,006	150	53	4.48	2.74
保健師、助産師、看護師	20,714	63,203	6,808	25,899	4,399	1,917	3.04	2.44
医療技術者	9,396	28,102	2,069	8,695	1,068	459	4.54	3.23
その他の保健医療従事者	5,178	15,225	1,569	8,008	969	341	3.30	1.90
社会福祉専門職業従事者	26,692	81,585	6,272	27,292	6,327	2,321	4.26	2.99
美術家、デザイナー、写真家、映像撮影者	998	3,165	2,713	20,277	1,642	128	0.37	0.16
その他の専門的職業	5,550	16,511	5,739	26,322	4,049	617	0.97	0.63
事務従事者	44,633	130,238	60,159	307,829	85,637	10,885	0.74	0.42
一般事務従事者	29,827	85,848	50,253	254,393	66,795	8,471	0.59	0.34
会計事務従事者	4,086	12,307	4,170	22,120	7,304	891	0.98	0.56
生産関連事務従事者	3,551	11,197	1,377	7,281	2,874	488	2.58	1.54
営業・販売事務従事者	4,422	13,320	2,770	13,813	6,885	719	1.60	0.96
外勤事務従事者	124	468	29	137	155	28	4.28	3.42
運輸・郵便事務従事者	1,941	5,115	356	1,681	767	177	5.45	3.04
事務用機器操作員	682	1,983	1,204	8,404	857	111	0.57	0.24
販売従事者	41,550	130,720	12,256	61,134	10,870	1,719	3.39	2.14
商品販売従事者	17,095	54,794	5,564	28,322	3,260	725	3.07	1.93
販売類似職業従事者	928	2,863	309	1,549	246	33	3.00	1.85
営業職業従事者	23,527	73,063	6,383	31,263	7,364	961	3.69	2.34
サービス職業従事者	71,452	218,559	20,068	93,033	15,810	5,451	3.56	2.35
家庭生活支援サービス職業従事者	44	149	35	175	17	5	1.26	0.85
介護サービス職業従事者	34,043	104,220	6,557	30,080	5,247	2,475	5.19	3.46
保健医療サービス職業従事者	4,577	13,910	1,256	4,765	1,945	668	3.64	2.92
生活衛生サービス職業従事者	5,650	19,207	1,210	6,609	505	151	4.67	2.91
飲食調理従事者	13,089	39,556	4,687	21,117	3,053	1,128	2.79	1.87
接客・給仕職業従事者	9,265	27,337	3,410	16,589	2,228	465	2.72	1.65
居住施設・ビル等管理人	799	2,603	1,014	4,676	1,198	187	0.79	0.56
その他のサービス職業従事者	3,985	11,577	1,899	9,022	1,617	372	2.10	1.28
保安職業従事者	17,084	51,889	1,922	8,136	3,011	990	8.89	6.38
農林漁業従事者	3,370	9,629	1,971	9,218	1,590	578	1.71	1.04
生産工程従事者	51,309	159,066	18,558	91,913	20,427	6,057	2.76	1.73
生産設備制御・監視従事者 (金属製品)	1,149	3,726	775	3,399	508	135	1.48	1.10
生産設備制御・監視従事者 (金属製品を除く)	1,855	6,058	654	3,041	935	243	2.84	1.99
機械組立設備制御・監視従事者	633	1,978	374	1,867	236	60	1.69	1.06
製品製造・加工処理従事者 (金属製品)	11,503	35,137	3,262	15,254	4,168	1,265	3.53	2.30
製品製造・加工処理従事者 (金属製品を除く)	12,202	38,215	4,758	23,259	7,277	2,278	2.56	1.64
機械組立従事者	5,498	17,240	3,770	19,352	2,479	701	1.46	0.89
機械整備・修理従事者	11,424	35,630	1,641	7,968	1,875	561	6.96	4.47
製品検査従事者 (金属製品)	1,039	3,108	484	2,279	578	169	2.15	1.36
製品検査従事者 (金属製品を除く)	1,198	3,555	405	1,801	719	239	2.96	1.97
機械検査従事者	894	2,472	386	1,700	384	107	2.32	1.45
生産関連・生産類似作業従事者	3,914	11,947	2,049	11,993	1,268	299	1.91	1.00
輸送・機械運転従事者	32,107	100,511	9,966	43,158	9,909	3,529	3.22	2.33
鉄道運転従事者	31	104	26	113	8	1	1.19	0.92
自動車運転従事者	24,815	78,272	6,763	27,774	7,156	2,769	3.67	2.82
船舶・航空機運転従事者	33	94	24	124	19	3	1.38	0.76
その他の輸送従事者	1,809	5,509	1,446	6,891	928	269	1.25	0.80
定置・建設機械運転従事者	5,419	16,532	1,707	8,256	1,798	487	3.17	2.00
建設・探掘従事者	34,731	106,499	4,240	19,145	3,590	1,548	8.19	5.56
建設躯体工事従事者	5,775	18,147	531	2,241	345	166	10.88	8.10
建設従事者 (建設躯体工事従事者を除く)	9,709	29,211	1,274	5,950	1,050	401	7.62	4.91
電気工事従事者	6,314	19,668	1,028	5,251	865	344	6.14	3.75
土木作業従事者	12,835	39,163	1,389	5,637	1,307	630	9.24	6.95
探掘従事者	98	310	18	66	23	7	5.44	4.70
運搬・清掃・包装等従事者	23,092	68,671	16,668	97,883	13,514	3,630	1.39	0.70
運搬従事者	13,033	38,332	7,261	35,338	6,657	1,790	1.79	1.08
清掃従事者	4,519	13,910	2,255	14,332	2,751	790	2.00	0.97
包装従事者	895	2,619	437	2,625	633	173	2.05	1.00
その他の運搬・清掃・包装等従事者	4,645	13,810	6,715	45,588	3,473	877	0.69	0.30
分類不能の職業	-	-	37,968	189,915	-	-	0.00	0.00

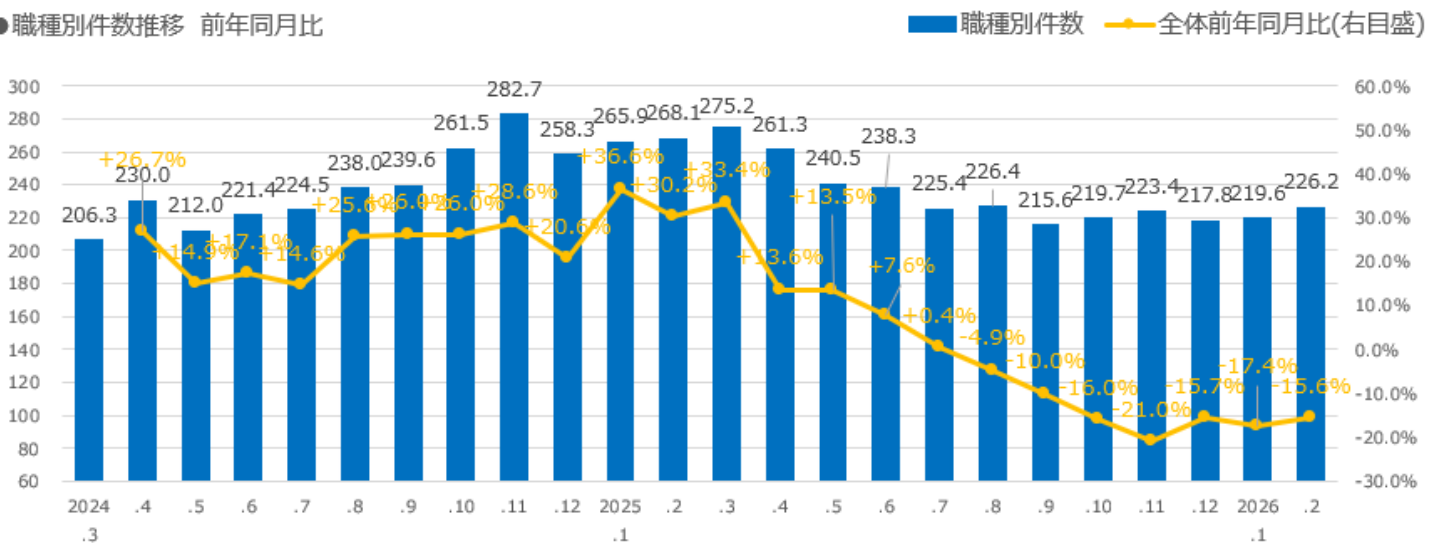
(注) 上記の数値は、平成21年12月改定の「日本標準職業分類」に基づく区分である。

# Market Highlights

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Zenkyukyo (the Association of Job Information of Japan) reports that February job ads totalled 2,262,216, up 3.0% MoM but down 15.6% YoY, reflecting a pullback from last year's surge and improved hiring efficiency. IT specialist roles grew (+10.6% YoY), highlighting continued demand in this sector. In contrast, transport/machinery operation (-44.8%) and administrative roles (-43.8%) declined sharply YoY, indicating a shift away from routine roles toward more specialised positions. Despite the overall decline in ads, labour shortages persist, with vacancies and wages continuing to rise.

●職種別件数推移 前年同月比



●職種別件数 (占有率TOP10)

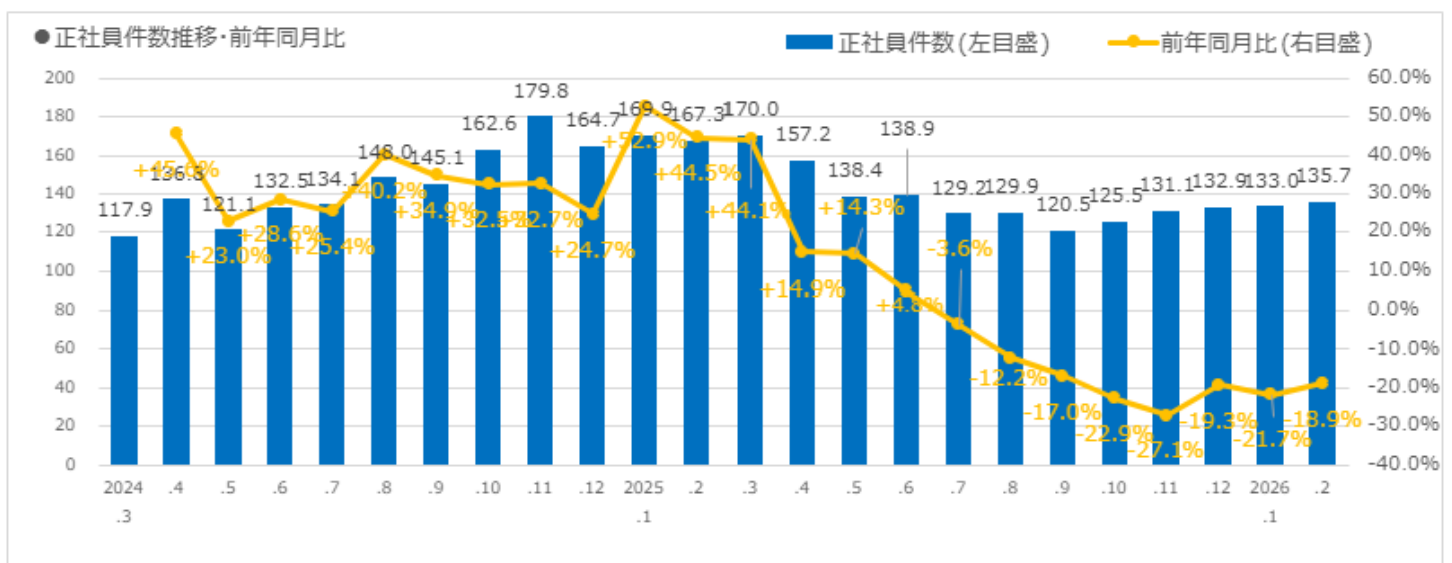
職種別	件数	前月比	前年同月比
全体計	2,262,216	+3.0%	-15.6%
専門 (IT技術者)	386,801	+8.7%	+10.6%
販売 (販売)	252,601	+3.1%	-6.4%
事務	231,503	+2.9%	-43.8%
販売 (営業)	150,849	+1.4%	-20.3%
輸送・機械運転	131,012	-3.0%	-44.8%
運搬・清掃・包装等	130,632	+4.0%	-8.3%
サービス (給仕)	129,430	+6.6%	-9.6%
建設・採掘	123,053	-4.2%	+16.1%
専門 (医療・福祉専門職)	112,323	+2.0%	-5.7%
生産工程	110,706	+6.0%	-18.4%

From top: total, IT engineer, shop sales, admin, sales, transport/machine operation, transport/cleaning/packing, services (waitering), construction/mining, specialist (medical/welfare), production process.

# Market Highlights

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## Full-time job ads



● 職種別×雇用形態別件数 (占有率TOP10)

職種	件数	前月比	前年同月比
正社員			
全体計	1,357,305	+2.1%	-18.9%
専門 (IT技術者)	376,723	+9.5%	+11.0%
事務	167,439	+3.0%	-49.4%
販売 (営業)	135,528	+1.6%	-17.1%
建設・採掘	106,271	-5.1%	+19.2%
販売 (販売)	95,622	+0.3%	-11.9%
輸送・機械運転	92,604	-5.7%	-50.8%
専門 (技術者・研究者)	79,036	-4.5%	-32.1%
専門 (医療・福祉専門職)	62,844	-0.7%	-7.1%
生産工程	53,580	+3.0%	-22.6%
サービス (給仕)	38,040	-0.0%	+7.9%

From top: total, IT engineer, admin, sales, construction/mining, shop sales, transport/machine operation, specialist (technical/research), specialist (medical/welfare), production process, services (waitering).

# Market Highlights

April 2026

## Market trend

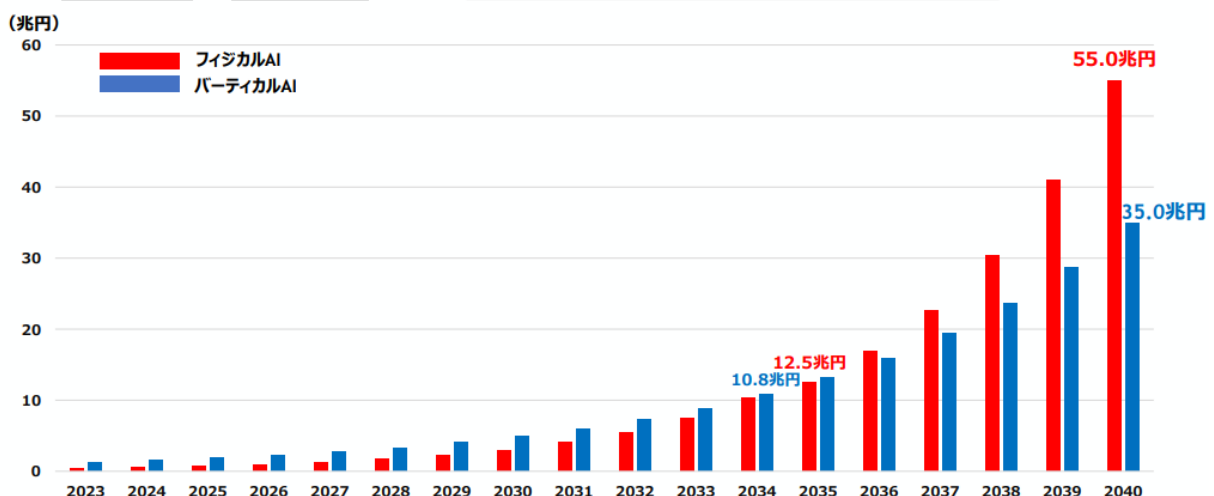
Japan's acute labour shortage is driving rapid investment in 'physical AI', while broader AI adoption reshapes hiring priorities and mid-career recruitment becomes increasingly selective.

Japan is accelerating investment in “physical AI”—AI embedded in robots, vehicles, and industrial hardware—using its acute labour shortage as a real-world proving ground. Rather than confining robots to pilots, companies are deploying them directly in warehouses, factories, infrastructure inspection, and service roles to fill jobs humans no longer want, not to replace existing workers. Driven by population aging, falling birthrates, and supportive national policy, this shift is backed by major investors and enabled by Japan's strengths in robotics components, with startups supplying software innovation and large corporations providing scale, capital, and deployment expertise.

## フィジカルAIとバーティカルAIの市場規模

AI

- 今後、生成AI市場の成長を牽引するのは、**バーティカルAI**※1と**フィジカルAI**※2。
- 市場規模で見ると、**バーティカルAIとフィジカルAIの両方とも、市場規模が加速度的に成長**していくことが見込まれる。
  - **バーティカルAIは年率21.6%で成長**（2034年：約10.8兆円、2040年：約35.0兆円）
  - **フィジカルAIは、年率34.4%で成長**（2035年：約12.5兆円、2040年：約55.0兆円）



※1 医療、金融、物流、製造など、特定の業界・業務に特化した専門性の高いAIエージェント。  
 ※2 画像・音声・動画・各種センサーを統合して、ロボット等の身体を通して現実世界を理解し自律的に動作するAI（本分析においては自動運転を除いている）。  
 （出所）フィジカルAI：Physical AI Market Size, Share, Industry Report 2026 - 2035（Acumen Research and Consulting）。2036年以降は、2026年～2035年にかけての成長率（34.4%）が持続すると仮定し機械的に計算  
 バーティカルAI：Vertical AI Market Global Forecast 2025 - 2034（Global Market Insights）。2035年以降は、2025年～2034年にかけての成長率（21.6%）が持続すると仮定し機械的に計算

Japan Turns Labor Crisis Into Physical AI Testing Ground | The Tech Buzz<sup>6</sup>

According to overseas reports, Japan is focusing on 'physical AI' due to labor shortages, and a hybrid model of startups and large corporations is emerging. - GIGAZINE<sup>7</sup>

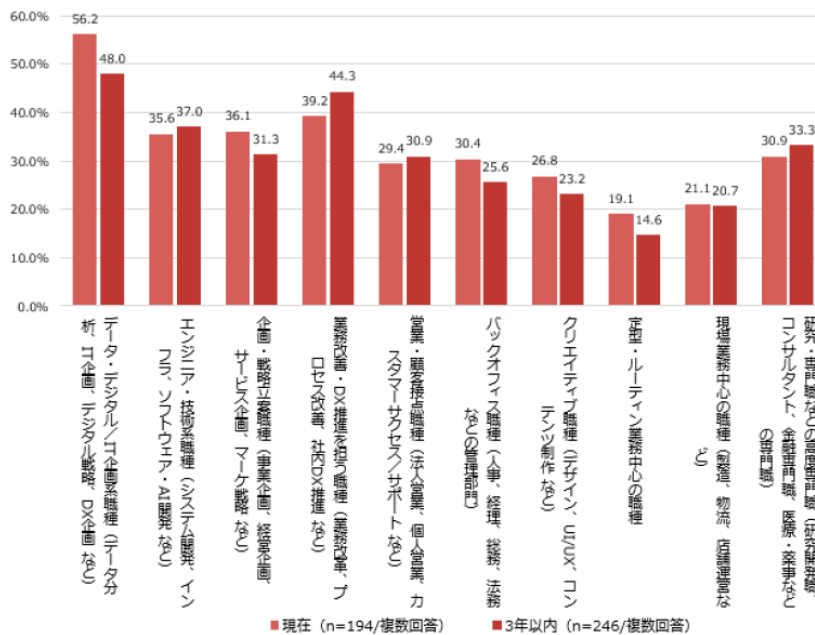
shiry04 第1回AI・半導体WG 事務局説明資料.pdf<sup>8</sup>

# Market Highlights

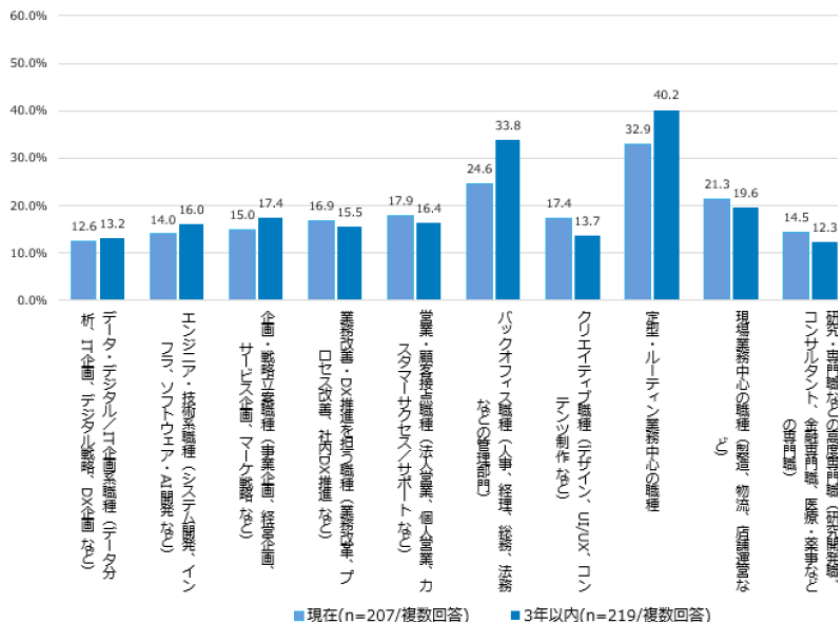
April 2026

AI adoption is significantly reshaping hiring and talent needs in large Japanese companies. Over half report changes in mid-career hiring, rising to nearly 60% within three years. Demand is increasing for data, digital, and IT planning roles, while routine and back-office jobs decline. Employers increasingly value AI literacy, adaptability, and independent thinking, but worry about uneven AI use, skill erosion, and reduced thinking ability—especially among younger workers.

【図3】採用人数が増えた・増える見込みがある職種領域



【図4】採用人数が減った・減る見込みがある職種領域



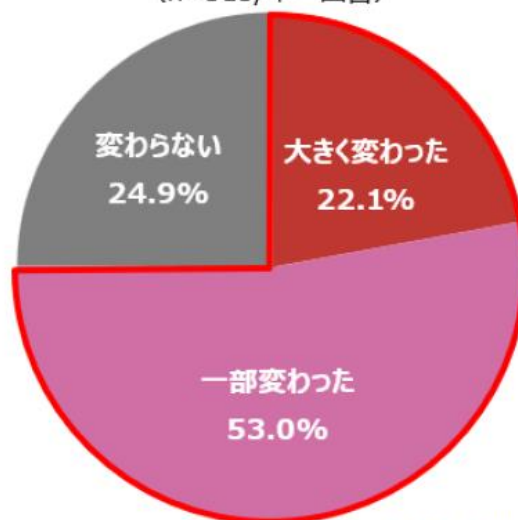
# Market Highlights

April 2026

AI adoption is fundamentally reshaping mid-career hiring, with over 75% of companies reporting changes in the type of talent they seek. Employers increasingly prioritize candidates who can apply AI skills in real business contexts, while placing higher value on deep expertise, immediate impact, and human strengths such as independent thinking, adaptability, and decision-making that AI cannot easily replace.

【図5】中途採用で求める人物像の変化

(n=515/単一回答)



出典：転職サービス「doda」

【図6】AI導入・活用の進展により、変化した中途採用で求める人物像（自由回答）



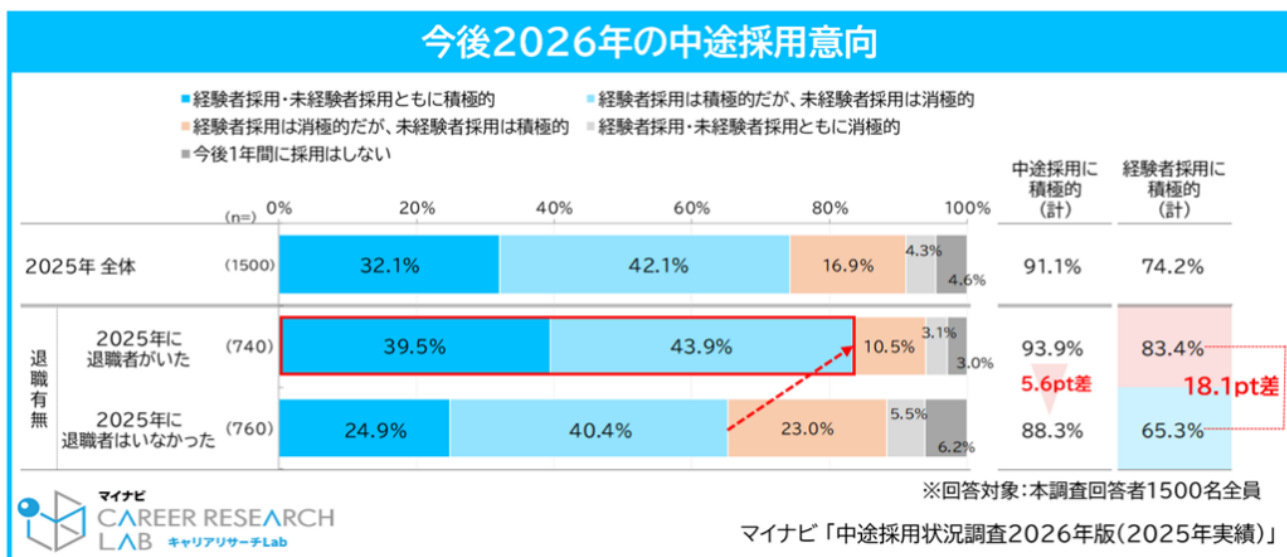
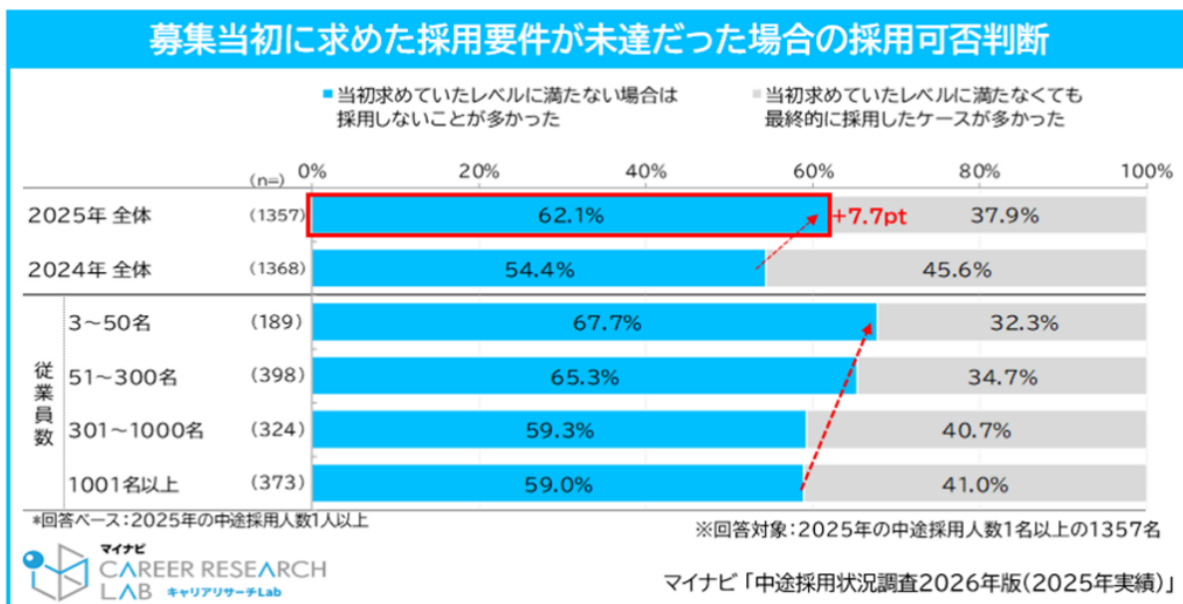
出典：転職サービス「doda」

# Market Highlights

April 2026

Mynavi Survey shows Japan's mid-career recruitment remains strong but more selective. In 2025, 92.9% of companies achieved their hiring targets—a record high—largely due to downward revisions in planned headcount rather than eased labour shortages. Over 40% of firms still feel short of regular employees, with the focus shifting from numerical shortages to a lack of skilled, job-ready talent. Looking ahead, 91% of companies plan to hire mid-career workers in 2026, especially experienced professionals, while competition for qualified talent intensifies.

中途採用状況調査2026年版（2025年実績） | マイナビキャリアリサーチLab<sup>10</sup>



# Market Highlights

April 2026

## West Japan expansion

**RelyEZ**, a Chinese battery system, is expanding in Japan and now has a RelyEZ Energy Japan office in Osaka.

系統用蓄電池ビジネスに新風が吹く リライズエナジー、日本市場に本格参入 | SOLAR JOURNAL<sup>11</sup>

**Marriott** expansion continues, opens Sugata Hotel Osaka Shinsaibashi.

「スガタホテル大阪心斎橋シリーズbyマリオット」公開 インバウンドに照準 - 日本経済新聞<sup>12</sup>

**Central Group**, a Thai hotel group, opens Centara Life Namba Osaka.

「センタラライフなんばホテル大阪」公開 タイ財閥セントラルが中価格帯、インバウンド取り込み - 日本経済新聞<sup>13</sup>

**Musinsa**, a Korean fashion brand, will open its 2<sup>nd</sup> offline store in Nagoya after Tokyo.

Musinsa Opens Second Matin Kim Store in Nagoya, Japan<sup>14</sup>

# Market Highlights

## April 2026

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