

Monthly Market Update

August 2026

Trend Summary

- AI investment is accelerating growth, but talent availability may determine how much value companies can capture.
- The definition of high-value talent is expanding beyond AI specialists.
- Building workforce capability is becoming a strategic priority for Japanese companies.

Highlights Overview

Market Data

1. HRog reports: full-time job, monthly salary at 296,793 yen, temp hourly wage at 1,603 yen.
2. Persol DODA job-to-applicant ratio was 2.55, +0.11 pt MoM.
3. The latest MHLW job-to-applicant ratio is 1.18, Tokyo 1.70 & Osaka 1.13, full-time 1.00.
4. Association of Job Information of Japan reports that job ads in June totaled 2,535,229, +1.5% up from the previous month and +6.4% YoY.

Market Trend

1. Japan's AI Transition: Workforce Capability Emerges as a Strategic Advantage.
2. The rapid expansion of AI infrastructure is creating new demand for construction, engineering, and infrastructure specialists as data centre development accelerates.
3. The Linux Foundation 2026 State of Tech Talent Japan Report identifies AI as a major driver of job creation in Japan, with a projected hiring growth rate of 54% for 2026, significantly outpacing global averages.

West Japan Expansion

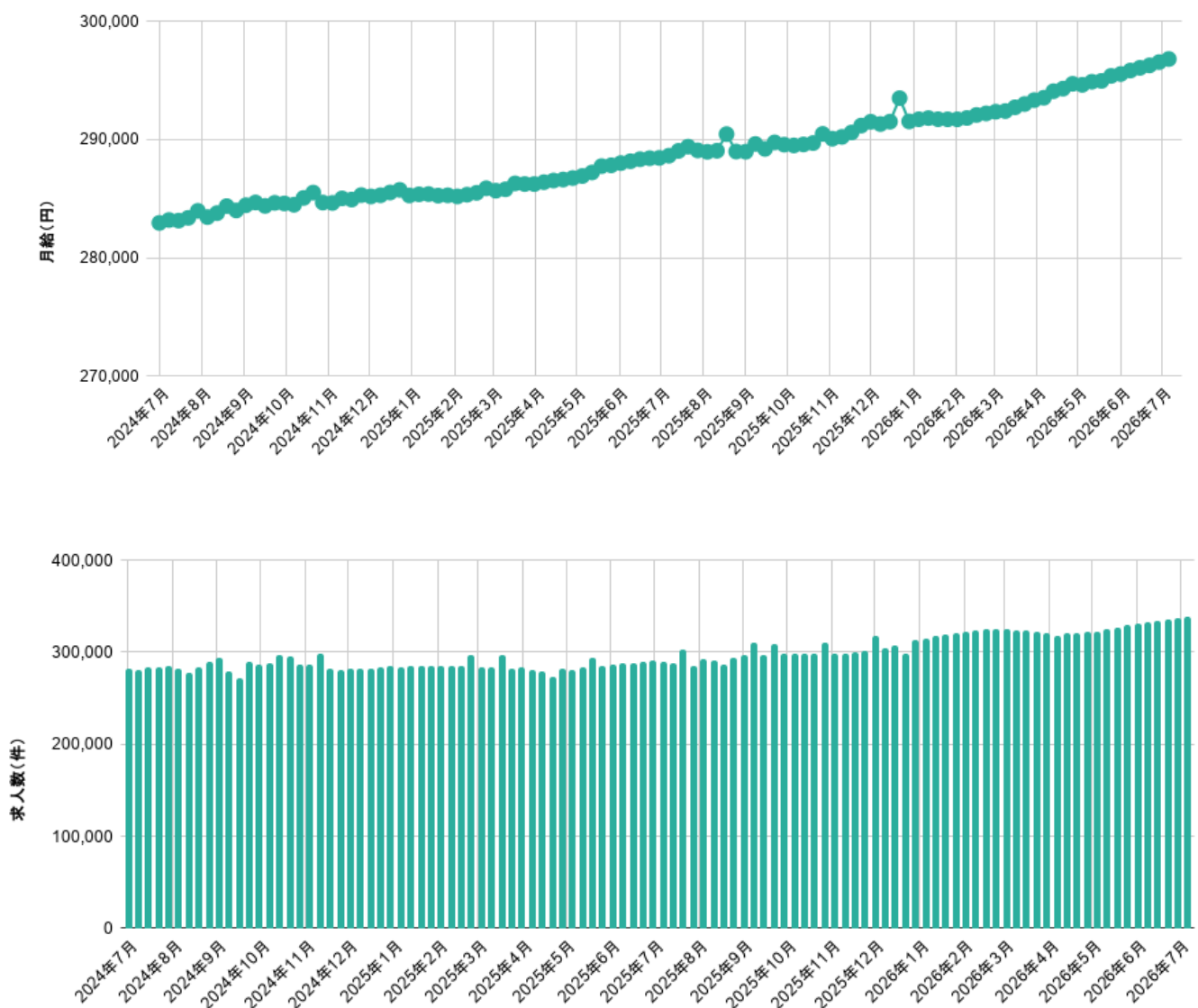
1. Conrad Nagoya opens in August.
2. READi ROBUST Machine, Korea Greentech, has a Nagoya office.
3. LYMPHOGENiX, a UK biotech started by Japanese, has a Nagoya R&D hub.
4. Innovation Dojo, an Australian cross-border business, will expand its Kobe office.
5. Ironstar, Australia, a Drupal hosting provider, has a Nara office.

Market Highlights

August 2026

Market Data

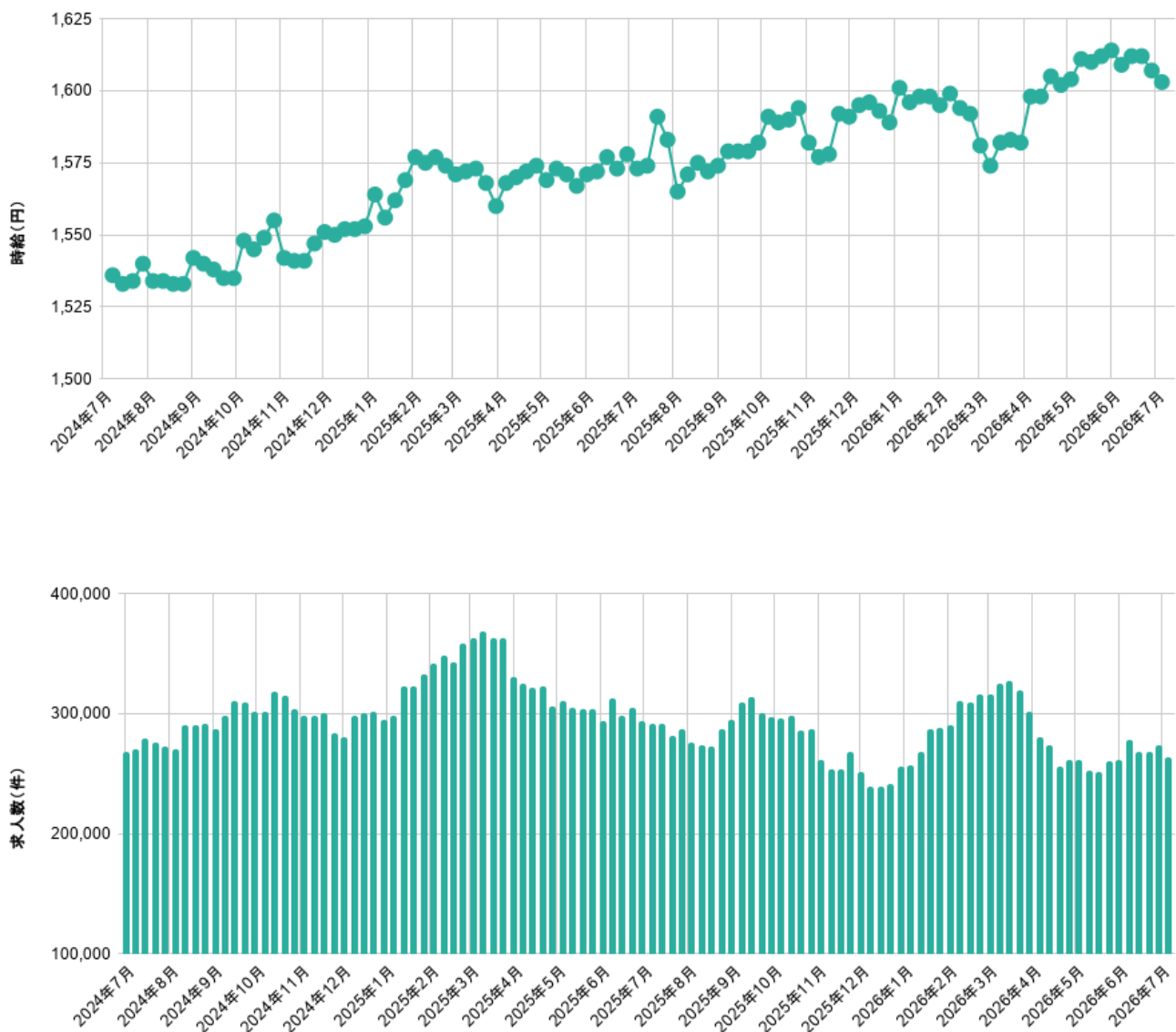
HRog (HRog Co., Ltd.) reports the July 2026 full-time employee average salary & vacancies. Average salary is 296,793 yen, +0.43% (+1,268 yen) MoM, +2.83% (+8,170 yen) YoY, with 338,656 vacancies, which is +2.12% (+7,034 jobs) MoM/ +16.75% (+48,589 jobs) YoY.



Market Highlights

August 2026

HRog reports the July 2026 temp hourly wage & vacancies. The average hourly wage is 1,603 yen, -0.68% (-11 yen) MoM, +1.91% (+30 yen) YoY, with 263,647 vacancies, which is +0.72% (+1,894 jobs) MoM/ -9.46% (-27,558 jobs) YoY.



Market Highlights

August 2026

Persol DODA reports the June mid-career job-to-applicant ratio was 2.55 (+0.11 pt MoM/+0.22 pt YoY). Vacancies increased 3.2% MoM (+16.6% YoY), while the number of job seekers declined 1.2% MoM but remained up 6.7% YoY. Hiring demand grew across industries, led by ICT and energy, with particularly strong demand for ICT engineers and Sales/Planning Management professionals.

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

August 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	2.55	↑ 0.11	↑ 0.22	103.2%	98.8%	全体	2.55	↑ 0.11	↑ 0.22	103.2%	98.8%
IT・通信	6.83	↑ 0.27	↑ 0.53	105.4%	101.1%	営業	2.85	↑ 0.10	↑ 0.19	103.4%	99.7%
メディア	3.64	↑ 0.15	↑ 0.41	103.3%	99.2%	企画・管理	3.05	↑ 0.12	↓ -0.15	103.4%	99.4%
金融	2.47	↓ -0.02	↓ -0.15	101.5%	102.2%	エンジニア（IT・通信）	11.06	↑ 0.39	↑ 0.52	105.2%	101.5%
メディカル	0.87	↑ 0.01	↓ -0.09	101.9%	100.3%	エンジニア（機械・電気）	6.02	↑ 0.16	↑ 0.81	103.0%	100.2%
メーカー	2.97	↑ 0.20	↑ 0.19	104.2%	97.3%	専門職（メディカル）	0.51	↑ 0.01	↓ -0.12	102.1%	99.9%
商社	1.70	↑ 0.03	↑ 0.17	101.9%	99.9%	専門職（化学・食品）	1.53	↑ 0.07	↑ 0.13	102.3%	97.6%
小売・流通	0.74	↑ 0.04	↑ 0.10	102.2%	96.4%	専門職（建設・不動産）	5.30	↑ 0.04	↑ 0.12	102.3%	101.5%
レジャー・外食	0.75	↑ 0.04	↑ 0.01	100.2%	94.5%	専門職（コンサル・金融）	5.69	↑ 0.16	↓ -0.12	101.4%	98.6%
エネルギー	2.18	↓ -0.09	↓ -0.31	105.2%	109.3%	クリエイター	1.14	↑ 0.03	↑ 0.08	101.9%	99.4%
建設・不動産	5.05	↑ 0.08	↑ 0.27	102.3%	100.7%	販売・サービス	0.73	↑ 0.03	↑ 0.07	100.0%	95.6%
コンサルティング	8.96	↑ 0.48	↑ 1.19	104.0%	98.5%	事務・アシスタント	0.53	↑ 0.01	↑ 0.11	100.5%	98.3%
人材サービス	9.66	↑ 0.22	↑ 2.24	101.4%	99.1%	その他	0.06	↑ 0.01	↑ 0.01	123.8%	101.0%
その他	0.24	↑ 0.01	- 0.00	104.4%	99.2%						

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

August 2026

LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF JUNE 2026

1.18
+0.01 MoM

**Total
National
average**

1.00
+0.01 MoM

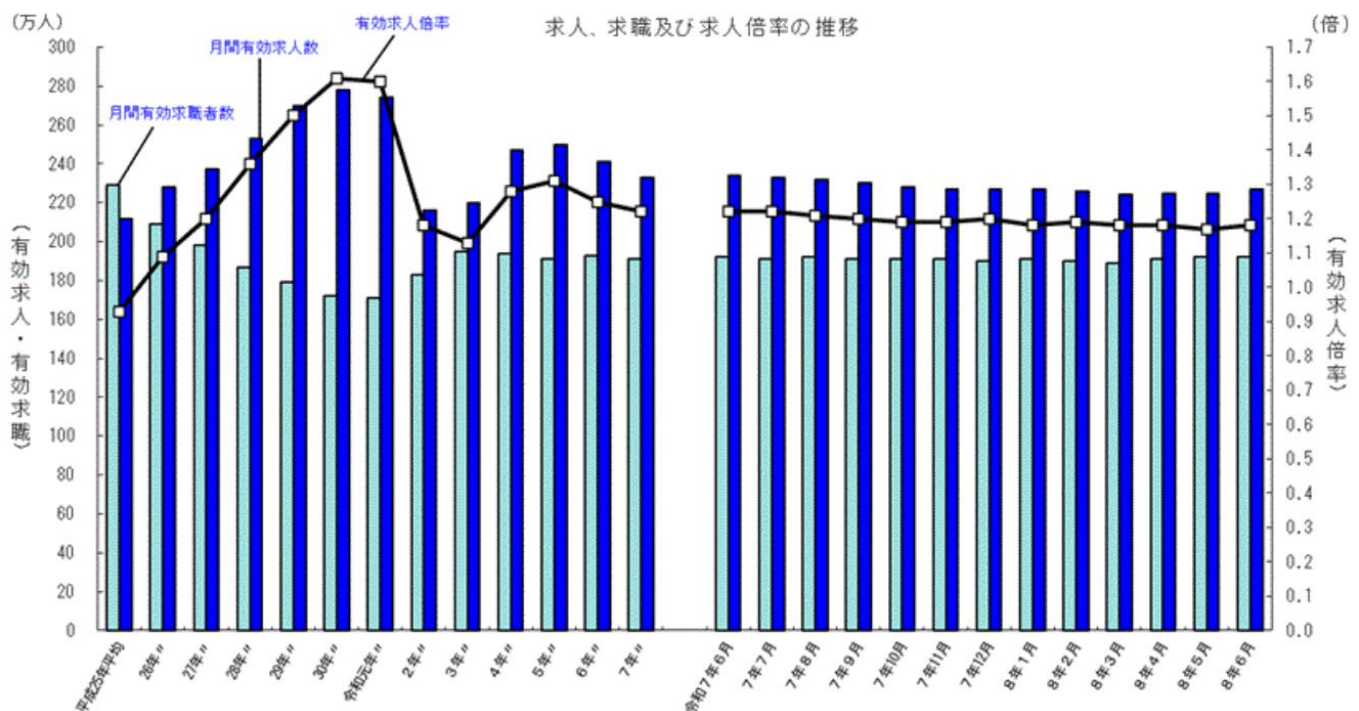
Full time

1.70
0.00 MoM

Tokyo

1.13
+0.02 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

August 2026

全国計

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

常用（除パート）

8年6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	462,600	1,317,115	220,064	1,165,202	184,735	42,929	2.10	1.13
管理的職業従事者	1,909	4,841	954	5,460	1,060	122	2.00	0.89
専門的・技術的職業従事者	122,169	343,194	34,831	190,840	27,023	7,003	3.51	1.80
製造技術者（開発）	5,143	14,914	1,003	6,665	975	166	5.13	2.24
製造技術者（開発を除く）	3,967	11,579	2,531	13,176	1,105	230	1.57	0.88
建築・土木・測量技術者	20,985	58,431	1,861	9,367	1,969	483	11.28	6.24
情報処理・通信技術者	17,472	50,909	5,294	34,120	6,300	369	3.30	1.49
その他の技術者	3,507	5,728	269	1,626	462	74	13.04	3.52
医師、歯科医師、獣医師、薬剤師	1,929	5,588	522	2,350	168	56	3.70	2.38
保健師、助産師、看護師	21,198	61,664	6,365	28,465	4,458	2,025	3.33	2.17
医療技術者	9,963	28,125	1,980	9,504	1,064	540	5.03	2.96
その他の保健医療従事者	5,097	14,719	1,433	7,972	747	275	3.56	1.85
社会福祉専門職業従事者	26,671	74,428	5,729	28,708	5,571	2,288	4.66	2.59
美術家、デザイナー、写真家、映像撮影者	869	2,802	2,902	20,711	1,631	110	0.30	0.14
その他の専門的職業	5,368	14,307	4,942	28,176	2,573	387	1.09	0.51
事務従事者	42,258	115,990	56,174	318,118	71,854	9,685	0.75	0.36
一般事務従事者	26,959	73,191	45,766	261,585	51,579	6,983	0.59	0.28
会計事務従事者	4,351	12,122	4,466	23,238	7,887	987	0.97	0.52
生産関連事務従事者	3,993	10,995	1,499	7,682	3,301	564	2.66	1.43
営業・販売事務従事者	4,618	12,686	2,946	14,798	7,294	822	1.57	0.86
外勤事務従事者	158	443	21	122	153	27	7.52	3.63
運輸・郵便事務従事者	1,608	4,701	345	1,820	749	185	4.66	2.58
事務用機器操作員	571	1,852	1,131	8,873	891	117	0.50	0.21
販売従事者	44,210	128,949	12,520	64,075	11,813	1,957	3.53	2.01
商品販売従事者	18,482	55,262	5,529	29,720	3,888	900	3.34	1.86
販売類似職業従事者	969	2,803	323	1,645	295	53	3.00	1.70
営業職業従事者	24,759	70,884	6,668	32,710	7,630	1,004	3.71	2.17
サービス職業従事者	75,367	218,685	19,593	95,515	16,463	5,818	3.85	2.29
家庭生活支援サービス職業従事者	61	157	23	174	20	8	2.65	0.90
介護サービス職業従事者	35,250	104,473	6,245	30,528	5,591	2,626	5.64	3.42
保健医療サービス職業従事者	4,578	13,215	1,091	4,785	1,994	691	4.20	2.76
生活衛生サービス職業従事者	7,255	19,257	1,188	6,615	537	180	6.11	2.91
飲食物調理従事者	13,220	40,043	4,576	21,581	3,183	1,224	2.89	1.86
接客・給仕職業従事者	10,360	28,604	3,853	17,710	2,339	430	2.69	1.62
居住施設・ビル等管理人	851	2,355	959	4,861	1,294	221	0.89	0.48
その他のサービス職業従事者	3,792	10,581	1,658	9,261	1,505	438	2.29	1.14
保安職業従事者	18,497	54,334	1,952	8,977	3,614	1,267	9.48	6.05
農林漁業従事者	3,450	9,619	1,770	9,093	1,344	578	1.95	1.06
生産工程従事者	56,301	161,242	19,516	94,004	22,476	6,786	2.88	1.72
生産設備制御・監視従事者（金属製品）	1,299	3,772	803	3,459	531	148	1.62	1.09
生産設備制御・監視従事者（金属製品を除く）	2,133	6,165	684	2,987	1,129	297	3.12	2.06
機械組立設備制御・監視従事者	1,000	2,563	409	1,956	292	78	2.44	1.31
製品製造・加工処理従事者（金属製品）	12,954	36,046	3,460	15,688	4,536	1,429	3.74	2.30
製品製造・加工処理従事者（金属製品を除く）	13,159	37,618	5,011	23,724	7,803	2,501	2.63	1.59
機械組立従事者	6,357	18,249	3,993	19,577	2,860	845	1.59	0.93
機械整備・修理従事者	12,302	36,229	1,720	8,395	2,061	633	7.15	4.32
製品検査従事者（金属製品）	979	2,923	517	2,224	590	177	1.89	1.31
製品検査従事者（金属製品を除く）	1,239	3,588	471	1,921	846	211	2.63	1.87
機械検査従事者	884	2,572	352	1,705	472	170	2.51	1.51
生産関連・生産類似作業従事者	3,995	11,517	2,096	12,368	1,356	297	1.91	0.93
輸送・機械運転従事者	33,986	100,126	10,179	44,780	10,308	3,897	3.34	2.24
鉄道運転従事者	18	120	23	137	9	2	0.78	0.88
自動車運転従事者	26,576	77,899	6,855	28,690	7,562	3,154	3.88	2.72
船舶・航空機運転従事者	23	91	30	130	10	4	0.77	0.70
その他の輸送従事者	1,854	5,499	1,533	7,176	915	250	1.21	0.77
定置・建設機械運転従事者	5,515	16,517	1,738	8,647	1,812	487	3.17	1.91
建設・探掘従事者	40,517	112,400	4,390	20,462	4,450	1,909	9.23	5.49
建設躯体工事従事者	6,948	19,083	531	2,231	501	239	13.08	8.55
建設従事者（建設躯体工事従事者を除く）	10,785	29,833	1,348	6,261	1,294	521	8.00	4.76
電気工事従事者	7,685	21,287	1,081	5,761	1,032	341	7.11	3.70
土木作業従事者	14,993	41,920	1,421	6,155	1,607	805	10.55	6.81
探掘従事者	106	277	9	54	16	3	11.78	5.13
運搬・清掃・包装等従事者	23,936	67,735	17,506	101,392	14,330	3,907	1.37	0.67
運搬従事者	13,267	38,290	7,985	37,607	7,418	1,946	1.66	1.02
清掃従事者	4,812	13,354	2,213	14,665	3,053	881	2.17	0.91
包装従事者	999	2,782	494	2,797	745	218	2.02	0.99
その他の運搬・清掃・包装等従事者	4,858	13,309	6,814	46,323	3,114	862	0.71	0.29
分類不能の職業	-	-	40,679	212,486	-	-	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。

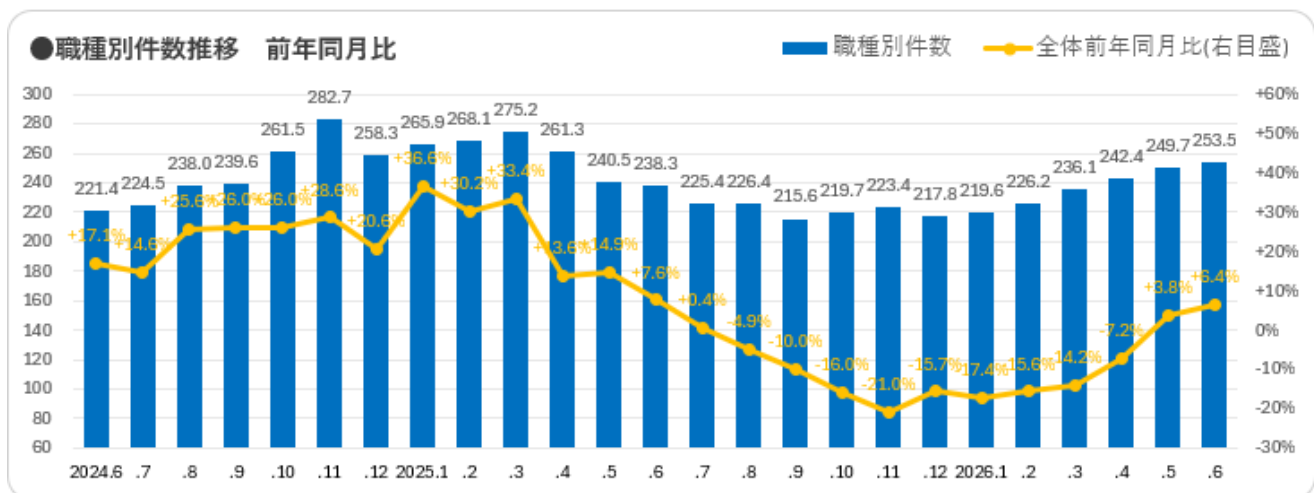
Market Highlights

August 2026

The June job-to-applicant ratio rose to 1.18, marking the first increase in four months. The improvement was driven by stronger hiring in semiconductor-related manufacturing and staffing services, reflecting ongoing labour shortages across industries. The unemployment rate remained unchanged at 2.5%.

6月の有効求人倍率1.18倍、4カ月ぶり上昇 - 日本経済新聞⁵

Zenkyukyo (the Association of Job Information of Japan) reports that June job ads totalled 2,535,229 (+1.5% MoM, +6.4% YoY), driven by increased Transportation & Machine Operations and IT Specialist positions. Compared with a year earlier, IT Specialist vacancies surged 142.5%, highlighting exceptionally strong demand for digital talent, while Administrative roles fell 36.0%. Although employers' current hiring sentiment eased somewhat, recruitment intentions for the next three months improved, reflecting ongoing labour market tightness.



●職種別件数（占有率TOP10）

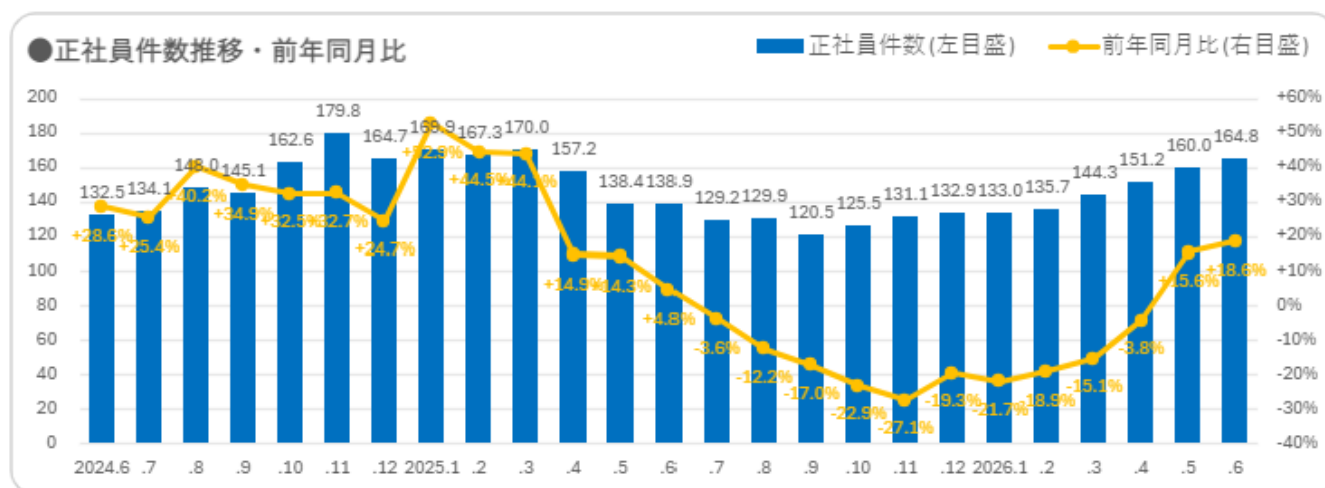
	件数	前月比	前年同月比
全体計	2,535,229	+1.5%	+6.4%
専門（IT技術者）	607,122	+6.7%	+142.5%
販売（販売）	266,092	+1.5%	+3.3%
事務	218,293	-0.2%	-36.0%
輸送・機械運転	195,435	+15.3%	-5.6%
販売（営業）	157,519	+1.1%	-7.2%
サービス（給仕）	135,061	-3.2%	-8.5%
建設・採掘	132,346	-1.6%	+18.1%
運搬・清掃・包装等	126,665	+0.7%	-9.2%
生産工程	113,581	+2.0%	-4.7%
専門（医療・福祉専門職）	104,581	-0.2%	+4.6%

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

Market Highlights

August 2026

Full-time job ads



●職種別×雇用形態別件数（占有率TOP10）

正社員	件数	前月比	前年同月比
全体計	1,647,943	+3.0%	+18.6%
専門（IT技術者）	597,725	+6.8%	+148.9%
事務	158,866	-0.9%	-41.2%
輸送・機械運転	147,923	+19.8%	-7.5%
販売（営業）	140,830	+0.9%	-3.7%
建設・採掘	116,360	-1.8%	+26.2%
販売（販売）	114,481	+4.4%	+17.1%
専門（技術者・研究者）	67,337	-25.4%	-25.9%
専門（医療・福祉専門職）	58,964	+1.3%	+8.0%
生産工程	54,061	+1.5%	-5.3%
サービス（給仕）	40,739	+3.1%	+16.8%

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

調査発表/求人広告掲載件数 – 全国求人情報協会 (zenkyukyo.or.jp)⁶

Market Highlights

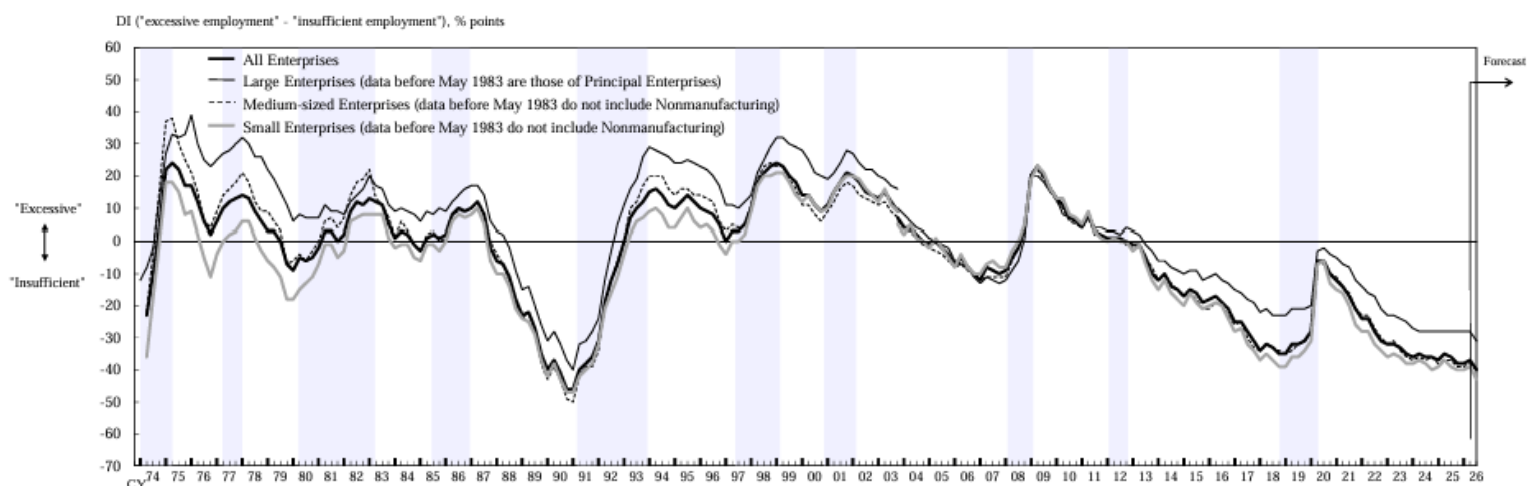
August 2026

Market trend

Japan's AI Transition: Workforce Capability Emerges as a Strategic Advantage. Japan's AI investment is accelerating business activity beyond the technology sector, with growing impacts on infrastructure development and workforce demand. While AI is supporting business growth and creating new demand for specialised skills, persistent labour shortages are making talent availability an increasingly important factor in determining how effectively companies can realise the benefits of these investments. Evidence across multiple industries suggests that Japan's talent challenge increasingly involves not only securing sufficient labour capacity, but also developing and attracting the specialised capabilities needed as AI adoption expands. As a result, recruitment, reskilling and retention are becoming increasingly strategic priorities for employers.

Recent economic data highlights this transition. The Bank of Japan's June 2026 Tankan survey showed business sentiment among large manufacturers improving for the fifth consecutive quarter, supported by strong AI- and semiconductor-related demand. At the same time, labour shortages remained persistent across both manufacturing and non-manufacturing sectors, particularly in areas such as engineering, construction and specialised technical roles, reinforcing concerns that workforce availability may increasingly constrain companies' ability to convert strong demand into future growth. [時事通信ニュース](#)⁷

[Employment Conditions (All industries)]



TANKAN (Summary) June 2026⁸

Market Highlights

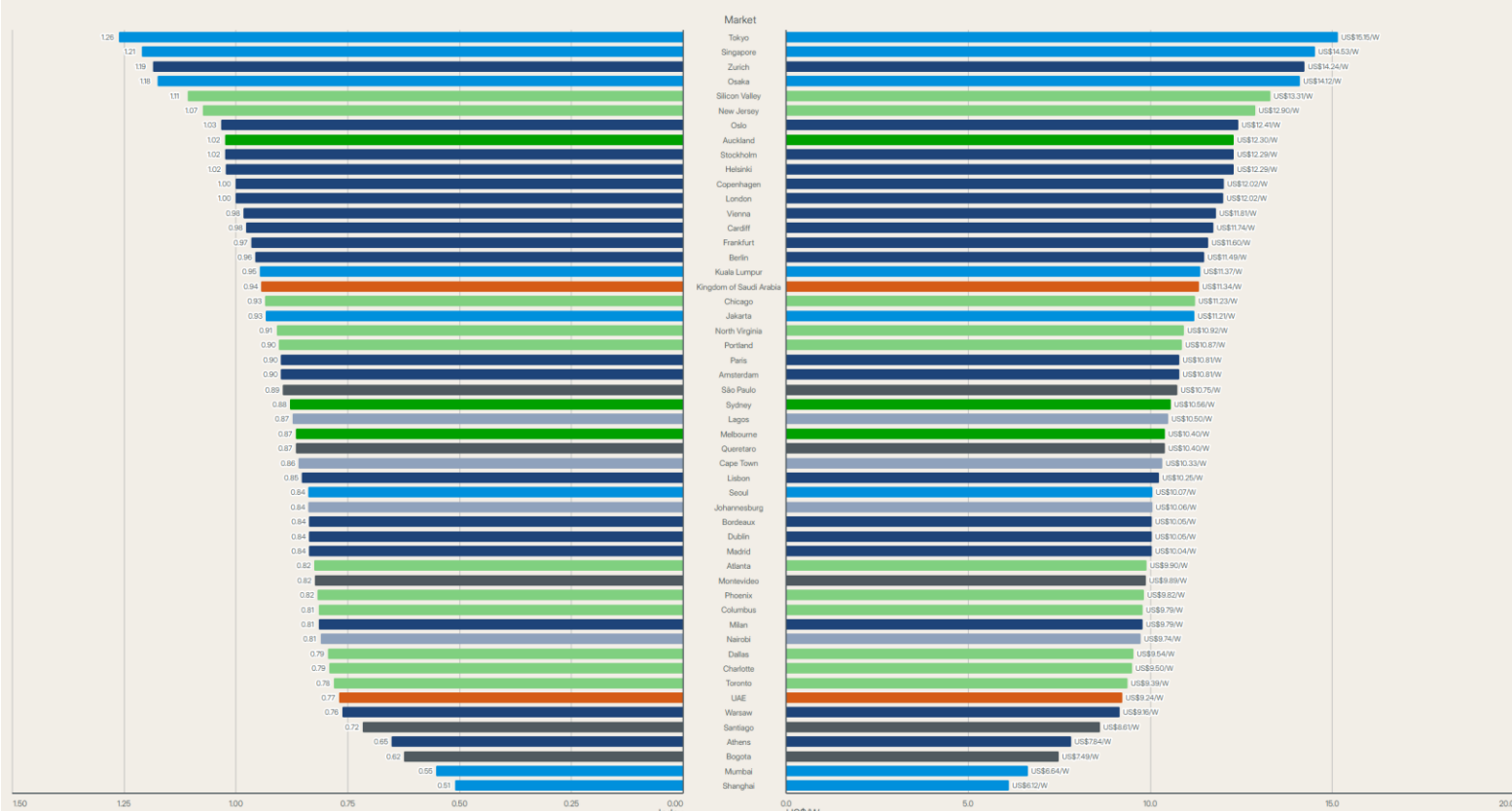
August 2026

The impact of AI investment is also extending well beyond the technology sector. The rapid expansion of AI infrastructure is creating new demand for construction, engineering and infrastructure specialists as data centre development accelerates. Turner & Townsend identifies shortages of skilled labour as a significant risk to project delivery, illustrating how AI-related investment is reshaping workforce requirements across the wider economy—not only increasing demand for software engineers, but also for the broader range of professionals needed to build and operate AI infrastructure.

TURNER & TOWNSEND GROUP LIMITED⁹

Figure 3:

Data centre cost index 2025 – index scores and US\$ per watt



Turner & Townsend - Data centre construction cost index 2025¹⁰

At the same time, AI is accelerating the re-pricing of skills and capabilities in the labour market, creating greater differentiation between professionals who can apply AI effectively and those whose tasks are more exposed to automation. The Linux Foundation 2026 State of Tech Talent Japan Report¹¹ identifies AI as a major driver of job creation in Japan, with a projected hiring growth rate of 54% for 2026, significantly outpacing global averages.

Market Highlights

August 2026

Meanwhile, [Nikkei](#)¹² reports widening differences in market value between roles that can effectively leverage AI and those more exposed to automation. Professionals who combine technical expertise with AI capability, business understanding, and stakeholder management are gaining greater market recognition, while routine coding-focused roles face increasing pressure from automation and changing skill requirements. The broader implication is that AI is reshaping demand for talent rather than simply reducing it, changing which capabilities create the greatest value. AI investment is not only increasing demand for AI specialists, but also broadening demand for the wider workforce required to build, deploy and scale AI-enabled businesses—including engineering, infrastructure, project management, business transformation and cross-functional change capabilities.

These changes are prompting a shift in corporate HR priorities. PERSOL Research Institute's [2026 HR Trends Survey](#)¹³ indicates that Japanese companies are placing greater emphasis on employee retention, reskilling and workforce planning as relying solely on external hiring becomes increasingly insufficient to address workforce needs. The research also highlights that organisations where HR plays a more strategic role tend to demonstrate stronger business performance, reflecting the growing importance of workforce capability as a business issue rather than solely an HR function. However, shifting HR from an administrative function to a strategic business function remains a challenge for many Japanese organisations, requiring changes in workforce planning, leadership practices and talent management approaches.

Employees are responding to changing labour market conditions as well. [En Inc's Career Change Survey](#)¹⁴ found that 66% of respondents are interested in changing industries or job functions, with younger employees showing particularly strong interest. The main motivations include developing new skills, improving career opportunities and achieving better work-life balance. This suggests that career mobility and continuous skills development are becoming increasingly important as workers adapt to changing capability requirements in an AI-enabled labour market. As AI reshapes the value of different skills and experiences, employees are increasingly seeking opportunities to acquire new capabilities and reposition their careers.

Taken together, these developments indicate that Japan's AI transition is increasingly becoming a human capital challenge alongside a technology challenge. AI investment is creating new growth opportunities across multiple industries, but organisations that successfully attract, develop and retain people capable of applying AI effectively in their roles are likely to be better positioned to realise the full value of AI investment. As AI adoption expands, workforce capability—alongside technology investment—is likely to become a key differentiator in determining how companies successfully capture the long-term value created by AI.

Market Highlights

August 2026

West Japan expansion

Conrad Nagoya opens in August.
Conrad Nagoya Opens – TRAICY Global¹⁵

READi ROBUST Machine, Korea Greentech, has an office in Nagoya.
https://www.readi.co.kr/jp/page/a_company.php¹⁶

LYMPHOGENiX, a UK biotech started by a Japanese, has a Nagoya R&D hub.
<https://www.lymphogenix.com/team>¹⁷

Innovation Dojo, an Australian cross-border business, will expand its Kobe office.
神戸市 企業進出総合サイト KOBE BUSINESS WIND¹⁸

Ironstar, Australia, a Drupal hosting provider, has a Nara office.
Ironstar Establishes Japanese Subsidiary in Nara City – JETRO¹⁹

Market Highlights

August 2026

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