

Monthly Market Update

February 2025

Trend Summary

- The latest BOJ quarterly survey TANKAN indicates that employment conditions remain tight.
- The Association of Job Information forecasts the hiring of full-time and part-time workers to increase in the next three months based on the job advertisement trend.
- Average hourly wage for temporary workers in the major three areas, Tokyo, Nagoya & Osaka regions, rose by 1.1% to 1,702 yen in December 2024.
- Population move in Japan, Tokyo recorded a net inflow of 79,285 people in 2024, marking the third consecutive year of increase.

Highlights Overview

Market Data

1. HRog reports: monthly salary & vacancies on increase.
2. Persol DODA job-to-applicant ratio increased to 3.15.
3. The latest MHLW job-to-applicant ratio is 1.25, the same MoM, Tokyo is 1.76 & Osaka is 1.24, and full-time is 1.03.
4. Association of Job Information of Japan reports that the number of job ads decreased MoM in December while it increased YoY.
5. 2024 Q4 Average monthly salary on job advertisement was 245,305 yen, +1.0% from Q3, 2.6% YoY.

Market Trend

1. TANKAN (Summary) December 2024 quarterly survey by BOJ indicates that employment conditions remain tight.
2. The average hourly wage for temporary workers in major metropolitan areas, Tokyo, Nagoya, and Osaka regions, rose by 1.1% to 1,702 yen in December 2024.
3. Zenkyukyo, Association of Job Information reports that hiring motivation of companies for both full-time employees and part-time/temporary workers is on the rise.
4. Population move in Japan, Tokyo recorded a net inflow of 79,285 people in 2024, marking the third consecutive year of increase.

West Japan Expansion

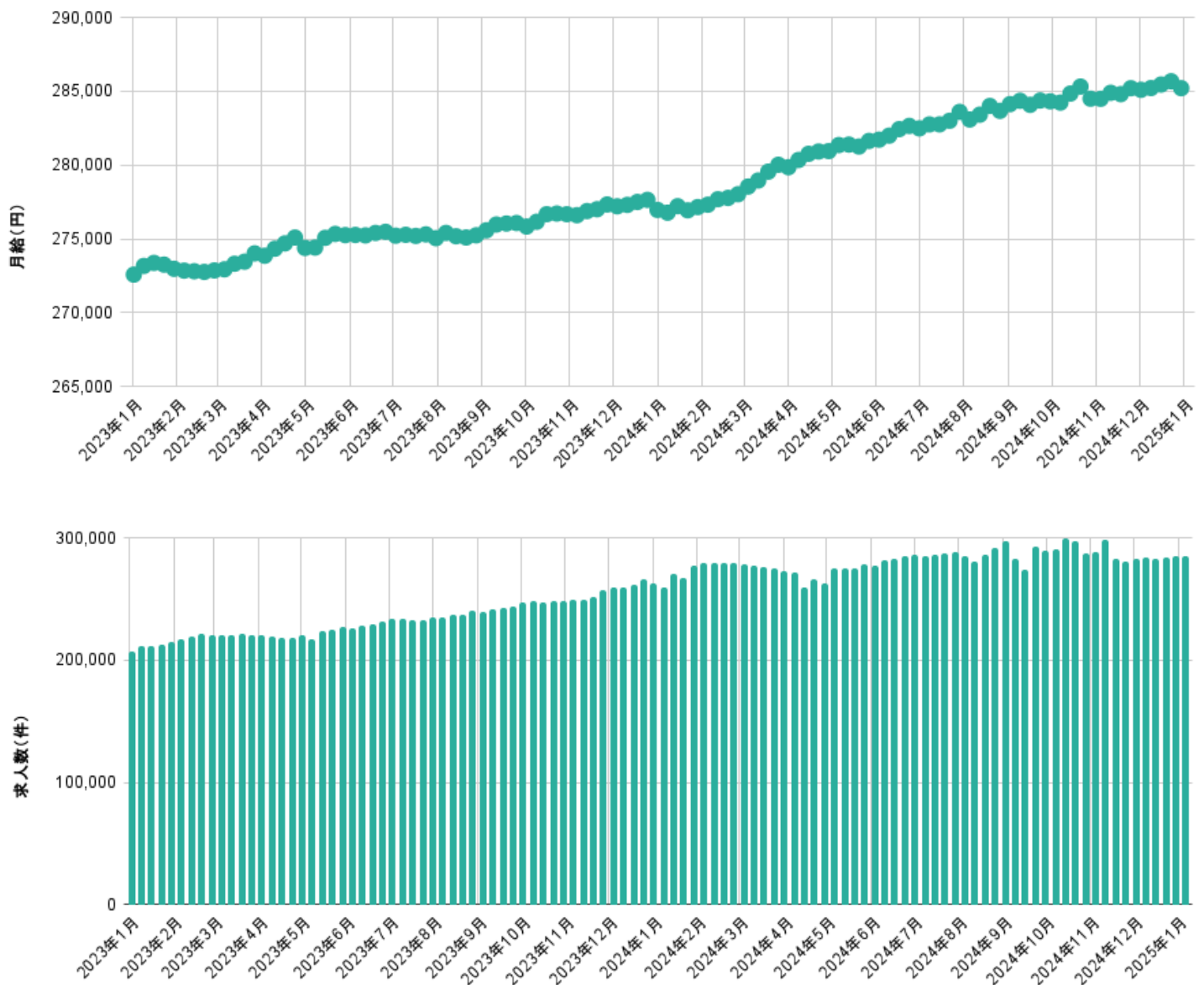
1. CapitaLand, plans to invest 109 billion yen in a new data centre in Osaka.
2. UK startup Transreport is collaborating with Hankyu Railway to introduce a web-based assistance reservation system for disabled and elderly passengers at 87 stations.
3. Junglia theme park in Okinawa will open on July 25, 2025.
4. Patentix is leading a project establishing a major semiconductor manufacturing hub around Lake Biwa.

Market Highlights

February 2025

Market Data

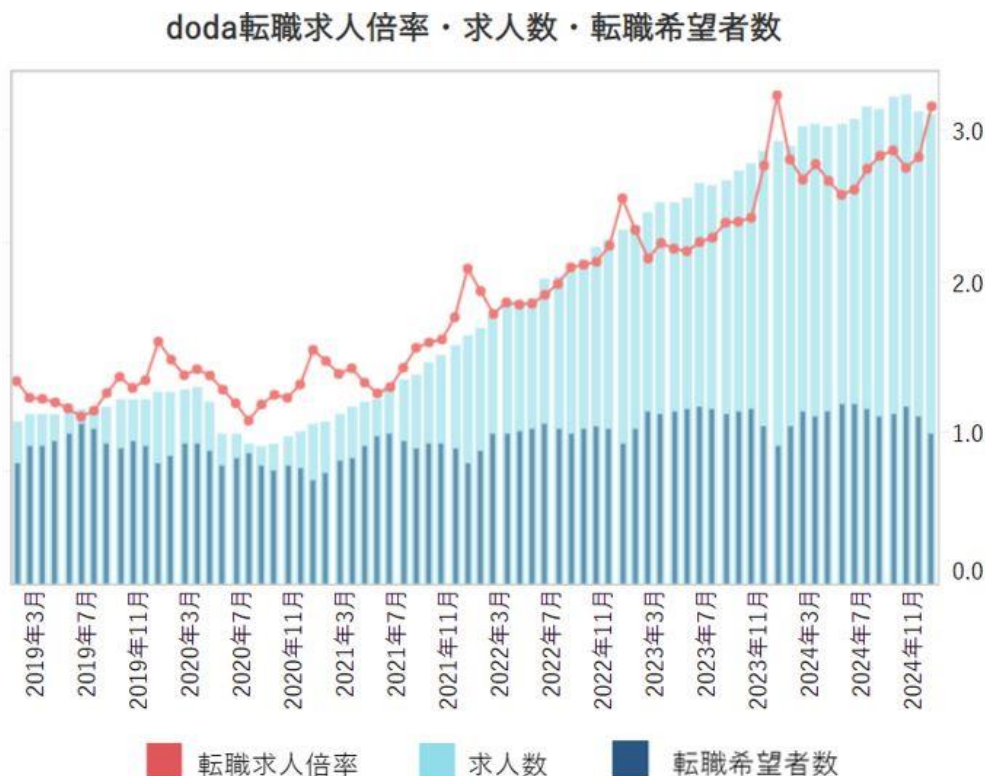
HRog (HRog Co., Ltd.) reports Jan 2025 full-time employee average salary & vacancies. Average salary is 285,306 yen, +0.07% (+205 yen) MoM, +3.01% (+8,338 yen) YoY with 284,737 vacancies which is +0.63% (+1,784 jobs) MoM/ +8.26% (+21,723 jobs) YoY.



Market Highlights

February 2025

December Persol DODA job-to-applicant ratio is 3.15, +0.33 pt MoM/ -0.07 pt YoY. Vacancies at 96.5% MoM and 105.9% YoY, job seekers at 89.0% MoM/ 108.4% YoY. Both vacancies & job seekers declined, job seekers declined more than vacancies which led to an increased job-to-applicant rate. The HR services and leisure/dining sectors saw the highest increase in job openings. The chemical/food specialists and sales/services roles experienced the most significant growth in job openings.



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

Market Highlights

February 2025

	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	3.15	↑ 0.33	↓ -0.07	99.5%	89.0%
IT・通信	8.33	↑ 0.87	↓ -0.52	100.4%	89.8%
メディア	4.51	↑ 0.41	↓ -0.50	98.5%	89.6%
金融	3.31	↑ 0.35	↑ 0.32	99.7%	89.3%
メディカル	1.26	↑ 0.15	↓ -0.24	99.9%	88.1%
メーカー	3.83	↑ 0.36	↑ 0.10	100.0%	90.5%
商社	2.03	↑ 0.22	↓ -0.08	99.5%	88.6%
小売・流通	0.82	↑ 0.09	↑ 0.03	100.4%	89.2%
レジャー・外食	0.96	↑ 0.12	↓ -0.07	101.2%	88.9%
エネルギー	3.16	↑ 0.40	↑ 0.10	99.3%	86.8%
建設・不動産	6.25	↑ 0.47	↓ -0.11	95.9%	88.6%
コンサルティング	10.53	↑ 0.80	↑ 2.80	98.4%	90.9%
人材サービス	10.36	↑ 1.64	↑ 0.82	102.3%	86.1%
その他	0.34	↑ 0.04	↓ -0.07	100.4%	88.5%

	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	3.15	↑ 0.33	↓ -0.07	99.5%	89.0%
営業	3.53	↑ 0.35	↓ -0.05	98.9%	89.2%
企画・管理	4.11	↑ 0.42	↓ -0.06	99.8%	89.6%
エンジニア（IT・通信）	14.15	↑ 1.30	↑ 0.87	100.0%	90.8%
エンジニア（機械・電気）	7.23	↑ 0.82	↑ 0.44	101.0%	89.6%
専門職（メディカル）	0.86	↑ 0.08	↓ -0.20	98.6%	89.7%
専門職（化学・食品）	1.99	↑ 0.24	↑ 0.06	102.1%	89.6%
専門職（建設・不動産）	6.61	↑ 0.59	↓ -0.44	97.6%	88.8%
専門職（コンサル・金融）	7.24	↑ 0.67	↓ -0.82	100.1%	90.8%
クリエイター	1.38	↑ 0.11	↓ -0.35	97.2%	89.6%
販売・サービス	0.86	↑ 0.10	↓ -0.05	101.1%	89.6%
事務・アシスタント	0.57	↑ 0.04	↓ -0.01	94.5%	87.0%
その他	0.06	↑ 0.01	↑ 0.01	103.6%	86.5%

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, and 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, and others.

Market Highlights

February 2025

LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF DECEMBER 2024

1.25
+0.00 MoM

**Total
National
average**

1.03
+0.01 MoM

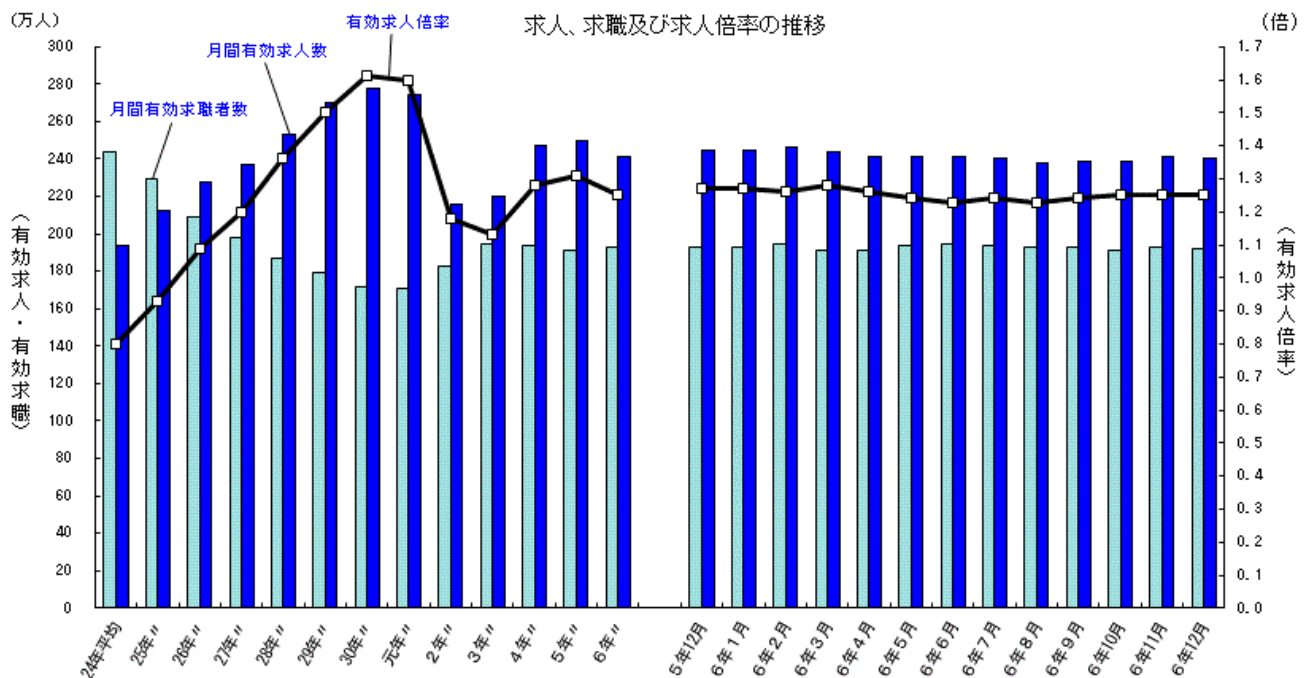
Full time

1.76
+0.00 MoM

Tokyo

1.24
+0.01 MoM

Osaka



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

The 2024 average job-to-applicant ratio is 1.25, -0.06 pt compared to 2023.

Market Highlights

February 2025

全国計

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

常用（除パート） 6年12月

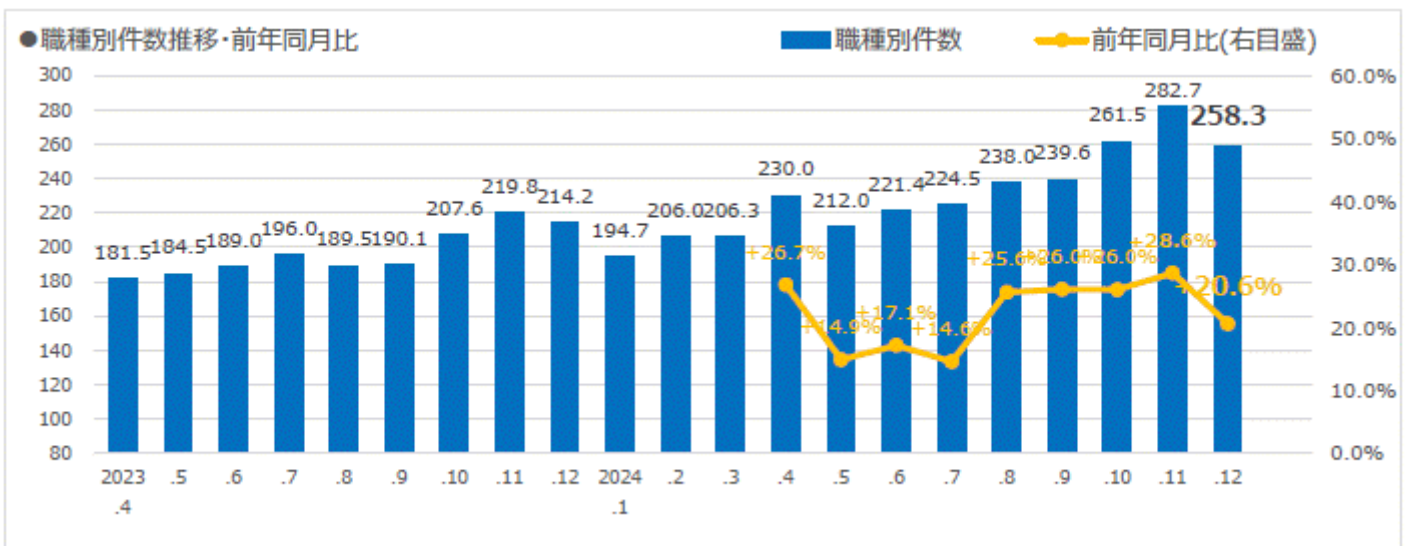
	新規求人	有効求人	新規求職	有効求職	紹介件数	就職件数	新規求人 倍率	有効求人 倍率
職業計	451,315	1,404,701	174,232	1,063,374	153,326	39,784	2.59	1.32
管理的職業従事者	1,960	6,043	936	5,118	923	110	2.09	1.18
専門的・技術的職業従事者	121,970	370,540	28,930	170,331	22,206	6,315	4.22	2.18
製造技術者（開発）	4,758	15,824	1,049	6,111	904	167	4.54	2.59
製造技術者（開発を除く）	3,749	11,919	2,202	12,201	977	248	1.70	0.98
建築・土木・測量技術者	19,548	58,249	1,436	7,890	1,510	457	13.61	7.38
情報処理・通信技術者	17,705	53,340	3,915	30,576	4,394	412	4.52	1.74
その他の技術者	4,125	11,850	283	1,415	377	91	14.58	8.37
医師、歯科医師、獣医師、薬剤師	2,240	6,406	364	1,900	142	44	6.15	3.37
保健師、助産師、看護師	21,320	64,138	5,597	24,026	3,596	1,637	3.81	2.67
医療技術者	9,277	27,973	1,584	8,081	889	458	5.86	3.46
その他の保健医療従事者	5,351	19,266	1,261	7,943	870	333	4.24	2.43
社会福祉専門職業従事者	27,383	82,091	4,600	24,507	4,444	1,944	5.95	3.35
美術家、デザイナー、写真家、映像撮影者	1,046	3,386	2,461	21,376	1,584	137	0.43	0.16
その他の専門的職業	5,468	16,098	4,178	24,305	2,519	387	1.31	0.66
事務従事者	45,304	132,740	45,379	291,763	60,936	9,199	1.00	0.45
一般事務従事者	29,936	85,047	37,087	240,721	44,163	6,420	0.81	0.35
会計事務従事者	4,272	13,215	3,652	21,561	6,835	1,042	1.17	0.61
生産関連事務従事者	3,800	11,626	1,144	6,653	2,520	579	3.32	1.75
営業・販売事務従事者	4,860	14,647	2,257	13,697	5,714	808	2.15	1.07
外勤事務従事者	156	437	17	107	73	22	9.18	4.08
運輸・郵便事務従事者	1,632	5,679	320	1,594	817	224	5.10	3.56
事務用機器操作員	648	2,089	902	7,430	814	104	0.72	0.28
販売従事者	44,015	145,476	10,339	61,627	10,858	2,108	4.26	2.36
商品販売従事者	16,753	61,487	4,325	28,412	3,251	861	3.87	2.16
販売類似職業従事者	1,270	3,903	263	1,453	279	51	4.83	2.69
営業職業従事者	25,992	80,086	5,751	31,762	7,328	1,196	4.52	2.52
サービス職業従事者	75,572	242,328	14,977	85,693	13,477	5,639	5.05	2.83
家庭生活支援サービス職業従事者	52	191	23	134	20	11	2.26	1.43
介護サービス職業従事者	35,147	111,509	4,988	29,044	4,928	2,646	7.05	3.84
保健医療サービス職業従事者	5,000	15,656	871	4,372	1,537	660	5.74	3.58
生活衛生サービス職業従事者	6,448	20,790	868	6,113	398	152	7.43	3.40
飲食物調理従事者	14,932	49,406	3,375	18,832	2,463	1,123	4.42	2.62
接客・給仕職業従事者	9,019	29,860	2,602	14,529	1,820	454	3.47	2.06
居住施設・ビル等管理人	1,016	3,087	843	4,310	984	224	1.21	0.72
その他のサービス職業従事者	3,958	11,829	1,407	8,359	1,327	369	2.81	1.42
保安職業従事者	17,004	54,525	1,435	7,060	2,446	1,016	11.85	7.72
農林漁業従事者	2,880	9,055	1,521	8,026	950	437	1.89	1.13
生産工程従事者	52,380	161,415	16,141	89,359	18,308	6,197	3.25	1.81
生産設備制御・監視従事者（金属製品）	1,163	3,309	596	2,895	404	149	1.95	1.14
生産設備制御・監視従事者（金属製品を除く）	1,955	6,091	503	2,663	843	288	3.89	2.29
機械組立設備制御・監視従事者	604	1,726	362	1,857	180	51	1.67	0.93
製品製造・加工処理従事者（金属製品）	11,624	35,675	2,897	14,732	3,817	1,311	4.01	2.42
製品製造・加工処理従事者（金属製品を除く）	12,763	39,982	4,037	22,151	6,492	2,402	3.16	1.80
機械組立従事者	5,313	16,346	3,577	20,342	2,088	664	1.49	0.80
機械整備・修理従事者	11,838	36,625	1,311	7,401	1,759	566	9.03	4.95
製品検査従事者（金属製品）	910	2,919	442	2,127	444	140	2.06	1.37
製品検査従事者（金属製品を除く）	1,141	3,533	344	1,814	658	183	3.32	1.95
機械検査従事者	844	2,581	339	1,831	416	119	2.49	1.41
生産関連・生産類似作業従事者	4,225	12,628	1,733	11,546	1,207	324	2.44	1.09
輸送・機械運転従事者	31,948	102,693	8,009	40,699	8,389	3,390	3.99	2.52
鉄道運転従事者	42	119	26	127	23	5	1.62	0.94
自動車運転従事者	24,424	79,247	5,371	26,334	5,858	2,574	4.55	3.01
船舶・航空機運転従事者	29	97	22	132	4	1	1.32	0.73
その他の輸送従事者	1,848	5,813	1,129	6,309	852	263	1.64	0.92
定置・建設機械運転従事者	5,605	17,417	1,461	7,797	1,652	547	3.84	2.23
建設・探掘従事者	36,358	109,655	3,495	17,521	3,252	1,637	10.40	6.26
建設躯体工事従事者	6,380	19,233	425	2,014	330	165	15.01	9.55
建設従事者（建設躯体工事従事者を除く）	10,127	29,876	1,096	5,268	946	392	9.24	5.67
電気工事従事者	6,455	19,585	797	4,927	754	348	8.10	3.98
土木作業従事者	13,270	40,630	1,163	5,257	1,199	722	11.41	7.73
探掘従事者	126	331	14	55	23	10	9.00	6.02
運搬・清掃・包装等従事者	21,924	70,231	13,481	95,588	11,581	3,736	1.63	0.73
運搬従事者	11,651	38,525	5,851	32,445	6,159	1,867	1.99	1.19
清掃従事者	4,571	14,787	1,705	13,311	2,316	865	2.68	1.11
包装従事者	859	2,646	339	2,233	560	186	2.53	1.18
その他の運搬・清掃・包装等従事者	4,843	14,273	5,586	47,599	2,546	818	0.87	0.30
分類不能の職業	-	-	29,589	190,589	-	-	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

February 2025

Zenkyukyo (the Association of Job Information of Japan) reports the number of job ads in Dec totalled 2,583,212 jobs -8.6% MoM, and +20.6% YoY. While job ads increased from June to November, they decreased in December. Financial/legal specialists saw the highest month-on-month increase, while technical/research specialists saw the largest decrease.



●職種別件数（占有率TOP10）

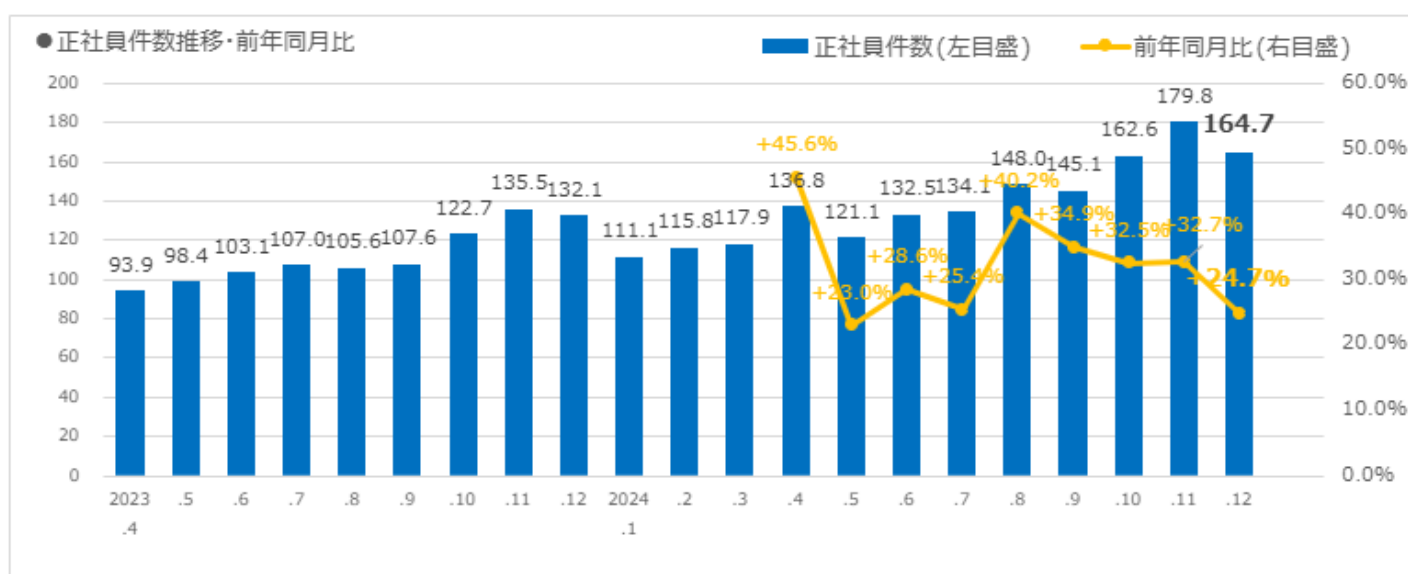
	件数	前月比	前年同月比
全体計	2,583,212	-8.6%	+20.6%
事務	425,672	-7.4%	+10.8%
専門（IT技術者）	341,366	-0.2%	+45.4%
販売（販売）	267,833	-10.1%	+9.9%
輸送・機械運転	204,040	-16.7%	+19.1%
販売（営業）	186,846	-1.0%	+30.9%
専門（技術者・研究者）	148,520	-31.2%	+88.9%
運搬・清掃・包装等	139,216	-7.8%	+23.7%
生産工程	129,374	-9.7%	+6.0%
サービス（給仕）	125,254	-13.2%	+8.5%
専門（医療・福祉専門職）	112,631	-3.8%	-6.0%

From top: total, admin, IT engineer, shop sales, transport/machine operation, Technical/research, sales, transport/cleaning/packing, production process, services, and medical/welfare.

Market Highlights

February 2025

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	1,647,189	-8.4%	+24.7%
事務	346,881	-7.6%	+7.7%
専門（IT技術者）	330,077	+0.0%	+47.5%
販売（営業）	160,752	-0.8%	+33.7%
輸送・機械運転	155,002	-15.9%	+13.8%
専門（技術者・研究者）	127,693	-34.4%	+83.4%
販売（販売）	108,677	-7.8%	+27.8%
建設・採掘	88,637	-4.1%	+20.0%
生産工程	69,197	-5.0%	+7.2%
専門（医療・福祉専門職）	63,745	-3.5%	-16.8%
運搬・清掃・包装等	40,933	-7.6%	+57.8%

From top: total, admin, IT tech, sales, transport/machine operation, technical/research, shop sales, construction, production process, medical/welfare, transport/cleaning/packing

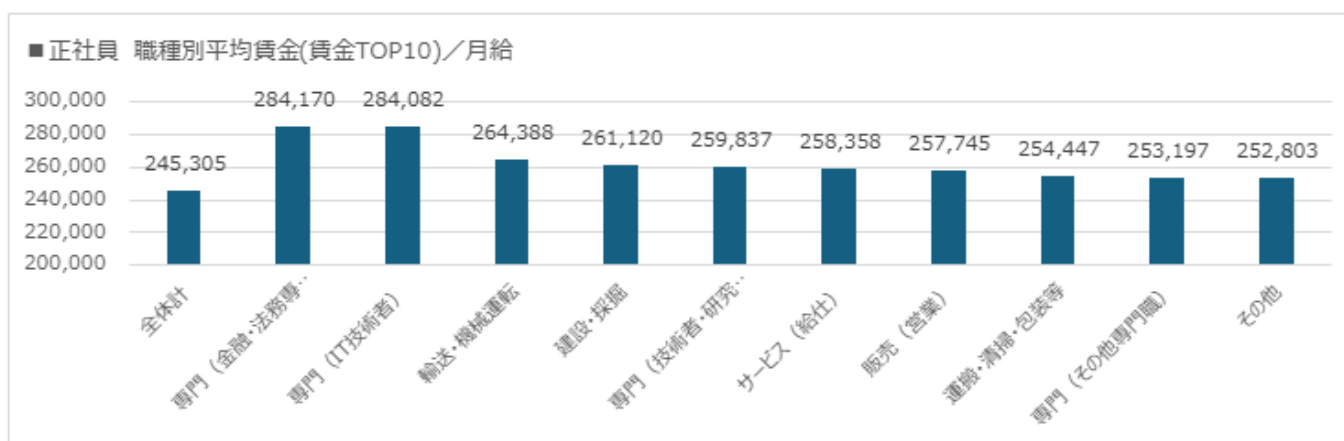
Market Highlights

February 2025

2024 Q4 Top 10 average monthly salary for full-time and part-time/temp roles

Full-Time Employees: Average monthly salary was 245,305 yen (up 1.0% from the previous period and 2.6% year-on-year).

Full-time monthly salaries by jobs: top 10 rankings.



● 職種別平均賃金(賃金TOP10)

正社員	平均賃金	前回比	前年同月比
全体計	245,305	+1.0%	+2.6%
専門(金融・法務専門職)	284,170	-1.2%	+3.7%
専門(IT技術者)	284,082	+0.4%	+7.2%
輸送・機械運転	264,388	+6.6%	-5.7%
建設・採掘	261,120	+0.8%	+3.9%
専門(技術者・研究者)	259,837	+1.0%	+3.5%
サービス(給仕)	258,358	-1.0%	+4.3%
販売(営業)	257,745	-0.2%	+5.1%
運搬・清掃・包装等	254,447	+1.0%	-1.5%
専門(その他専門職)	253,197	-0.5%	+10.6%
その他	252,803	+4.3%	+2.6%

From top: total, FS/legal, IT tech, transport/machine operation, construction, technical/research, service (waiting), sales, transport/cleaning/packing, other specialists

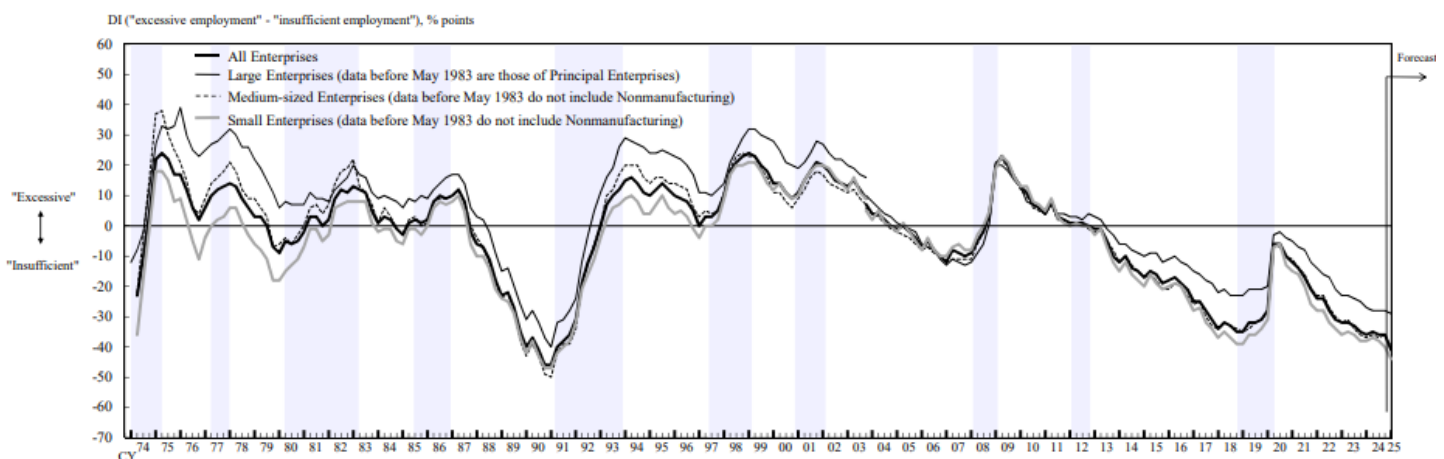
Market Highlights

February 2025

Market trend

[TANKAN \(Summary\) December 2024](#)⁵ quarterly survey by BOJ indicates that employment conditions remain tight. The diffusion index (DI) for employment conditions, which measures the balance between “excessive employment” and “insufficient employment” shows a continued trend of insufficient employment across all industries.

[Employment Conditions (All industries)]



The average hourly wage for temporary workers in major metropolitan areas, Tokyo, Nagoya, and Osaka regions, rose by 1.1% to 1,702 yen in December 2024. The wage in major cities has stabilized in the 1,700-yen range. Expo 2025 in Osaka is driving demand for temporary staff. And DX continues increasing, but labour shortages persist.

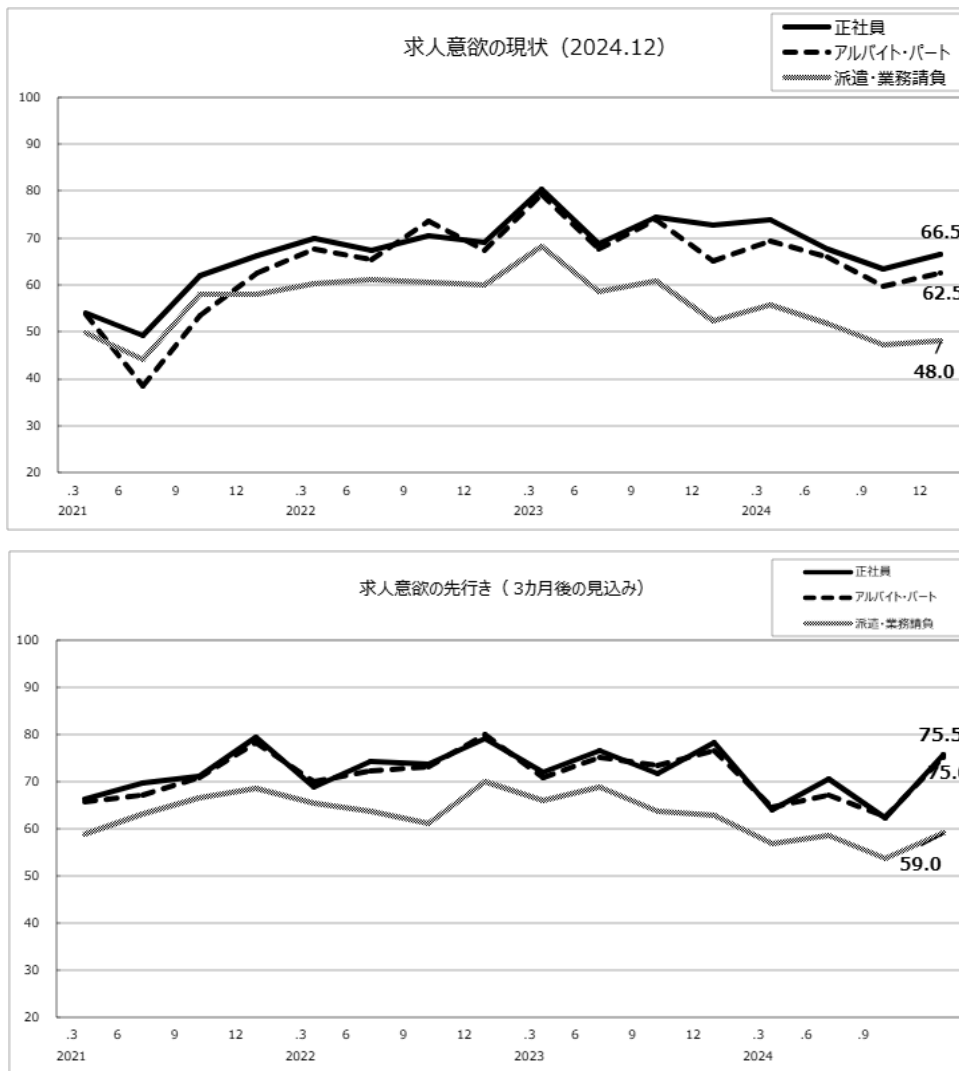


派遣時給、24年12月は1%高 関西は万博関連で求人
- 日本経済新聞⁶

Market Highlights

February 2025

The Zenkyukyo, Association of Job Information reports that hiring motivation of companies for both full-time employees and part-time/temporary workers is on the rise, overall increase expected in the next three months, especially for full-time positions.



Top: Current situation & bottom: 3-month forecast trend (black line: full-time, dashed line: part-time, grey line: temp/outourcing).

The survey evaluates companies' hiring intentions every three months. Members of the association, who are sales and editorial staff of job media, rate the hiring intentions on a five-point scale based on their observations: High (+1.00), Slightly High (+0.75), Neutral (Unchanged) (+0.50), Slightly Low (+0.25), Low (0.00).

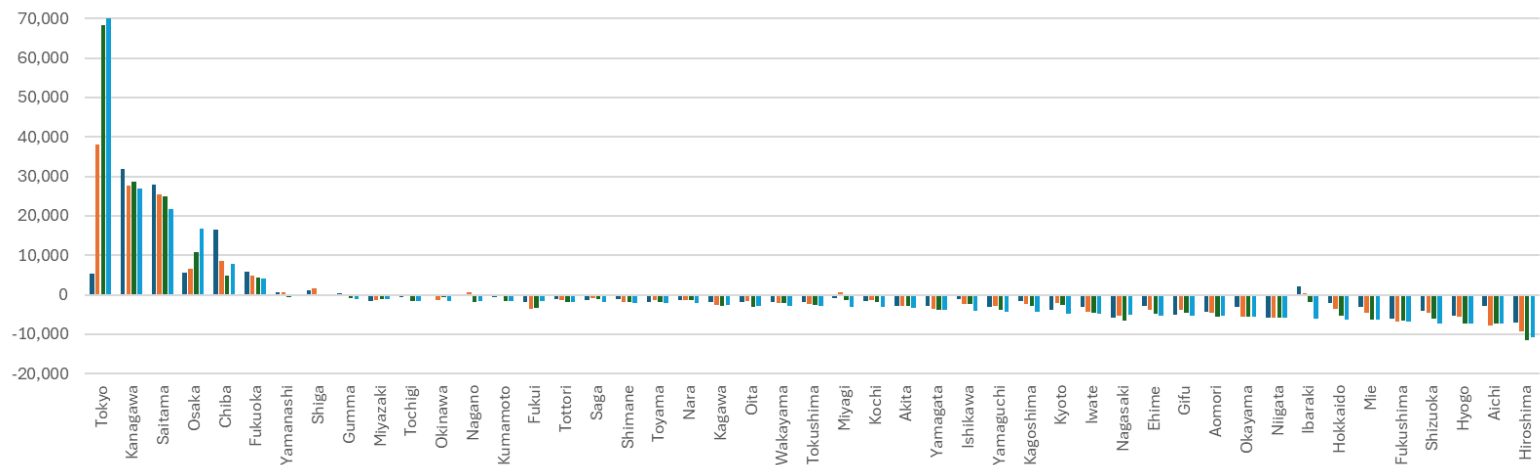
Market Highlights

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Population move in Japan, Tokyo recorded a net inflow of 79,285 people in 2024, marking the third consecutive year of increase. The increase is driven by young people moving to Tokyo for education, jobs, and transfers. The Tokyo metropolitan area saw a net inflow of 135,843 people, while the Osaka metropolitan area had a net inflow of 2,679 people. Seven prefectures, including Tokyo, Kanagawa, Saitama, Osaka, Chiba, Fukuoka, and Yamanashi, experienced net inflows, while the remaining 40 prefectures saw net outflows. Hiroshima had the highest net outflow with 10,711 people.

Net migration trend by prefecture

■ 2021 ■ 2022 ■ 2023 ■ 2024



Source: Statistics Bureau of Japan 統計局ホームページ/住民基本台帳人口移動報告 2021, 2022, 2023, & 2024

統計局ホームページ/住民基本台帳人口移動報告 2024年（令和6年）結果⁸
統計局ホームページ/住民基本台帳人口移動報告 2023年（令和5年）結果⁹
統計局ホームページ/住民基本台帳人口移動報告 2022年（令和4年）結果¹⁰
統計局ホームページ/住民基本台帳人口移動報告 2021年（令和3年）結果¹¹

Market Highlights

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West Japan expansion

CapitaLand, a Singaporean real estate investment group, plans to invest 109 billion yen in a new data centre in Osaka. This is their first data centre project in Japan, with a planned capacity of 50 megawatts. The project aims to expand its global digital infrastructure portfolio, with completion expected in several years. CapitaLand plans to integrate this project into a future data centre investment fund, enhancing its geographic diversification strategy.

キャピタランド、大阪でデータセンター 1000億円投資 - 日本経済新聞¹²

UK startup Transreport is collaborating with Hankyu Railway to introduce a web-based assistance reservation system for disabled and elderly passengers at 87 stations. This is the 1st implementation in Japan. Transreport's app allows users to book assistance and search routes, aiming to improve accessibility and efficiency, addressing rising demand and labour shortages.

阪急電鉄、障害者介助をウェブ予約 英スタートアップのシステム採用 - 日本経済新聞¹³

Junglia theme park in Okinawa will open on July 25, 2025, leveraging Okinawa's strategic location, being within a 4-hour flight from many Asian countries, targeting the market of the 2 billion population in Southeast Asia. The park features unique attractions like dinosaur adventures and hot air balloon rides. Ticket prices are set differently for domestic and international visitors.

沖縄「ジャングリア」が7月開業、アジアの20億人市場争奪 - 日本経済新聞¹⁴

Patentix, a startup from Ritsumeikan University, is leading a project to establish a major semiconductor manufacturing hub around Lake Biwa. They plan to mass-produce new substrates that significantly reduce power loss. The project involves around 20 companies and aims to create a comprehensive ecosystem for advanced semiconductor production.

【滋賀】琵琶湖まわりに半導体産業集積計画 立命館大学発パテンティクスが「新工場」 - 日本経済新聞¹⁵



Market Highlights

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