

# Monthly Market Update

## January 2025

### Trend Summary

- World to add 170 million jobs by 2030, lose 92 million, resulting in a net growth of 78 million jobs according to WEF.
- Japan's business transformation is driven by trends such as an aging and declining workforce, and advancements in AI and information processing technologies.
- In 2024 full-time job opportunities, especially from DODA and MyNavi, have increased, with the average monthly salary rising to ¥285,180.
- In 2024 temporary jobs surged in March and April, with the average hourly wage up to ¥1,551.
- The World City Rankings 2024 Tokyo holds 3rd place for the 9th year and Osaka rises to 35th.

### Highlights Overview

#### Market Data

1. HRog reports: monthly salary & vacancies on increase.
2. Persol DODA job-to-applicant ratio increased to 2.82.
3. Latest MHLW job-to-applicant ratio is 1.25, the same MoM, Tokyo is 1.76 & Osaka is 1.23, and full-time is 1.01.
4. Association of Job Information of Japan reports number of jobs ads on increase YoY in November.

#### Market Trend

1. World to add 170 million jobs by 2030, lose 92 million.
2. Full-time jobs increased especially from DODA and MyNavi with average monthly salary increased by ¥5,809, reaching ¥285,180.
3. Temporary jobs increased especially in March and April with average hourly wage +8 yen, reaching ¥1,551.
4. London tops the World City Rankings 2024, followed by New York. Tokyo holds 3rd place for the 9th year, improving in cultural exchange and transportation.

#### West Japan Expansion

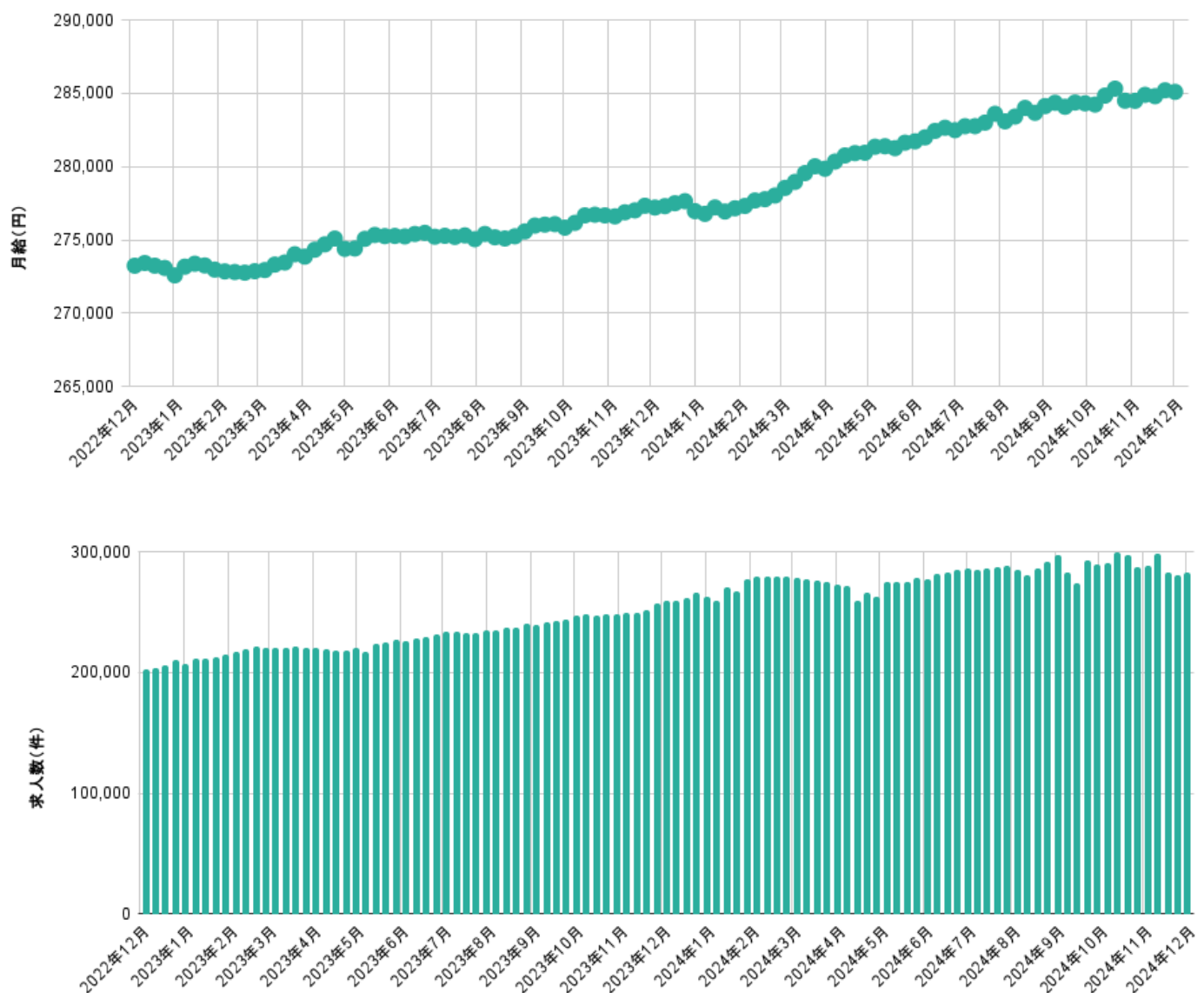
1. Taiwan plans to establish a service company in Kyushu to support high-tech expansion.
2. KDDI to build an AI data center in Sakai.
3. BYD, a leading Chinese electric vehicle (EV) manufacturer, opened its first dealership in Shiga Prefecture, Japan.
4. The number of foreign residents in Okinawa has increased by 1.5 times in 2.5 years.

# Market Highlights

## January 2025

### Market Data

**HRog** (HRog Co., Ltd.) reports Dec 2024 full-time employee average salary & vacancies. Average salary is 285,101 yen, +0.21% (+611 yen) MoM, +2.85% (+7,887 yen) YoY with 282,952 vacancies which are -1.79% (-5,153 jobs) MoM/ +9.26% (+23,977 jobs) YoY.



# Market Highlights

## January 2025

November Persol DODA job-to-applicant ratio is 2.82, +0.07 pt MoM/+0.06 pt YoY. Vacancies at 96.5% MoM and 109.1% YoY, job seekers at 94.1% MoM/106.9% YoY. Both vacancies & job seekers declined. Job seekers declined more than vacancies which led to an increased job-to-applicant rate. The leisure and dining industry saw the highest MoM increase in job openings, while consulting had the largest YoY increase. Among job types, sales, and service roles saw the highest MoM increase, and engineering roles had the largest YoY increase.

doda転職求人倍率・求人数・転職希望者数



# Market Highlights

## January 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	2.82	↑ 0.07	↑ 0.06	96.5%	94.1%
IT・通信	7.46	↑ 0.26	↓ -0.17	98.5%	95.1%
メディア	4.10	↑ 0.20	↓ -0.31	97.8%	93.1%
金融	2.96	↑ 0.28	↑ 0.43	100.8%	91.3%
メディカル	1.11	↑ 0.03	↓ -0.20	98.4%	96.0%
メーカー	3.47	↑ 0.17	↑ 0.24	97.9%	93.0%
商社	1.81	↑ 0.08	- 0.00	98.8%	94.2%
小売・流通	0.73	↑ 0.05	↑ 0.08	99.9%	93.6%
レジャー・外食	0.84	↑ 0.05	↓ -0.03	101.1%	95.5%
エネルギー	2.77	↑ 0.04	↑ 0.08	98.5%	97.0%
建設・不動産	5.78	↑ 0.09	↑ 0.38	94.4%	92.9%
コンサルティング	9.73	↑ 0.01	↑ 2.88	95.2%	95.0%
人材サービス	8.71	↓ -0.13	↑ 0.67	91.5%	92.9%
その他	0.30	- 0.00	↓ -0.05	96.0%	94.9%

	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	2.82	↑ 0.07	↑ 0.06	96.5%	94.1%
営業	3.19	↑ 0.13	↑ 0.07	97.4%	93.4%
企画・管理	3.69	↑ 0.03	↑ 0.01	97.0%	96.3%
エンジニア (IT・通信)	12.85	↑ 0.49	↑ 1.35	98.7%	95.0%
エンジニア (機械・電気)	6.42	↓ -0.03	↑ 0.73	93.4%	93.9%
専門職 (メディカル)	0.78	↑ 0.02	↓ -0.13	100.1%	97.5%
専門職 (化学・食品)	1.75	↓ -0.13	↑ 0.07	87.6%	94.0%
専門職 (建設・不動産)	6.01	↑ 0.14	↑ 0.17	95.5%	93.3%
専門職 (コンサル・金融)	6.57	↓ -0.10	↓ -0.78	95.8%	97.2%
クリエイター	1.27	↑ 0.01	↓ -0.28	94.8%	94.1%
販売・サービス	0.76	↑ 0.05	↓ -0.01	100.3%	93.8%
事務・アシスタント	0.53	↑ 0.01	↑ 0.03	95.4%	93.2%
その他	0.05	↑ 0.01	↑ 0.01	110.9%	92.5%

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, administrative assistant, and others.

# Market Highlights

## January 2025

### LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF NOVEMBER 2024

**1.25**  
+0.00 MoM

**Total  
National  
average**

**1.02**  
+0.00 MoM

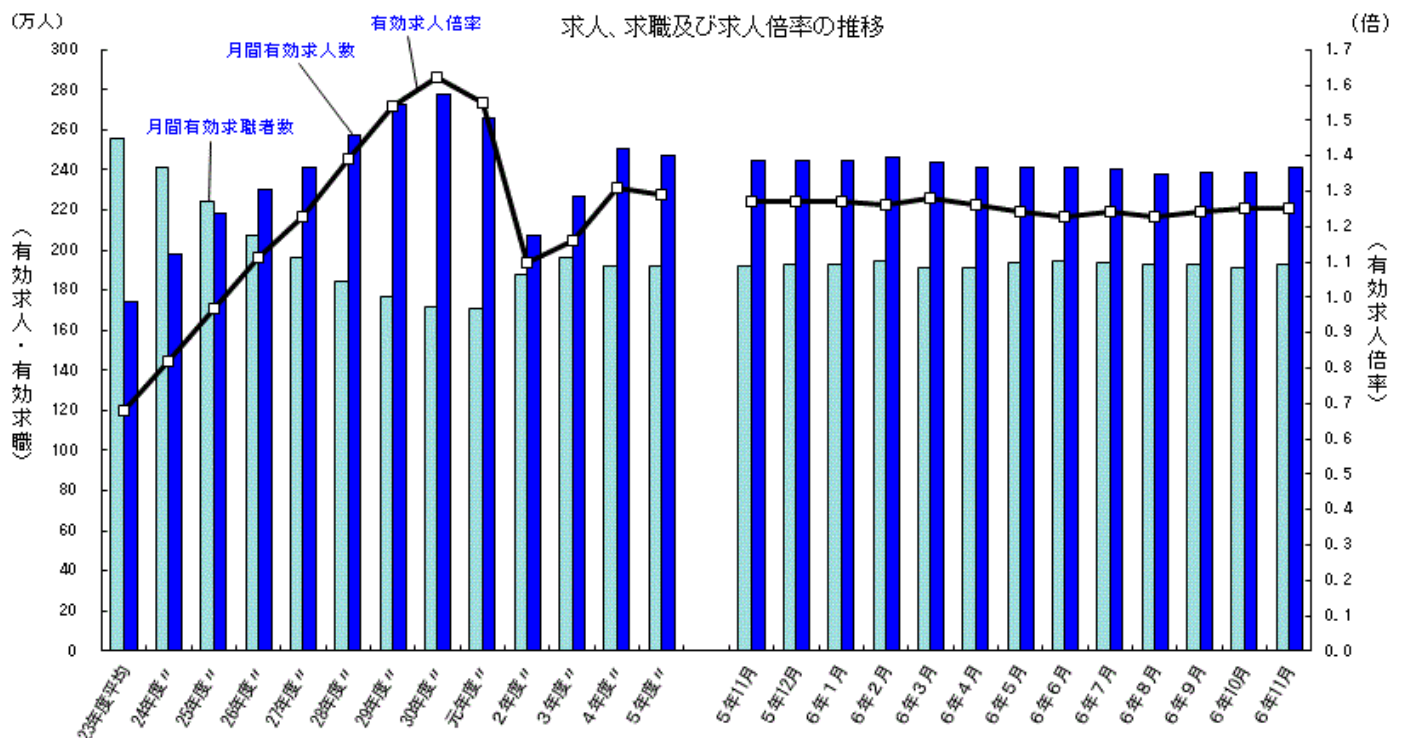
**Full time**

**1.76**  
-0.01 MoM

**Tokyo**

**1.23**  
+0.02 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.



# Market Highlights

## January 2025

全国計 By job breakdown (regular jobs excluding part-time jobs)

常用（除パート） 6年11月

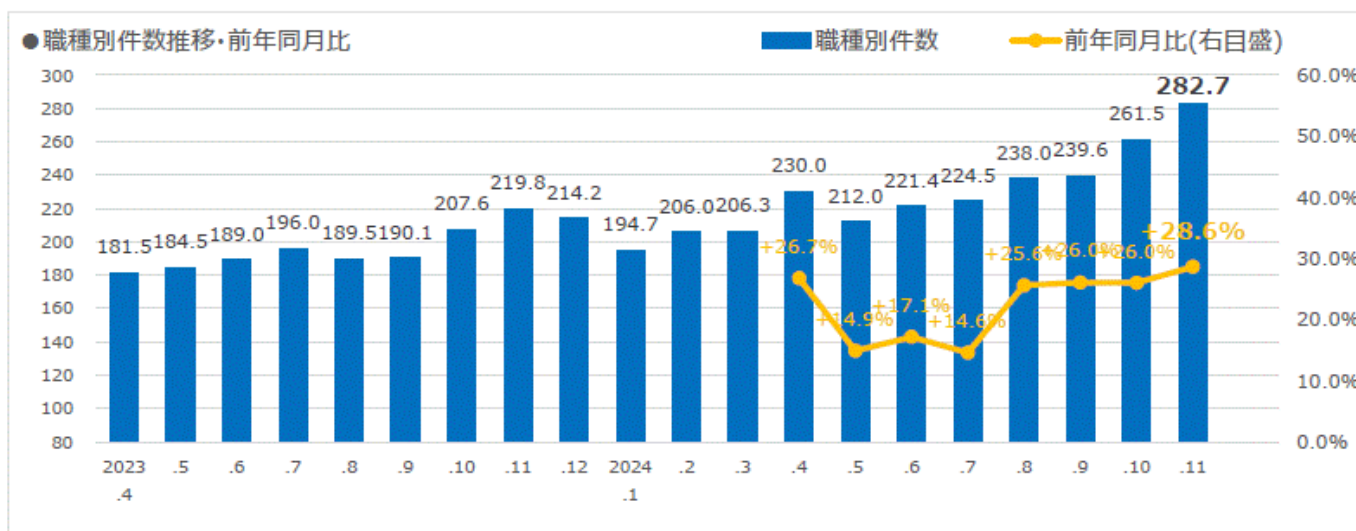
	新規求人	有効求人	新規求職	有効求職	紹介件数	就職件数	新規求人 倍率	有効求人 倍率
職業計	467,597	1,421,601	190,219	1,118,338	172,241	43,026	2.46	1.27
管理的職業従事者	2,057	5,928	980	5,183	1,087	117	2.10	1.14
専門的・技術的職業従事者	124,965	369,469	30,310	177,602	25,026	6,543	4.12	2.08
製造技術者（開発）	5,533	15,857	1,070	6,132	1,033	159	5.17	2.59
製造技術者（開発を除く）	3,843	11,956	2,355	12,718	1,111	263	1.63	0.94
建築・土木・測量技術者	18,610	58,503	1,523	8,271	1,912	494	12.22	7.07
情報処理・通信技術者	16,610	52,676	4,271	31,447	4,964	413	3.89	1.68
その他の技術者	5,305	11,973	215	1,406	422	101	24.67	8.52
医師、歯科医師、獣医師、薬剤師	1,875	6,288	372	1,984	132	37	5.04	3.17
保健師、助産師、看護師	21,423	64,019	5,370	25,369	3,829	1,804	3.99	2.52
医療技術者	9,532	28,200	1,771	8,562	1,028	462	5.38	3.29
その他の保健医療従事者	8,146	19,201	1,312	8,357	908	316	6.21	2.30
社会福祉専門職業従事者	28,056	81,324	4,939	25,684	5,198	1,939	5.68	3.17
美術家、デザイナー、写真家、映像撮影者	1,042	3,464	2,788	22,398	1,707	129	0.37	0.15
その他の専門的職業	4,990	16,008	4,324	25,274	2,782	426	1.15	0.63
事務従事者	45,320	132,788	48,543	305,072	63,262	9,604	0.93	0.44
一般事務従事者	28,954	84,334	39,759	251,968	43,802	6,818	0.73	0.33
会計事務従事者	4,666	13,580	3,741	22,346	7,830	1,055	1.25	0.61
生産関連事務従事者	3,884	11,697	1,213	6,898	3,144	529	3.20	1.70
営業・販売事務従事者	4,815	14,623	2,522	14,450	6,432	810	1.91	1.01
外勤事務従事者	155	382	23	111	114	15	6.74	3.44
運輸・郵便事務従事者	2,162	5,951	306	1,625	964	226	7.07	3.66
事務用機器操作員	684	2,221	979	7,674	976	151	0.70	0.29
販売従事者	50,174	148,808	11,140	64,948	12,972	2,235	4.50	2.29
商品販売従事者	23,261	64,361	4,878	30,314	3,730	946	4.77	2.12
販売類似職業従事者	1,122	3,915	267	1,517	309	63	4.20	2.58
営業職業従事者	25,791	80,532	5,995	33,117	8,933	1,226	4.30	2.43
サービス職業従事者	81,664	245,637	16,993	90,434	15,836	6,092	4.81	2.72
家庭生活支援サービス職業従事者	74	191	20	132	27	9	3.70	1.45
介護サービス職業従事者	37,953	112,851	5,868	30,744	5,788	2,714	6.47	3.67
保健医療サービス職業従事者	5,148	15,846	928	4,665	1,803	712	5.55	3.40
生活衛生サービス職業従事者	6,755	20,695	943	6,636	475	166	7.16	3.12
飲食物調理従事者	16,385	50,044	3,850	19,845	2,988	1,255	4.26	2.52
接客・給仕職業従事者	10,648	31,123	2,932	15,307	2,082	597	3.63	2.03
居住施設・ビル等管理人	1,016	3,122	861	4,382	1,299	252	1.18	0.71
その他のサービス職業従事者	3,685	11,765	1,591	8,723	1,374	387	2.32	1.35
保安職業従事者	17,875	55,163	1,483	7,435	3,029	1,188	12.05	7.42
農林漁業従事者	2,880	9,532	1,524	8,190	1,256	541	1.89	1.16
生産工程従事者	51,574	164,581	17,314	94,676	21,590	6,948	2.98	1.74
生産設備制御・監視従事者（金属製品）	990	3,412	644	3,106	446	129	1.54	1.10
生産設備制御・監視従事者（金属製品を除く）	1,994	6,052	574	2,798	1,087	330	3.47	2.16
機械組立設備制御・監視従事者	489	1,648	361	1,887	224	62	1.35	0.87
製品製造・加工処理従事者（金属製品）	11,583	36,861	3,060	15,422	4,396	1,473	3.79	2.39
製品製造・加工処理従事者（金属製品を除く）	12,870	40,910	4,204	23,526	7,586	2,646	3.06	1.74
機械組立従事者	5,343	16,862	3,908	21,893	2,556	763	1.37	0.77
機械整備・修理従事者	11,476	36,848	1,477	7,764	1,954	627	7.77	4.75
製品検査従事者（金属製品）	888	2,983	465	2,206	566	174	1.91	1.35
製品検査従事者（金属製品を除く）	1,174	3,615	402	1,935	811	221	2.92	1.87
機械検査従事者	829	2,676	345	1,972	475	134	2.40	1.36
生産関連・生産類似作業従事者	3,938	12,714	1,874	12,167	1,489	389	2.10	1.04
輸送・機械運転従事者	33,752	105,452	9,257	43,317	10,091	3,956	3.65	2.43
鉄道運転従事者	16	107	28	144	8	6	0.57	0.74
自動車運転従事者	25,978	81,608	6,329	28,251	7,010	3,089	4.10	2.89
船舶・航空機運転従事者	44	90	35	133	8	2	1.26	0.68
その他の輸送従事者	1,936	5,913	1,320	6,858	1,047	296	1.47	0.86
定置・建設機械運転従事者	5,778	17,734	1,545	7,931	2,018	563	3.74	2.24
建設・探掘従事者	34,075	111,940	3,652	18,178	3,850	1,682	9.33	6.16
建設躯体工事従事者	6,075	19,499	420	2,056	388	215	14.46	9.48
建設従事者（建設躯体工事従事者を除く）	8,759	30,444	1,127	5,433	1,162	472	7.77	5.60
電気工事従事者	6,084	19,754	855	5,079	849	301	7.12	3.89
土木作業従事者	13,046	41,948	1,242	5,557	1,430	684	10.50	7.55
探掘従事者	111	295	8	53	21	10	13.88	5.57
運搬・清掃・包装等従事者	23,261	72,303	14,976	100,737	14,242	4,120	1.55	0.72
運搬従事者	12,945	39,381	6,557	34,163	7,661	2,048	1.97	1.15
清掃従事者	4,813	15,334	1,954	14,024	2,802	941	2.46	1.09
包装従事者	866	2,728	403	2,355	644	218	2.15	1.16
その他の運搬・清掃・包装等従事者	4,637	14,860	6,062	50,195	3,135	913	0.76	0.30
分類不能の職業	-	-	34,047	202,566	-	-	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

January 2025

Zenkyukyo (the Association of Job Information of Japan) reports the number of job ads in November totalled 2,827,097 jobs +8.1% MoM, and +28.6% YoY. Technical and research roles saw the highest increases, while financial and legal roles decreased. They report that they identified some data issues, currently re-aggregating data for May to October 2024.



●職種別件数（占有率TOP10）

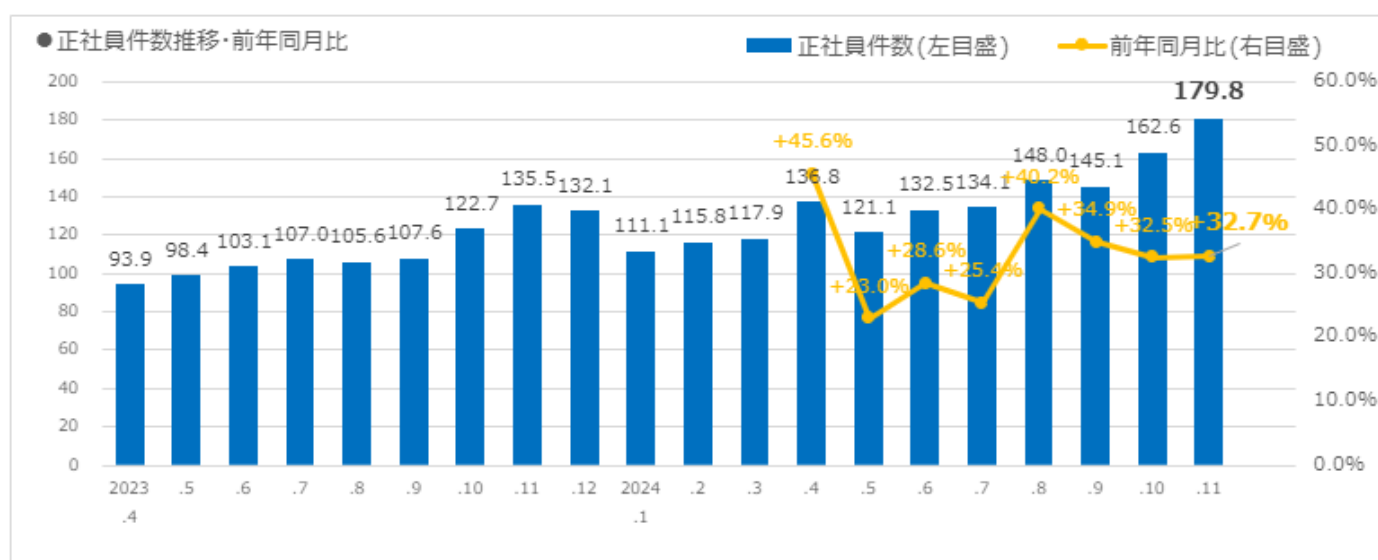
	件数	前月比	前年同月比
全体計	2,827,097	+8.1%	+28.6%
事務	459,694	+7.6%	+14.6%
専門（IT技術者）	342,073	+8.2%	+29.1%
販売（販売）	298,086	+3.5%	+23.9%
輸送・機械運転	245,019	+11.2%	+38.5%
専門（技術者・研究者）	215,922	+52.7%	+190.3%
販売（営業）	188,772	+3.8%	+27.5%
運搬・清掃・包装等	150,942	+7.6%	+25.2%
サービス（給仕）	144,378	-0.3%	+20.6%
生産工程	143,296	+2.4%	+23.8%
専門（医療・福祉専門職）	117,128	+7.7%	-2.5%

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

# Market Highlights

## January 2025

### Perm 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	1,797,666	+10.5%	+32.7%
事務	375,332	+7.9%	+10.8%
専門 (IT技術者)	329,924	+8.5%	+29.6%
専門 (技術者・研究者)	194,520	+60.9%	+201.3%
輸送・機械運転	184,245	+9.1%	+29.6%
販売 (営業)	162,085	+4.9%	+28.5%
販売 (販売)	117,924	+1.5%	+47.0%
建設・採掘	92,400	+5.7%	+32.2%
生産工程	72,807	+3.6%	+25.1%
専門 (医療・福祉専門職)	66,076	+6.7%	-15.0%
運搬・清掃・包装等	44,291	+7.8%	+74.7%

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



# Market Highlights

## January 2025

### Market trend

World to add 170 million jobs by 2030, lose 92 million<sup>5</sup>

**Job Growth and Decline:** By 2030, 170 million jobs are expected to be created globally, while 92 million jobs will disappear, resulting in a net growth of 78 million jobs.

**Fastest-Growing Jobs:** Technology-related roles such as big data specialists, FinTech engineers, and AI/machine learning specialists are expected to grow the most.

**Fastest-Declining Jobs:** Roles like postal service clerks, bank tellers, and data entry clerks are expected to decline the fastest.

**Skills Gap:** The skills gap is the most significant barrier to business transformation, cited by 63% of employers. Analytical thinking, resilience, flexibility, and leadership are the top core skills needed.

**Survey Details:** The report is based on a survey of over 1,000 companies worldwide, representing 14.1 million employees.

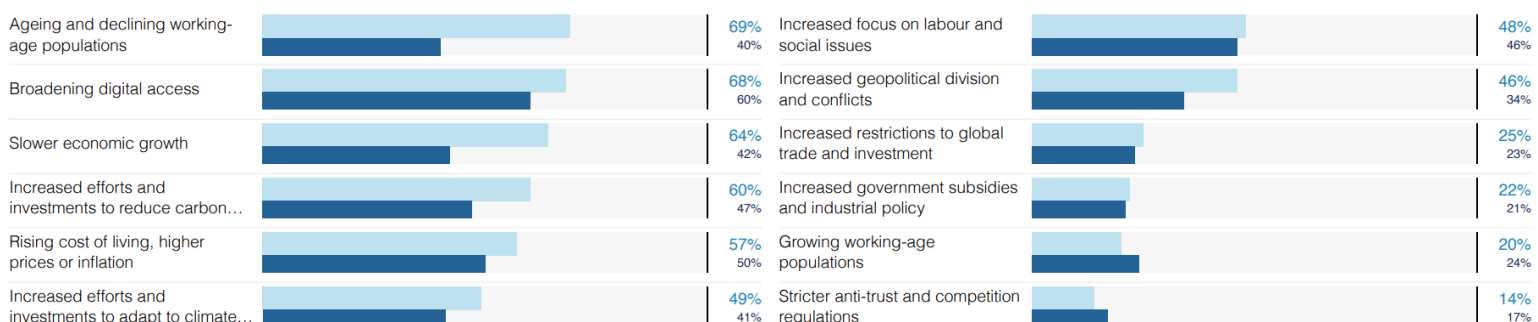
**Japan's business transformation is driven by trends such as an aging and declining workforce, and advancements in AI and information processing technologies.** However, barriers to this transformation include organisational culture, resistance to change, and challenges in attracting talent to the industry. The full report is available here: [WEF\\_Future\\_of\\_Jobs\\_Report\\_2025.pdf<sup>6</sup>](#). Japan section is on pages 158-159.

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Economy ■ Global



# Market Highlights

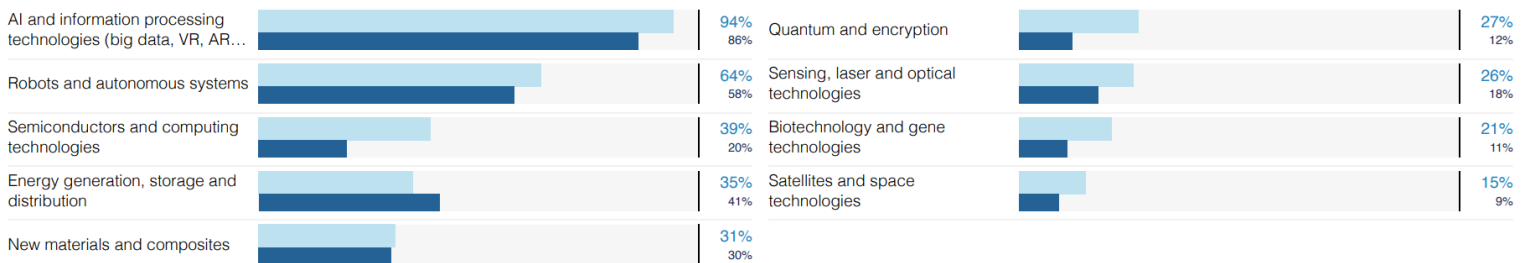
## January 2025

### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

■ Economy ■ Global



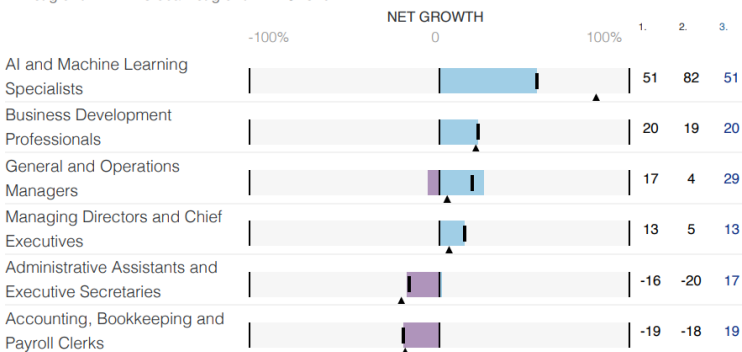
### Jobs outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth ■ Job Growth ■ Job displacement ■ Net Growth ▲ Global net growth

1. Net growth 2. Global net growth 3. Churn



### Skill outlook

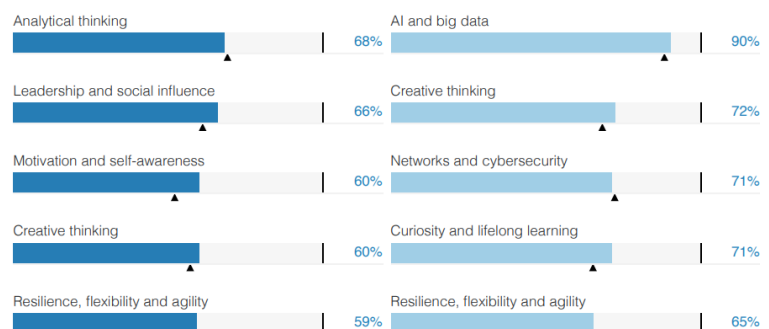
#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Economy ▲ Global

#### CORE SKILLS OF 2025

#### SKILLS OF INCREASING USE BY 2030

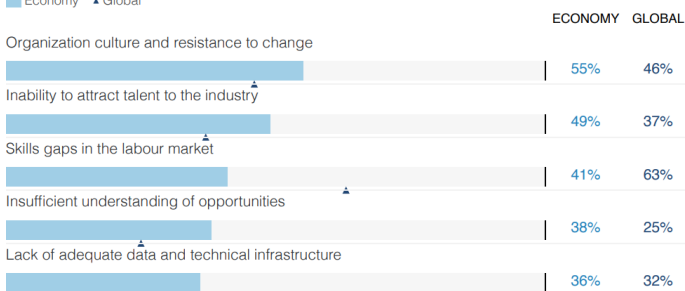


### Key barriers for business transformation

#### Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

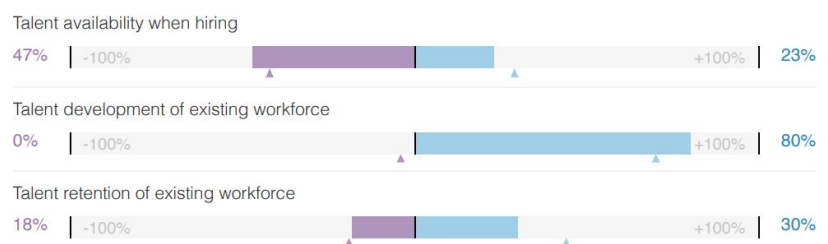
■ Economy ▲ Global



### Talent trend

Share of respondents who expect their talent availability to improve or worsen in five years

■ Improving ▲ Global average ■ Worsening ▲ Global average

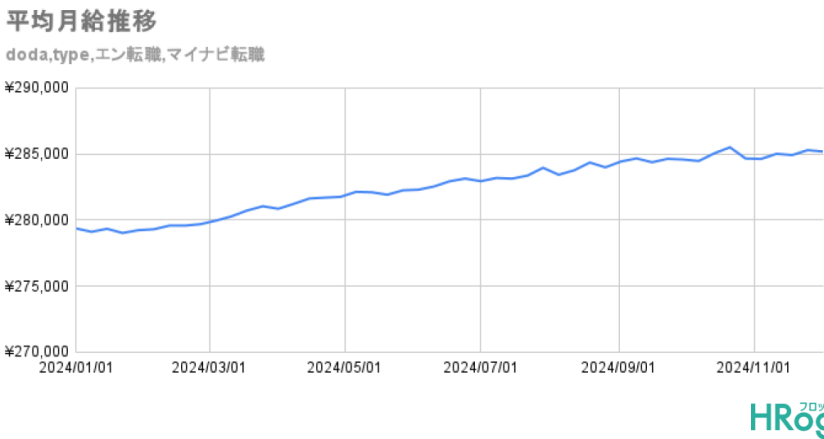


# Market Highlights

## January 2025

### HRog 2024 hiring trend summary report

Full-time jobs increased especially from DODA and MyNavi with average monthly salary increased by ¥5,809, reaching ¥285,180. Top job categories: Sales/Administration, Electrical/Mechanical, IT Engineers.



#### 職種別・求人数増加ランキング(正社員)

2024/01/01→2024/12/02

順位	職種大分類	2024/01/01	2024/12/02	増加数
1位	営業/事務/企画/管理	81,560件	93,728件	+12,168件
2位	電気/電子/機械/自動車	14,716件	22,685件	+7,969件
3位	ITエンジニア/IT系専門職	53,802件	56,628件	+2,826件
4位	販売/接客/サービス	6,253件	8,825件	+2,572件
5位	製造/工場/化学/食品	14,979件	17,438件	+2,459件

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#### 職種別・月給増加ランキング(正社員)

2024/01/01→2024/12/02

順位	職種大分類	2024/01/01	2024/12/02	増加額
1位	ホテル/旅館/ブライダル	249,592円	263,921円	+14,329円
2位	専門職	286,371円	296,125円	+9,754円
3位	販売/接客/サービス	245,920円	254,843円	+8,923円
4位	建設/土木/エネルギー	265,718円	274,094円	+8,376円
5位	営業/事務/企画/管理	284,810円	292,291円	+7,481円

HRog

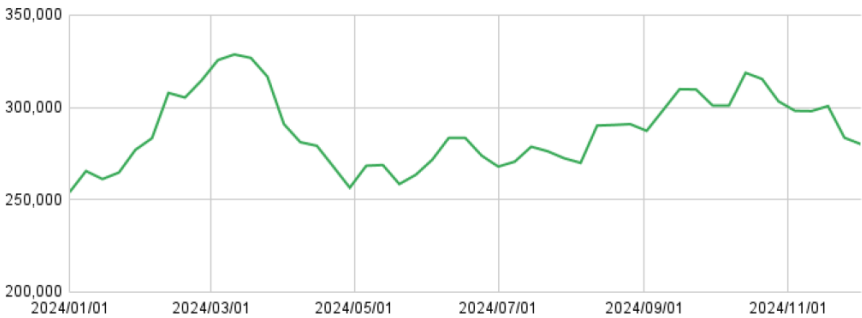
# Market Highlights

## January 2025

Temporary jobs increased especially in March and April with average hourly wage +8 yen, reaching ¥1,551. Top job categories: Sales/Administration, Healthcare, Manufacturing.

### 求人件数推移

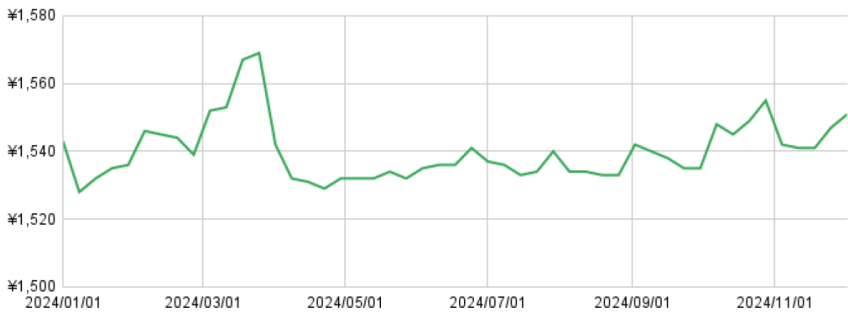
はたらこねっと,エン派遣



フロッグ  
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### 平均時給推移

はたらこねっと,エン派遣



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### 職種別・求人数増加ランキング(派遣)

2024/01/01→2024/12/02

順位	職種大分類	2024/01/01	2024/12/02	増加数
1位	営業/事務/企画/管理	115,313件	131,520件	+16,207件
2位	医療/医薬/福祉	45,403件	49,270件	+3,867件
3位	製造/工場/化学/食品	7,576件	11,274件	+3,698件
4位	教育/語学/スポーツ	19,534件	22,429件	+2,895件
5位	運輸/物流/配送/警備/作業/調査	41,814件	43,221件	+1,407件

フロッグ  
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### 職種別・時給増加ランキング(派遣)

2024/01/01→2024/12/02

順位	職種大分類	2024/01/01	2024/12/02	増加額
1位	ITエンジニア/IT系専門職	2,643円	2,704円	+61円
2位	教育/語学/スポーツ	1,382円	1,411円	+29円
3位	運輸/物流/配送/警備/作業/調査	1,300円	1,326円	+26円
4位	クリエイティブ(Web以外)	1,851円	1,870円	+19円
5位	営業/事務/企画/管理	1,544円	1,561円	+17円

フロッグ  
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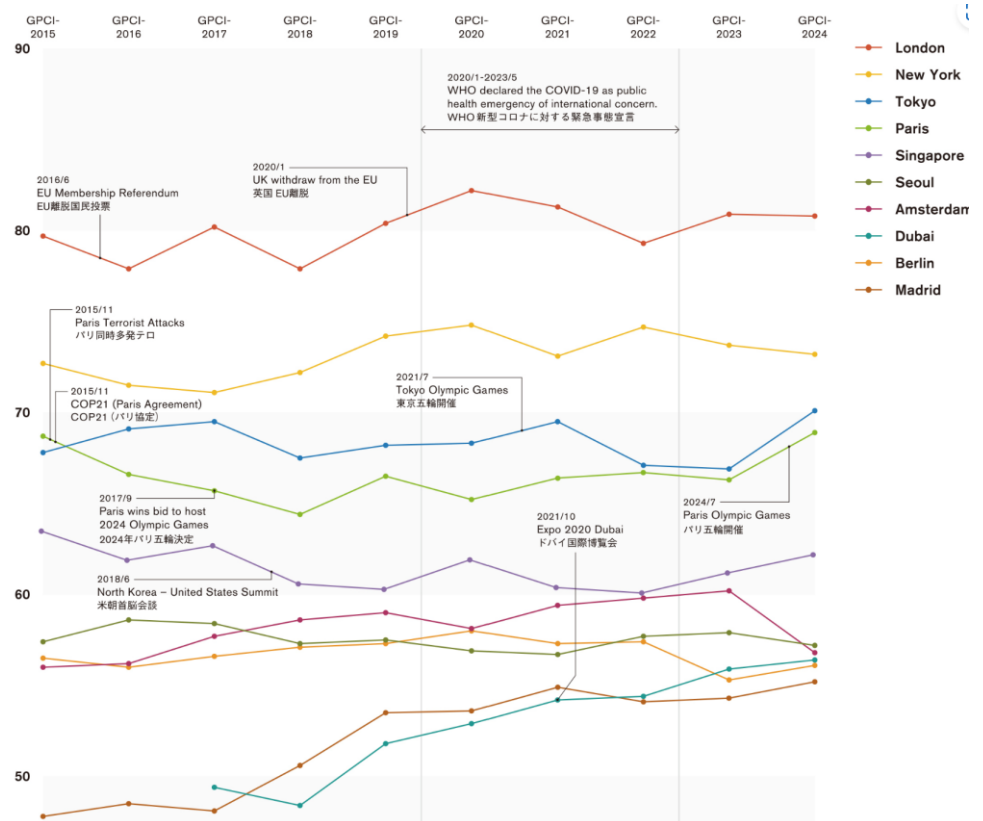
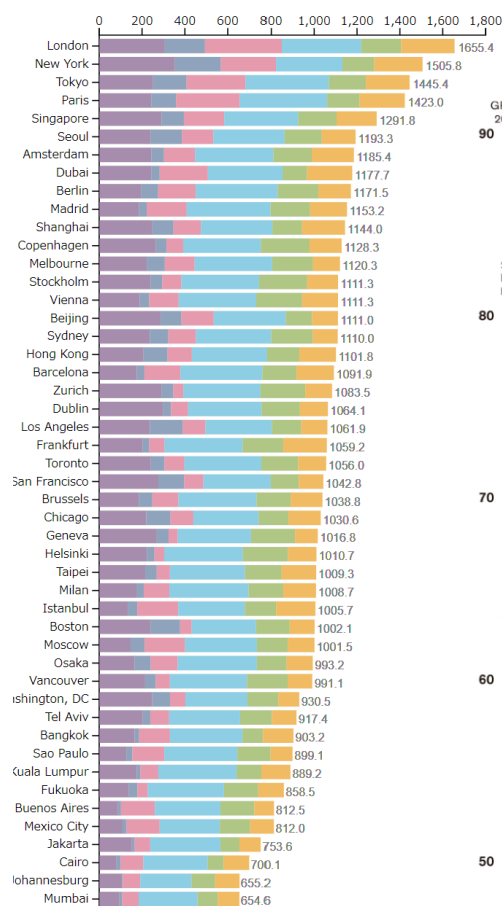
# Market Highlights

## January 2025

London tops the World City Rankings 2024, followed by New York. Tokyo holds 3rd place for the 9th year, improving in cultural exchange and transportation. Osaka rises to 35th, benefiting from better transportation and living conditions ahead of the 2025 World Expo.

- 1(1) London
- 2(2) New York
- 3(3) **Tokyo**
- 4(4) Paris
- 5(5) Singapore
- 35(37) **Osaka**
- 42(42) **Fukuoka**

■ 経済 ■ 研究・開発  
■ 文化・交流 ■ 居住  
■ 環境 ■ 交通・アクセス





# Market Highlights

## January 2025

### West Japan expansion

**Taiwan plans to establish a service company in Kyushu to support high-tech expansion,** focusing on semiconductors. Potential locations include Fukuoka and Kumamoto. This initiative aims to secure land and promote Japan-Taiwan cooperation. TSMC and ASE have already made significant investments in the region.

Taiwan to set up service company in Japan's Kyushu: economics minister - Taipei Times<sup>9</sup>  
台湾、ハイテク企業の九州進出を支援 福岡に拠点検討 - 日本経済新聞<sup>10</sup>

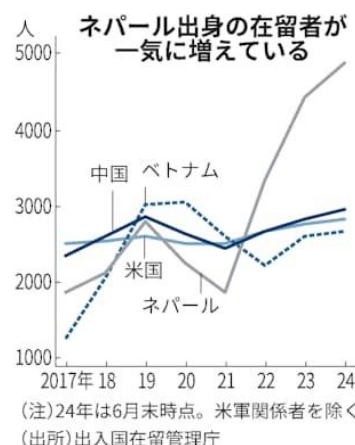
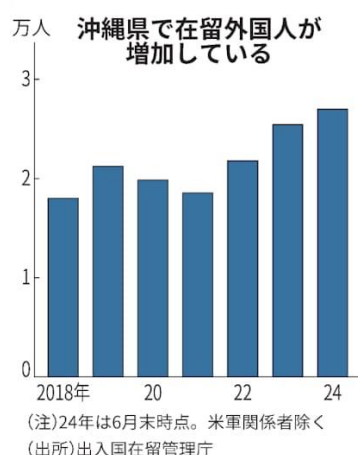
**KDDI to build an AI data center in Sakai.** Sharp and KDDI have agreed to build an AI data center on Sharp's halted LCD plant site in Sakai, Osaka Prefecture. Construction will start within fiscal 2024, with operations beginning in fiscal 2025. Initially, the Data section and Super Micro Computer were involved, but they have since withdrawn. The project aims to repurpose the site, which ceased operations in August, for advanced AI applications. Sharp is also in talks with SoftBank for another data center on the same site.

KDDI to build AI data center on Sharp's LCD plant site - The Japan Times<sup>11</sup>

**BYD**, a leading Chinese electric vehicle (EV) manufacturer, opened its first dealership in Shiga Prefecture, Japan. The new store, operated by Liberty, will sell models like the ATTO3 SUV. BYD aims to expand to all 47 prefectures, with plans for additional stores in Kyoto within the year.

中国BYD、滋賀県に1号店 EV世界大手 - 日本経済新聞<sup>12</sup>

**The number of foreign residents in Okinawa has increased by 1.5 times in 2.5 years,** driven by employment in the hospitality industry.



沖縄の在留外国人、2年半で1.5倍 宿泊業の接客に需要 - 日本経済新聞<sup>13</sup>

# Market Highlights

## January 2025

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