Robert— —Walters

Monthly Market Update May 2025

Trend Summary

- BOJ Tankan Employment DI reached -37, the worst in 33 years, signalling significant labour shortages.

- 28% of Japanese speaking English as a Second language, only 2% of Japanese are fluent in English.

- Workday survey shows 51% of leaders worry about future talent gaps, a shift to skills-based strategies due to talent shortages.

- McKinsey identifies 18 emerging industries, including AI, cybersecurity, and robotics, forecasting they will contribute 10-16% to global GDP by 2040.

Highlights Overview

Market Data

- 1. <u>HRog reports: full-time job monthly salary on increase to 286,385yen, temp job hourly</u> wage at 1,568yen.
- 2. <u>Persol DODA job-to-applicant ratio increased to 2.51 MoM.</u>
- 3. <u>The latest MHLW job-to-applicant ratio is 1.26, +0.02pt, Tokyo 1.76 & Osaka 1.23, full</u> <u>time 1.05.</u>
- 4. <u>Association of Job Information of Japan reports the number of job ads increased</u> <u>MoM/YoY in March.</u>

Market Trend

- 1. <u>TANKAN (Summary) March 2025 the latest quarterly survey by BOJ Employment DI</u> reached -37, the worst in 33 years, signalling significant labour shortages.
- 2. Only 2% of Japanese achieve high fluency in English, a CEFR level of B2-C1.
- 3. <u>Workday's survey shows a shift to skills-based strategies due to talent shortages.</u>
- 4. <u>The McKinsey report "The Arena: The Next Stage of Competition" identifies 18</u> <u>industries that could transform the global business environment and generate 29</u> <u>trillion USD to 48 trillion USD in revenue by 2040.</u>

West Japan Expansion

- 1. <u>Hiton Gardin Inn Nagasaki, the 2nd Hilton-branded hotel in Nagasaki to open in early</u> 2027
- 2. <u>ALLEYPIN INTERACTIVE, a Taiwanese digital medical service, established its office in Kobe.</u>
- 3. <u>Aurum Fancy/Papillon Doux, Taiwanese cosmetics company set up an office in Karatsu,</u> <u>Saga.</u>
- 4. 筑波科技/Tsukuba Technology, Tainwanese semicon testing/medical systems has an office in Izumi, Kagoshima. Aiming to establish a research center within five years.



Market Data

<u>HRog (HRog Co., Ltd.)</u> reports April 2025 full-time employee averages salary & vacancies. The average salary is 286,385yen, +0.25% (+718 yen) MoM, +1.97% (+5,525) YoY with 280,026 vacancies which is -1.11% (-3,143 jobs) MoM/ +5.41% (+14,372 jobs) YoY.



<u>2025年4月度の正社員平均月給・求人数レポート|株式会社フロッグ</u>



Market Data

HRog (HRog Co., Ltd.) reports April 2025 temp staff averages wage & vacancies. Average wage is 1,568 yen, -0.19% (-3 yen) MoM, +1.69% (+26 yen) YoY with 324,568 vacancies which is -10.42% (-37,744 jobs) MoM/ +11.54% (+33,592 jobs) YoY.



<u>2025年4月度の派遣平均時給・求人数レポート|株式会社フロッグ²</u>



March <u>Persol DODA</u> job-to-applicant ratio is 2.51, +0.05 pt MoM/ -0.27 pt YoY. Vacancies at 101.3% MoM and 101.8% YoY, job seekers at 99.3% MoM/ 112.6% YoY. Job openings increased in Consulting, medical and retail sectors.



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)



	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	2.51	↑ 0.05	↓ -0.27	101.3%	99.3%	全体	2.51	10.05	↓ -0.27	101.3%	99.3%
IT・通信	7.08	↓-0.01	↓ -0.57	99.9%	100.1%		2.87	- 0.00	↓ -0.31	99.1%	99.2%
メディア	3.48	↓-0.16	↓ -0.45	95.3%	99.6%	企画・管理	3.27	↓-0.05	↓-0.16	102.0%	103.4%
金融	2.60	10.02	10.05	100.7%	99.9%	エンジニア(IT・通信)	11.84	↑ 0.43	↓ -0.43	104.4%	100.6%
メディカル	1.06	1 0.05	↓ -0.18	102.3%	97.6%	エンジニア(機械・電気)	5.63	↓-0.02	↓ -0.27	99.9%	100.2%
メーカー	2.98	↓ -0.03	↓ -0.12	100.2%	101.3%	専門職 (メディカル)	0.71	1 0.03	↓ -0.19	101.7%	97.2%
商社	1.64	10.02	↓ -0.14	100.4%	99.2%	専門職(化学・食品)	1.59	1 0.03	↓ -0.07	100.9%	99.1%
小売・流通	0.65	10.02	↓ -0.02	102.3%	99.8%				-		
レジャー・外食	0.76	↑ 0.02	↓-0.11	100.5%	98.2%	専門職(建設・不動産)	5.30	1 0.11	↓ -0.62	101.1%	99.1%
エネルギー	2.56	↑ 0.07	↓ -0.03	101.7%	99.0%	専門職(コンサル・金融)	5.77	↓ -0.22	↓ -1.35	99.0%	102.8%
建設・不動産	5.03	10.07	↓-0.61	100.2%	98.8%	クリエイター	1.14	↑ 0.01	↓ -0.18	99.6%	98.8%
コンサルティング	8.68	1.64	1 0.44	124.9%	101.3%	販売・サービス	0.69	↑ 0.02	↓ -0.07	100.9%	98.3%
人材サービス	8.08	10.22	↓ -0.15	101.0%	98.2%	事務・アシスタント	0.45	- 0.00	↓ -0.03	100.7%	100.2%
その他	0.26	- 0.00	↓ -0.08	97.8%	98.5%	その他	0.06	- 0.00	↑ 0.01	103.1%	94.5%

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, 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.

Breakdown by industry and by job <u>【転職求人倍率】doda(デューダ)</u>³





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.

<u>一般職業紹介状況(令和7年3月分)について|厚生労働省|厚生労働省(mhlw.go.jp)</u>4

金国計 Breakdown by jobs (regular jobs excluding part-time jobs) (常用 (除パート) 17年3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	461, 159	1, 405, 232	229, 570	1, 130, 380	207, 234	54, 854	信平 2.01	信平 1.24
管理的職業從事者	2, 196	5,904	1,080	5, 404	1, 157	145	2.03	1.09
専門的・技術的職業従事者	120, 611	368, 292	36, 856	181, 307	30, 251	9,620	3. 27	2.03
製造技術者(開発)	4, 699	15, 435	1,057	6, 187	1,095	171	4.45	2.49
製造技術者 (開発を除く) 建築・土木・測量技術者	3, 807 19, 481	11, 340 58, 235	2,749	12, 802 8, 372	1,260	261 657	1.38 10.45	0.89
建築・エネ・洞重技術者 情報処理・通信技術者	19, 481	58, 235	4, 717	30, 637	5, 338	450	3, 97	1.78
その他の技術者	4, 157	11,066	313	1, 534	600	186	13.28	7. 21
医師, 歯科医師, 獣医師, 薬剤師	2, 235	6,405	451	1,975	167	68	4.96	3. 24
保健師、助産師、看護師	20, 923	64, 512	6, 938	26, 622	4, 852	2,676	3.02	2.42
医療技術者	9, 231	28, 521	2, 372	9,065	1, 393	675	3.89	3.15
その他の保健医療従事者 社会福祉専門職業従事者	5, 558 25, 341	18, 264 79, 965	1, 680 5, 994	8, 583 27, 152	969 6, 572	466 3,079	3. 31 4. 23	2.13 2.95
社会価値等口線未促事合 美術家,デザイナー,写真家,映像撮影者	982	3, 436	3, 348	21, 605	1, 973	136	0.29	0, 16
その他の専門的職業	5, 468	16, 543	5, 373	26, 773	3, 834	795	1.02	0.62
事務従事者	46, 254	137, 126	57, 759	312, 816	82, 130	14, 887	0.80	0.44
一般事務従事者	30, 374	90, 038	47, 545	259, 210	60, 805	11,750	0.64	0.35
会計事務従事者	4, 529	13,061	4, 332	22, 791	8, 207	1, 125	1.05	0.57
生産関連事務従事者 営業・販売事務従事者	3, 860 4, 910	11, 292 14, 711	1,467 2,823	6, 983 14, 075	3, 265	652 922	2.63	1.62
3米·威元争伤促争者 外勤事務従事者	162	385	2, 623	14, 075	135	20	5, 79	3, 47
運輸・郵便事務従事者	1, 730	5, 453	400	1, 767	1, 109	251	4. 33	3.09
事務用機器操作員	689	2, 186	1, 164	7,879	1, 160	167	0.59	0. 28
販売従事者	43, 657	140, 914	13, 205	63, 373	13, 344	2,455	3. 31	2. 22
商品販売従事者 販売類似職業従事者	16, 977 1, 185	59, 138 3, 598	5, 962 334	29, 199 1, 594	4, 155 305	1,088	2.85 3.55	2.03 2.26
版元頭似職未從事 省業職業従事者	25, 495	78, 178	6, 909	32, 580	8, 884	1, 295	3, 69	2.20
日本映来にする サービス職業従事者	75, 724	235, 406	21,048	92, 837	18, 921	7,300	3, 60	2.54
家庭生活支援サービス職業従事者	48	191	36	166	37	9	1.33	1.15
介護サービス職業従事者	35, 021	107, 887	7, 214	30, 756	6, 306	3, 124	4.85	3. 51
保健医療サービス職業従事者	5, 034	15, 554	1, 303	5,074	2,458	903	3.86	3.07
生活衛生サービス職業従事者 飲食物調理従事者	6, 279 14, 596	19,606 46,428	1, 229	6, 579 20, 943	567 3, 639	199 1, 509	5.11 3.05	2.98
設備の調理化事合	9, 507	30, 639	3, 461	15, 463	2, 439	694	2.75	1. 98
居住施設・ビル等管理人	1, 127	3,056	1, 129	4, 862	1,466	247	1.00	0.63
その他のサービス職業従事者	4, 112	12,045	1,895	8, 994	2,009	615	2.17	1.34
保安職業従事者	18, 552	55,900	1,972	7,933	3, 416	1, 314	9.41	7.05
<u>農林漁業従事者</u> 生産工程従事者	3, 530 53, 367	10, 308 161, 570	2,092	9, 058 94, 640	1,812	814	1.69	1.14
生産設備制御・監視従事者(金属製品)	1, 243	3, 412	838	34, 040	25, 905	186	1, 48	1. 05
生産設備制御・監視従事者(金属製品を除く)	2,009	6, 221	706	2,943	1,200	326	2.85	2. 11
機械組立設備制御・監視従事者	550	1, 708	452	1,942	245	54	1.22	0.88
製品製造・加工処理従事者(金属製品)	12, 196	35, 919	3, 742	15, 922	5,039	1,540	3.26	2.26
製品製造・加工処理従事者(金属製品を除く) 機械組立従事者	13, 196 5, 267	40, 199	5, 427	23, 542 20, 982	8, 622 2, 608	2,870 736	2.43	1.71
機械相立促争有機械整備,修理從事者	11, 737	15,910 36,620	4, 461	8,077	2,008	736	1.18	4. 53
製品検査従事者(金属製品)	908	2,879	520	2, 251	596	186	1.75	1. 28
製品検査従事者(金属製品を除く)	1, 174	3, 542	468	1,925	921	244	2.51	1.84
機械検査従事者	882	2, 533	421	1, 887	502	108	2.10	1.34
生産関連・生産類似作業従事者	4, 205	12, 627	2, 316	11,930	1,622	406	1.82	1.06
輸送,機械運転從事者 鉄道運転従事者	34, 226 22	105, 163 93	10, 729 26	43, 567 104	11, 261 9	4, 235	3.19 0.85	2. 41 0. 89
自動車運転従事者	26, 309	81, 350	7, 233	28, 210	7, 916	3, 242	3, 64	2.88
船舶·航空機運転從事者	36	101	39	140	11	7	0.92	0.72
その他の輸送従事者	1, 979	6, 163	1,614	6, 810	1, 125	318	1.23	0.90
定置・建設機械運転従事者	5, 880	17, 456	1,817	8, 303	2, 200	665	3. 24	2.10
建設・採掘従事者 建設躯体工事従事者	38, 972 7, 184	112, 632 20, 193	4, 825 575	19, 721 2, 304	4, 704 501	2,003 226	8.08	5. 71 8. 76
建設従事者(建設躯体工事従事者を除く)	10, 445	20, 193	1, 511	2, 304	1, 409	556	6, 91	5. 08
電気工事従事者	7, 012	20, 204	1,084	5, 260	1,029	385	6.47	3.84
土木作業従事者	14, 221	41, 361	1,641	6, 081	1,733	818	8.67	6.80
採掘従事者	110	307	14	61	32	18	7.86	5.03
運搬・清掃・包装等従事者 運搬従事者	24, 070 12, 526	72,017 38,708	18, 165 8, 000	100, 262	16, 273	4,709 2,138	1.33	0.72
連 版 促 争 者 清 揚 従 事 者	5, 130	38, 708	2, 362	35, 353 14, 205	8, 359 3, 268	2, 138	2.17	1.09
// 请使 () 争 音 包装従事者	1, 036	2,773	2, 302	2, 519	798	246	2.05	1. 10
その他の運搬・清掃・包装等従事者	5, 378	15, 233	7, 298	48, 185	3, 848	1,230	0.74	0.32
分類不能の職業	-	-	40, 765	199, 462	-	-	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	業分類」に	握づく区分'	である。				



<u>Zenkyukyo (the Association of Job Information of Japan)</u> reports the number of job ads in March totalled 2,751,618 jobs +2.6% MoM, and +33.4% YoY. Agriculture and education saw the highest monthly growth, while transport led annual increases.



●職種別件数(占有率TOP	10)		
	件数	前月比	前年同月比
全体計	2,751,618	+2.6%	+33.4%
事務	422,276	+2.6%	+40.6%
専門(IT技術者)	353,632	+1.1%	+92.8%
販売(販売)	282,869	+4.9%	+9.7%
輸送·機械運転	243,573	+2.7%	+169.5%
販売(営業)	193,310	+2.1%	+48.1%
サービス(給仕)	155,374	+8.5%	+14.8%
運搬·清掃·包装等	144,580	+1.4%	+13.6%
専門(技術者·研究者)	138,679	+1.5%	-14.4%
生産工程	137,265	+1.1%	+9.6%
専門(医療·福祉専門職)	113,988	-4.3%	-2.0%

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



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	1,699,519	+1.6%	+44.1%						
專門(IT技術者)	343,346	+1.2%	+99.5%						
事務	341,957	+3.3%	+44.1%						
輸送·機械運転	193,400	+2.8%	+240.9%						
販売(営業)	166,626	+2.0%	+49.7%						
専門(技術者·研究者)	118,110	+1.5%	-22.6%						
販売(販売)	110,857	+2.2%	+19.6%						
建設·採掘	91,908	+3.1%	+54.0%						
生産工程	68,710	-0.7%	+7.6%						
専門(医療・福祉専門職)	62,408	-7.8%	-13.8%						
運搬·清掃·包装等	38,853	-0.9%	+34.3%						

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

調查発表/求人広告掲載件数-全国求人情報協会(zenkyukyo.or.jp)5



2025 Q1 Top 10 average monthly salary for full time positions

Average monthly salary was 247,209 yen (up 0.8% from the previous period and 4.0% yearon-year).



●職種別平均賃金(賃金TOP			
正社員	平均賃金	前回比	前年同月比
全体計	247,209	+0.8%	+4.0%
専門(金融·法務専門職)	286,996	+1.0%	+10.4%
専門(IT技術者)	283,754	-0.1%	+3.5%
輸送·機械運転	272,562	+3.1%	+10.7%
專門 (技術者·研究者)	265,343	+2.1%	+8.4%
建設·採掘	263,136	+0.8%	-1.7%
販売(営業)	259,312	+0.6%	+3.8%
運搬·清掃·包装等	259,176	+1.9%	+7.2%
サービス(給仕)	258,977	+0.2%	+0.2%
専門(その他専門職)	254,382	+0.5%	-1.3%
サービス(理美容)	246,471	-0.1%	+3.6%

Total, FS/legal, IT tech, transport/machine operation, specialist (technical/research), construction, sales, transport/cleaning/packing, service (waiting), other specialists, service (beauty/hair dressing).



Market trend

<u>TANKAN (Summary) March 2025</u> **the latest quarterly survey by BOJ Employment DI** reached -37, the worst in 33 years, signalling significant labour shortages. Indicating 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)]





Only 2% of Japanese achieve high fluency in English, a CEFR level of B2-C1. Surveys show that roughly 15-28% of the Japanese population (18-34 million) speaks English. Most English speakers in Japan have a B1 (intermediate) level. Japan ranks 92nd out of 116 countries in the 2024 English Proficiency Index. Tokyo has the best English speakers in Japan, with an EPI score of 496 out of 800. Younger people, especially those under 25, are more likely to learn and speak English.

Region	EPI Score	Proficiency Level	CEFR Equivalent	City	EPI Score	Proficiency Level	CEFR Equivalent
Kantō	482	Low	B1	Tōkyō	496	Low	ВІ
Kansai	477	Low	В1	Ōsaka	488	Low	ВІ
Shikoku	468	Low	B1	Kawasaki	482	Low	ВІ
Hokkaidō	461	Low	В1	Yokahama	476	Low	Bl
				Kyoto	467	Low	ВІ
Kyūshū & Okinawa	454	Low	B1	Kobe	441	Very Low	В1
Chūbu	448	Very Low	B1	Fukuoka	441	Very Low	ВІ
Chūgoku	444	Very Low	В1	Nagiya	439	Very Low	ВІ
Tohoku	440	Very Low	В1	Hiroshima	435	Very Low	В1

Regions and cities with their English scores and CEFR levels

How Many People in Japan Speak English? [2025 Data]⁷

Comparison table: various English proficiency tests and CERF

	合員伯・快足試験として下にの対照を 文部科学省(平成30年3月)									
CEFR	ケンプリッジ 英語検定	実用英語技能検定 1 ^{級-3級}	GTEC Advanced Basic Core CBT	IELTS	TEAP	TEAP CBT	TOEFL iBT	TOEIC L&R/ TOEIC S&W		
C2	230 ⁽²³⁰⁾ 1 200 (210)	各級CEFR 算出範囲	各試験CEFR 算出範囲	9.0 ' 8.5						
C1	199 - 180 (190) (180) (180)	(3299) 1 2600 2630	(1400) 1400 1350	8.0 ' 7.0	400 ' 375	800	120 ' 95	1990 ' 1845		
B2	179 160 ⁽¹⁷⁰⁾ ¹⁵¹ 160 ⁽¹⁷⁰⁾	(2599) 2599 2300 2304 1 (2304)	1349 ' (1280) 1190	6.5 ' 5.5	374 ' 309	795 1 600	94 ' 72	1840 ' 1560		
B1	159 140 ⁽¹⁵⁰⁾ 140(140)	(2299) 2299 1950 1980 2 1980 1 1980 1 19	1189 960 (1080)	5.0 , 4.0	308 1 225	595 1 420	71 ' 42	1555 ' 1150		
A2	139 120 Kit (120)	(1949) 1949 1700 1728 # (1728)	959 - (840) 690		224 135	415 235		1145 625		
A1	119 「 100 (100) 名試験CEFR 算出範囲	(1699) 1699 1400 1400 1456 1400 1456 1400 1400 1400 1400 1400 1400	689 ¹ 270 (270)					620 」 320		
とを意味す ※ ケンブ! いる。 ※ TOEI	(100) (270) ※認知の影響は、各試体におりなCEFRとの対影情にして無定さきる能力の秘密の上限と下層 まなかの数値は各資格・検定試験の定める試験結果のスコアを指す。スコアの記載がない欄は、各資格・検定試験において当該欄に対応する能力を有していると認定できないに ※ かフガリッジ英語検定、実用英語技能検定及びGTECは複数の試験から構成されており、それぞれの試験がCEFRとの対照関係として測定できる能力の範囲が定められて いる、当該範囲を下回った場合にはなCEFRの対定は行われず、当該範囲を上回った場合には当該範囲の上限に位置付けられているCEFRの対定が行われる。 ※ TOEIC L&R/ TOEIC S&WICフUTは、TOEIC S&WICZUTを追加しての違いたスコアで判定する。 ※ 障害等のある受検生について、一部技能を免除する場合等があるが、そうした場合のCEFRとの対照関係については、各資格・検定試験実施主体において公表予定。									

各資格・検定試験とCEFRとの対照表

「大学入学共通テスト」検討・準備グループ(平成30年度~)⁸



Workday's survey shows a shift to skills-based strategies due to talent shortages. 51% of leaders worry about future talent gaps, and only 32% are confident in their workforce's skills. 55% of companies have adopted skills-based models, with 23% planning to do so soon. Al enhances efficiency and decision-making, but human skills like communication and creativity remain vital. Challenges include reskilling time, resistance to change, and inadequate infrastructure. Combining AI and human skills is key to creating a resilient workplace.



such as

communication,

teamwork and

problem-solving

Global State of Skills Report | Workday⁹

APAC

Individual skills such as personal adaptability, resilience and creativity

Digital skills such as digital literacy and proficiency with software and Gen Al



The McKinsey report "The Arena: The Next Stage of Competition" identifies 18 industries that could transform the global business environment and generate 29 trillion USD to 48 trillion USD in revenue by 2040. Key growth areas include AI software/services, cybersecurity, and robotics. The report advises Japanese companies to focus on innovation, target high-growth markets, improve their competitive edge, and adapt to global trends. This can be achieved through investments in R&D, digital transformation, and international collaboration to stay competitive and expand globally.

Current Arenas/Key industries (2005-2020): Biopharmaceuticals, electric vehicles, cloud services, e-commerce, software, and semiconductors. These industries grew from 3% to 9% of global GDP, showing significant economic contributions.

Future Arenas/Emerging industries (2025-2040): Al software/services, cybersecurity, next-gen air mobility, obesity treatment drugs, robotics, non-medical biotechnology. Expected to contribute 10-16% to global GDP by 2040.

The 18 potential arenas of tomorrow include arenas of today, spin-off

Exhibit E2

The 18 potential arenas of tomorrow could generate \$29 trillion to \$48 trillion in revenues and \$2 trillion to \$6 trillion in profits

\$48 trillion in revenues a				on t	,	arenas, and emergent arenas.				
18 potential arenas of tomorrow, by 2040 revenue estimate, \$ billion	Revenue, 2022 v	2040 estimate	(CAGR, 2022-40, %)	es	o fit, 2040 timate, ¹ \$ billion ofit margin, %)			e as arenas of tomorrow as of today • Candidate arenas of to	omorrow	
E-commerce	4,000		14,000- ← 20,000 (7-9) ←	•	280- 1,000 (2-5)		Cloud services E-commerce	e Electric Semi- vehicles conductors		4 arenas of today could continue as arenas of tomorrow.
Al software and services	• 85		600–4,600 7–25)	•	230-920 (15-20)		Consumer	r, Video/audio		
Cloud services	• 220		600-3,400 2-17)	۲	160–510 (10–15)			oftware entertainment		3 spin-offs of arenas of today could become arenas of tomorrow.
Electric vehicles	450		500-3,200 0-12)	٠	100-320 (4-10)		advertise- Al	software Streaming diservices video		arenas or tomorrow.
Digital advertisements	520		100–2,900 –10)	۲	320-580 (15-20)				. 7	
Semiconductors	630		700–2,400 –8)	۲	340-600 (20-25)		Batteries Cybersecuri	ty Drugs Future for obesity air mobility		
Shared autonomous vehicles	n/a	61	0-2,300	*	20-460 (4-20)			Nuclear fission power		11 emergent arenas could exhibit high growth
Space	• 300	96	60-1,600 (7-10)	۲	50-160 (5-10)		biotech	plants		and high dynamism through 2040.
Cybersecurity	• 160	59	90-1,200 (8-12)	۲	90-240 (15-20)		Shared	Video		
Batteries	• 98	81	0-1,100 (12-14)	۲	40-110 (5-10)		Robotics autonomou vehicles	s games Space)	
Modular construction	• 180	54	0-1,100 (6-10)	•	20-220 (4-20)					
Streaming video	• 160	51	0-1,000 (6-11)	۲	50-150 (10-15)	Why other in	ndustries considered mi	ght not emerge as arenas of to	omorrow	
Video games	• 230	55	60-910 (5-8)	۲	80-180 (15-20)		day could lack the growth n through 2040 to	8 almost-emergent arenas through 2040 but were not a		
Robotics	• 21	1 9	0-910 (13-23)	٠	20-180 (10-20)	continue as ar	renas of tomorrow.	the likelihood of the scenario		
Industrial and consumer biotech	• 140	34	0-900 (5-11)		10-270 (4-30)	 Biopharma 		Clean hydrogen	Renewal equipme	ble energy generation ent
Future air mobility	n/a	. 75	-340		10-70 (10-20)	Consumer e		Lower-carbon materials	Sustaina	ble fuels
Drugs for obesity and related conditi			0-280 (9-15)	٠	30-100 (25-35)	 Industrial e 		Nuclear fusion		eality and augmented reality
Nuclear fission power plants	• 18		5-150 (7-13)	۲	5-50 (5-30)	 Information 	n-enabled business services	 Products and services 		
Total	7,25		9,000-48,000 (8-11)		1,900-6,100	 Payments 		for older adults	🚽 web3, in	cluding decentralized finance
			c .		1.1.1		2005 · C	/ 1	``	

the-arena-the-next-stage-of-competition.pdf¹⁰ Apr 2025 in Summary (Japanese) the-next-big-arenas-of-competition_final.pdf¹¹ Oct 23 2024 full report (English)



West Japan expansion

HaploX Biotechnology, Chinese medical technology, has Osaka office, HaploX Japan KK HaploX JAPAN株式会社¹²

Hiton Gardin Inn Nagasaki, the 2nd Hilton-branded hotel in Nagasaki to open in early 2027 <u>Hilton Garden Inn to open in Nagasaki – JAPAN PROPERTY CENTRAL K.K.</u>¹³

Zenware SAS, Columbia AI SW devel, has an office in Nagoya, **Zenware kk**. <u> π - Δ -</u><u>Zenware</u>¹⁴

Virufy, US NPO, med tech, develops AI based infection analysis app, has Fukuoka office, — 般社団法人Virufy Fukuoka <u>Virufy: Developing Cutting Edge AI Technology in Healthcare</u>¹⁵

Aurum Fancy/Papillon Doux, Taiwanese cosmetics company set up an office in Karatsu, Saga. The city has been promoting cosmetic initiative with nearby cities. 台湾の香水会社が唐津市に進出 唐津イメージの商品開発も | 行政・社会 | 佐賀県のニュー ス | 佐賀新聞¹⁶

Tencent Cloud launches region in Osaka, opens data center in the Kansai area <u>Tencent</u> <u>Cloud launches region in Osaka, Japan - DCD¹⁷</u>

筑波科技/**Tsukuba Technology,** Tainwanese semicon testing/medical systems has an office in Izumi, Kagoshima. Aiming to establish a research center within five years. Two staff from Taiwan will be stationed to open the Japan office.

<u>出水市に初の台湾企業 日本支店足がかりに事業拡大へ 鹿児島|鹿児島のニュース | MBC</u> <u>NEWS | 南日本放送 (1ページ)</u>¹⁸



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