

Monthly Market Update

December 2025

Trend Summary

- **Decline in regular administrative job postings:** companies are automating office tasks, leading to reduced demand.
- **AI's impact on employment:** While AI poses risks to simple or education-based skills, experience-based knowledge remains difficult to replace. Entry-level roles benefit from AI augmentation, improving efficiency and retention.
- **Evolving candidate expectations:** Companies must align hiring strategies with candidates' changing preferences, emphasising authentic employer branding, competitive pay, flexibility and personalised communication.
- **Japan's optimism toward AI:** unlike other advanced economies, where concerns about AI-driven job loss are widespread, Japan remains optimistic about AI's impact on employment.

Highlights Overview

Market Data

1. HRog reports: full-time job, monthly salary on increase to 290,060 yen.
2. En Inc: average temp hourly wage for Tokyo/Nagoya/Osaka: a record high of 1,710 yen.
3. Persol DODA job-to-applicant ratio was 2.50, +0.07 MoM.
4. The latest MHLW job-to-applicant ratio is 1.18, -0.02 pt MoM, Tokyo 1.71 & Osaka 1.17, full time 0.99.
5. Association of Job Information of Japan reports that job ads in October totalled 2,197,339 +1.9% up from the previous month and down 16.0% YoY.

Market Trend

1. AI impacts more on codified knowledge-based roles and less on experience-based roles.
2. Young workers adopting career plans. 40% of new grad job-seekers have changed their preferred job roles due to the rise of generative AI.
3. Nikkei xTECH reveals that most Japanese workers do not fear losing their jobs to AI.

West Japan Expansion

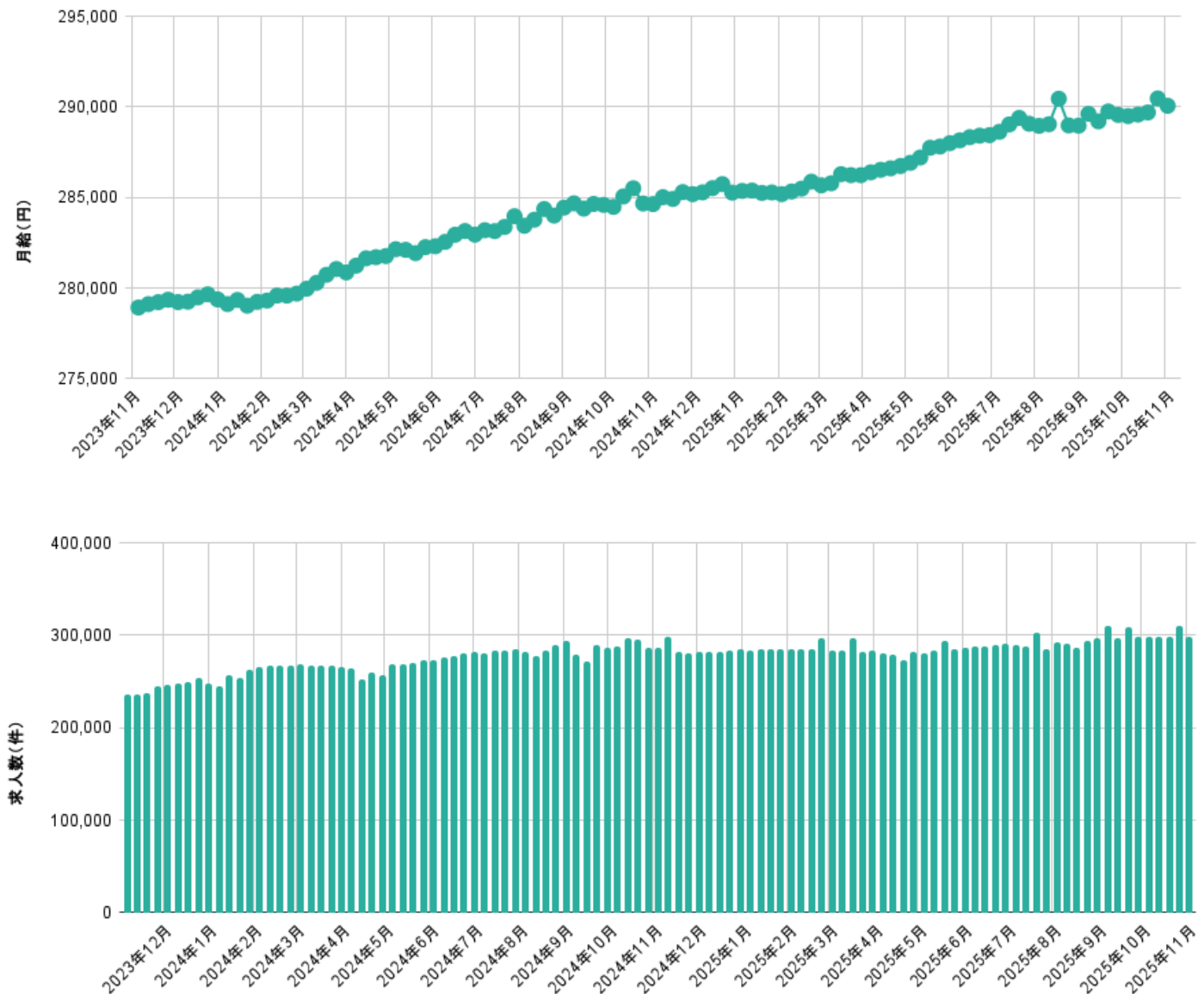
1. Conrad Hotel, Kobe City, plans to rebuild its main office tower by 2036.
2. UL Solutions opened Japan's first motor energy efficiency testing lab in Ise, Mie.
3. Tebon, Chinese manufacturing, has a Nagoya office, 大森FMEA応用技研株式会社, since 2020, high tech manufacturing, SPC/FMEA analysis.

Market Highlights

December 2025

Market Data

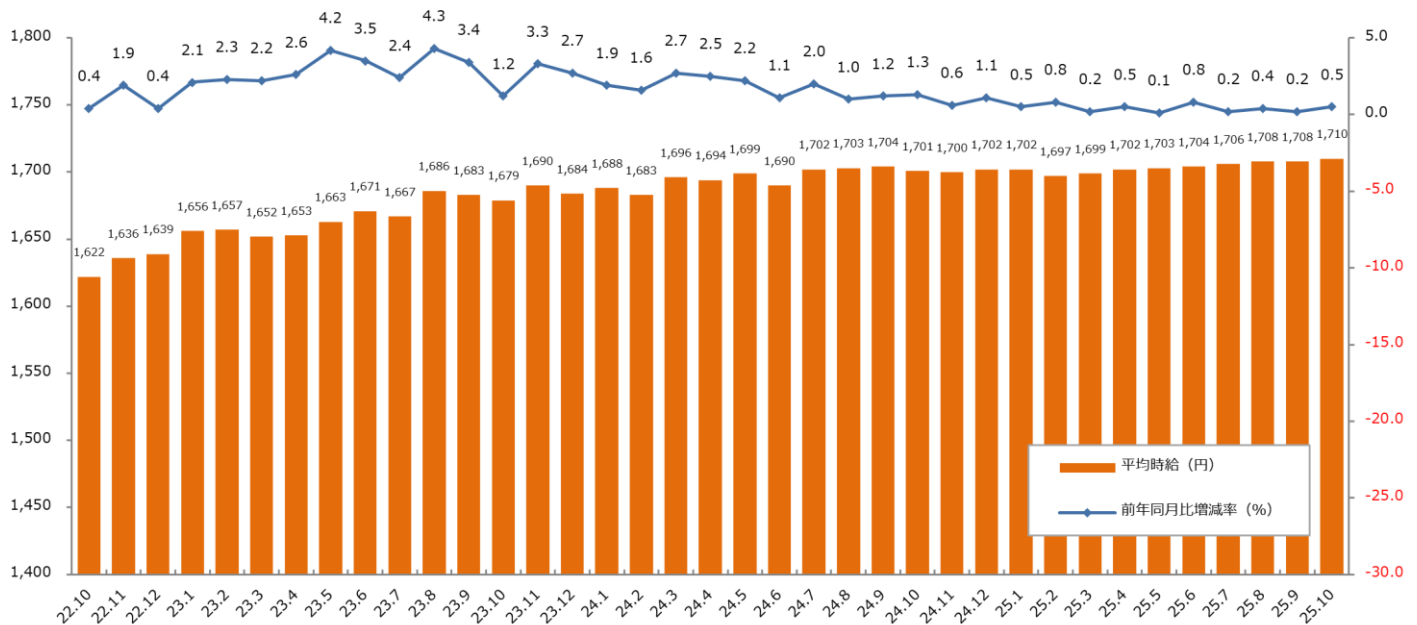
HRog (HRog Co., Ltd.) reports November 2025 full-time employee average salary & vacancies. Average salary is 290,060 yen, +0.20% (+569 yen) MoM, +1.91% (+5,426 yen) YoY, with 298,629 vacancies, which is +0.02% (+73 jobs) MoM/ +4.17% (+11,954 jobs) YoY.



Market Highlights

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En Inc reports the three major metropolitan areas reached a record-high average hourly wage of ¥1,710 (up for the 38th consecutive month) in October, driven by a surge in high-paying office roles and seasonal demand in sales and service, as staffing firms raised wages to attract skilled talent—making competitive pay and flexible work key to successful hiring.

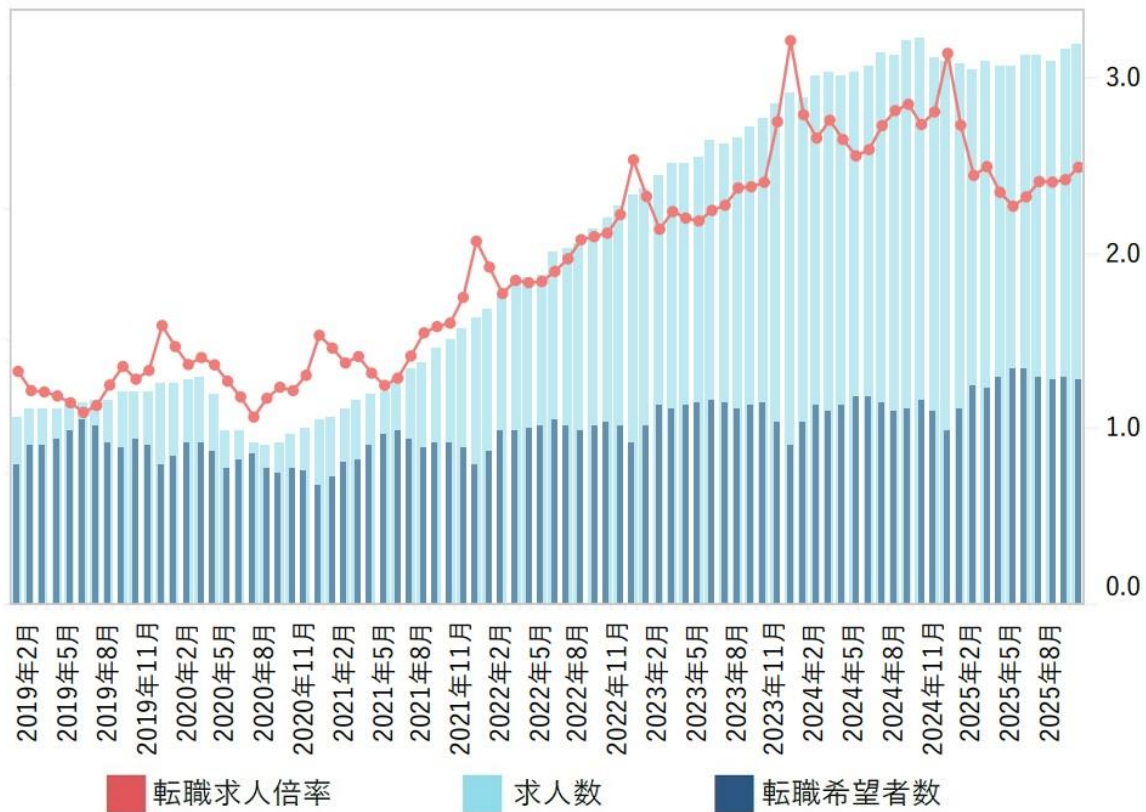


Market Highlights

December 2025

Persol DODA October job-to-applicant ratio is 2.50, +0.07 MoM. Vacancies +0.9% MoM/-1.1% YoY, job seekers -2.0% MoM/+8.5% YoY. Job postings increased across industries.

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

December 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		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	2.50	↑0.07	↓-0.24	100.9%	98.0%	全体	2.50	↑0.07	↓-0.24	100.9%	98.0%
IT・通信	6.70	↑0.16	↓-0.50	100.6%	98.2%	営業	2.89	↑0.10	↓-0.16	101.5%	98.1%
メディア	3.68	↑0.16	↓-0.22	101.1%	96.6%	企画・管理	3.27	↑0.10	↓-0.40	100.3%	97.3%
金融	2.65	↑0.06	↓-0.03	99.8%	97.5%	エンジニア (IT・通信)	11.47	↑0.43	↓-0.90	100.3%	96.5%
メディカル	1.00	↑0.03	↓-0.09	101.8%	99.0%	エンジニア (機械・電気)	5.48	↑0.13	↓-0.97	100.5%	98.1%
メーカー	2.98	↑0.04	↓-0.32	100.4%	99.2%	専門職 (メディカル)	0.65	↑0.02	↓-0.11	101.3%	98.6%
商社	1.66	↑0.07	↓-0.07	102.4%	98.0%	専門職 (化学・食品)	1.59	↑0.05	↓-0.28	100.6%	97.6%
小売・流通	0.70	↑0.03	↑0.02	101.9%	97.6%	専門職 (建設・不動産)	5.56	↑0.27	↓-0.31	101.1%	96.2%
レジャー・外食	0.78	↑0.02	↓-0.01	101.3%	98.6%	専門職 (コンサル・金融)	6.10	↑0.24	↓-0.57	102.0%	98.0%
エネルギー	2.85	↑0.18	↑0.13	100.6%	94.4%	クリエイター	1.18	↑0.08	↓-0.07	102.4%	95.7%
建設・不動産	4.97	↑0.17	↓-0.72	101.7%	98.1%	販売・サービス	0.72	↑0.02	↑0.01	101.1%	98.1%
コンサルティング	8.38	↑0.24	↓-1.34	101.1%	98.2%	事務・アシスタント	0.45	↑0.01	↓-0.06	103.1%	100.0%
人材サービス	8.55	↑0.23	↓-0.30	100.3%	97.6%	その他	0.05	-0.00	-0.00	103.3%	97.6%
その他	0.25	↑0.01	↓-0.04	101.0%	97.6%						

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

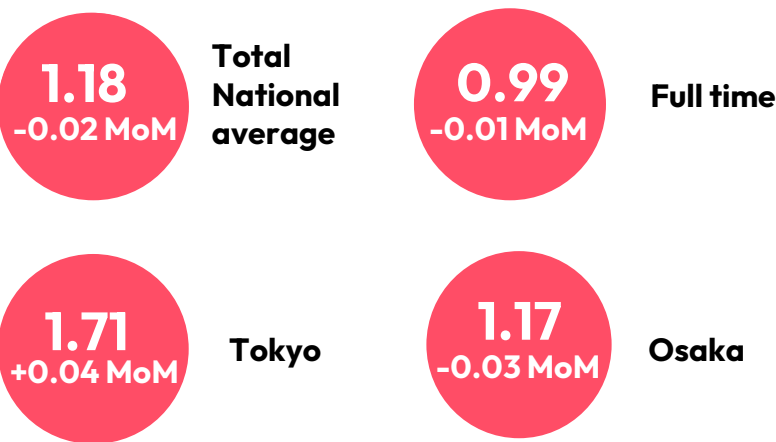
Left table: By sector breakdown: total, ICT, Media, FS, Medical, Manufacturing, Trading firm, retail/distribution, leisure/dining, energy, construction/real estate, Consulting, HR services, others.

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

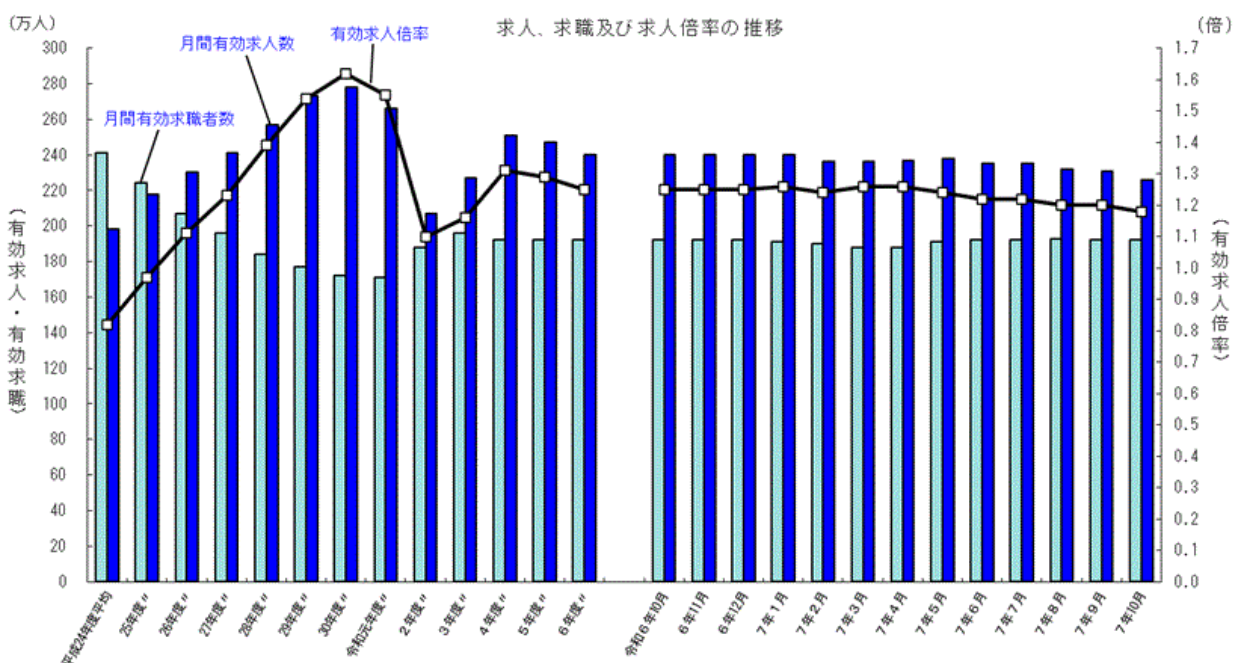
December 2025

LATEST MHLW JOB-TO-APPLICANT RATIO – AS OF OCTOBER 2025



First decline in 2 months, lowest since January 2022, drop attributed to labour-saving measures and rising prices. The unemployment rate stayed at 2.6% the same MoM. The minimum wage increase led some employers to review hiring plans.

10月の有効求人倍率は1.18倍、2カ月ぶりの低下 - 日本経済新聞⁴



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

December 2025

全国計

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

常用(除パート)

7年10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	495,840	1,366,131	229,930	1,152,570	192,221	46,077	2.16	1.19
管理的職業従事者	2,109	5,824	1,108	5,409	1,169	119	1.90	1.08
専門的・技術的職業従事者	127,133	356,948	36,267	185,355	27,493	7,029	3.51	1.93
製造技術者(開発)	5,366	14,846	1,310	6,677	1,208	168	4.10	2.22
製造技術者(開発を除く)	4,249	11,847	2,688	13,105	1,207	261	1.58	0.90
建築・土木・測量技術者	20,411	58,239	1,807	8,534	2,053	513	11.30	6.82
情報処理・通信技術者	18,532	51,098	5,405	33,022	5,748	362	3.43	1.55
その他の技術者	2,265	10,611	321	1,552	523	105	7.06	6.84
医師、歯科医師、獣医師、薬剤師	2,062	5,711	534	2,193	174	39	3.86	2.60
保健師、助産師、看護師	22,678	62,276	6,605	27,174	4,327	2,066	3.43	2.29
医療技術者	9,925	27,890	2,169	9,254	1,061	515	4.58	3.01
その他の保健医療従事者	5,528	15,989	1,454	7,911	775	289	3.80	2.02
社会福祉専門職業従事者	29,120	79,598	5,625	26,982	5,506	2,149	5.18	2.95
美術家、デザイナー、写真家、映像撮影者	1,227	3,288	3,102	22,399	1,913	146	0.40	0.15
その他の専門的職業	5,770	15,555	5,247	26,552	2,998	416	1.10	0.59
事務従事者	47,171	125,550	58,901	311,845	72,313	10,295	0.80	0.40
一般事務従事者	30,026	78,846	47,806	256,119	50,553	7,251	0.63	0.31
会計事務従事者	5,046	13,407	4,615	23,328	8,680	1,066	1.09	0.57
生産関連事務従事者	4,112	11,195	1,592	7,442	3,453	662	2.58	1.50
営業・販売事務従事者	5,042	13,853	3,141	14,435	7,554	917	1.61	0.96
外勤事務従事者	399	651	27	128	141	16	14.78	5.09
運輸・郵便事務従事者	1,782	5,295	402	1,776	879	204	4.43	2.98
事務用機器操作員	764	2,303	1,318	8,617	1,053	179	0.58	0.27
販売従事者	49,748	135,420	13,655	66,386	13,349	2,280	3.64	2.04
商品販売従事者	21,127	56,498	5,961	30,430	4,061	1,008	3.54	1.86
販売類似職業従事者	1,159	3,014	326	1,678	346	50	3.56	1.80
営業職業従事者	27,462	75,908	7,368	34,278	8,942	1,222	3.73	2.21
サービス職業従事者	83,086	230,897	20,808	96,729	17,751	6,351	3.99	2.39
家庭生活支援サービス職業従事者	65	183	37	164	39	6	1.76	1.12
介護サービス職業従事者	40,079	110,802	6,921	32,012	6,271	2,970	5.79	3.46
保健医療サービス職業従事者	5,268	14,375	1,134	4,872	2,143	726	4.65	2.95
生活衛生サービス職業従事者	7,261	19,902	1,284	6,849	610	209	5.65	2.91
飲食物調理従事者	15,741	42,219	4,745	21,750	3,287	1,246	3.32	1.94
接客・給仕職業従事者	9,372	29,185	3,868	17,418	2,372	558	2.42	1.68
居住施設・ビル等管理人	1,087	2,667	1,041	4,536	1,419	216	1.04	0.59
その他のサービス職業従事者	4,213	11,564	1,778	9,128	1,610	420	2.37	1.27
保安職業従事者	21,111	54,403	1,911	7,989	3,330	1,259	11.05	6.81
農林漁業従事者	3,584	9,804	1,802	8,887	1,424	557	1.99	1.10
生産工程従事者	58,804	160,781	20,789	98,450	24,310	7,547	2.83	1.63
生産設備制御・監視従事者(金属製品)	1,325	3,608	900	3,667	558	177	1.47	0.98
生産設備制御・監視従事者(金属製品を除く)	2,338	6,184	749	3,095	1,179	316	3.12	2.00
機械組立設備制御・監視従事者	690	1,974	439	2,098	265	77	1.57	0.94
製品製造・加工処理従事者(金属製品)	12,807	35,361	3,791	16,440	4,923	1,588	3.38	2.15
製品製造・加工処理従事者(金属製品を除く)	14,523	39,494	5,087	24,635	8,710	2,938	2.85	1.60
機械組立従事者	6,249	16,499	4,440	21,577	2,733	778	1.41	0.76
機械整備・修理従事者	13,190	36,730	1,761	8,239	2,300	716	7.49	4.46
製品検査従事者(金属製品)	1,180	2,993	568	2,443	655	190	2.08	1.23
製品検査従事者(金属製品を除く)	1,326	3,466	473	2,037	898	250	2.80	1.70
機械検査従事者	782	2,372	392	1,869	447	115	1.99	1.27
生産関連・生産類似作業従事者	4,394	12,100	2,189	12,350	1,642	402	2.01	0.98
輸送・機械運転従事者	37,641	103,611	10,901	45,202	11,182	4,250	3.45	2.29
鉄道運転従事者	63	119	33	131	5	2	1.91	0.91
自動車運転従事者	29,075	80,293	7,468	29,231	7,928	3,283	3.89	2.75
船舶・航空機運転従事者	34	113	24	132	8	1	1.42	0.86
その他の輸送従事者	2,190	5,724	1,664	7,557	1,147	345	1.32	0.76
定置・建設機械運転従事者	6,279	17,362	1,712	8,151	2,094	619	3.67	2.13
建設・探掘従事者	39,344	110,921	4,252	19,255	4,284	1,927	9.25	5.76
建設躯体工事従事者	6,480	18,748	531	2,194	421	197	12.20	8.55
建設従事者(建設躯体工事従事者を除く)	10,567	29,792	1,317	5,896	1,260	499	8.02	5.05
電気工事従事者	7,131	20,138	1,005	5,375	964	355	7.10	3.75
土木作業従事者	15,051	41,924	1,385	5,713	1,605	863	10.87	7.34
探掘従事者	115	319	14	77	34	13	8.21	4.14
運搬・清掃・包装等従事者	26,109	71,972	18,382	103,542	15,616	4,463	1.42	0.70
運搬従事者	14,440	40,402	8,229	38,117	8,407	2,256	1.75	1.06
清掃従事者	5,315	14,457	2,447	14,886	3,043	993	2.17	0.97
包装従事者	1,101	2,842	521	2,792	778	260	2.11	1.02
その他の運搬・清掃・包装等従事者	5,253	14,271	7,185	47,747	3,388	954	0.73	0.30
分類不能の職業	-	-	41,154	203,521	-	-	0.00	0.00

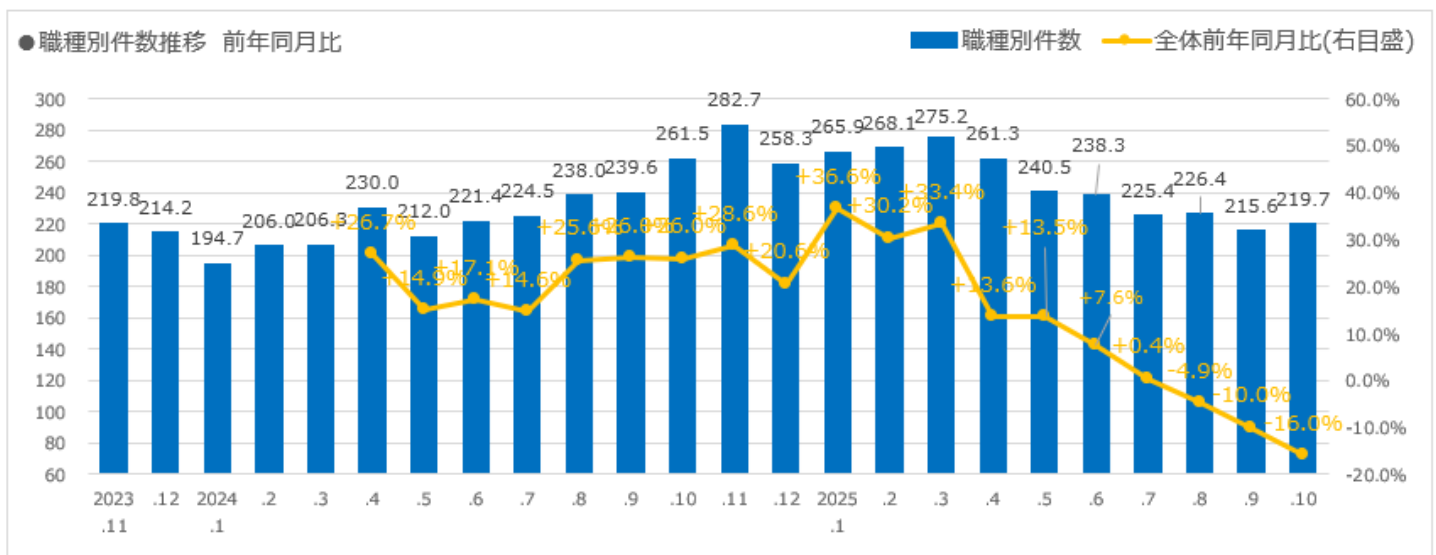
(注)上記の数値は、平成21年12月改定の「日本標準職業分類」に基づく区分である。

Market Highlights

December 2025

Zenkyukyo (the Association of Job Information of Japan) reports that job ads in October totalled 2,197,339, +1.9% MoM and -16.0% YoY, a slight MoM increase thanks to year-end and new year hiring needs, fell sharply YoY, with regular employee ads down 22.9% due to a significant drop in clerical jobs amid automation and diversified hiring methods.

求人広告3カ月連続減 10月減少率拡大、正社員事務52%減 - 日本経済新聞7



●職種別件数 (占有率TOP10)

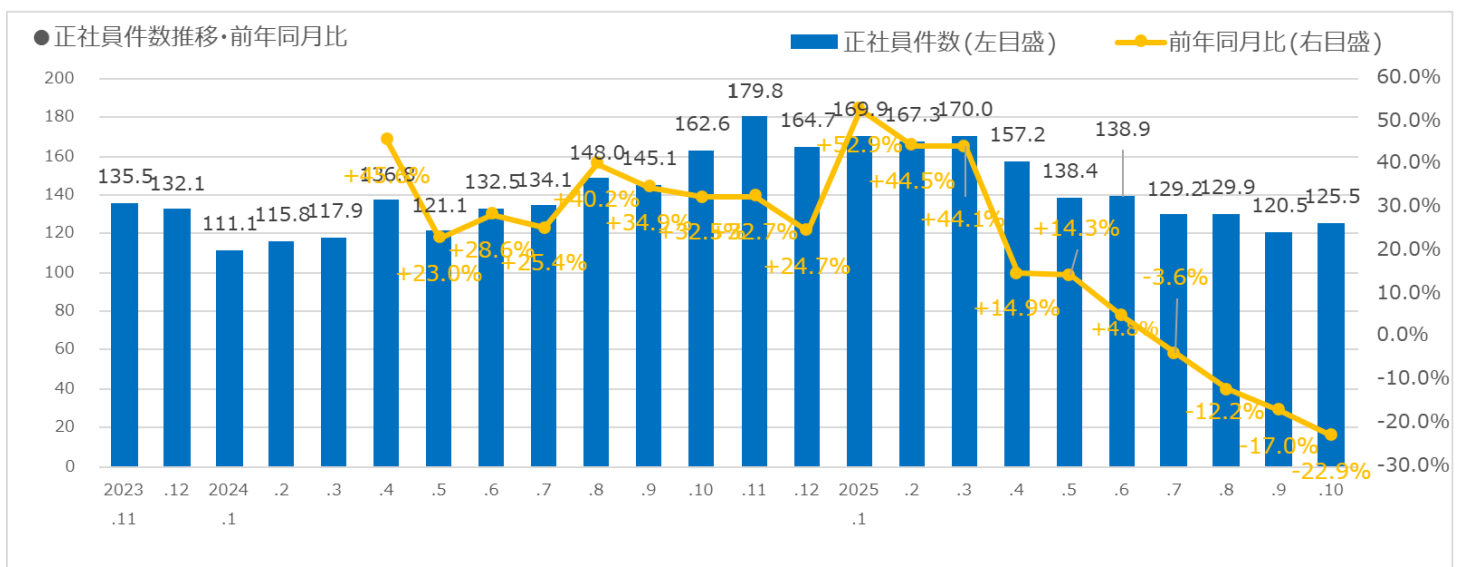
	件数	前月比	前年同月比
全体計	2,197,339	1.9%	-16.0%
販売 (販売)	266,054	-2.3%	-7.6%
専門 (IT技術者)	240,301	+27.0%	-24.0%
事務	228,603	+0.3%	-46.5%
輸送・機械運転	169,629	+0.7%	-23.0%
販売 (営業)	155,143	+1.1%	-14.7%
サービス (給仕)	137,650	+1.0%	-5.0%
運搬・清掃・包装等	131,862	-1.0%	-6.0%
建設・採掘	125,929	+4.6%	+19.3%
専門 (医療・福祉専門職)	115,961	+8.7%	+6.7%
生産工程	106,297	-2.7%	-24.0%

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

Market Highlights

December 2025

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	1,254,568	+4.1%	-22.9%
専門 (IT技術者)	227,175	+29.5%	-25.3%
事務	165,477	-0.5%	-52.4%
販売 (営業)	138,685	+0.8%	-10.2%
輸送・機械運転	130,965	-1.6%	-22.4%
建設・採掘	108,422	+5.2%	+24.0%
販売 (販売)	94,908	-5.5%	-18.3%
専門 (技術者・研究者)	88,091	+0.1%	-27.1%
専門 (医療・福祉専門職)	65,221	+9.3%	+5.3%
生産工程	51,917	-8.6%	-26.2%
サービス (給仕)	37,857	+0.5%	+1.6%

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

Market Highlights

December 2025

Market trend

Hiring shifts driven by automation and diversifying hiring methods: Persistent labour shortages have led companies to automate administrative tasks and to diversify hiring methods (e.g., temp staff, spot work) ([Reuters](#)⁹). Job postings have declined for four consecutive months (April–July), while construction and childcare roles increased slightly, and administrative positions saw the largest drop. Companies are cutting back on office staff and shifting to non-regular employment.

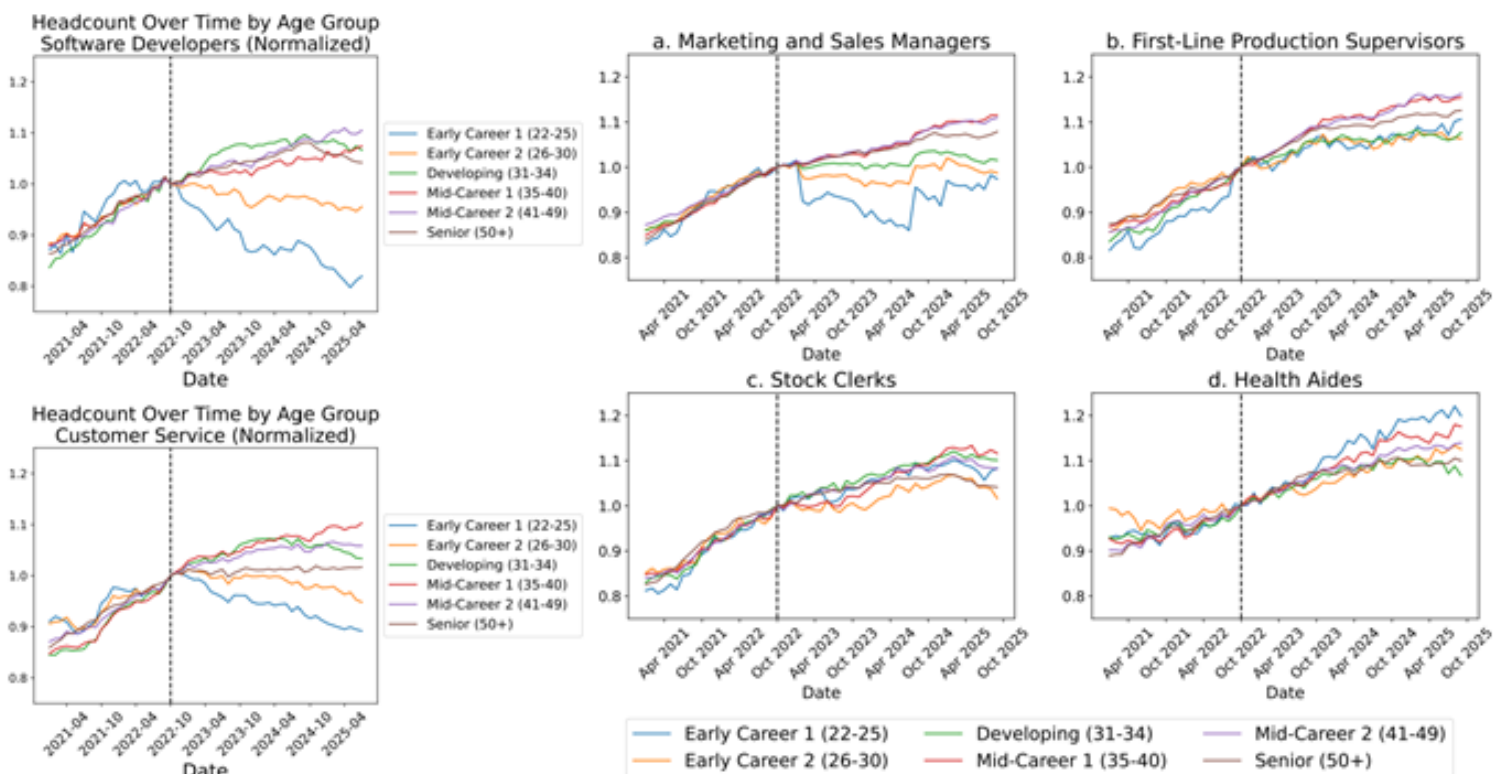
AI impacts codified knowledge-based roles more than experience-based roles.

Experience-based knowledge is difficult to replace while simple or education-based skills are more at risk, but at the same time, AI augment more efficiency for entry-level and inexperienced staff.

[Stanford study](#)¹⁰ shows a 13% employment decline for US workers aged 23–25 in AI-exposed roles (e.g., customer service, accounting, software development) since 2022.

Older workers and less AI-exposed jobs (e.g., nursing aides) remain stable or have grown.

Young workers relying on formal education-based skills are more at risk than those with experience-based knowledge. AI’s impact is not uniform; some roles for young workers, like health aides, production supervisors, have seen growth.



Market Highlights

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NBER- Generative AI at Work¹¹ highlights generative AI’s ability to improve efficiency, accelerate learning curves, and enhance employee retention—especially for entry-level and less experienced staff. It poses minimal risk to high performers while creating opportunities for scaling quality service and workforce stability in customer-facing and operational roles.

Young workers adopting career plans. 40% of new grad job-seekers have changed their preferred job roles due to the rise of generative AI. They aim for roles “not easily replaced by AI,” such as management, healthcare, and sales, while they think most likely to shrink jobs are white-collar positions like customer support, administrative roles and even some IT roles. Frequent AI users are more likely to change career plans and anticipate job reductions. Overall perception of AI is positive, with 74% believing it will have a good impact on life and careers.

就活生が考える生成AIによる雇用への影響

雇用が減る		減らない
カスタマーサポート (12.0%)	1	経営者・管理職 (7.6%)
事務・総務・秘書・受付 (10.7%)	2	医師・薬剤師・看護師 (7.6%)
システムエンジニア・プログラマー (7.2%)	3	営業職 (6.4%)
経理・財務・法務、販売・接客 (6.6%)	4	研究開発 (6.3%)
商品企画・マーケティング (6.1%)	5	教員・講師・インストラクター (6.2%)
Webデザイナー・クリエイティブ職 (5.5%)	6	ソーシャルワーカー・介護士 (5.2%)
インフラエンジニア・セキュリティ・データ分析 (5.2%)	7	警備・清掃 (4.5%)
人事・労務 (4.6%)	8	公務員 (4.5%)
コンサルタント (4.2%)	9	ドライバー・物流 (4.4%)
製造・品質管理・生産管理 (3.5%)	10	弁護士・税理士など士業 (4.3%)

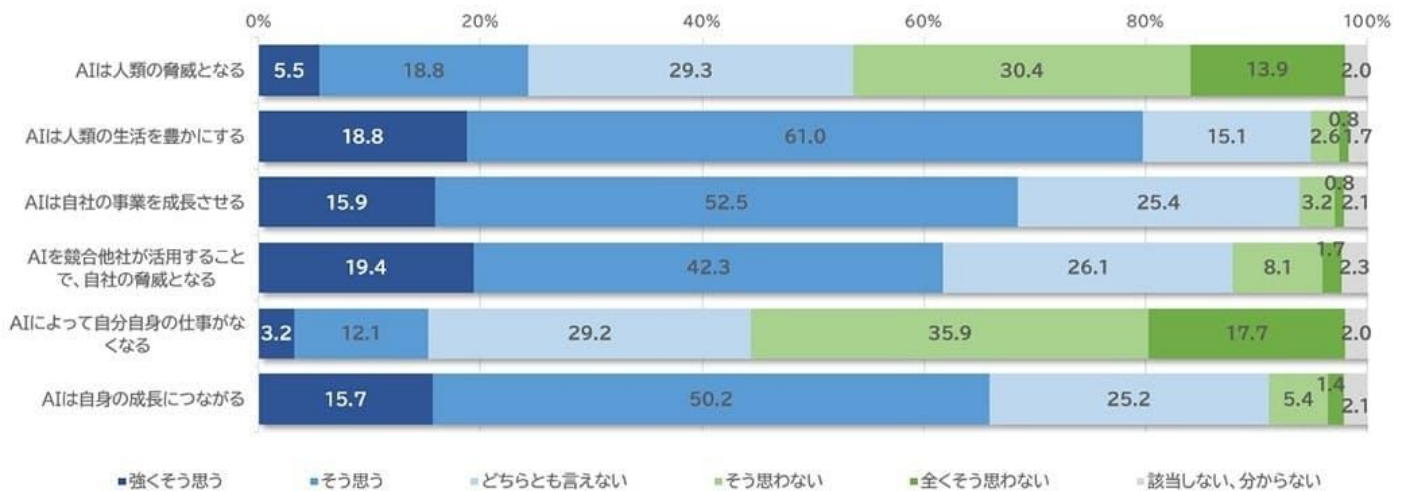
(注) 選択肢から複数回答。順位は小数第2位の値も考慮

「AIに奪われない職」就活生も意識 4割が志望変更、1116人調査 - 日本経済新聞¹²
To attract young candidates, companies must align hiring strategies with evolving expectations, build authentic employer branding, offer flexibility and ensure fast, personalised communication to secure top talent.

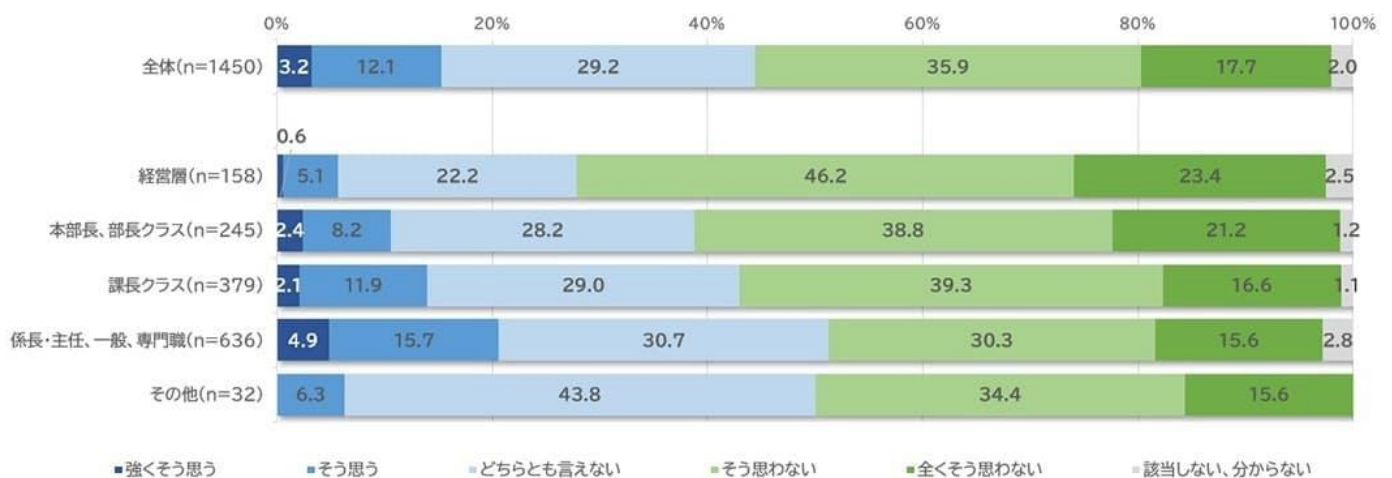
Market Highlights

December 2025

Nikkei xTECH¹³ reveals that most Japanese workers do not fear losing their jobs to AI, with over half believing their roles will remain secure and only a small minority expecting job elimination.



■ AIに対する考え: AIによって自分自身の仕事がなくなる【全体/役職別】



Market Highlights

December 2025

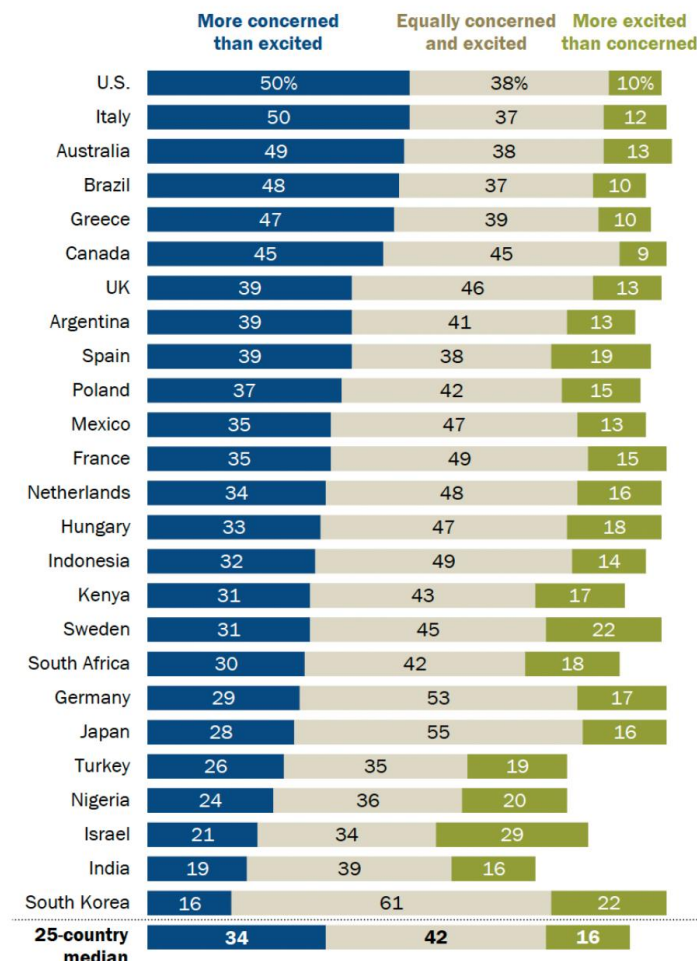
Compared to other advanced economies, such as the US, where concerns about AI-driven job loss are widespread, many Japanese also do not view AI as a threat to humanity. While executives tend to be more positive than frontline employees, overall anxiety remains low. Germany and South Korea also show low levels of concern about AI. In Germany, only 29% of people express caution, while in South Korea, the figure is even lower at 16%, below Japan’s level. Countries with strong manufacturing sectors, such as those with major automotive industries, may be less wary of AI’s impact.

Despite this optimism, actual adoption of generative AI in Japanese companies is still limited, with only a small percentage of employees reporting active use. This contrast between positive expectations and slow implementation highlights a unique dynamic in Japan’s approach to AI.

How do people around the world feel about the rise of AI in daily life? | Pew Research Center¹³

How do people around the world feel about the rise of AI in daily life?

% who say the increased use of artificial intelligence in daily life makes them feel ...



Market Highlights

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West Japan expansion

Conrad Hotel, Kobe City plans to rebuild its main office tower by 2036, adding a luxury Conrad hotel on upper floors to attract wealthy tourists and boost the local economy. 高級ホテル「コンラッド」が神戸市役所本庁舎に進出 海外富裕層の取り込みで活性化ねらう - 産経ニュース¹⁴

UL Solutions opened Japan's first motor energy efficiency testing lab in Ise, Mie, UL Solutions、日本に電動モーターのエネルギー効率試験所を開設 - 高まる需要に対応 | UL Solutions Incのプレスリリース | 共同通信PRワイヤー¹⁵

Tebon, Chinese manufacturing, has a Nagoya office, 大森FMEA応用技研株式会社, since 2020, high tech manufacturing, SPC/FMEA analysis TEBON大森¹⁶

Market Highlights

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