

Human Resources Business Market in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic human resources business market with the following conditions:

1. Research period: From July to October, 2016
2. Research targets: Agencies and companies in staffing service business (mainly for office works), recruiting firms, outplacement agencies that handle white-collar-jobs and office works, employment firms for engineers, sales, manufacturing, contract workers, medical staff, job-offer information service providers, and recruiting companies for global human resources.
3. Research methodologies: Face-to-face interviews, mail-in surveys, and literature research

What is human resources business?

Human resources business generally targets the following nine categories of employment firms: staffing service agencies (for general workers or general employees); recruiting (or employment) firms; outplacement agencies; recruiting companies for engineers; recruiting firms for sales and sales support resources; online job search engine companies; employment agencies for manufacturers or contract workers; employment companies for medical staff, and recruiting companies for global human resources. This report deals with three of the nine categories, which are: Staffing service agencies (for general workers or general employees); recruiting (or employment) firms; and recruiting companies for global human resources. Note that the figures for “staffing service market” until FY2014 are extracted from “the Sales of Worker Dispatch Business” in “Worker Dispatch Business Report 2014” issued by the Health, Labour and Welfare Ministry. Also note that “recruiting firms” indicate only those that handle white-collar jobs.

◆ Key Findings

■ Staffing Service Market in FY2015 Attained 4,102.0 Billion Yen, 105.0% of Size of Previous Fiscal Year, Marking Second Consecutive Increase

The staffing service market in FY2015 attained 4,102.0 billion Yen, 105.0% of the size of the previous fiscal year, securing positive growth for two years in a row. Generally speaking, the market is in a condition where not enough supply (number of staff to dispatch) is secured against the demand, but there are some cases in some industries where the supply has begun exceeding the demand, causing the growth rate to scale down slightly from the previous fiscal year. This trend has been passed on for FY2016, so that the growth margin of the market is considered to slowdown gradually from what it was in FY2014. The staffing service market in FY2016 is projected to be 4,184.0 billion yen, 102.0% of the size of the preceding fiscal year.

■ Recruiting Market Size in FY2015 Achieved 210.0 Billion Yen, 113.5% on Y-o-Y Basis, Marking Sixth Consecutive Years of Rise

Due to a continuous trend of economic recovery, rising demand of human resources at

enterprises, and higher unit price of placement fees, the recruiting market in FY2015 reached 210.0 billion yen, 113.5% of the size of the preceding fiscal year, recording double digit growth and sixth consecutive years of increase since FY2010. The recruiting market is projected to continue expanding in FY2016, attaining 230.0 billion yen, 109.5% on Y-o-Y basis.

■ **Global-Human-Resources Recruiting Market in FY2015 Rose to 25.7 Billion Yen, 106.2% on Y-o-Y Basis**

Size of the recruiting business for global human resources estimated as 25.7 billion yen, 106.2% of the size of the preceding fiscal year. Although the market is on the rise, lack of number of recruiting consultants and lengthening period until a contract to reach agreement, the growth rate of the market is likely to slow down from double digit increase achieved in FY2013 and FY2014. Because such a trend seems to continue in FY2016, the global-human-resources recruiting market in the fiscal year is projected to be 26.6 billion yen, 103.5% of the size of the previous fiscal year.

◆ **Report Format:**

Published report: “Human Resources Business 2016”

Issued on: November 8, 2016

Language: Japanese

Format: 803 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

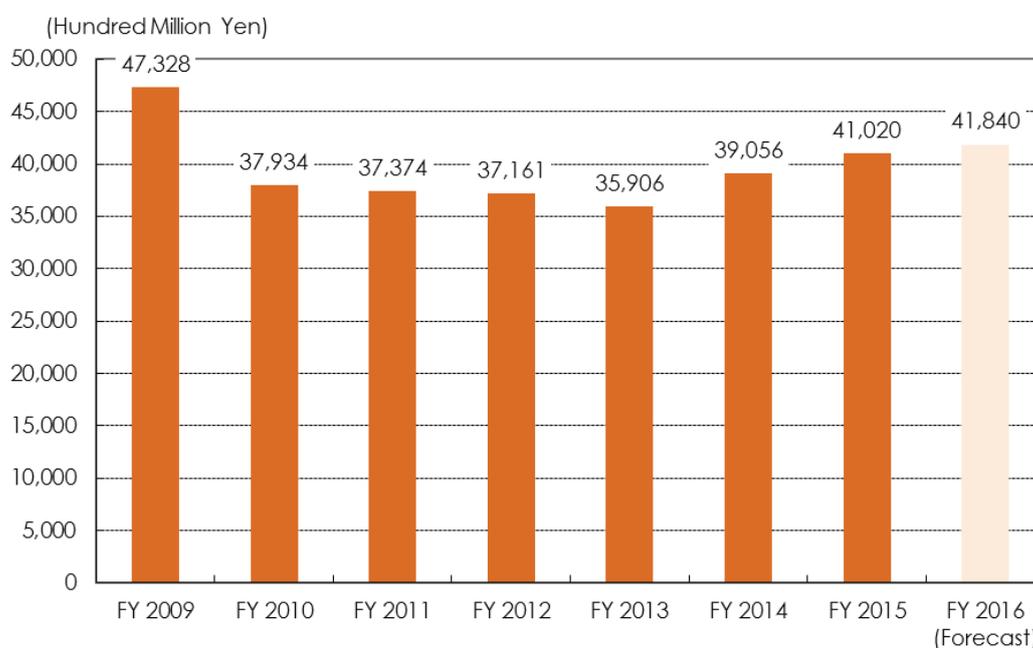
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Transition of Size of Staffing Service Market**

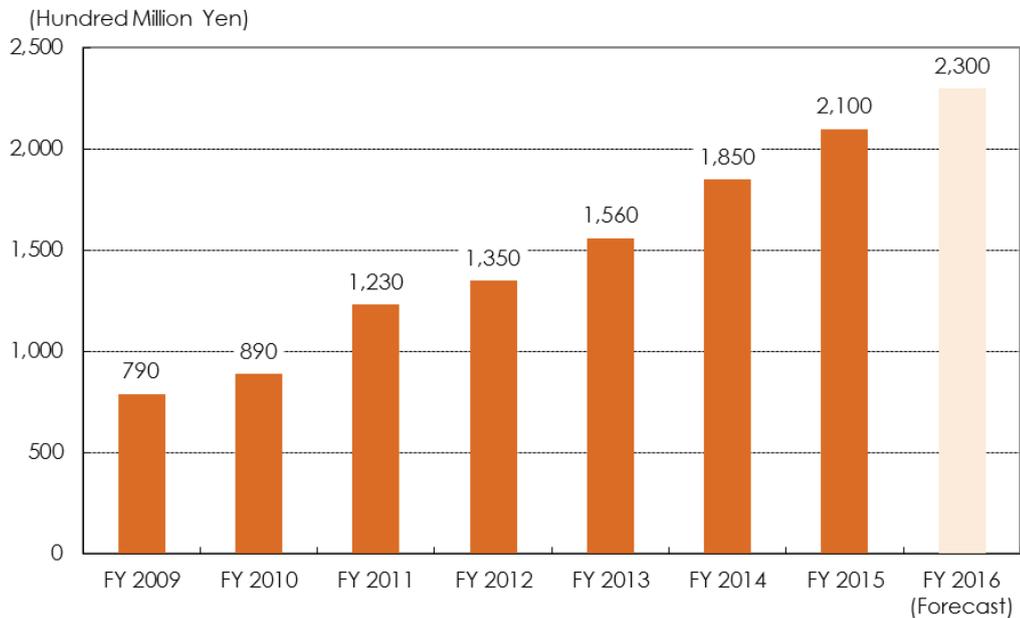


Survey by Yano Research Institute

Notes:

1. The figures until FY2014 are extracted from “the Sales of Worker Dispatch Business” in “Worker Dispatch Business Report 2014” issued by the Health, Labour and Welfare Ministry, and the figures of FY2015 and beyond are estimated and forecasted by Yano Research Institute.
2. The market size is based on the sales of the businesses.

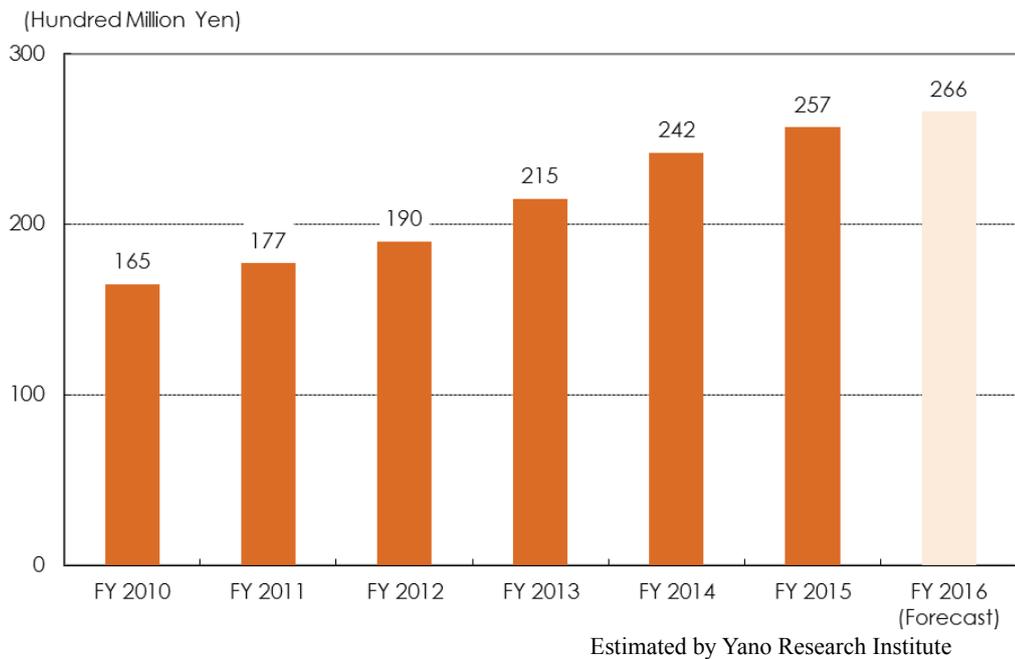
■ **Figure 2: Transition of Size of Recruitment (Employment) Market**



Notes:

3. The market only targets those that handle white-collar jobs.
4. The market size is based on the sales of businesses.

■ **Figure 3: Transition of Size of Global-Human-Resources Recruiting Market**



Notes:

5. The recruiting business for global human resources market helps find jobs specifically for bilingual people to foreign companies in Japan or the international departments of domestic enterprises.
6. The market size is based on the sales of businesses.