EMEA-LATAM Economic Insights

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SUMMARY

Hiring continued to weaken across EMEA-LATAM in June (down -17.4% YoY on average), and down -2.6% MoM. Industry hiring declines were led by Utilities; Oil, Gas, and Mining; and Consumer Services. Hybrid postings declined across EMEA; remote roles continue to attract outsized candidate interest relative to supply — roughly double the supply share.

EMEA-LATAM HIRING WEAKENED FURTHER IN JUNE (-17.4% YOY ON AVERAGE), WITH THE LARGEST DECLINES IN MEXICO (-28.0%), THE UAE (-22.4%), AND BRAZIL (-21.9%).

- Year-over-year hiring across EMEA-LATAM was down -17.4% on average in June and remained below pre-pandemic levels (-27.3% Yo7Y on average compared with June 2019).
- Israel (-4.0% YoY) and Ireland (-12.6%) showed the smallest declines, followed by the UK (-14.2%) and Germany (-15.4%). Southern Europe and the LATAM markets weakened further, with hiring down in Italy (-21.8%), Brazil (-21.9%), and Mexico recording the steepest decline in the region (-28.0%). The UAE (-22.4% YoY) remains the only market still above pre-pandemic levels (+6.3% Yo7Y compared with June 2019).
- Most markets saw month-over-month declines: only Israel (+2.4% MoM), the UAE (+1.8%), and France (+0.3%) recorded MoM gains, while Mexico posted the sharpest monthly pullback (-13.7% MoM).
- Industry declines remained widespread, led by Utilities (-24.1% YoY on average); Oil, Gas, and Mining (-22.9%); Consumer Services (-21.4%); and Retail (-20.7%). Technology, Transportation, and Construction were the least affected (each averaging -14 to -15% YoY).

HIRING CAUTION PERSISTS ON BOTH SIDES OF THE MARKET, WITH APPLICATIONS PER APPLICANT FALLING FURTHER ACROSS MOST COUNTRIES.

- Job postings per applicant continued to decline across all countries analysed, down -13.8% YoY on average. The steepest decline was in the UAE (-32.2%), followed by Germany (-20.1%) and the Netherlands (-17.5%); Brazil was the most resilient (-1.8%).
- Applications per applicant fell sharply — down -20.5% YoY on average — pointing to cooling job search intensity across the region. The UAE again saw the largest drop (-26.8%), followed by Brazil (-23.8%) and the UK (-21.8%).
- Together these signals continue to point to hiring caution on both sides of the market, consistent with ongoing macro uncertainty.

HYBRID POSTINGS DECLINED ACROSS EMEA; REMOTE ROLES CONTINUE TO ATTRACT OUTSIZED CANDIDATE INTEREST RELATIVE TO SUPPLY.

- Hybrid job postings remained the dominant flexible work option but contracted further in June, down -14.8% YoY on average. Shares were highest in Israel (34.9%), the UK (32.1%), and Ireland (31.2%); the steepest YoY declines were in Sweden (-25.3%), the UAE (-21.9%), and Italy (-18.5%).
- The share of applications for hybrid roles also fell (-9.6% YoY on average), but continued to exceed posting shares in most countries — signalling persistent candidate preference for hybrid work even as supply contracts. The highest application shares were in Israel (39.4%), the UK (38.2%), and Ireland (36.2%).
- Remote postings split sharply by country: the UAE recorded strong growth (+65.3% YoY), with further gains in the Netherlands (+23.3%) and the UK (+9.1%);

meanwhile shares fell in France (-10.1%), Ireland (-7.2%), and Sweden (-2.8%). Remote postings remain a small share of total job advertising (5.7% on average across the region).

- Remote roles continue to attract outsized candidate interest relative to supply — accounting for 11.1% of applications on average, roughly double the supply share.

METHODOLOGY

- The LinkedIn Hiring Rate (LHR) is a measure of hires divided by LinkedIn membership in the country. This is based on members' profile updates using the start date of a new job. The hiring rate has been seasonally adjusted, as detailed in the LinkedIn Hiring Rate methodology. This number is indexed to the average month in 2016; for example, an index of 1.05 indicates a hiring rate that is 5% higher than the average month in 2016.
- Labour market tightness is calculated from the ratio of active job listings (open listings) that attract applicants (has at least one application) to the number of job seekers who applied to such listings.
- Job search intensity is the average number of job applications per applicant, measuring the intensity of each applicant's job search where job applicants and job postings share the same country. The higher the number, the more intense the job seeking behaviour of the applicant.
- A "remote job" refers to jobs that can be done completely out of the office and is defined as either the job poster explicitly labelled it as "remote" or if the job contained keywords like "work from home" in the listing. A "hybrid job" refers to jobs that are done both in the office and out of the office and is defined as being explicitly labelled as "hybrid" by job poster. The share of hybrid and remote jobs is calculated in proportion to all paid job postings.

APPENDIX

Table 1. % change in hiring

June 2026 (seasonally adjusted)

	Jun 2026	YoY % change
Israel	1.08	-4.0
Ireland	0.83	-12.6
United Kingdom	0.79	-14.2
Germany	0.89	-15.4
France	0.80	-16.0
Netherlands	0.63	-16.1
Spain	0.76	-17.3
Sweden	0.64	-19.3
Italy	0.72	-21.8
Brazil	1.44	-21.9
United Arab Emirates	1.09	-22.4
Mexico	0.75	-28.0

Table 2. % change in hiring by industry

June 2026 (seasonally adjusted), EMEA-LATAM Average

	YoY % change
Technology, Information and Media	-14.5
Transportation, Logistics, Supply Chain and Storage	-15.0
Construction	-15.1
Manufacturing	-15.2
Education	-15.3
Financial Services	-16.3
Hospitals and Health Care	-17.2
Professional Services	-17.4
Farming, Ranching, Forestry	-18.3
Real Estate and Equipment Rental Services	-18.5
Administrative and Support Services	-18.5
Wholesale	-18.7
Government Administration	-18.9
Entertainment Providers	-18.9
Accommodation and Food Services	-20.6
Retail	-20.7
Consumer Services	-21.4
Oil, Gas, and Mining	-22.9

Table 3. Labour market tightness and job search intensity

June 2026

	Job Postings per Applicant YoY % change	Applications per Applicant YoY % change
Brazil	-1.8	-23.8
Mexico	-5.0	-20.0
United Kingdom	-6.0	-21.8
Ireland	-12.7	-20.9
Italy	-13.8	-14.4
France	-14.8	-20.7
Netherlands	-17.5	-16.8
Germany	-20.1	-19.2
United Arab Emirates	-32.2	-26.8

Table 4. Share (%) of hybrid job postings

June 2026

	Jun 2026	YoY % change	MoM % change
Israel	32.1	-9.4	-0.5
United Kingdom	31.2	-9.6	-1.2
Ireland	27.4	-6.1	+1.5
Netherlands	24.0	-25.3	-2.4
Sweden	23.8	-14.3	-1.4
Germany	22.4	-18.5	-0.7
Italy	20.9	-13.8	-1.8
France	6.9	-21.9	-5.8
United Arab Emirates	32.1	-9.4	-0.5

Table 5. Share (%) of hybrid job applications

June 2026

	Jun 2026	YoY % change	MoM % change
Israel	39.4	-8.7	-1.5
United Kingdom	38.2	-6.5	+1.8
Ireland	36.2	0.0	+3.3
Netherlands	34.5	-9.1	+0.4
Germany	30.0	-10.4	+1.8
Italy	26.9	-11.7	+1.5
Sweden	26.7	-15.2	-2.2
France	26.1	-10.6	-0.8
United Arab Emirates	7.6	-14.4	-6.3

Table 6. Share (%) of remote job postings

June 2026

	Jun 2026	YoY % change	MoM % change
United Kingdom	9.3	+9.1	-0.7
Ireland	8.9	-7.2	-5.9
Germany	7.2	+5.5	-0.3
Italy	6.2	+8.5	-6.8
United Arab Emirates	6.2	+65.3	+5.4
Sweden	4.5	-2.8	-1.8
Israel	3.3	+1.0	+0.4
France	3.2	-10.1	+0.6
Netherlands	3.0	+23.3	-3.9

Table 7. Share (%) of remote job applications

June 2026

	Jun 2026	YoY % change	MoM % change
Germany	16.9	-22.4	-3.5
United Kingdom	16.5	-11.3	-4.2
Ireland	15.2	-23.9	-2.6
Italy	12.8	-3.2	-1.4
Netherlands	9.4	-27.5	-4.1
Sweden	9.3	-28.5	-0.5
Israel	7.6	-15.6	+0.7
United Arab Emirates	6.4	+8.8	-3.0
France	6.1	-18.3	-0.6