EMEA-LATAM Economic Insights

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SUMMARY

Hiring weakened further across EMEA-LATAM in April, down -20.8% YoY on average — a sharp deepening from March's -14.5% YoY. All twelve markets analysed contracted, with the United Arab Emirates leading declines for the first time (-40.3% YoY) after months as the regional outlier. Industry contraction has broadened, with Utilities, Accommodation & Food Services, and Professional Services worse affected. Both job postings and applications per applicant fell further, while hybrid roles continued to retreat and remote postings diverged across markets.

APRIL HIRING DEEPENED ACROSS EMEA-LATAM, WITH ALL TWELVE MARKETS CONTRACTING AND THE UAE LEADING DECLINES.

- Year-over-year hiring fell by -20.8% on average across EMEA-LATAM in April, deepening from March's -14.5% YoY, and remained -26.9% below pre-pandemic levels (Yo7Y).
- Hiring contracted for all geos analysed amid heightened economic uncertainty from the Iran war, with Western (United Kingdom down -14.2% YoY, Germany -16.6%) and Southern (Spain -17.1%, Italy -17.2%) Europe most robust. LATAM contractions deepened most: Brazil dropped by -23.6% YoY, Mexico -24.6%. The UAE recorded the steepest decline (-40.3% YoY), though hiring remains close to pre-pandemic levels (-1.7% Yo7Y).
- Pre-pandemic gaps have widened: with hiring in the Netherlands declining -42.3% Yo7Y compared to a pre-pandemic May 2019, Sweden by -39.3%, France by -38.7%, and Italy by -34.7%.
- Industry contraction has broadened, with the steepest declines on average across the region in Utilities (-22.8% YoY), Accommodation & Food Services (-22.3%), Professional Services (-21.9%), Wholesale (-21.0%), and Government Administration (-20.9%). Oil, Gas & Mining (-20.1%) and Manufacturing (-19.8%) remain deeply negative but no longer lead the contraction.

DEMAND AND CANDIDATE ACTIVITY BOTH COOLED, WITH THE SHARPEST DROPS IN THE UAE AND GERMANY.

- Job postings per applicant fell most in the United Arab Emirates (-33.4% YoY), Germany (-19.9%), the Netherlands (-18.7%), and France (-17.1%).
- Applications per applicant fell sharply: UAE -36.9%, UK -26.2%, Ireland -24.6%, Germany -23.2%, France -22.5%.
- Together these signals point to hiring caution on both sides of the market - consistent with broader macro uncertainty rather than supply-side slack.

HYBRID ROLES RETREATED FURTHER; REMOTE POSTINGS DIVERGED BY MARKET.

- Hybrid job postings declined year-over-year across all markets, with sharpest drops in Sweden (-24.6% YoY), Italy (-14.5%), Germany (-13.8%), and the Netherlands (-11.2%); the UAE share fell to just 7.0% of all job postings (-63.2% YoY).
- Hybrid job applications continue to exceed hybrid postings in most markets as candidate preference for flexibility persists, with the UK at 38.5% of applications versus 33.1% of postings, and Ireland at 35.2% versus 32.3%.
- Remote postings diverging across geos: the UK (+14.2% YoY), UAE (+38.7%), and Italy (+3.5%) saw growth in remote job postings; Ireland (-34.9%), Israel (-55.9%), Sweden (-19.1%), and France (-11.7%) declined.

- Remote applications continue to outpace remote postings everywhere, most pronounced in Germany (17.7% of applications versus 7.0% of postings) and the UK (16.8% versus 9.6%).

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

April 2026 (seasonally adjusted)

	Apr 2026	YoY % change
United Kingdom	0.79	-14.2
Germany	0.90	-16.6
Spain	0.75	-17.1
Italy	0.77	-17.2
Ireland	0.79	-17.7
Sweden	0.64	-18.1
France	0.79	-18.6
Netherlands	0.63	-19.5
Israel	1.05	-21.5
Brazil	1.44	-23.6
Mexico	0.81	-24.6
United Kingdom	0.79	-14.2

Table 2. % change in hiring by industry

April 2026 (seasonally adjusted), EMEA-LATAM Average

	YoY % change
Construction	-16.6
Financial Services	-17.0
Retail	-18.0
Technology, Information and Media	-18.4
Real Estate and Equipment Rental Services	-18.5
Transportation, Logistics, Supply Chain and Storage	-18.6
Hospitals and Health Care	-19.0
Entertainment Providers	-19.4
Consumer Services	-19.6
Manufacturing	-19.8
Oil, Gas, and Mining	-20.1
Administrative and Support Services	-20.4
Education	-20.5
Government Administration	-20.9
Wholesale	-21.0
Professional Services	-21.9
Accommodation and Food Services	-22.3
Utilities	-22.8

Table 3. Labour market tightness and job search intensity

April 2026

	Job Postings per Applicant YoY % change	Applications per Applicant YoY % change
United Kingdom	-7.5	-26.2
Italy	-14.7	-17.0
Ireland	-16.0	-24.6
Mexico	-16.2	-18.2
Brazil	-16.6	-18.9
France	-17.1	-22.5
Netherlands	-18.7	-21.3
Germany	-19.9	-23.2
United Arab Emirates	-33.4	-36.9

Table 4. Share (%) of hybrid job postings

April 2026

	Apr 2026	YoY % change	MoM % change
Israel	35.3	-7.0	-3.6
United Kingdom	33.1	-3.2	-5.0
Ireland	32.3	-4.0	-3.9
Netherlands	26.0	-11.2	-1.6
Sweden	24.8	-24.6	-10.7
Germany	24.6	-13.8	-2.5
Italy	21.9	-14.5	-3.4
France	21.6	-6.4	-3.2
United Arab Emirates	7.0	-63.2	-4.6

Table 5. Share (%) of hybrid job applications

April 2026

	Apr 2026	YoY % change	MoM % change
Israel	39.2	-8.7	-4.2
United Kingdom	38.5	-5.1	-8.9
Ireland	35.2	-4.3	-6.4
Netherlands	34.7	-7.7	-7.5
Germany	29.8	-12.5	-10.0
Sweden	27.8	-12.5	-11.6
Italy	27.5	-6.9	-8.9
France	27.1	-7.4	-4.2
United Arab Emirates	8.1	-12.0	-20.2

Table 6. Share (%) of remote job postings

April 2026

	Apr 2026	YoY % change	MoM % change
United Kingdom	9.6	14.2	-7.9
Ireland	9.0	-34.9	0.5
Germany	7.0	-1.7	-13.3
Italy	6.6	3.5	-5.0
United Arab Emirates	6.2	38.7	-27.5
Sweden	4.3	-19.1	3.3
Israel	3.3	-55.9	-7.4
France	3.3	-11.7	-16.1
Netherlands	2.7	-11.9	-29.2

Table 7. Share (%) of remote job applications

April 2026

	Apr 2026	YoY % change	MoM % change
Germany	16.8	-14.0	-5.0
United Kingdom	15.9	-24.9	-8.9
Ireland	12.2	-8.4	-3.1
Italy	10.2	-23.7	-13.9
Netherlands	9.5	-20.8	-11.5
Sweden	8.3	-12.1	-9.3
Israel	6.8	7.5	-12.7
United Arab Emirates	6.1	-16.0	-8.7
France	16.8	-14.0	-5.0