In construction the vacancy rate went from 7.5% to 7.4%

The labour market cooled everywhere since 2022, except in the sectors where the work cannot wait.

Summary

Between mid-2022 and mid-2025 the Dutch vacancy rate fell from 5.1% to 4.2%. That average hides the real story. In ICT the rate dropped from 8.2% to 5.1%, in trade and hospitality from 6.6% to 4.7%. In construction it went from 7.5% to 7.4%, and in healthcare from 4.4% to 4.3%. Two sectors barely cooled at all, and they are exactly the sectors where production cannot be postponed or automated.

A cooling labour market has been widely reported since 2023. That is true, and it is misleading. The cooling is very unevenly spread, and in two large sectors it has effectively not happened.

What the average hides

The vacancy rate counts open vacancies per 100 posts. Across the whole Dutch business economy it fell from 5.1% in the second quarter of 2022 to 4.2% in the second quarter of 2025, a drop of almost a fifth.

By sector it looks entirely different. Both figures are second quarter, so they compare cleanly without a seasonal effect.

- Information and communication: from 8.2% to 5.1%
- Trade, transport and hospitality: from 6.6% to 4.7%
- Financial services: from 5.7% to 4.1%
- Professional services: from 6.6% to 5.3%
- Manufacturing: from 5.1% to 4.0%
- Transport and storage: from 4.9% to 3.8%
- Healthcare: from 4.4% to 4.3%
- Construction: from 7.5% to 7.4%

ICT gave up 3.1 percentage points. Construction gave up 0.1. That is not a difference of degree, it is a different story.

Construction is now the tightest market in the country

At 7.4%, construction has more than 7 open vacancies for every 100 posts. That is nearly double the national average and the highest of any sector.

Across Europe the gap is wider still. The Dutch construction vacancy rate stands at 7.4%, against 5.5% in Belgium, 3.9% in Germany, 2.8% in France, 2.5% in Norway, 2.3% in Sweden and 0.8% in Finland. The EU average is 2.7%. Dutch construction is close to three times as tight as European construction on average.

That is not accidental. The demand comes from programmes that do not move with the business cycle: housing, the energy transition and the renewal of infrastructure. The construction economics institute projects that tens of thousands of new workers are needed in the coming years, and that education can supply only part of them. The rest has to come from lateral entry.

Healthcare barely moves

Healthcare was already lower than construction in 2022 at 4.4%, and now stands at 4.3%. It is another sector where demand does not fall when the economy cools, because the demand comes from demography rather than from orders.

Here too the Netherlands sits high: 4.3% against 3.4% in Norway, 3.3% in France, 2.8% in Belgium, 2.4% in Germany, 1.3% in Sweden and 1.2% in Finland.

The rule underneath

Line the sectors up and a pattern appears. Sectors where work can be postponed, moved or automated cooled. Sectors where it cannot did not.

A software project can wait a quarter. A renovation already under way cannot. A marketing campaign can move abroad. An operation cannot. Part of the administrative work can be absorbed by software. A roof cannot.

That is why the cooling reported in the press does not mean recruitment has got easier. It means recruitment has got easier in the sectors least dependent on people.

What this means for agencies

For a recruitment agency this is the heart of the matter. A client's question is not whether the market is tight, but whether their market is tight. That difference is now 3 percentage points wide.

- **Quote the sector rate, not the national one.** Telling a construction firm the market is cooling is factually wrong for their market. So is telling a software firm the market is red hot.
- **Ground urgency in the number that did not fall.** In construction and healthcare the vacancy rate has held nearly flat for three years despite a cooling economy. That is a stronger argument than a peak figure from 2022.
- **Lateral entry is the main route in these sectors, not a fallback.** Education structurally supplies too few. An agency that can present candidates from adjacent trades is selling the answer, not just the search.
- **Energy infrastructure is its own pool.** Grid operators report a standing shortage of technicians that persists for years, broken down by role. That is demand fixed in investment programmes rather than in order books.

What this means for employers

If you hire in construction or healthcare, you are not competing in a cooling market. You are competing with the same tightness as three years ago. Waiting for things to calm down is not a strategy in these two sectors, because nothing suggests they will.

If you hire in ICT, trade or financial services, there is genuinely more room than in 2022. But that room sits mid-career rather than at entry level, and the vacancies that remain are the hardest ones.

Method and sources

Vacancy rates come from Eurostat, dataset jvs_q_nace2, not seasonally adjusted, all size classes. The comparison is between the second quarter of 2022 and the second quarter of 2025, so seasonal effects play no part. Denmark reports no vacancy rate to Eurostat and is therefore absent from the country comparison.

The sector interpretation draws on UWV labour market information, ING sector analyses, the construction economics institute's forecasts for the building labour market, and Netbeheer Nederland's figures on technicians. The healthcare figures align with the AZW programme.

Shortage, Sectors, Construction, Healthcare, IT, All markets

Sources

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- UWV arbeidsmarktinformatie
- ING sectoronderzoek
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