



ГЭР БҮЛ, ХӨДӨЛМӨР,  
НИЙГМИЙН ХАМГААЛЛЫН ЯАМ



ХӨДӨЛМӨР, НИЙГМИЙН ХАМГААЛЛЫН  
СУРГАЛТ, ҮКМЭГЭЭ, СУВАНГАЛЫН  
ИНСТИТУТ

# LABOR MARKET BULLETIN

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First Quarter 2025

Ulaanbaatar

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# LABOR MARKET INDICATORS – FIRST QUARTER 2025

As of the 1st quarter of 2025, **1,459.1** thousand (62.0 percent) of the population aged 15 and above are in the labor force, while **893.7** thousand (38.0 percent) are outside the labor force.

## LABOR FORCE



Employed

**94.6%**



Unemployed

**5.4%**



**1 459.1** THOUSAND

## PERSONS OUTSIDE THE LABOR FORCE



Retired

**33.5%**



Students

**33.8%**



Other

**32.7%**



**893.7** THOUSAND

## EMPLOYED

Q1 2024

**1 332.6** THOUSAND

**54.0%**



**46.0%**



**3.5%**

From same period  
of the previous year

Q1 2025

**1 380.1** THOUSAND

**54.4%**



**45.6%**

## UNEMPLOYED

Q1 2024

**71.8** THOUSAND

**57.8%**



**42.2%**



**10.0%**

From same period  
of the previous year

Q1 2025

**79.0** THOUSAND

**60.3%**



**39.7%**

## 3 SECTORS OF ECONOMIC ACTIVITY WITH THE LARGEST NUMBER OF EMPLOYEES



**379.4** THOUSAND (27.5%)

Agriculture, forestry, fishing  
and hunting

**58.0%**

**219.9** THOUSAND



**42.0%**

**159.5** THOUSAND



**187.4** THOUSAND (13.6%)

Wholesale and retail trade, repair  
of vehicles and motorcycles

**44.0%**

**82.4** THOUSAND



**56.0%**

**105.0** THOUSAND



**127.8** THOUSAND (9.3%)

Manufacturing

**60.2%**

**65.0** THOUSAND



**60.2%**

**62.8** THOUSAND

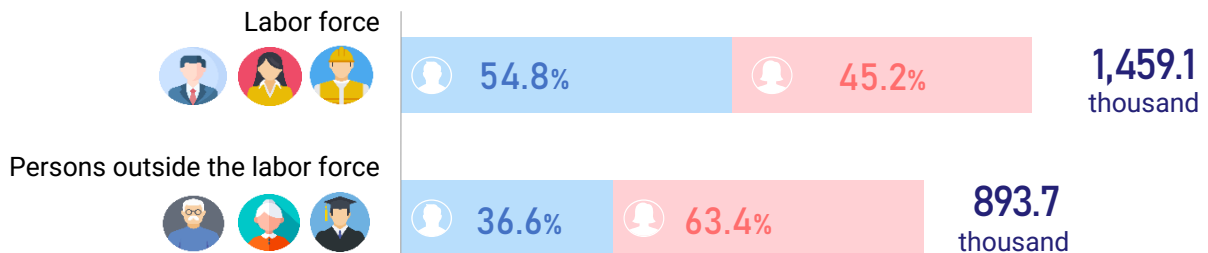


## KEY LABOR MARKET INDICATORS

### Labor market indicators

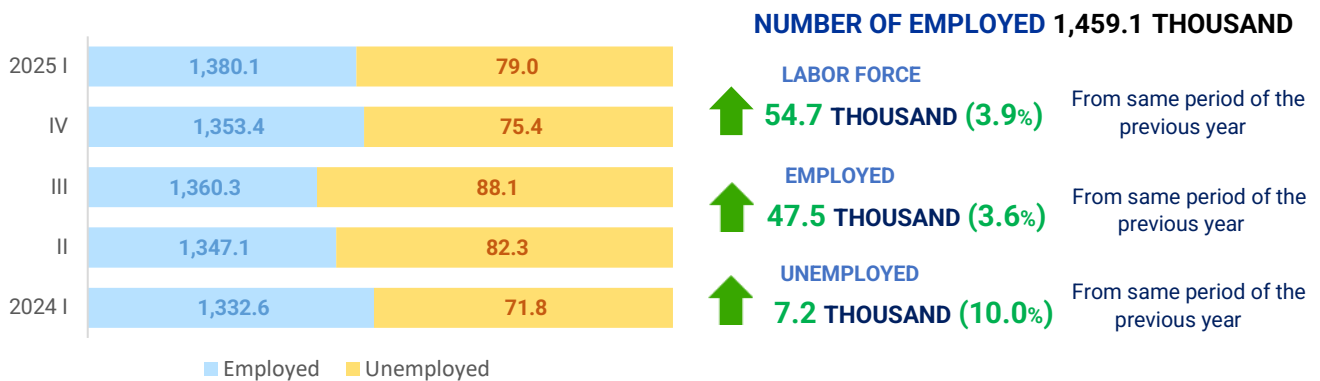
According to the results of the Labor Force Survey-Quarter I 2025 of the National Statistics Office, out of 2,352.8 thousand persons aged 15 and over, 1,459.1 thousand (62.0 percent) are in the labor-force and 893.7 thousand (38.0 percent) are persons outside the labor force. The working-age population increased by 54.7 thousand or 2.4 percent compared to the previous year and by 54.8 thousand or 2.4 percent compared to the previous quarter.

Figure 1. Labor force, number of persons outside the labor force, in thousand persons



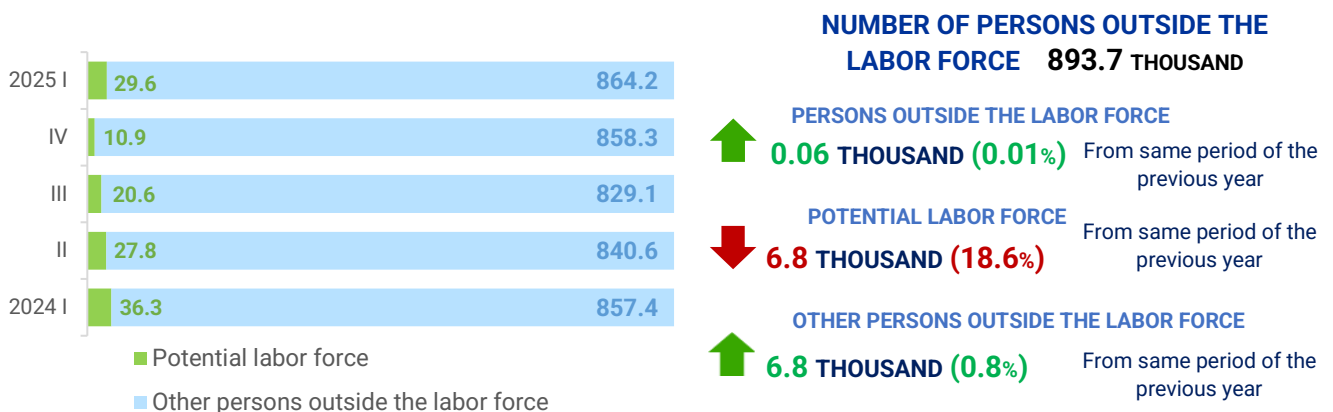
Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 2. Number of employed, in thousand persons



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 3. Number of persons outside the labor force, in thousand persons



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 4. Labor underutilization, by structure, in thousand persons

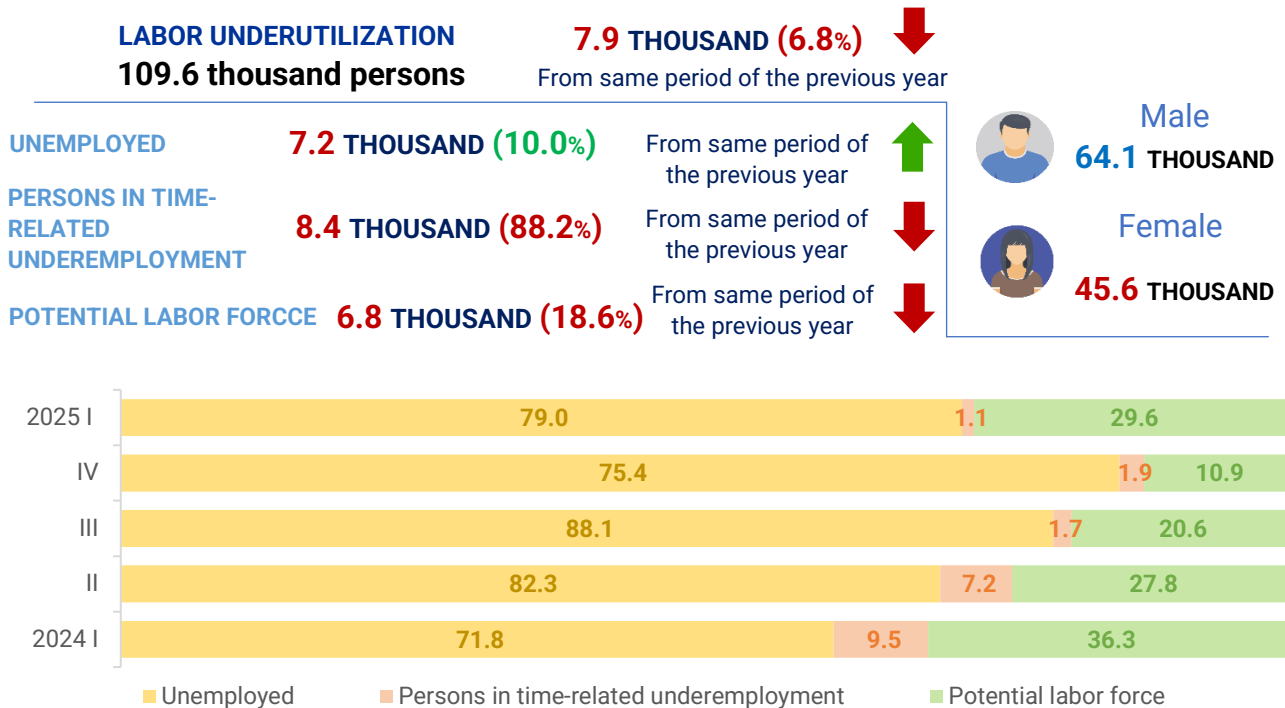
Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

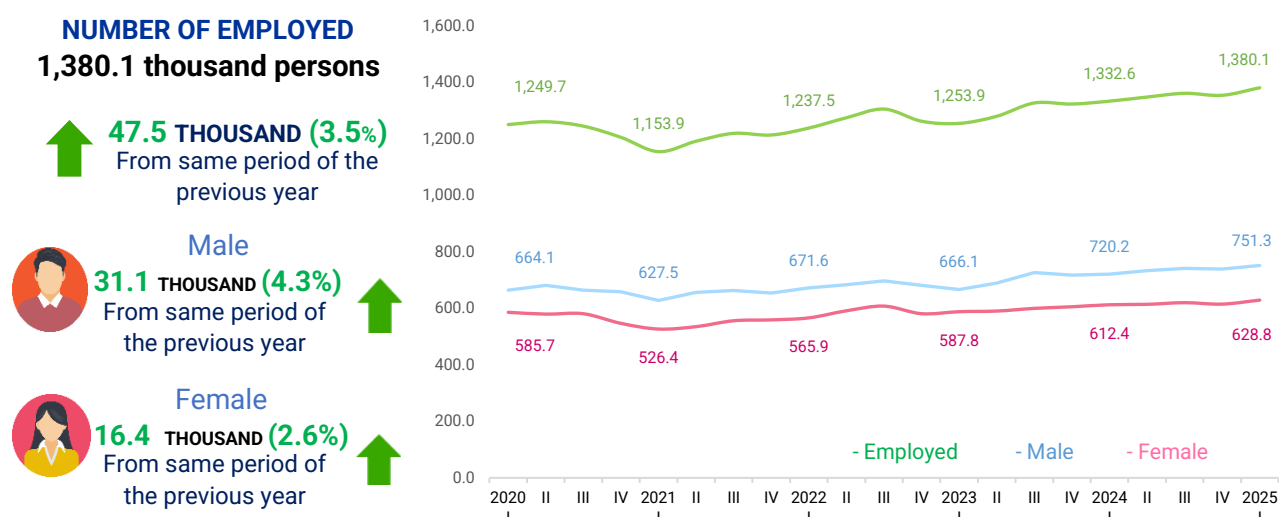
Table 1. Key employment indicators, in thousand persons

Content	2024				2025	Change	
	I	II	III	IV	I	year	quarter
Labor force	1,404.4	1,429.4	1,448.4	1,428.8	1,459.1	54.7	30.3
Female	642.7	648.6	655.4	646.2	660.1	17.4	13.9
Employed	1,332.6	1,347.1	1,360.3	1,353.4	1,380.1	47.5	26.7
Female	612.4	613.9	619.7	614.6	628.8	16.4	14.2
Time-related underemployment	9.5	7.2	1.7	1.9	1.1	-8.4	-0.8
Female	5.9	4.5	1.3	1.2	0.5	-5.4	-0.7
Unemployed	71.8	82.3	88.1	75.4	79.0	7.2	3.6
Female	30.3	34.7	35.7	31.6	31.3	1.0	-0.3
Persons outside the labor force	893.7	868.5	849.6	869.2	893.7	0.0	24.5
Female	547.0	541.4	541.3	556.1	567.0	20.0	10.9
Potential labor force	36.3	27.8	20.6	10.9	29.6	-6.7	18.7
Female	16.1	13.8	8.6	6.3	13.7	-2.4	7.4
Other persons outside the labor force	857.4	840.6	829.1	858.3	864.2	6.8	5.9
Female	530.9	527.6	532.7	549.8	553.3	22.4	3.5
Labor underutilization	117.6	117.3	110.3	88.2	109.6	-8.0	21.4
Female	52.2	53.0	45.7	39.1	45.6	-6.6	6.5

Source: [www.1212.mn](http://www.1212.mn), National Statistics Office



Figure 5. Number of employed, by gender, in thousand persons

Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

In terms of economic sector of activity, 50 out of every 100 employed persons (50.3 percent) are in agriculture, forestry, fishing, hunting, wholesale and retail trade, repair of vehicles and motorcycles, and manufacturing in the first quarter of 2025. Among these sectors, agriculture, forestry, fishing, and hunting remains the largest, accounting for one-fourth (27.5 percent) of employment.

Figure 6. Number of employed, by sector of economic activity, in thousand persons

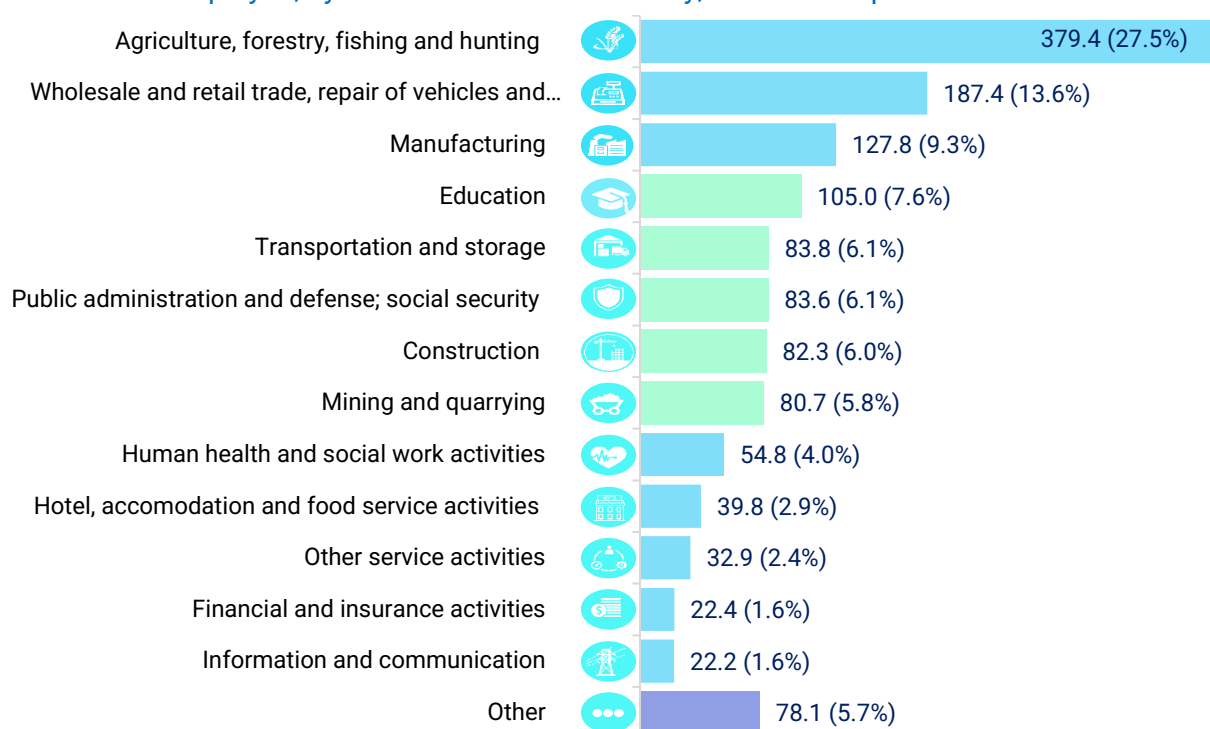
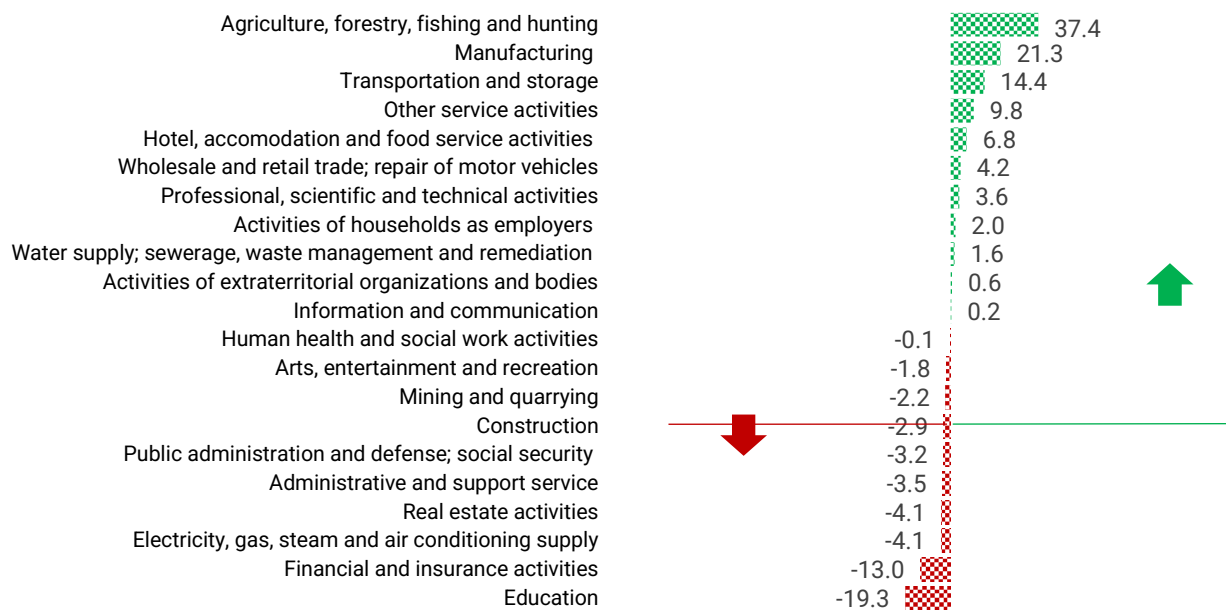
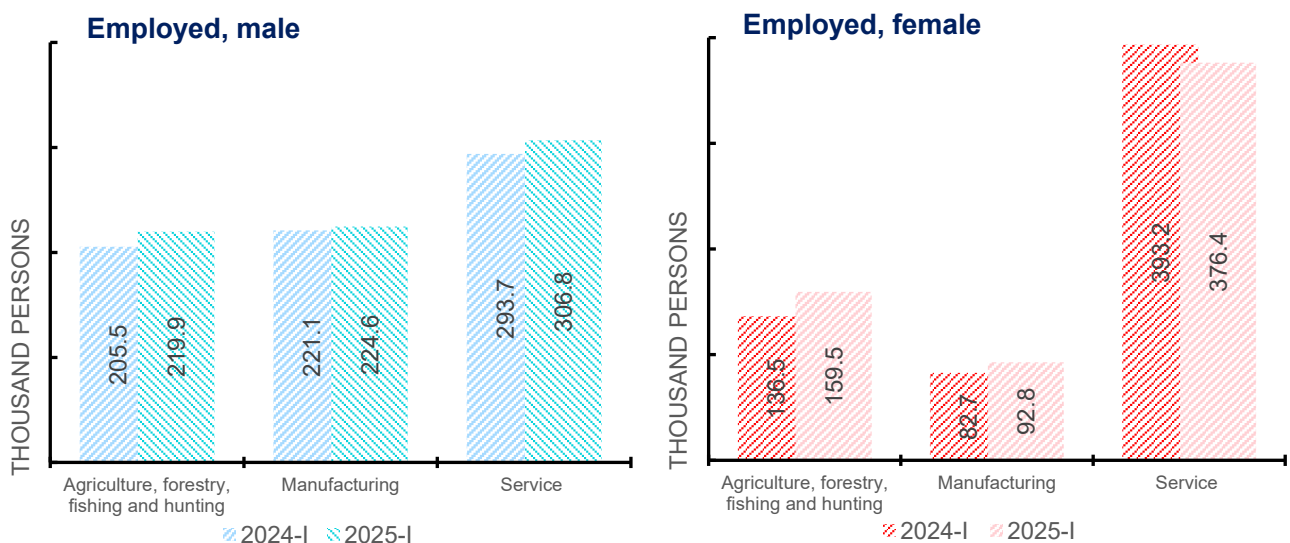
Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 7. Year-on-year change in employment, by sector of economic activity, compared to the same period of the previous year, in thousand persons



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 8. Change in the number of employed persons, by gender and by three main economic sectors, compared to the same period of the previous year, in thousand persons



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

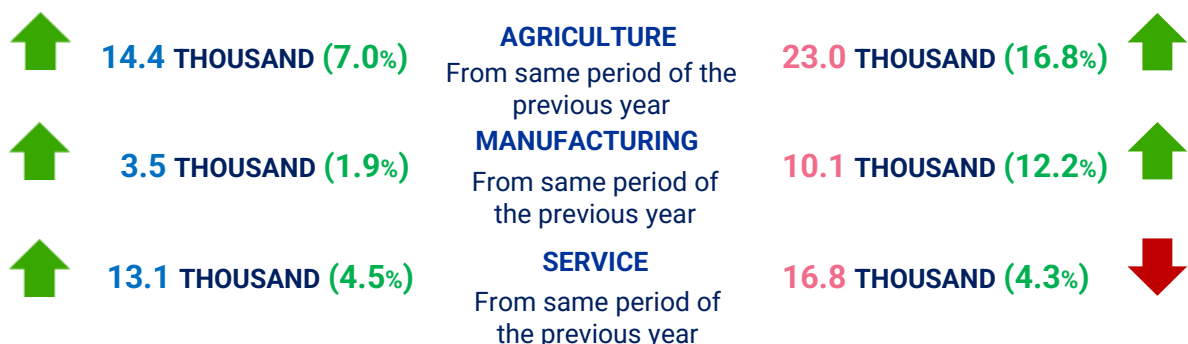


Figure 9. Number of employed, by region, by changes

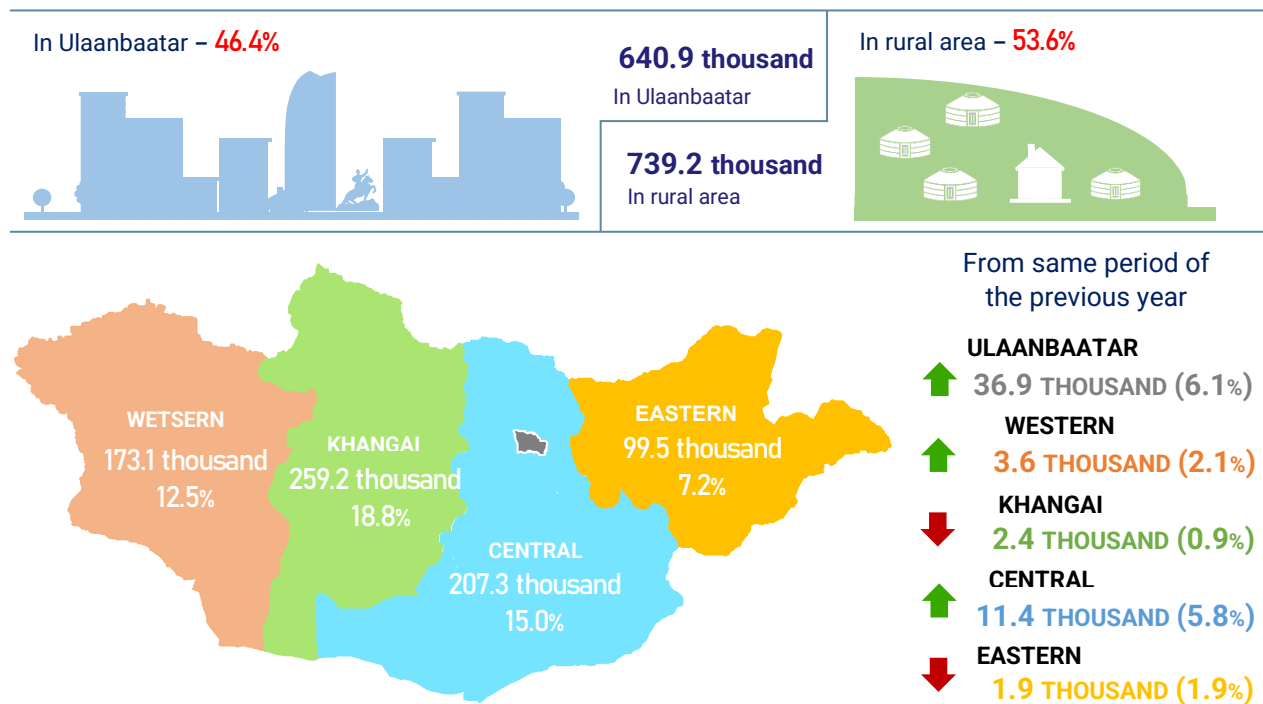


Figure 10. Number of unemployed, by gender, by region, by changes

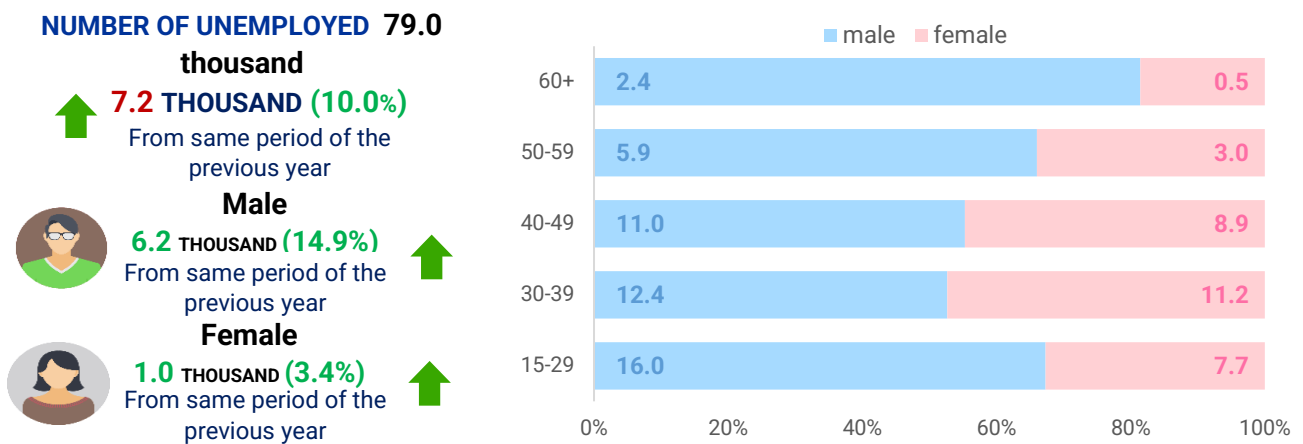
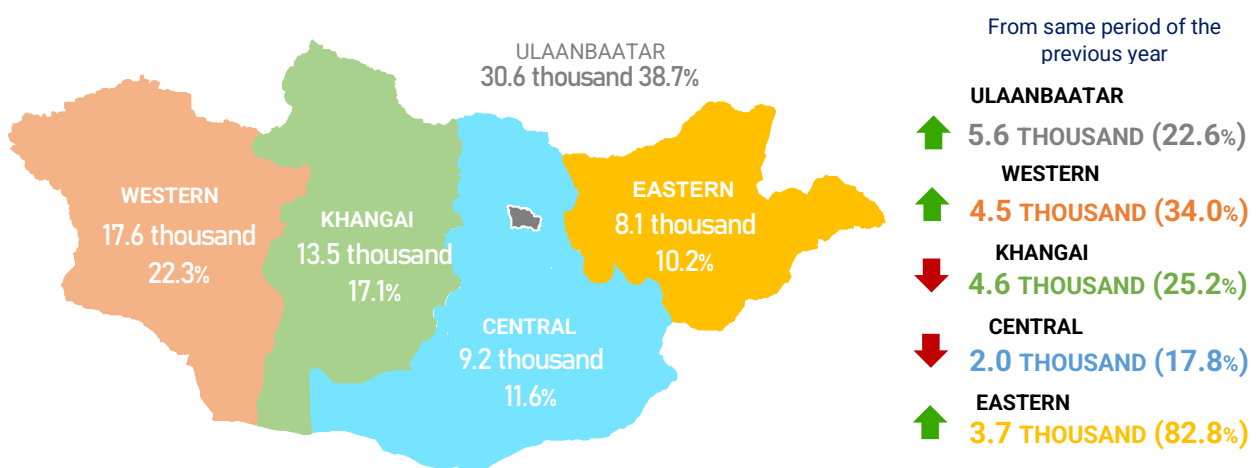
Source: [www.1212.mn](http://www.1212.mn), National Statistics OfficeSource: [www.1212.mn](http://www.1212.mn), National Statistics Office

Table 2. Number of unemployed, by quarter, in thousand persons

Content		2023				2024				2025		Change	
		I	II	III	IV	I	II	III	IV	I	Year	Quarter	
<b>Total</b>		<b>87.2</b>	<b>76.2</b>	<b>73.9</b>	<b>53.3</b>	<b>71.8</b>	<b>82.3</b>	<b>88.1</b>	<b>75.4</b>	<b>79.0</b>	<b>7.2</b>	<b>3.6</b>	
<b>Gender</b>	Male	53.9	46.6	43.2	34.4	41.4	47.6	35.7	43.8	47.6	6.2	3.8	
	Female	33.2	29.6	30.7	18.9	30.3	34.7	52.3	31.6	31.3	1	-0.3	
<b>By age group</b>	15-24	14.1	18.4	17.7	12.4	12.2	21.9	21.2	17.2	11.6	-0.6	-5.6	
	25-34	25.3	20.8	20.1	14.2	22.1	21.9	24.8	22.8	24.9	2.8	2.1	
	35-44	24.6	20.4	21.3	12.6	21.2	24.7	22.0	19.6	22.1	0.9	2.5	
	45-54	18.7	12.8	11.0	9.8	12.5	9.9	13.4	12.3	14.8	2.4	2.5	
	55+	4.5	3.8	3.9	4.3	3.8	3.9	6.7	3.5	5.5	1.7	2	
<b>By region</b>	Western region	11.6	13.7	11.7	6.7	13.1	12.3	12.1	13.3	17.6	4.5	4.3	
	Khangai region	20.8	12.5	16.3	13.4	18.1	15.8	13.8	8.8	13.5	4.6	4.7	
	Central region	12.3	15.7	15.2	10.3	11.2	10.9	11.7	12.5	9.2	-2	-3.3	
	Eastern region	3.5	3.1	5.1	3.7	4.4	3.9	5.0	4.8	8.1	3.7	3.3	
	Ulaanbaatar	39.0	31.2	25.5	19.3	24.9	39.4	45.4	35.9	30.6	5.6	-5.3	

Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 11. Number of unemployed, by education level, by percentage

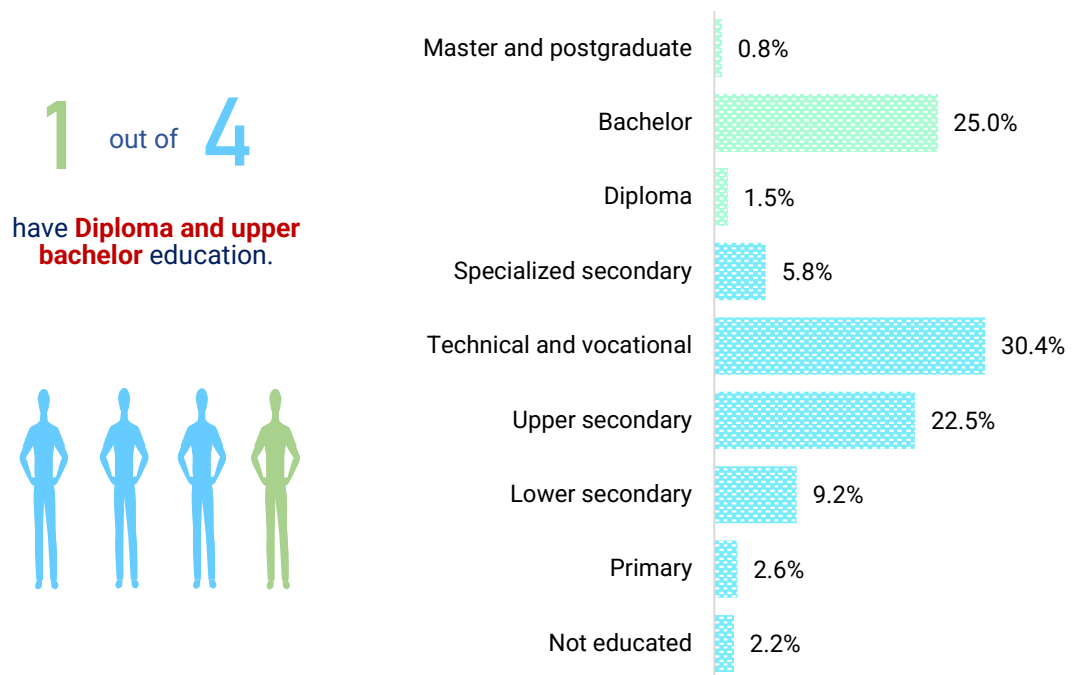
Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 12. Unemployment level, by gender

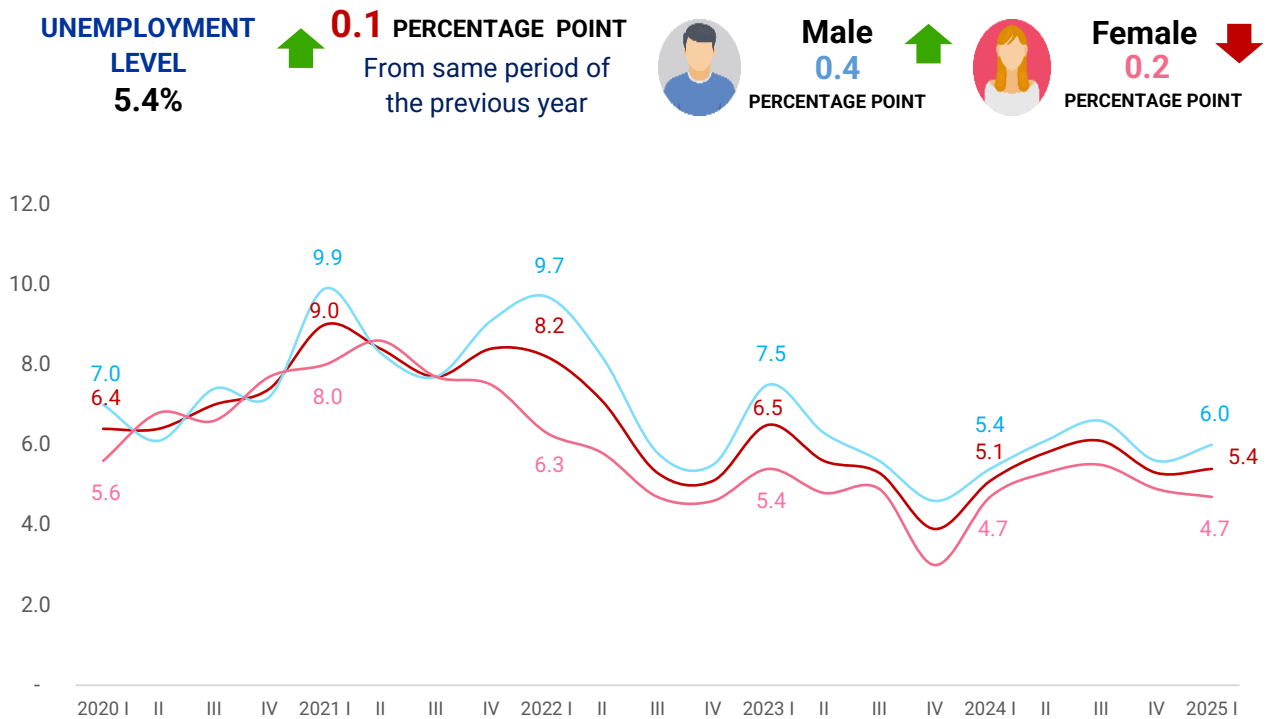
Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

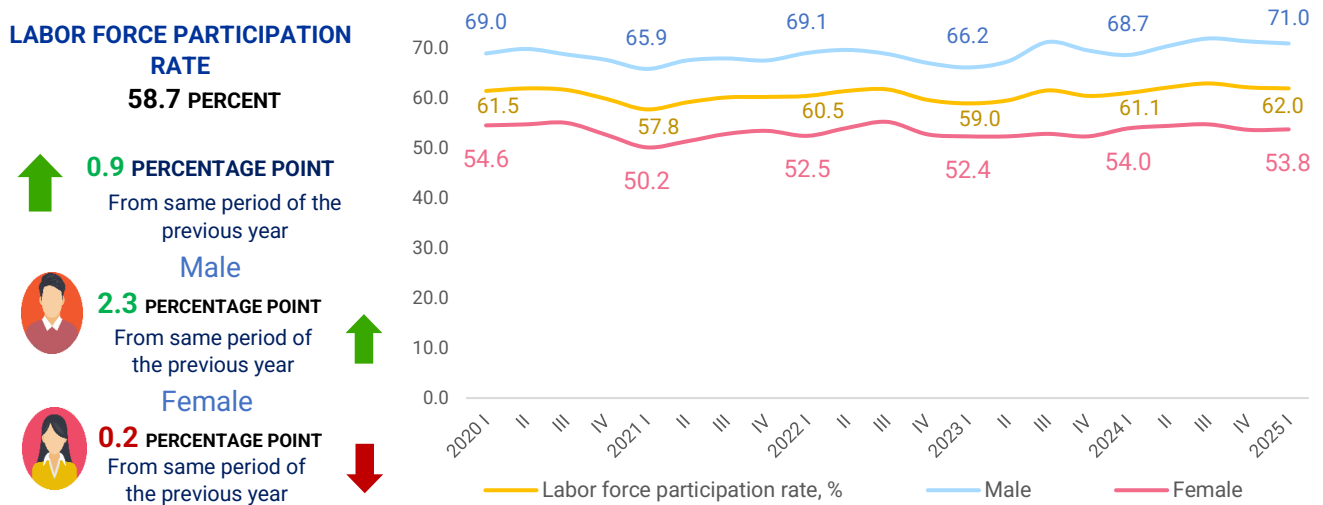
Figure 13. Working-age population (15+), percentage of employed persons among the working-age population, by quarter

Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

On a quarterly basis, the labor force participation rate which is the rate of labor supply to the working-age population, reached 62.0 percent in the first quarter of 2025, representing a decrease of 0.9 percentage points compared to the same period last year and 0.2 percentage points compared to the previous quarter.

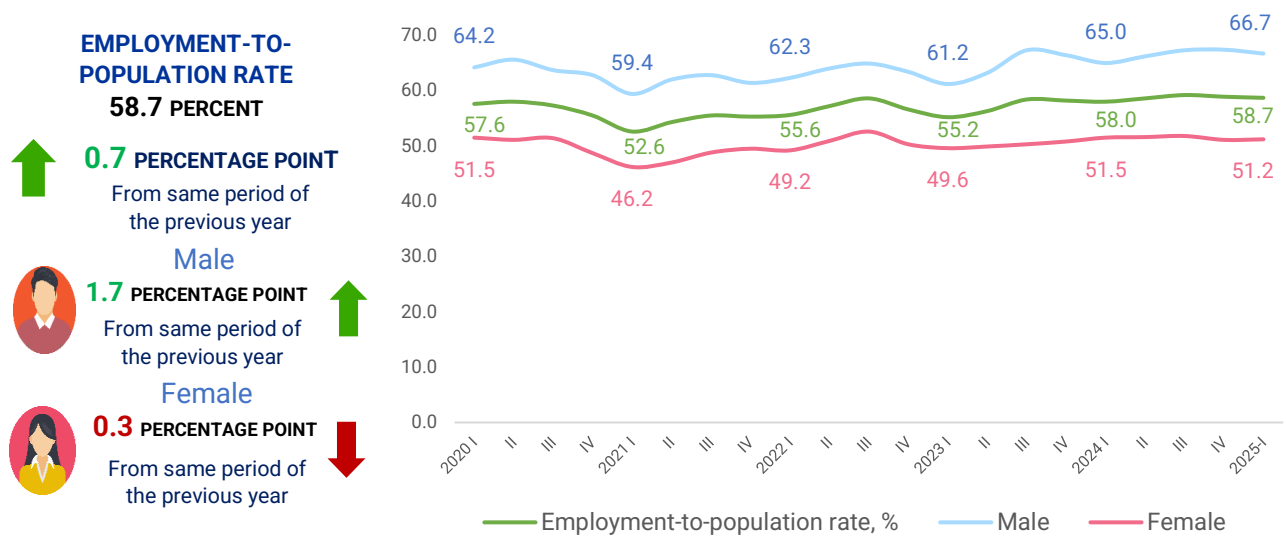
In the working-age population, the employment-to-population ratio reached 58.7 percent in the first quarter of 2025, representing an increase of 0.7 percentage points compared to the same period of the previous year.

Figure 14. Labor force participation rate, by gender, by quarter



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 15. Employment-to-population rate, by gender, by quarter



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office



# SOCIAL INSURANCE INDICATORS – FIRST QUARTER 2025

## ORGANIZATIONS PAYING SOCIAL INSURANCE PREMIUM



Q1 2024

49 329

Q1 2025

56 617

14.8% ↑

from same period  
of the previous year

## INSURED



Q1 2024

860 181

Q1 2025

977 268

13.6% ↑

from same period  
of the previous year

## PENSIONERS

Q1 2024

496.7

THOUSAND

509.9

THOUSAND

Q1 2025

2.7% ↑

from same period  
of the previous year

Old-age pension

79.8%

Invalidity pension

12.0%



Survivor's pension

3.9%

Military pension

4.3%

## Insured, by type

Compulsory

91.1%

890.4 THOUSAND



Voluntarily

8.9%

86.9 THOUSAND



## VOLUNTARY INSURED

Herder

23.2%



15.1 THOUSAND

3-FOLD

from same period  
of the previous year

## REVENUE



1 138.0 BILLION

From same period of the previous year

↑ 30.5%

## EXPENDITURE



1 443.2 BILLION

From same period of the previous year

↑ 29.3%

### Pension

80.7%



918.3 billion

### Benefit

8.6%

97.4 billion

### IAOD\*

7.6% 86.2 billion

### Unemployment

3.2% 36.2 billion

### Pension

91.1%



1 314.7 billion

### Benefit

4.8%

69.8 billion

### Unemployment

3.3% 47.1 billion

### IAOD\*

0.8% 11.7 billion



## Social insurance indicators





<b>ORGANIZATIONS PAYING CONTRIBUTION</b> <b>56.6 thousand</b>	<b>7.3 THOUSAND (14.8%)</b> From same period of the previous year 	<b>NUMBER OF INSURED</b> <b>977.3 thousand</b>	<b>117.1 THOUSAND (13.6%)</b> From same period of the previous year 
<b>MANDATORY INSURED</b> <b>890.4 thousand</b>	<b>86.4 THOUSAND (10.7%)</b> From same period of the previous year 	<b>VOLUNTARILY INSURED</b> <b>86.9 thousand</b>	<b>30.7 THOUSAND (54.7%)</b> From same period of the previous year 

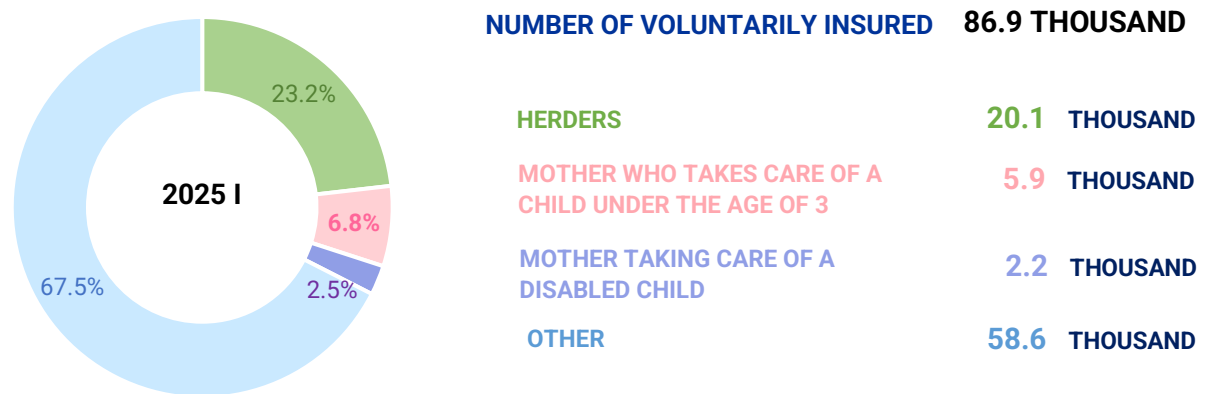
Table 3. Number of organizations paying social insurance premium and insured, by quarter

Quarter	Organizations paying social insurance contribution	Insured		
		Total	Voluntarily	Mandatory
2020 I	42,862	831,943	108,042	723,901
II	46,762	961,692	156,624	805,068
III	47,818	1,051,309	172,892	878,417
IV	49,067	1,156,793	192,090	964,703
2021 I	46,242	845,802	100,956	744,846
II	48,738	962,387	136,141	826,246
III	50,625	1,062,030	147,827	914,203
IV	52,388	1,181,282	161,111	1,020,171
2022 I	48,462	891,825	107,417	784,354
II	51,776	1,029,922	133,167	896,755
III	53,425	1,141,946	146,833	995,113
IV	55,121	1,274,588	162,414	1,112,174
2023 I	51,282	925,215	108,644	816,571
II	54,405	1,061,097	129,881	931,216
III	56,057	1,175,543	142,159	1,033,384
IV	58,209	1,315,989	158,588	1,157,401
2024 I	49,329	860,181	56,135	804,046
II	53,075	927,414	94,686	832,728
III	58,502	1,209,548	153,909	1,055,639
IV	60,657	1,332,595	171,332	1,161,263
2025 I	56,617	977,268	86,861	890,407

Source: General Authority for Social Insurance

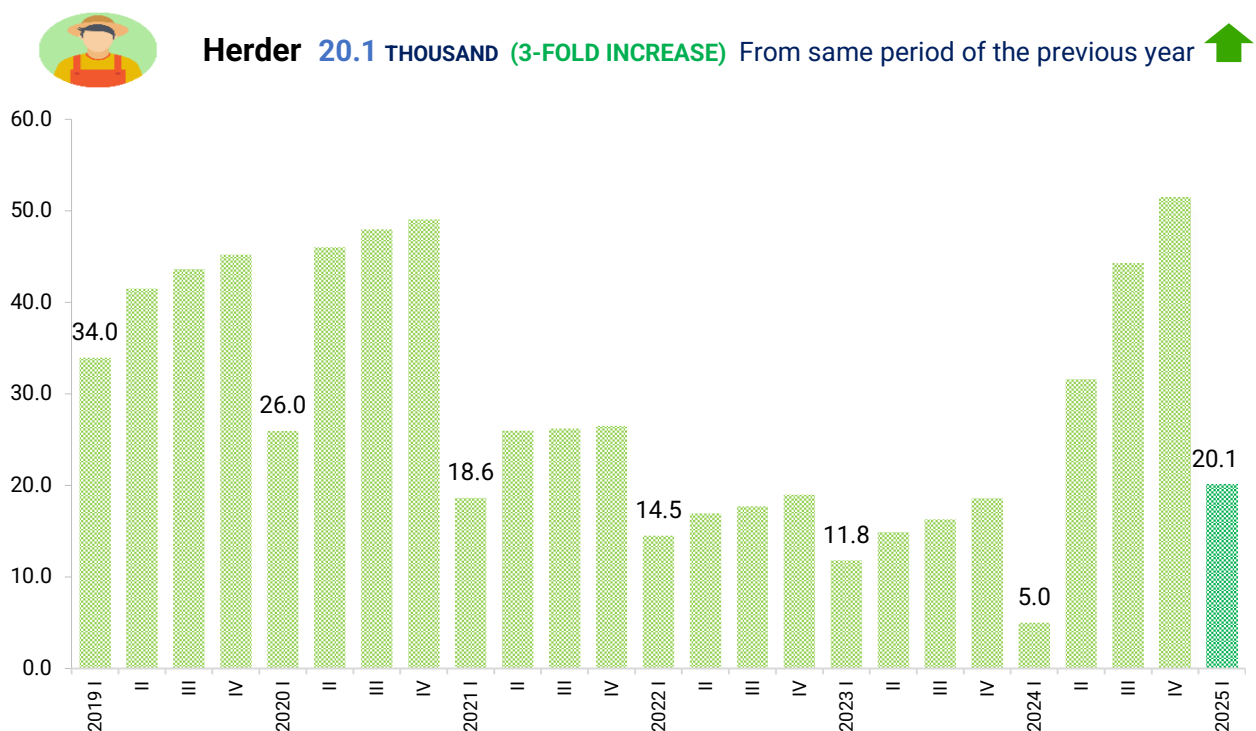


Figure 16. Number of voluntarily insured, by percentage, by types, Quarter I 2025



Source: General Authority for Social Insurance

Figure 17. Number of voluntarily insured herders, in thousand persons



Source: General Authority for Social Insurance

The number of pensioners receiving pensions from the Pension Insurance Fund reached 509.9 thousand in the first quarter of 2025, an increase of 13.3 thousand or 2.7 percent compared to the same period of the previous year and by 4.3 thousand or 0.9 percent compared to the previous quarter.

Table 4. Number of pensioners who received pension from the Pension Insurance Fund, by category, by quarter

Quarter	Number of pensioners	Of which:			
		Old-age pension	Invalidity pension	Survivor's pension	Military pension
<b>2020 I</b>	427,247	320,602	67,912	19,853	18,880
<b>II</b>	434,186	327,799	67,663	19,711	19,013
<b>III</b>	439,481	333,026	67,769	19,584	19,102
<b>IV</b>	444,788	338,982	67,018	19,553	19,235
<b>2021 I</b>	449,419	344,287	66,344	19,511	19,277
<b>II</b>	451,845	347,235	65,771	19,377	19,462
<b>III</b>	454,298	350,091	65,197	19,437	19,573
<b>IV</b>	456,365	353,775	63,318	19,563	19,709
<b>2022 I</b>	462,607	359,783	63,439	19,588	19,797
<b>II</b>	467,420	364,173	63,491	19,625	20,131
<b>III</b>	471,387	368,050	63,280	19,705	20,424
<b>IV</b>	476,446	373,209	62,702	19,743	20,792
<b>2023 I</b>	480,312	376,643	63,097	19,744	20,828
<b>II</b>	484,981	380,843	63,133	19,850	21,155
<b>III</b>	488,366	384,043	63,117	19,969	21,237
<b>IV</b>	493,038	388,345	63,305	20,008	21,380
<b>2024 I</b>	496,669	391,819	63,302	20,079	21,469
<b>II</b>	500,560	395,387	63,412	20,107	21,654
<b>III</b>	503,903	399,241	62,902	20,143	21,617
<b>IV</b>	505,624	402,358	61,569	19,989	21,708
<b>2025 I</b>	<b>509,946</b>	<b>406,881</b>	<b>61,022</b>	<b>19,936</b>	<b>22,107</b>

Source: General Authority for Social Insurance

Figure 18. Number of pensioners who received pension from the Pension Insurance Fund, by category, by percentage



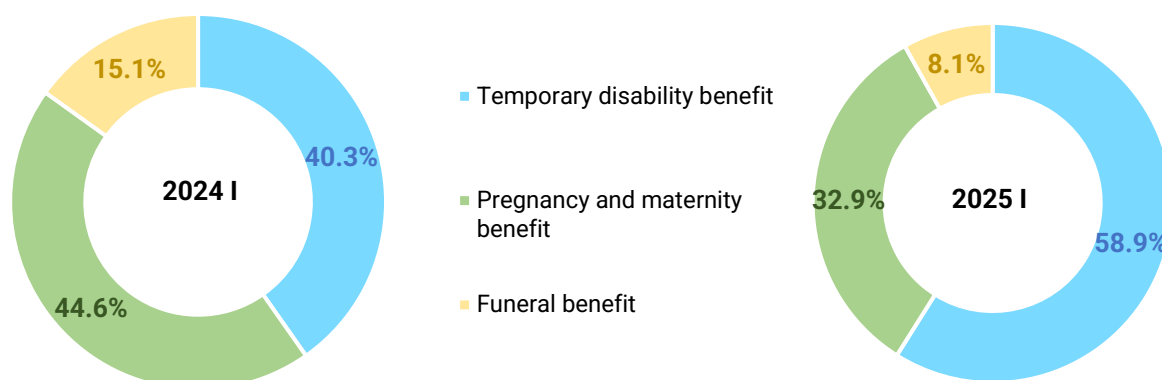
Source: General Authority for Social Insurance

Figure 19. Change in the number of pensioners receiving pensions from the Pension Insurance Fund, by type

<b>NUMBER OF PENSIONERS</b>	<b>13.3 THOUSAND (2.7%)</b>	From same period of the previous year	↑
<b>OLD-AGE PENSION</b>	<b>15.1 THOUSAND (3.8%)</b>	From same period of the previous year	↑
<b>INVALIDITY PENSION</b>	<b>2.3 THOUSAND (3.6%)</b>	From same period of the previous year	↓
<b>SURVIVOR'S PENSION</b>	<b>0.1 THOUSAND (0.7%)</b>	From same period of the previous year	↓
<b>MILITARY PENSION</b>	<b>0.6 THOUSAND (3.0%)</b>	From same period of the previous year	↑

The number of pensioners receiving benefits from the Benefit Insurance Fund reached 40.3 thousand in the first quarter of 2025, an increase of 16.4 thousand or 68.6 percent compared to the same period of the previous year.

Figure 20. Number of pensioners receiving benefits from the Benefit Insurance Fund, by category, by percentage



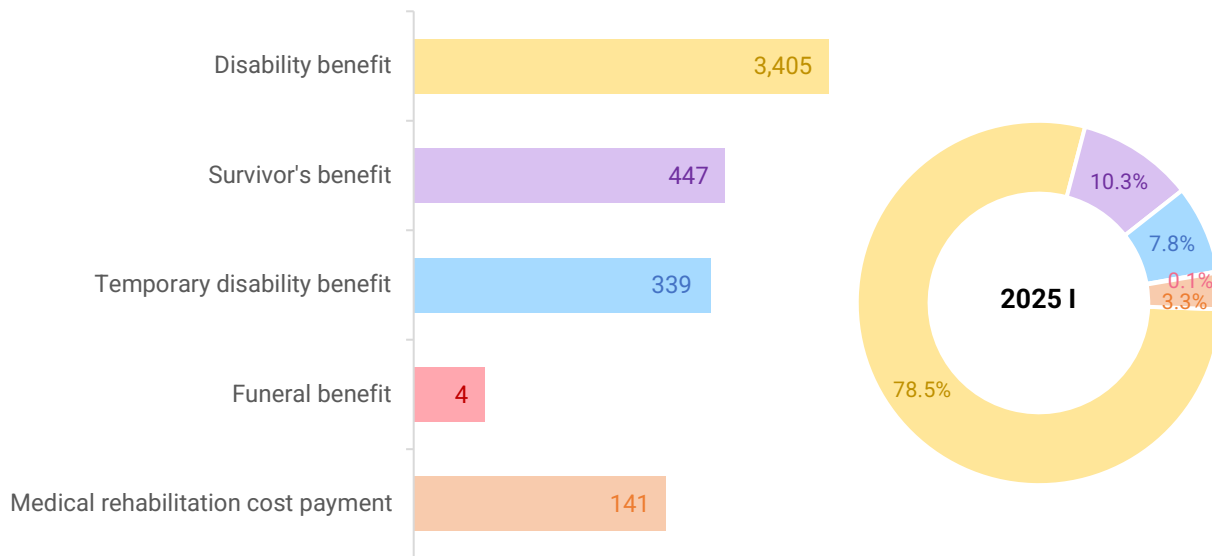
Source: General Authority for Social Insurance

Figure 21. Change in the number of pensioners receiving pensions from the Benefit Insurance Fund, by type

<b>NUMBER OF PENSIONERS</b>	<b>16.4 THOUSAND (68.6%)</b>	From same period of the previous year	↑
<b>TEMPORARY DISABILITY BENEFITS</b>	<b>14.1 THOUSAND (146.9%)</b>	From same period of the previous year	↑
<b>PREGNANCY AND MATERNITY BENEFITS</b>	<b>2.6 THOUSAND (24.4%)</b>	From same period of the previous year	↓
<b>FUNERAL BENEFITS</b>	<b>0.3 THOUSAND (9.3%)</b>	From same period of the previous year	↑

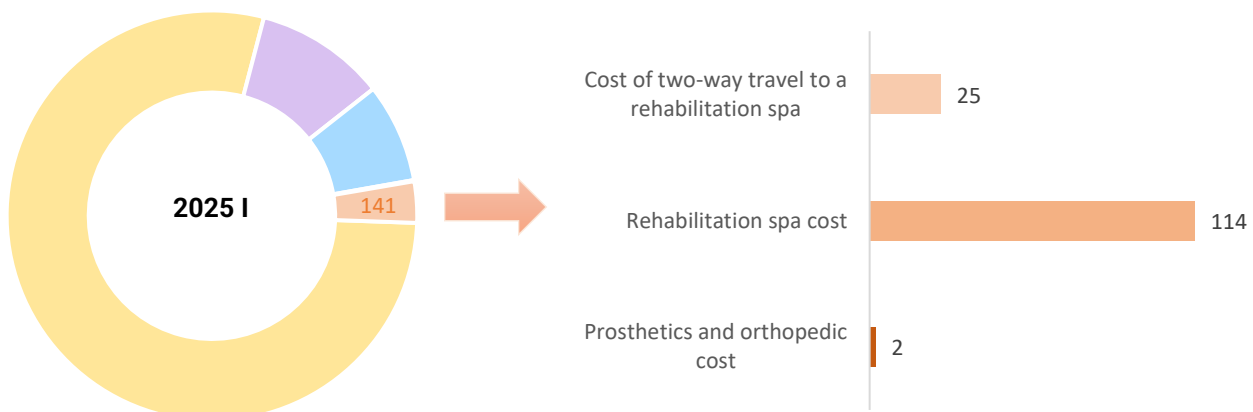
The number of pensioners receiving benefits from the Social Insurance Fund against Industrial Accidents and Occupational Diseases reached 4.3 thousand in the first quarter of 2025, an increase by 169 or 4.1 percent compared to the same period of the previous year.

Figure 22. Pensioners receiving benefits from the Social Insurance Fund against Industrial Accidents and Occupational Diseases, by category, by percentage



Source: General Authority for Social Insurance

Figure 23. Pensioners receiving health care rehabilitation expenses



Source: General Authority for Social Insurance

In the first quarter of 2025, the revenue from social insurance premium reached MNT 1,138.0 billion, an increase by MNT 266.1 billion or 30.5 percent compared to the same period of previous year and the social insurance expenditure reached MNT 1,443.2, an increase by MNT 327.0 billion or 29.3 percent compared to the same period of previous year.

#### REVENUE FROM SOCIAL INSURANCE PREMIUM

BY 266.1 BILLION (30.5%)

From same period of the previous year



#### SOCIAL INSURANCE EXPENDITURE

BY 327.0 BILLION (29.3%)

From same period of the previous year



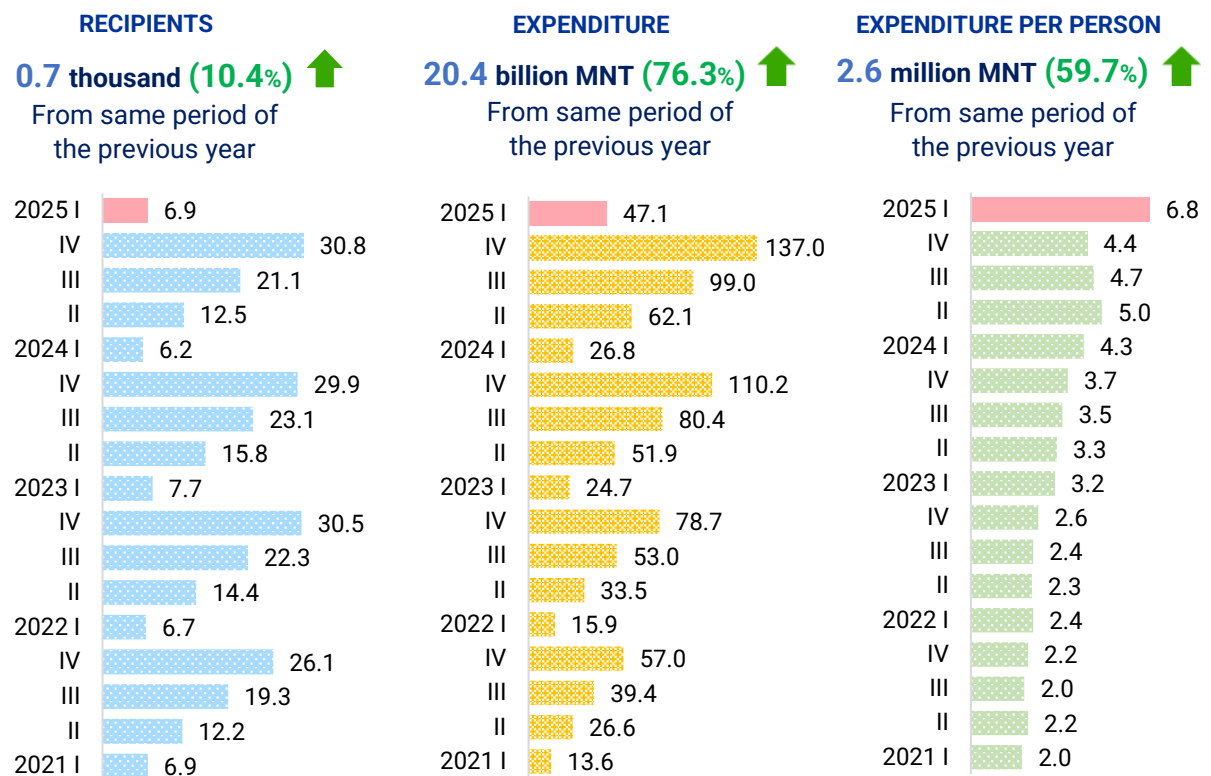
Table 5. Revenue and expenditure from social insurance premium, by billion MNT

Contents	2024 I		2025 I		Changes	
		Percentage		Percentage	In figure	Percentage
Revenue from social insurance premium	<b>871.9</b>	<b>100.0%</b>	<b>1,138.0</b>	<b>100.0%</b>	<b>266.1</b>	30.5%
Pension	708.0	81.2%	918.3	80.7%	210.3	29.7%
Benefit	74.4	8.5%	97.4	8.6%	23.0	30.9%
Industrial accident and occupational disease	62.2	7.1%	86.2	7.6%	24.0	38.6%
Unemployment	27.2	3.1%	36.2	3.2%	9.0	33.1%
Social insurance expenditure	<b>1,116.2</b>	<b>100.0%</b>	<b>1,443.2</b>	<b>100.0%</b>	<b>327.0</b>	<b>29.3%</b>
Pension	1,035.9	92.8%	1,314.7	91.1%	278.8	26.9%
Benefit	43.5	3.9%	69.8	4.8%	26.3	60.5%
Industrial accident and occupational disease	10.1	0.9%	11.7	0.8%	1.6	15.8%
Unemployment	26.7	2.4%	47.1	3.3%	20.4	76.3%

Source: General Authority for Social Insurance

As of the first quarter of 2025, MNT 47.1 billion was spent as unemployment benefits for 6.9 thousand people.

Figure 24. Number of people who received unemployment benefit, the expenditure spent, by quarter



Source: General Authority for Social Insurance

# EMPLOYMENT PROMOTION ACTIVITY – FIRST QUARTER 2025

## JOB SEEKER

7 771



Disability  
2.4%



Female  
48.8%



## REGISTERED UNEMPLOYED

6 591

Disability  
2.0%



Female  
49.5%



## JOB ORDER

22 952



31.6%

From same period  
of the previous year



12.4%

Labor market  
demand fulfilment



## JOB PLACEMENT

2 842



42.4%

From same period  
of the previous year

Female  
52.0%



## FOREIGN CITIZENS WORKING IN MONGOLIA UNDER CONTRACT, by country

9 871

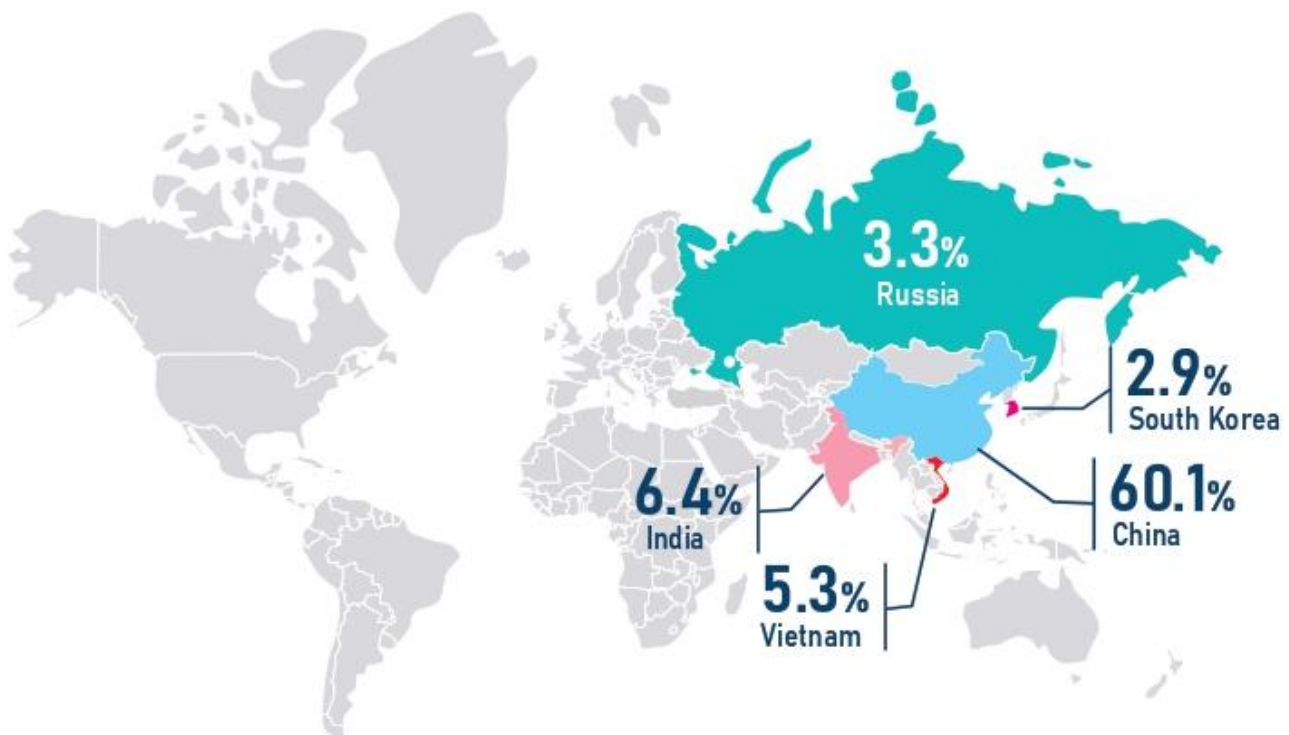
Foreign citizens



8 451  
(85.6%)



1 420  
(14.4%)

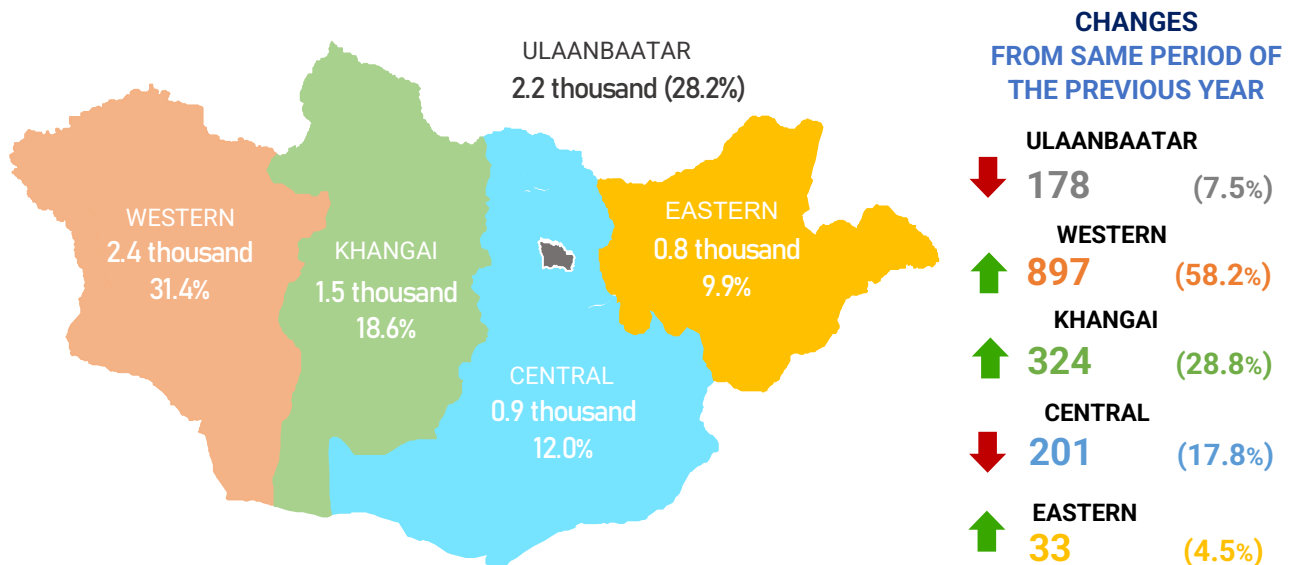


## EMPLOYMENT PROMOTION ACTIVITY

### Employment promotion services

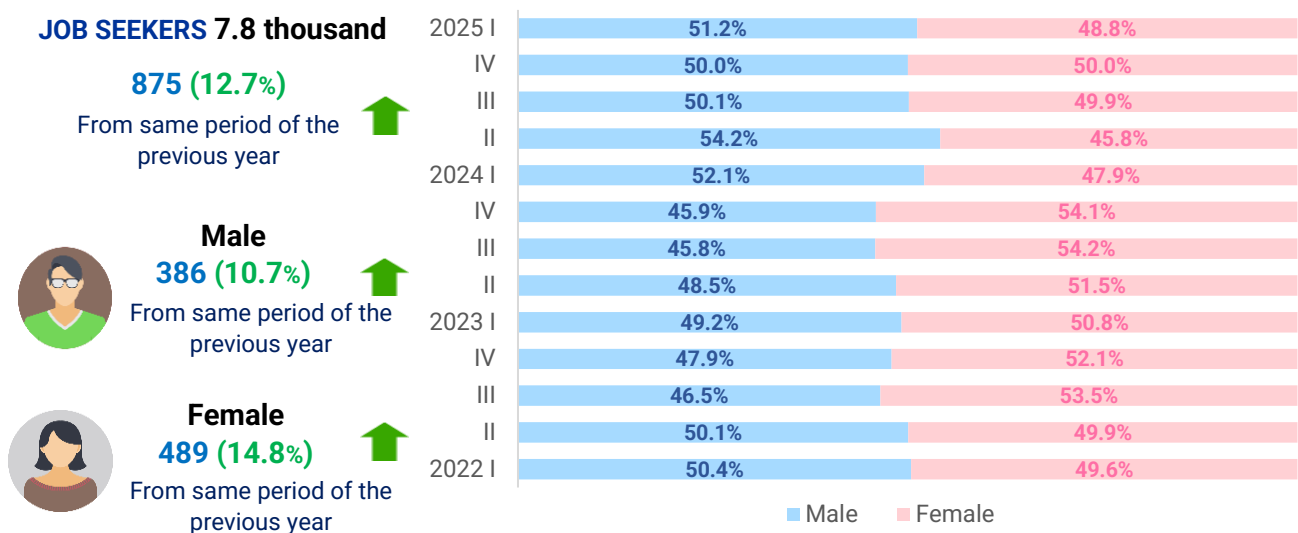
The number of job seekers who are currently not employed or employed but looking for a job to earn additional income reached 7.8 thousand in the first quarter of 2025.

Figure 25. Job seekers, by region, as of Quarter I 2025



Source: General Agency of Labor and Welfare Service

Figure 26. Job seekers, by gender, as of the Quarter I 2025

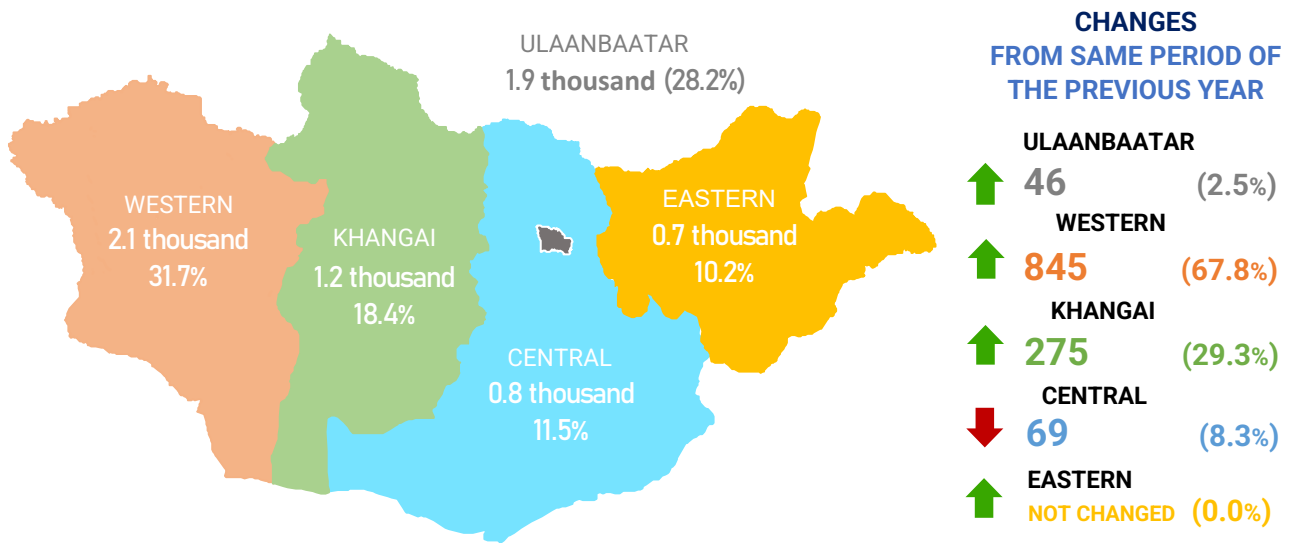


Source: General Agency of Labor and Welfare Service

In the reporting period, the number of registered unemployed who are currently not employed or those who are actively looking for a job and registered with the labor and welfare service departments or labor exchange offices reached 6.6 thousand.

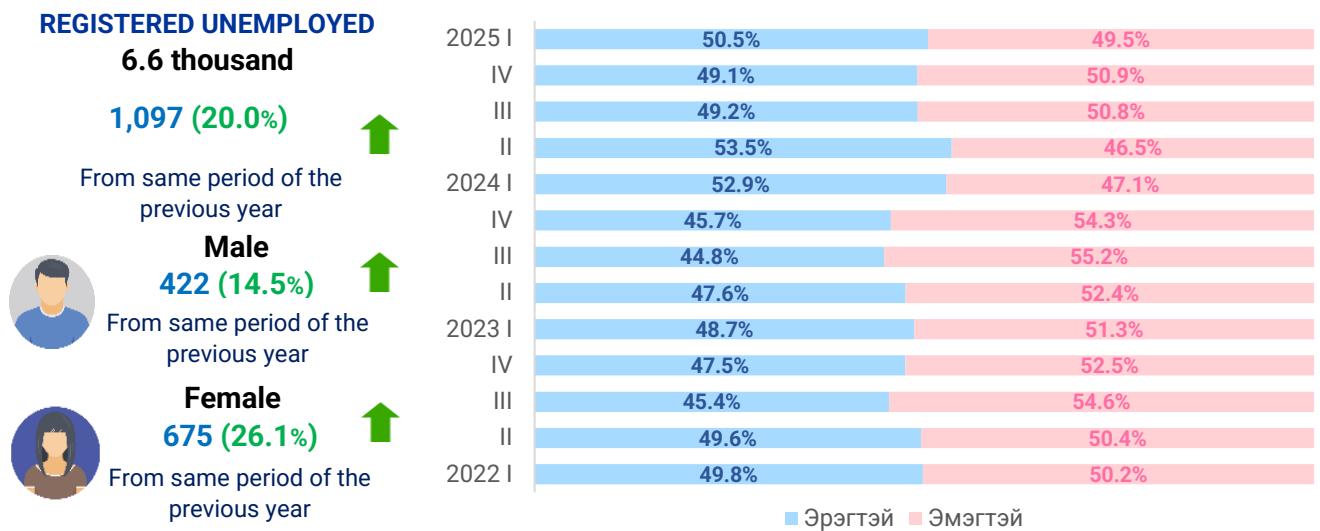


Figure 27. Registered unemployed, by region, Quarter I 2025



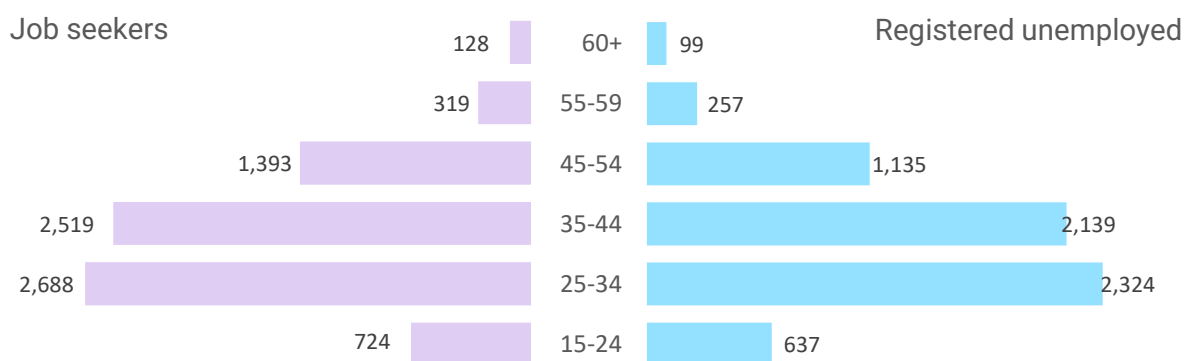
Source: General Agency of Labor and Welfare Service

Figure 28. Registered unemployed, by gender, Quarter I 2025



Source: General Agency of Labor and Welfare Service

Figure 29. Number of job seekers and registered unemployed, by age group, Quarter I 2025



Source: General Agency of Labor and Welfare Service

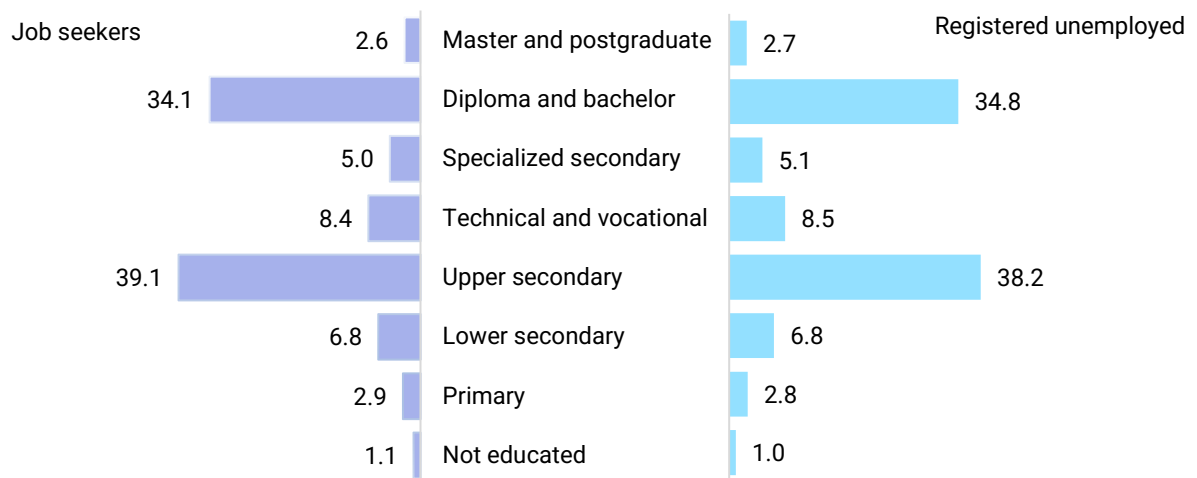


Table 6. Number of job seekers and registered unemployed, as of the end of the month, by quarter

Quarter	Job seekers /at the end of the month/			Registered unemployed		
		Women	Percentage	/at the end of the month/	Women	Percentage
<b>2020 I</b>	<b>31,785</b>	<b>16,285</b>	<b>51.2%</b>	<b>19,394</b>	<b>10,009</b>	<b>51.6%</b>
II	30,320	15,367	50.7%	19,563	10,001	51.1%
III	27,504	14,301	52.0%	17,829	9,446	53.0%
IV	29,952	15,390	51.4%	18,103	9,535	52.7%
<b>2021 I</b>	<b>25,105</b>	<b>12,774</b>	<b>50.9%</b>	<b>16,775</b>	<b>8,650</b>	<b>51.6%</b>
II	26,991	13,837	51.3%	17,650	9,202	52.1%
III	21,804	11,316	51.9%	15,053	7,895	52.4%
IV	27,950	14,510	51.9%	18,644	9,821	52.7%
<b>2022 I</b>	<b>24,255</b>	<b>12,019</b>	<b>49.6%</b>	<b>16,622</b>	<b>8,345</b>	<b>50.2%</b>
II	24,184	12,075	49.9%	16,282	8,210	50.4%
III	19,832	10,609	53.5%	13,545	7,389	54.8%
IV	21,256	11,069	52.1%	13,966	7,326	52.4%
<b>2023 I</b>	<b>14,246</b>	<b>7,238</b>	<b>50.7%</b>	<b>9,069</b>	<b>4,651</b>	<b>51.1%</b>
II	5,737	2,954	51.5%	4,323	2,265	52.4%
III	6,224	3,372	54.2%	4,655	2,568	55.2%
IV	11,662	6,308	54.1%	8,813	4,784	54.3%
<b>2024 I</b>	<b>6,896</b>	<b>3,303</b>	<b>47.9%</b>	<b>5,494</b>	<b>2,590</b>	<b>47.1%</b>
II	9,563	4,384	45.8%	7,681	3,570	46.5%
III	7,178	3,579	49.9%	5,811	2,954	50.8%
IV	11,970	5,984	50.0%	9,996	5,091	50.9%
<b>2025 I</b>	<b>7,771</b>	<b>3,792</b>	<b>48.8%</b>	<b>6,591</b>	<b>3,265</b>	<b>49.5%</b>

Source: General Agency of Labor and Welfare Service

Figure 30. Job seekers and registered unemployed, by education level, by percentage, Quarter I, 2025



Source: General Agency of Labor and Welfare Service

In the first quarter of 2025, 23.0 thousand job orders were received and 2.8 thousand people were placed in jobs and 12.4 percent of labor market demand was fulfilled.

In the first quarter of 2025, 12.4 percent of the total labor market demand was fulfilled. This represents a decrease of 15.9 percentage points compared to the same period of the previous year and a decrease of 17.4 percentage points compared to the previous quarter.

Table 7. Job order, job placement, by quarter

**JOB ORDER** **5.5 THOUSAND (31.6%)**

From same period of the  
previous year



**JOB PLACEMENT** **2.1 THOUSAND (42.4%)**

From same period of the  
previous year



Quarter	Job order	Job placement	Women	Percentage	Labor market demand fulfilment
<b>2020 I</b>	<b>7,595</b>	<b>4,489</b>	<b>2,307</b>	<b>51.4%</b>	<b>59.1%</b>
II	28,036	15,250	7,330	48.1%	54.4%
III	42,433	21,672	10,858	50.1%	51.1%
IV	58,022	33,006	16,651	50.4%	56.9%
<b>2021 I</b>	<b>6,413</b>	<b>3,066</b>	<b>1,545</b>	<b>50.4%</b>	<b>47.8%</b>
II	20,352	11,416	5,542	48.5%	56.1%
III	32,656	17,636	9,068	51.4%	54.0%
IV	51,034	29,929	15,460	51.7%	58.6%
<b>2022 I</b>	<b>9,322</b>	<b>3,901</b>	<b>2,003</b>	<b>51.3%</b>	<b>41.8%</b>
II	24,320	13,670	6,709	49.1%	56.2%
III	32,972	18,897	9,499	50.3%	57.3%
IV	55,211	32,290	16,412	50.8%	58.5%
<b>2023 I</b>	<b>4,863</b>	<b>2,267</b>	<b>1,066</b>	<b>47.0%</b>	<b>46.6%</b>
II	16,950	8,199	4,149	50.6%	48.3%
III	50,222	16,656	8,660	51.2%	33.2%
IV	84,870	35,281	18,903	53.6%	41.6%
<b>2024 I</b>	<b>17,435</b>	<b>4,930</b>	<b>2,486</b>	<b>50.4%</b>	<b>28.3%</b>
II	53,198	13,964	6,521	46.7%	26.2%
III	73,959	18,564	8,976	48.4%	25.1%
IV	112,390	33,485	16,763	50.1%	29.8%
<b>2025 I</b>	<b>22,952</b>	<b>2,842</b>	<b>1,478</b>	<b>52.0%</b>	<b>12.4%</b>

Source: General Agency of Labor and Welfare Service

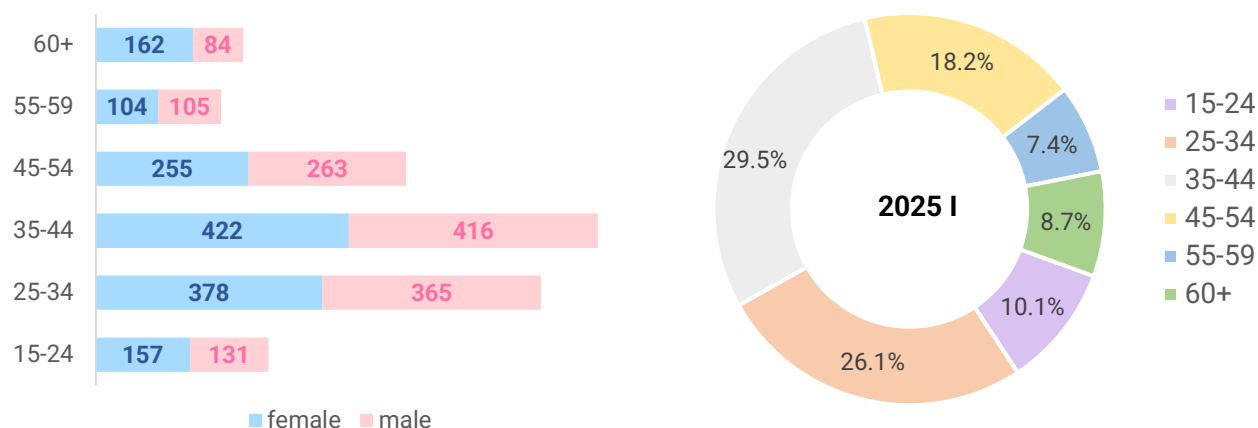
As for labor market demand by economic activity, out of total job orders received in the first quarter of 2025, 5.1 thousand (22.1 percent) of all job orders were received in mining and quarrying, 4.2 thousand (18.1 percent) in construction, 3.5 thousand (15.4 percent) in manufacturing and 2.5 thousand (10.9 percent) in electricity, gas, steam and air conditioning supply.

Table 8. Job order, job placement, Quarter I 2025

Sector of economic activities	Job order		Job placement		Demand fulfillment percentage
		Percentage		Percentage	
Total	22,952	100.00%	2,842	100.00%	12.38%
Agriculture, forestry, fishing and hunting	1,631	7.11%	448	15.76%	27.47%
Mining and quarrying	5,060	22.05%	205	7.21%	4.05%
Manufacturing	3,534	15.40%	330	11.61%	9.34%
Electricity, gas, steam and air conditioning supply	2506	10.92%	21	0.74%	0.84%
Water supply, sewerage, waste management and remediation activities	728	3.17%	261	9.18%	35.85%
Construction	4,152	18.09%	130	4.57%	3.13%
Wholesale and retail trade	766	3.34%	164	5.77%	21.41%
Transportation and storage	707	3.08%	34	1.20%	4.81%
Hotel, accommodation and food service activities	450	1.96%	36	1.27%	8.00%
Information and communication	52	0.23%	11	0.39%	21.15%
Financial and insurance activities	55	0.24%	22	0.77%	40.00%
Real estate activities	123	0.54%	0	0.00%	0.00%
Professional, scientific and technical activities	95	0.41%	52	1.83%	54.74%
Administrative and support services	635	2.77%	139	4.89%	21.89%
Public administration and defense	1,211	5.28%	606	21.32%	50.04%
Education	501	2.18%	206	7.25%	41.12%
Health and social work activities	399	1.74%	88	3.10%	22.06%
Arts, entertainment and recreation	86	0.37%	15	0.53%	17.44%
Other service activities	246	1.07%	71	2.50%	28.86%
Activities of households as employers	10	0.04%	1	0.04%	10.00%
Activities of extraterritorial organizations and bodies	5	0.02%	2	0.07%	40.00%

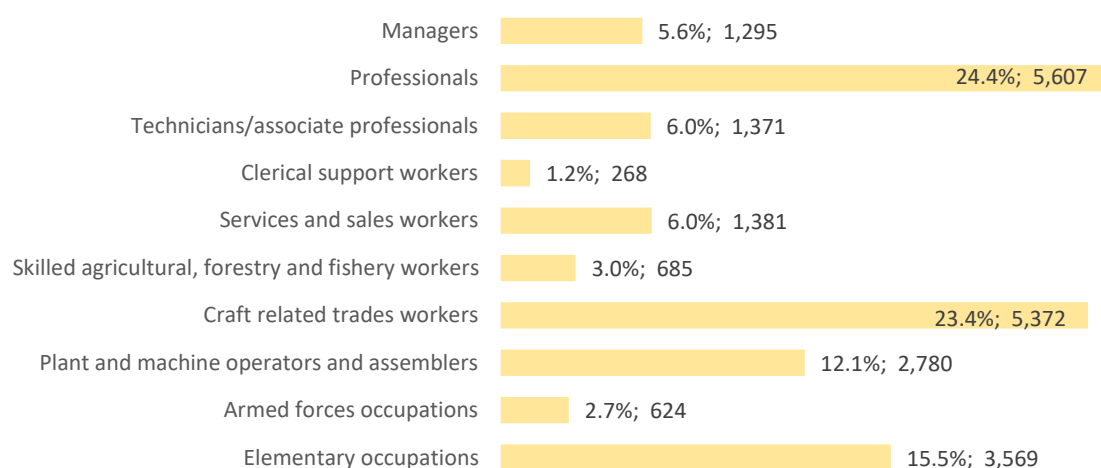
Source: General Agency of Labor and Welfare Service

Figure 31. Job placement, by gender and age group, Quarter I 2025



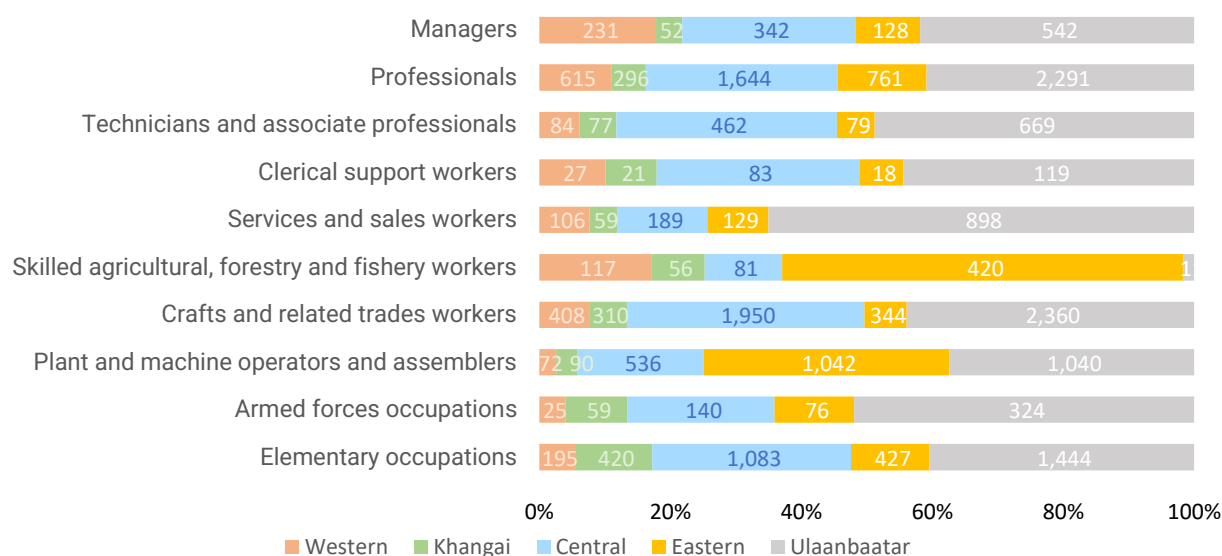
Source: General Agency of Labor and Welfare Service

Figure 32. Job order, by occupational classification, by percentage



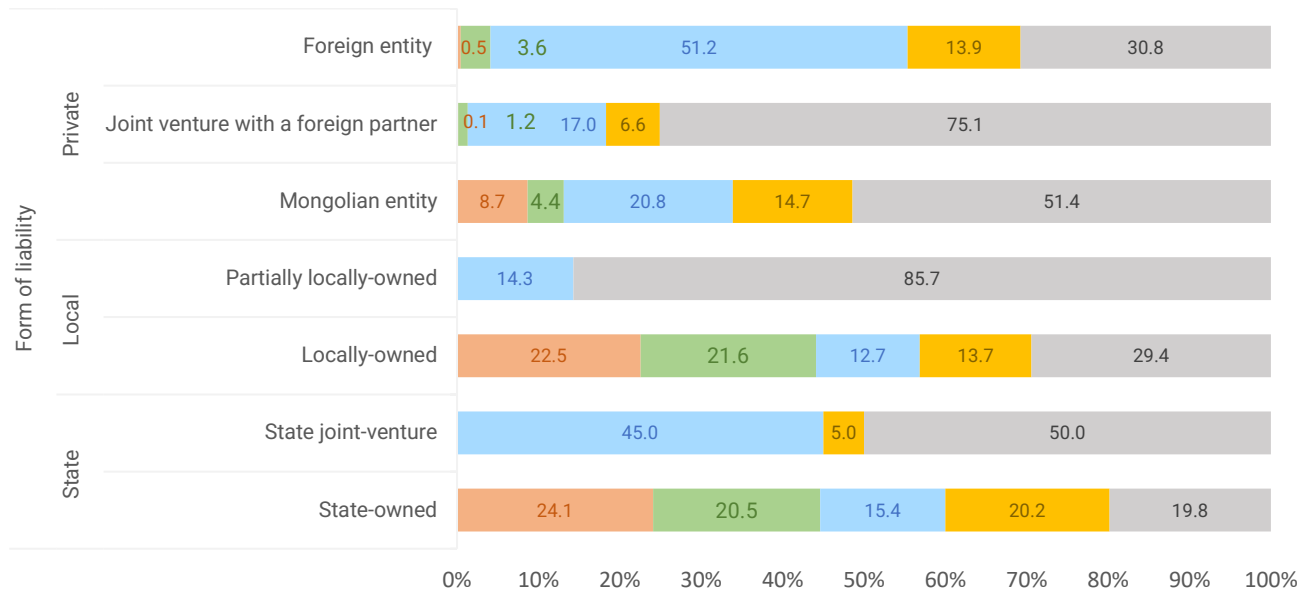
Source: General Agency of Labor and Welfare Service

Figure 33. Job order, by occupational classification, by region



Source: General Agency of Labor and Welfare Service

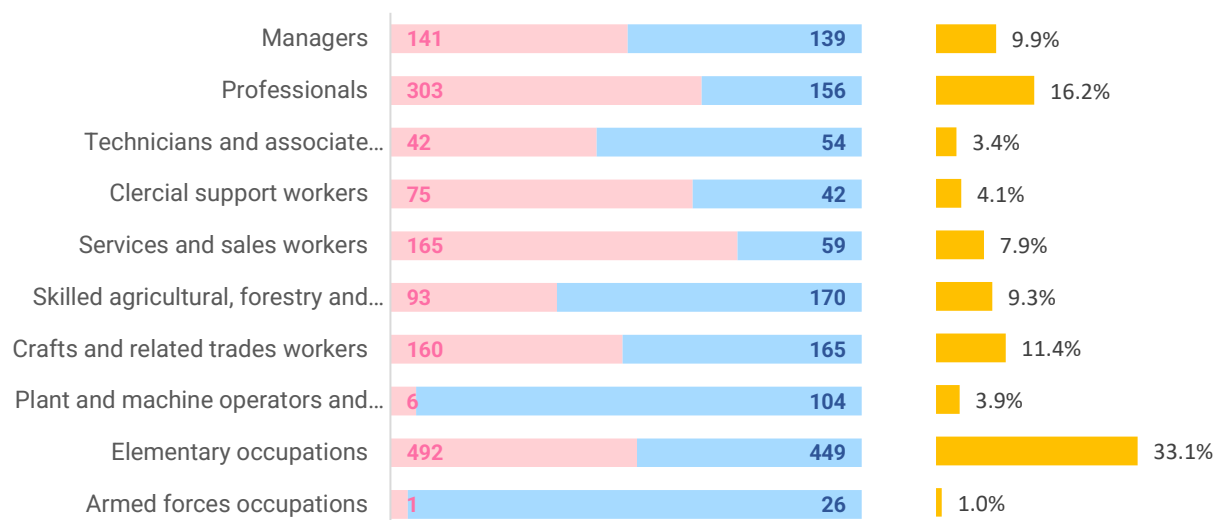
Figure 34. Job order, by form of liability, by region, by percentage, Quarter I 2025



	Form of liability						
	State		Local		Private		
	State-owned	State joint-venture	Locally-owned	Partially locally-owned	Mongolian entity	Joint venture with a foreign partner	Foreign entity
Western	722	-	23	-	1,104	1	30
Khangai	614	-	22	-	564	9	231
Central	460	9	13	1	2,639	128	3,260
Eastern	604	1	14	-	1,872	50	883
Ulaanbaatar	594	10	30	6	6,535	566	1,957

Source: General Agency of Labor and Welfare Service

Figure 35. Job placement, by occupational classification, by gender, by percentage

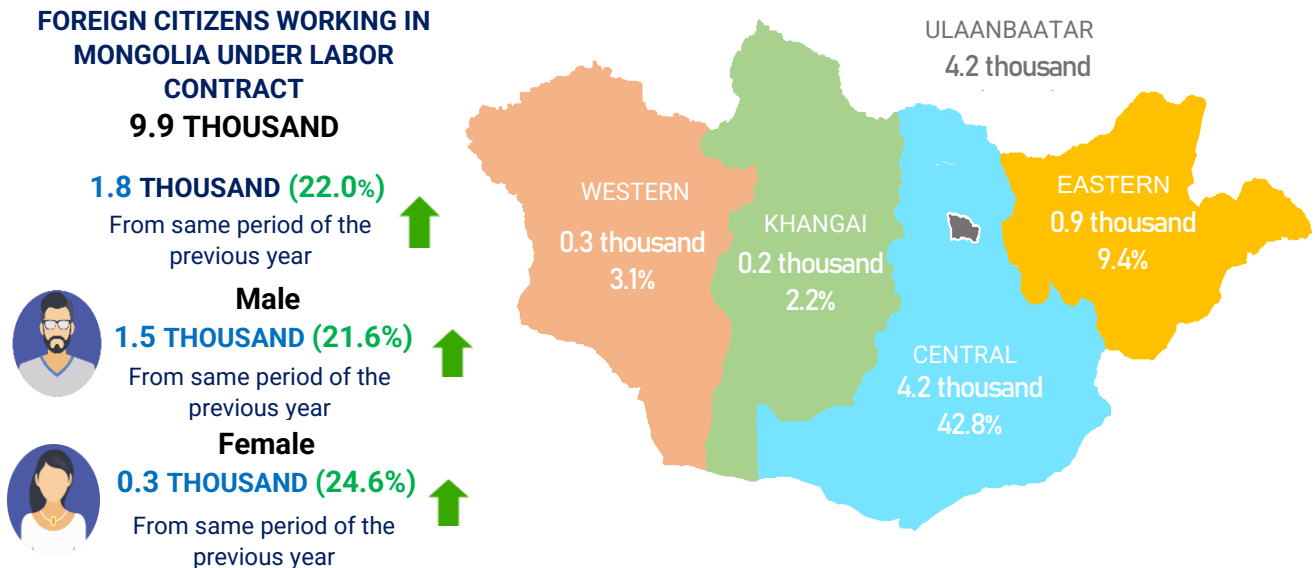


Source: General Agency of Labor and Welfare Service

## Receiving labor force and specialists from abroad and sending labor force abroad

As of the first quarter of 2025, 9,871 citizens from 103 foreign countries are working in Mongolia under a labor contract. By gender, 8,451 (85.6 percent) of total foreign citizens working in Mongolia are men and 1,420 (14.4 percent) are women.

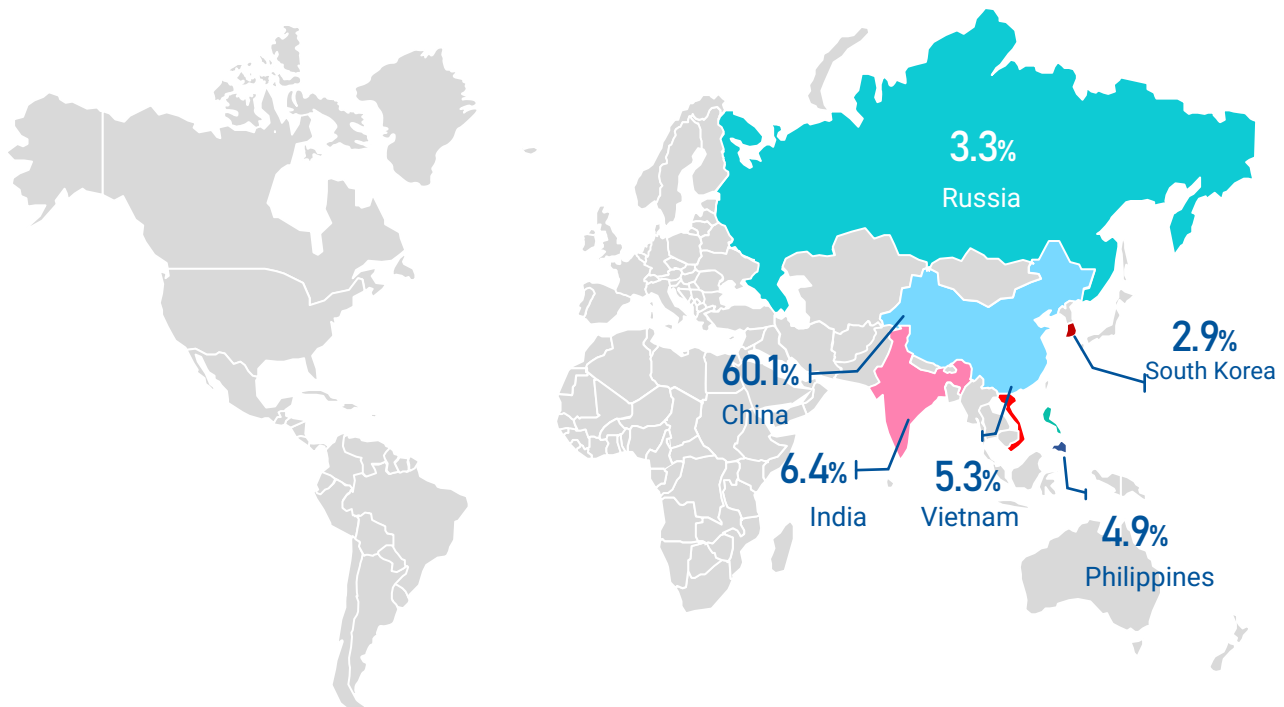
Figure 36. Foreign citizens working in Mongolia under labor contract, by region



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

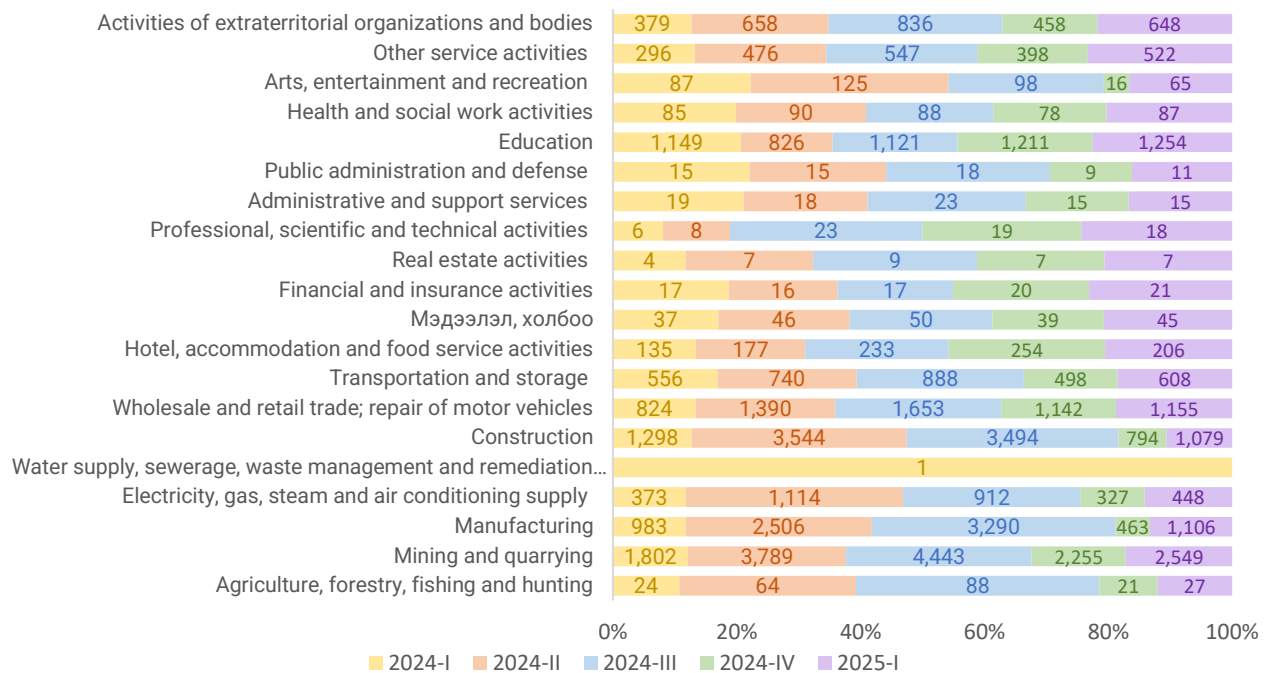
In terms of citizenship, out of total foreign citizens working in Mongolia under the labor contracts, 5,937 (60.1 percent) are from China, 627 (6.4 percent) are from India, 526 (5.3 percent) are from Vietnam, 486 (4.9 percent) are from the Philippines, 326 (3.3 percent) are Russia, 288 (2.9 percent) are from South Korea, and the remaining 1,681 (17.0 percent) are from other countries.

Figure 37. Foreign citizens working in Mongolia under labor contract, by 6 countries with the highest number of employees, by percentage



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

Figure 38. Foreign citizens working in Mongolia under labor contract, by sector of economic activities, Quarter I 2025

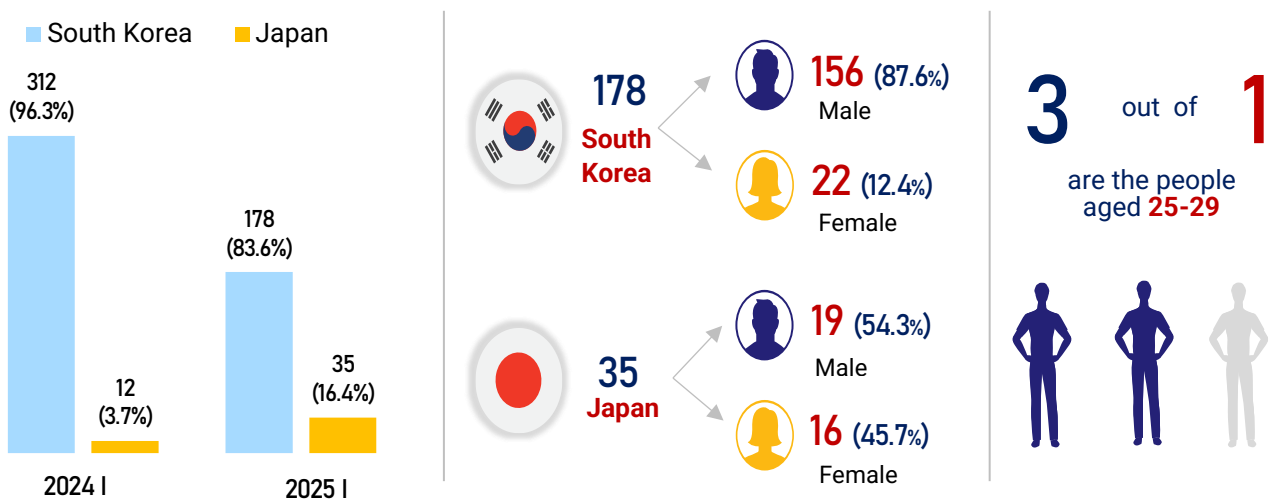


Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

In the first quarter of 2025, 213 people were placed in job abroad under the labor contract and the number of people placed in job under the labor contract decreased by 111 or 34.3 percent compared to the previous quarter.

Out of total people who were placed in job abroad, 178 (83.6 percent) were placed in employment in South Korea and 35 (16.4 percent) were placed in jobs in Japan. Out of total people who were placed in jobs, 175 (82.2 percent) are men and 38 (17.8 percent) are women.

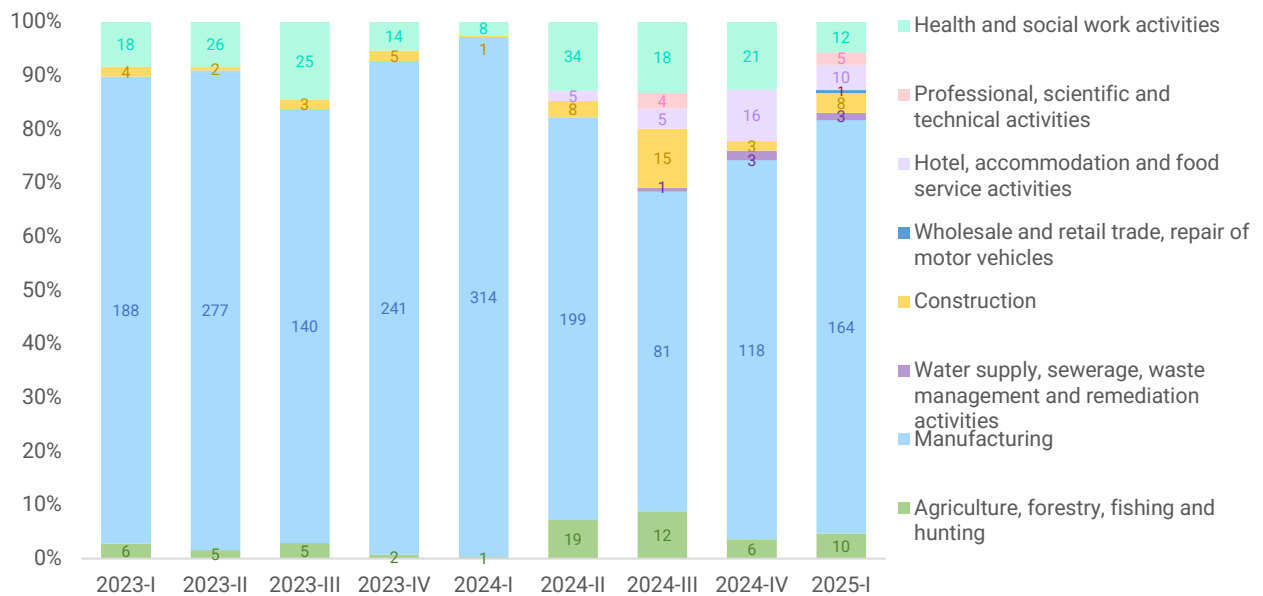
Figure 39. People who were placed in job abroad under the labor contract



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office

By education level, 61.1 percent have upper secondary education, 30.5 percent have bachelor degree or diploma, 6.0 percent have have technical and vocational education, 1.2 percent have no education, 0.6 percent have master's and postgraduate education and 0.6 percent have primry education.

Figure 40. People who were placed in job abroad under the labor contract, by sector of economic activity



Source: [www.1212.mn](http://www.1212.mn), National Statistics Office



## ANALYSIS OF THE WAGE STRUCTURE SURVEY -2025

### Summary of the analysis

The analysis of the Wage Structure Survey is a national-level study that compares updated wage data with key economic indicators such as GDP and inflation and examines business activity, employment, and workplace expenditures to identify influencing factors. The analysis focuses on changes in basic and total wages, incentive pays, additional payments, and the minimum wage in relation to these indicators.

This analysis used quantitative data from the “Wage Structure Survey” for the years 2019, 2021, and 2023—periods marked by economic volatility. The results were derived by comparing wage structures across indicators such as gender, education level, form of liability of enterprises, economic sector, and geographical location.

Table 9. Regression analysis of changes in logarithmic wages

Comparative variables	2019		2021		2023	
	1. Evaluated coefficient	Standard error	2. Evaluated coefficient	Standard error	3. Evaluated coefficient	Standard error
TVET	0.143	0.008	0.131	0.011	0.093	0.009
Higher education	0.439	0.007	0.357	0.008	0.280	0.008
Experience	0.019	0.001	0.012	0.001	0.002	0.000
Experience square	0.000	0.000	0.000	0.000	0.000	0.000
Men	0.111	0.006	0.106	0.007	0.122	0.006
State-owned	0.078	0.012	0.095	0.018	0.037	0.015
Private	0.003	0.012	0.005	0.018	0.036	0.014
Enterprise	0.101	0.007	0.148	0.008	0.070	0.007
Agriculture	-0.027	0.027	-0.100	0.031	-0.011	0.011
Khangai	-0.246	0.010	-0.158	0.011	-0.231	0.012
Central	-0.120	0.009	-0.079	0.011	-0.043	0.012
Eastern	-0.196	0.014	-0.089	0.015	-0.120	0.020
Western	-0.251	0.011	-0.195	0.012	-0.199	0.013
Constant	6.268	0.014	6.382	0.020	6.825	0.016
Number of observation	37,977		23,087		29,053	
R2	0.15		0.13		0.08	

In this model, the baseline comparison group consists of female workers with secondary education or lower, employed in the service sector, with no work experience, working in Ulaanbaatar or in locally owned enterprises. The wages of employees in this group are treated as the baseline wage for comparison.

The return to education compared to wages for workers with technical or higher education: In 2019, workers with higher education earned wages that were 43.9 percent higher than those of workers with lower educational attainment, while those with technical education earned 14 percent more. However, the return to education showed a declining trend in subsequent years. By 2023, the wage premium for higher education had decreased by 1.6 percentage points, and the return to technical education had dropped by 5 percentage points.

**Gender Wage Gap Compared to Male Workers' Salaries:** Male workers consistently earn higher wages than female workers. In 2019, the gender wage gap was 11.1 percent, which increased to 12.2 percent in 2023, representing a 1.1 percentage point rise over the period.

**Wage Differences by Economic Sector Compared to the Service Sector:** Compared to the service sector, wages in the agricultural sector are generally lower, while those in the industrial sector are higher. In 2019, wages in the agricultural sector were 2.7 percent lower than in the service sector. This gap widened to 10 percent in 2021 but narrowed significantly to just 1.1 percent in 2023. In contrast, wages in the industrial sector were 10 percent higher than those in the service sector in 2019. This wage premium increased to 14.8 percent in 2021, an increase of 4.8 percentage point, but declined to 7 percent in 2023, still representing a modest increase compared to 2019.

**Wage Differences in Other Regions Compared to Ulaanbaatar City:** Salaries of employees in local organizations outside Ulaanbaatar are generally lower than those of employees working in enterprises based in the capital. The wage gap is particularly pronounced in the western and Khangai regions, where wages are approximately 20–25 percent lower than in Ulaanbaatar. In the central region, the wage gap compared to Ulaanbaatar was 4.1 percent in 2020, increased to 7.9 percent in 2021, and then slightly narrowed to 4.3 percent in 2023. However, some estimates indicate that the gap widened to 12 percent in 2023, reflecting a 3.1 percentage point increase from 2021.

### Labor cost analysis

Wages represent income for employees and their families, while for employers, they constitute the primary cost of utilizing labor to carry out operations and produce goods and services. The study revealed that employee wages account for 86.8 percent of the total labor and operational costs of organizations. Both nominal and real labor costs can be measured using various indicators, including basic wages, bonuses, additional payments, allowances, social protection, training expenses, and other related costs.

**Table 10. NOMINAL labor cost per employee, thousand MNT**

	Nominal labor cost, thousand MNT			Change, by percentage (from previous year)			Number of days worked per month under normal working hours
	Per month	Per day	Per hour	Per month	Per day	Per hour	
<b>2019</b>	1,080.2	49.8	6.2	34.7	31.3	28.5	22
<b>2021</b>	1,158.9	57.3	7.2	7.3	15.1	16.7	21
<b>2023</b>	1,912.3	93.9	18.5	65.0	63.8	157.0	22

The study found that average nominal labor costs increased between 2019 and 2023. In 2021, monthly labor costs per employee in business entities increased by 7.3 percent, while daily and hourly labor costs increased by 15.1 percent and 16.7 percent, respectively. However, in 2023, the growth in hourly labor costs was more than twice that of both monthly and daily labor costs.

**Table 11. NOMINAL labor cost per employee, at 2015 price, thousand MNT**

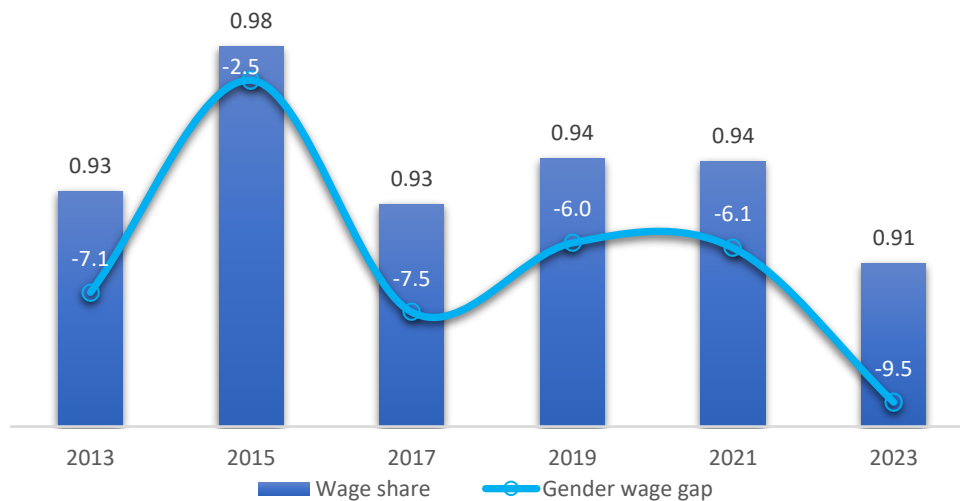
	Nominal labor cost, at 2015 price, thousand MNT			Change, by percentage (from previous year)			Number of days worked per month under normal working hours
	Per month	Per day	Per hour	Per month	Per day	Per hour	
<b>2019</b>	1013.7	46.7	5.8	-	-	-	22
<b>2021</b>	1091.5	54.0	6.8	7.7	15.5	17.1	21
<b>2023</b>	1790.4	88.0	17.4	64.0	62.9	156.5	22

In terms of actual labor costs, the average monthly labor cost in 2021 increased by 7.7 percent compared to 2019, while daily and hourly labor costs rose by 15.5 percent and 17.1 percent, respectively. By 2023, monthly labor costs had increased by 64 percent, and daily costs by 62.9 percent compared to 2019 levels.

### Wage gap by gender

The study's findings, compared with data from the previous three years, show that the gender pay gap was smallest in 2015, when female employees earned 97.5 percent of what male employees earned—just 2.5 percent lower. However, by 2019, this ratio declined to 94.2 percent, indicating a 5.8 percent gender pay gap, which was 1.5 percentage points wider than two years prior. In 2023, the gap widened further, with female employees earning only 91 percent of the average salary of male employees, reflecting a 9 percent wage gap. This trend suggests a gradual increase in the gender pay disparity over the years.

Figure 41. Wage gap between male and female workers

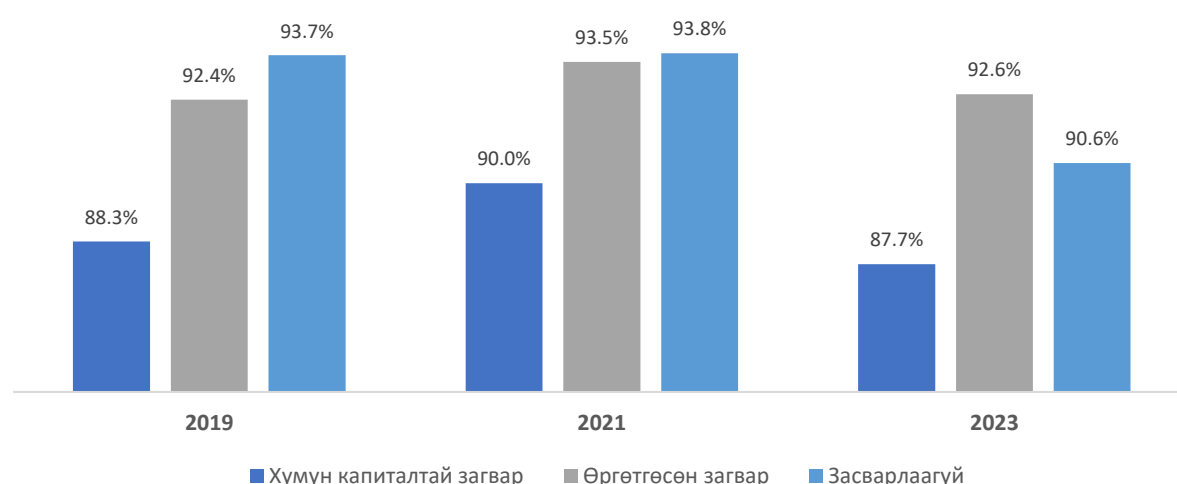


### Wage gap breakdown

To explain the wage gap, the traditional Oaxaca–Blinder decomposition method (Oaxaca, 1973; Blinder, 1973) was employed to analyze and interpret the adjusted wage ratio. Theoretically, the adjusted wage ratio refers to the wage differential estimated using the human capital model and its extended forms, accounting for factors such as education, experience, sector of employment, and other relevant variables.

The unadjusted and adjusted wage ratios between male and female employees, calculated using both the human capital and extended models, are presented in the figure below. The unadjusted wage ratio—which reflects the raw wage gap without controlling for observable characteristics—was 93.7 percent in 2019, rose slightly to 93.8 percent in 2021, and declined to 90.6 percent in 2023. Over the three-year period, the adjusted wage ratio, which accounts for differences in characteristics such as education, experience, and occupation, has consistently remained below the unadjusted ratio. Specifically, the adjusted wage ratio estimated using the human capital model declined from 88.3 percent in 2019 to 90.0 percent in 2021, then dropped again to 87.7 percent in 2023. In other words, the unexplained portion of the wage gap—the difference not accounted for by the variables in the human capital model—was 11.7 percent in 2019, 10.0 percent in 2021, and 12.3 percent in 2023, suggesting persistent structural or discriminatory factors affecting female employees' wages.

Figure 42. Adjusted and unadjusted wage ratio



According to the results above, the human capital-adjusted wage gap exceeds the unadjusted gap, indicating that, on average, female workers possess greater human capital than their male counterparts. Our sample shows that women outperform men on key human capital indicators and this result was confirmed by the model.

A section of the table presents the estimated results from the human capital model. The analysis shows that female workers generally have higher levels of education and more work experience than male workers, which helps reduce the gender wage gap. Specifically, women's educational attainment narrows the wage gap by 3.2 to 3.8 percentage points, while their work experience contributes to a reduction of 0.2 to 1.5 percentage points. B section of the table presents the results from the extended model. The contributions of education and experience remain consistent with those observed in the human capital model, suggesting that their effects persist across economic sectors, occupations, collective agreements, and public versus private sector employment. In 2019, the combined effect of sectoral and occupational segregation increased the gender wage gap by 5 percentage points, accounting for 16.4 percent of the total gap. This contribution rose to 5.7 percentage points (16.8 percent) in 2021 and slightly declined to 4.4 percentage points (19.2 percent) in 2023. These findings indicate that sectoral and occupational differences are among the most significant contributors to the gender wage gap.

Table 12. Wage difference breakdown

Variables	2019		2021		2023	
	Log value	Explained share of the gender wage gap	Log value	Explained share of the gender wage gap	Log value	Explained share of the gender wage gap
<b>A. Human capital model</b>						
Experience variables	-0.0193	-6.3	-0.0146	-4.3	-0.0026	-1.1
Education variables	0.0523	-17.1	-0.0379	-11.1	-0.0320	-14.0
Regional variables	0.0130	4.2	0.0123	3.6	0.0035	1.5
Total explained	0.0586	-19.2	-0.0403	-11.8	-0.0312	-13.6
Total unexplained	0.3643	119.2	0.3810	111.8	0.2602	113.6
Total wage difference	0.3057	100	0.3406	100	0.2291	100
<b>B. Extended model</b>						
Experience variables	0.0162	-5.3	-0.0133	-3.9	-0.0019	-0.8
Education variables	0.0423	-13.8	-0.0361	-10.6	-0.0306	-13.4
Regional variables	0.0157	5.1	0.0138	4.1	0.0056	2.5
State, joint agreement	0.0210	-6.9	-0.0242	-7.1	0.0060	2.6
Occupational variables	0.0184	-6.0	-0.0207	-6.1	0.0102	4.5
Sectoral variables	0.0686	22.4	0.0781	22.9	0.0338	14.8
Total explained	0.0135	-4.4	-0.0024	-0.7	0.0233	10.2
Total unexplained	0.3192	104.4	0.3430	100.7	0.2058	89.8
Total wage gap	0.3057	100	0.3406	100	0.2291	100

## TERMS AND DEFINITIONS

**Working age population** is defined as those aged 15 years and above. Working age population is categorized into labor force and persons outside of the labor force.

**Labor force** refers to the current supply of the labor for the production of goods and services in exchange for pay or profit.

**Persons outside the labor force** are those of working age who were neither in employment nor in unemployment in the short reference period with reasons of either in education, retired, elderly and disability or were discouraged for seeking employment. Extended labor force is defined as the sum of the labor-force and the potential labor force.

**Labor underutilization** refers to mismatches between labor supply and demand, which translates to an unmet need for employment among the working age population.

**Persons in time-related underemployment** are defined as all persons in employment who, during a short reference period, wanted to work additional hours or whose working time in all jobs was less than a specified hours threshold. Moreover, those who were available to work additional hours given an opportunity for more work. The specified hours threshold is determined in Mongolia labor law currently as 40 hours in a week.

**Persons in unemployment** are defined as all those of working age who were not in employment, carried out activities to seek employment during a specified recent period and were currently available to take up employment given a job opportunity.

**Potential labor force**, refers to persons not in employment who express an interest in this form of work but for whom existing conditions limit their active job search and/or their availability.

**Labor force participation rate**: Shall be figured by the ratio of number of labor force and working age population.

$$\text{Labour force participation rate} = \frac{\text{Number of labour force}}{\text{Number of working-age population}} * 100\%$$

**Employment-to-population ratio**: Shall be estimated by the ratio of the number of employed to number of working age population.

$$\text{Employment to population ratio} = \frac{\text{Number of employed}}{\text{Working-age population}} * 100\%$$

**Insured** means a person and legal entities whose social insurance premiums are paid and interests are protected by an insurance policy and who contracts for an insurance policy that indemnifies him or her against loss of job, property, life or health etc.;

**Social insurance premium** is an advance payment made by an individual, the state or an employer to the social insurance fund at the rate specified by law for the purpose of social insurance.

**Unemployment allowance** is an amount of money to be paid from the social insurance fund to an insured person who has paid unemployment insurance premiums before becoming unemployed in accordance with the conditions and procedures set forth in the law.

**Average salary** is calculated by dividing total amount of received salary by total number of worked month;

**Nominal salary** is the rate of pay employees are compensated for the work performed during a given period.

**Job seekers** is a person who is unemployed or employed but looking to improve conditions of employment and additional income.

**Registered unemployed** are those, not employed or not own account workers, available to work, actively seeking job, at working age and registered in labor and welfare service offices or private labor exchange.

**Permanent job** duties which are undertaken at employer's workplace on work days or in shifts using the employer's work tools pursuant to a pre-determined procedure under the norm, evaluation and salary rate approved under the employer or its representative's supervision.

**Permanent worker** is a person who holds a permanent job under formal employment agreement and whose taxes and social insurance are paid by the employer and labor relations are regulated by laws on labor and public service.

**Informal employer** A self-employed person who employs one or more persons for a fixed period of time as a "paid employee". Henceforth, this category of informal employment workers will be referred to as "employer".

**Informal employee** A paid employee working in conditions where the employment relationship is not fully regulated within the legal framework. From now on, this category of informal employment workers will be referred to as "employee".

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