

## The Current Condition of the Japanese Machine Tool Industry

### Monthly Machine Tool Orders (February 2025)

The total value of machine tool orders in February was 118.2 billion yen. This increased 1.8% compared to January 2025 and marked the first month of month-on-month growth in two months. Moreover, this figure represented an increase of 3.5% compared to the same month of the previous year and marked the fifth consecutive year-on-year growth.

Total orders fell below 120 billion yen for two consecutive months. This is roughly the same level as the same month last year, and the overall trend is remaining flat.

Although orders in February increased both compared to the previous month and compared to the previous year, as in the previous month, there were differences depending on the order industry, country, and region, so we will need to keep an eye on future trends.

Domestic orders rose by 5.5% over January to 33.77 billion yen. This marked the first months of month-on-month growth in two months. Furthermore, this figure was an increase of 3.8% over the same month of the previous year and marked year-on-year growth for four consecutive months. Looking at major industries, orders compared to January rose by 5.8% in industrial machinery, by 17.0% in motor vehicles, fell by 25.2% in electrical & precision machinery, and rose by 105.5% in aircraft, shipbuilding & transport equipment.

Foreign orders rose by 0.3% over January to 84.43 billion yen, marked the first month of month-on-month growth in two months. Additionally, foreign orders showed an increase of 3.4% over the same month of the previous year, and this marked the fifth consecutive month of year-on-year growth. By region, orders from Asia fell by 8.2% by January to 41.11 billion yen. This increased 12.9% over the same month of the previous year. Orders from Europe rose by 16.7% over January to 15.42 billion yen. This was a decrease of 10.0% from the same month of the previous year. Orders from North America rose by 6.6% over January, amounting to 25.74 billion yen. This figure was an increase of 0.4% over the same month of the previous year.

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## NET NEW ORDERS – METAL CUTTING MACHINE TOOLS IN JAPAN

(Value: in Millions of Yen)

Industry	Period	Total 2024	24/23 (%)	24/07–24/09	24/10–24/12	Previous Quarter (%)	year-to-year (%)	25/01–25/02	year-to-year (%)	Feb. '25	Feb. 25/Jan. 25 (%)	Feb. 25/Feb. 24 (%)
1. Primary Metals		15,172	92.8	3,265	4,254	130.3	153.2	1,685	110.0	836	98.5	117.6
2. Fabricated Metal Products		37,200	101.1	10,721	9,411	87.8	134.3	6,181	131.6	2,804	83.0	122.6
Machinery & Equipment Industries	3. Industrial Machinery	181,041	88.9	46,676	44,717	95.8	109.0	24,390	93.0	12,536	105.8	90.0
	(of which construction machinery)	8,449	67.9	1,608	1,688	105.0	66.9	1,182	62.3	438	58.9	67.0
	(of which dies and molds)	15,761	55.9	3,358	3,037	90.4	59.4	2,116	55.0	1,220	136.2	66.4
	4. Motor Vehicles	91,025	90.5	20,978	21,034	100.3	80.6	12,962	94.8	6,989	117.0	104.9
	(of which auto parts)	62,400	84.9	14,600	13,255	90.8	69.6	9,036	90.8	5,361	145.9	115.2
	5. Electrical Machinery	31,506	86.9	8,853	7,011	79.2	124.8	3,422	71.6	1,503	78.3	62.9
	6. Precision Machinery	23,227	108.4	4,937	6,103	123.6	105.4	4,149	131.3	1,738	72.1	117.2
	5–6. Electrical & Precision Machinery (Sub Total)	54,733	94.9	13,790	13,114	95.1	114.9	7,571	95.3	3,241	74.8	83.7
	7. Aircraft, Shipbuilding & Transport equipment	24,218	120.1	5,364	6,433	119.9	106.7	6,227	194.2	4,189	205.5	226.6
	(of which aircraft)	13,183	154.9	2,399	4,106	171.2	156.1	2,900	195.2	2,218	325.2	267.6
3–7. Sub total	351,017	91.9	86,808	85,298	98.3	100.8	51,150	100.2	26,955	111.4	102.4	
8. Other Machinery & Equipment	18,793	82.2	4,234	4,733	111.8	84.4	4,353	149.4	1,840	73.2	111.4	
9. Government, Public Agencies & Schools	2,532	128.1	1,119	418	37.4	78.0	199	76.2	151	314.6	145.2	
10. Others	11,917	98.0	2,591	2,738	105.7	99.5	1,653	83.1	944	133.1	83.5	
11. Trading Companies	4,907	105.9	686	840	122.4	63.1	542	75.7	237	77.7	69.5	
1–11. Domestic Total	441,538	92.6	109,424	107,692	98.4	103.0	65,763	104.1	33,767	105.5	103.8	
12. Foreign	1,043,571	103.4	250,648	277,279	110.6	110.7	168,581	104.0	84,431	100.3	103.4	
1–12. Grand Total	1,485,109	99.9	360,072	384,971	106.9	108.4	234,344	104.1	118,198	101.8	103.5	
(of which: NC machines)	1,461,592	99.9	354,947	378,755	106.7	108.3	229,807	103.7	116,010	101.9	103.0	
Sales		1,526,187	94.4	399,490	407,990	102.1	100.6	242,228	107.3	130,914	117.6	111.2
(of which: NC machines)		1,503,335	94.5	393,475	402,999	102.4	100.9	238,981	107.9	129,060	117.4	112.0
Order Backlog		767,825	97.7	767,716	767,825	100.0	97.7	759,941	96.8	759,941	98.4	96.8
(of which: NC machines)		746,270	98.1	743,032	746,270	100.4	98.1	737,096	96.9	737,096	98.3	96.9

# NET NEW ORDERS BY DESTINATION

(Value in Millions of yen)

2025		Jan.		Feb.		Mar.		Apr.		May		June		July		Aug.		Sep.		Oct.		Nov.		Dec.		Total 2025					
					%		%		%		%		%		%		%		%		%		%		%		%				
Asia	East Asia	Korea	2,629	106.4	3,041	171.9																					5,670	133.8			
		Taiwan	1,285	76.9	1,683	119.8																						2,968	96.5		
		China	27,600	121.7	26,684	116.9																							54,284	119.3	
		Other	42	-	0	-																							42	-	
		East Asia Total	31,556	117.6	31,408	120.8																							62,964	119.2	
	Other Asia	Thailand	1,057	47.0	1,125	67.5																							2,182	55.8	
		Malaysia	334	33.8	634	75.1																							968	52.9	
		Singapore	542	59.6	525	144.2																							1,067	83.8	
		Philippine	370	445.8	137	39.7																							507	118.5	
		Indonesia	632	123.4	696	175.8																							1,328	146.3	
Vietnam		1,743	171.9	1,187	71.7																							2,930	109.8		
India		8,387	198.1	5,388	104.4																							13,775	146.7		
Other	178	8900.0	8	266.7																							186	3720.0			
Other Asia Total	13,243	132.6	9,700	93.0																								22,943	112.4		
Sub Total	44,799	121.7	41,108	112.9																								85,907	117.3		
Europe	EU	Germany	3,042	83.0	3,789	91.5																							6,831	87.5	
		Italy	1,508	60.8	1,644	97.0																							3,152	75.5	
		France	1,923	143.7	1,634	69.5																							3,557	96.4	
		Central Europe	851	64.9	1,262	63.6																								2,113	64.1
		Other	2,098	51.5	2,615	86.8																								4,713	66.5
	Sub Total	9,422	73.2	10,944	83.0																								20,366	78.2	
	Other West Europe	U.K.	1,592	123.3	1,703	105.3																								3,295	113.3
		Turkey	980	57.7	1,704	117.8																								2,684	85.4
		Switzerland	536	66.0	575	88.1																								1,111	75.8
		East Europe	169	241.4	328	164.0																								497	184.1
		Russia - Other	10	250.0	17	212.5																								27	225.0
		Sub Total	13,218	79.0	15,422	90.0																								28,640	84.5
		North America & Central America	U.S.A.	20,768	98.7	23,026	102.0																								43,794
Canada	1,839		105.2	1,719	122.5																								3,558	112.9	
Mexico	1,551		101.7	997	60.2																								2,548	80.1	
Sub Total	24,158		99.3	25,742	100.4																								49,900	99.9	
South America & Oceania	Brazil	699	153.6	611	55.9																								1,310	84.6	
	Other	29	13.6	439	2195.0																								468	200.9	
	Sub Total	728	109.0	1,050	94.3																								1,778	99.8	
Australia & Oceania	Australia	701	114.7	466	78.3																								1,167	96.8	
	Other	2	1.4	1	1.1																								3	1.3	
Sub Total	703	93.9	467	68.3																									1,170	81.6	
Middle East	376	37.5	477	88.3																									853	55.2	
Africa	168	305.5	165	141.0																									333	193.6	
Grand Total	84,150	104.7	84,431	103.4																								168,581	104.0		
Of which NC	83,878	105.6	83,727	103.0																									167,605	104.3	

(Note) It will be described as “-”, if the actual value is “negative” or “0” or no actual value.  
From January 2021, the UK was moved from the “EU” to “other Western Europe”.

Japan Machine Tool Builders' Association