



NEWS RELEASE

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The Current Condition of the Japanese Machine Tool Industry

Monthly Machine Tool Orders (March 2025)

The total value of machine tool orders in March was 151.10 billion yen. This increased 27.8% compared to February 2025 and marked the second consecutive month of month-on-month growth. Moreover, this figure represented an increase of 11.4% compared to the same month of the previous year and marked the sixth consecutive year-on-year growth.

The total order amount exceeded 150 billion yen for the first time in 30 months. This increase in orders was driven by domestic demand as well as foreign demand (China and India).

Orders in March increased both domestically and internationally compared to the same month of the previous year, but the end-of-period effect and special demand contributed greatly. There are concerns about the expanding impact of US tariff measures, so we will need to keep a close eye on future trends.

Domestic orders rose by 45.9% over February to 49.26 billion yen. This marked the second consecutive months of month-on-month growth. Furthermore, this figure was an increase of 0.0% over the same month of the previous year and marked year-on-year growth for five consecutive months. Looking at major industries, orders compared to February rose by 52.8% in industrial machinery, by 70.7% in motor vehicles, by 64.7% in electrical & precision machinery, and fell by 25.7% in aircraft, shipbuilding & transport equipment.

Foreign orders rose by 20.6% over February to 101.84 billion yen, marked the second consecutive month of month-on-month growth. Additionally, foreign orders showed an increase of 17.9% over the same month of the previous year, and this marked the sixth consecutive month of year-on-year growth. By region, orders from Asia rose by 35.0% by February to 55.51 billion yen. This increased 44.0% over the same month of the previous year. Orders from Europe rose by 7.1% over February to 16.52 billion yen. This was a decrease of 4.3% from the same month of the previous year. Orders from North America rose by 6.0% over February, amounting to 27.28 billion yen. This figure showed a decrease of 3.3% from the same month of the previous year.

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Main Statistics of Metal Cutting Machine Tools

Value in Millions of Yen

Period	ORDERS								PRODUCTION				SALES		INVENTORY		EXPORTS		IMPORTS		EMPLOYEES	WHOLE-SALE
	Total	%	Domestic	%	Foreign	%	Sales	Order Backlog	Unites	Weight	Value	%	Unites	Value	Unites	Weight	Value	%	Value	%	No. of	PRICE
	Value		Value		Value		Value	Value		ton						ton				Persons	INDEX	
C.Y. 2008	1,301,147	81.8	566,820	78.0	734,327	85.0	1,472,029	574,383	95,310	492,188	1,249,184	95.9	88,319	1,267,372	11,436	31,685	874,723	98.1	60,226	83.0	25,323	101.5
2009	411,809	31.6	159,648	28.2	252,161	34.3	596,920	382,592	28,281	180,025	486,283	38.9	29,894	514,793	9,547	22,656	321,399	36.7	28,717	47.7	24,542	100.2
2010	978,622	237.6	307,527	192.6	671,095	266.1	851,272	508,446	67,607	302,376	813,002	167.2	67,954	820,517	10,464	24,489	608,551	189.3	30,579	106.5	23,380	100.0
2011	1,326,188	135.5	421,599	137.1	904,589	134.8	1,179,316	653,138	85,483	432,693	1,149,394	141.4	87,452	1,170,069	10,437	28,720	855,195	140.5	43,442	142.1	24,348	102.5
2012	1,212,445	91.4	375,822	89.1	836,623	92.5	1,329,650	543,736	93,649	429,207	1,151,980	100.2	95,824	1,173,114	9,894	34,483	945,594	110.6	51,080	117.6	25,524	102.7
2013	1,117,049	92.1	400,803	106.6	716,246	85.6	1,094,673	566,113	56,780	320,904	886,372	76.9	62,518	911,286	7,890	31,779	766,495	81.1	63,016	123.4	24,716	101.2
2014	1,509,397	135.1	496,391	123.8	1,013,006	141.4	1,422,184	652,213	99,407	454,866	1,186,293	133.8	102,231	1,221,172	9,924	34,308	961,862	125.5	78,087	123.9	25,188	104.0
2015	1,480,592	98.1	586,240	118.1	894,352	88.3	1,532,603	607,499	102,101	489,253	1,258,087	106.1	105,147	1,310,282	11,274	38,620	932,123	96.9	91,580	117.3	25,826	100.0
2016	1,250,003	84.4	530,545	90.5	719,458	80.4	1,280,584	522,527	67,991	374,124	1,012,810	80.5	73,443	1,058,471	9,321	35,371	666,519	71.5	78,249	85.4	26,252	100.5
2017	1,645,554	131.6	629,369	118.6	1,016,185	141.2	1,467,285	694,231	88,644	426,841	1,129,823	111.6	92,174	1,181,505	9,936	33,453	786,221	118.0	72,276	92.4	26,161	99.3
2018	1,815,771	110.3	750,343	119.2	1,065,428	104.8	1,684,768	826,197	84,803	454,619	1,236,790	109.5	90,160	1,297,087	9,167	31,553	881,700	112.1	90,574	125.3	27,348	101.1
2019	1,229,900	67.7	493,188	65.7	736,712	69.1	1,501,633	561,265	62,240	380,419	1,072,452	86.7	66,288	1,118,969	9,490	33,806	735,108	83.4	85,996	94.9	27,436	103.7
2020	901,835	73.3	324,455	65.8	577,380	78.4	1,033,616	430,794	45,569	244,973	723,994	67.5	49,457	762,032	8,145	28,075	529,567	72.0	55,530	64.6	27,249	100.0
2021	1,541,419	170.9	510,324	157.3	1,031,095	178.6	1,283,499	701,005	67,601	313,143	895,409	123.7	68,971	923,460	7,465	30,612	712,613	134.6	60,794	109.5	26,689	100.1
2022	1,759,601	114.2	603,231	118.2	1,156,370	112.1	1,568,350	896,813	70,004	375,672	1,078,833	120.5	72,456	1,143,899	7,421	33,180	857,072	120.3	84,031	138.2	26,671	104.4
2023	1,486,519	84.5	476,821	79.0	1,009,698	87.3	1,616,581	785,775	58,832	362,386	1,051,791	97.5	61,160	1,124,691	7,129	38,613	830,389	96.9	85,481	101.7	27,041	112.3
2024	1,485,109	99.9	441,538	92.6	1,043,571	103.4	1,526,187	767,825	50,447	298,089	901,301	85.7	52,436	982,743	6,521	37,392	761,738	91.7	75,614	88.5	26,485	116.3
F.Y. 2020	988,483	89.9	325,988	73.0	662,495	101.5	1,032,575	446,582	50,683	248,838	728,004	74.6	53,627	757,915	6,581	25,927	546,956	81.2	52,435	66.8	27,108	99.2
2021	1,667,502	168.7	566,229	173.7	1,101,273	166.2	1,368,954	757,694	69,950	333,552	953,784	131.0	70,992	985,574	7,704	30,669	747,726	136.7	66,234	126.3	26,570	100.6
2022	1,705,623	102.3	581,667	102.7	1,123,956	102.1	1,618,780	849,094	67,788	376,846	1,089,727	114.3	70,956	1,166,617	7,104	32,820	875,478	117.1	85,224	128.7	26,800	106.3
2023	1,453,136	85.2	457,521	78.7	995,615	88.6	1,564,251	757,003	54,102	342,985	991,001	90.9	56,538	1,067,568	6,345	35,804	802,996	91.7	83,042	97.4	26,977	113.9
2024	1,509,736	103.9	444,162	97.1	1,065,574	107.0	1,597,467	692,400														116.5
2022 4-6	463,043	121.9	161,313	141.6	301,730	113.4	362,729	858,008	17,481	87,843	246,409	110.1	18,470	256,607	7,230	32,142	198,031	112.3	20,674	150.9	26,572	103.9
7-9	432,587	106.7	156,164	105.9	276,423	107.2	402,230	888,365	17,014	97,737	281,353	125.8	17,417	298,698	7,451	33,353	222,335	119.3	21,387	149.1	26,719	106.5
10-12	415,792	95.8	132,487	87.5	283,305	100.3	411,901	896,813	16,084	94,153	273,385	119.5	16,809	295,485	7,421	33,180	239,619	127.5	22,852	119.8	27,017	106.7
2023 1-3	394,201	88.0	131,703	85.9	262,498	89.0	441,920	849,094	17,209	97,113	288,580	103.9	18,260	315,827	7,104	32,820	215,493	109.3	20,310	106.2	26,892	108.2
4-6	374,236	80.8	120,380	74.6	253,856	84.1	380,609	842,594	15,281	91,753	260,377	105.7	15,024	262,942	7,971	39,763	196,936	99.4	23,430	113.3	27,243	111.8
7-9	363,042	83.9	120,147	76.9	242,895	87.9	388,329	816,786	13,757	89,342	257,183	91.4	14,650	283,203	7,579	38,054	212,355	95.5	21,457	100.3	27,247	114.2
10-12	355,040	85.4	104,591	78.9	250,449	88.4	405,723	785,775	12,585	84,178	245,651	89.9	13,226	262,719	7,129	38,613	205,605	85.8	20,283	88.8	26,783	114.8
2024 1-3	360,818	91.5	112,403	85.3	248,415	94.6	389,590	757,003	12,479	77,712	227,790	78.9	13,638	258,704	6,345	35,804	188,100	87.3	17,871	88.0	26,635	114.7
4-6	379,248	101.3	112,019	93.1	267,229	105.3	329,117	807,134	11,227	68,729	201,413	77.4	11,408	210,721	6,441	38,802	171,756	87.2	18,494	78.9	26,507	116.6
7-9	360,072	99.2	109,424	91.1	250,648	103.2	399,490	767,716	12,864	74,329	232,409	90.4	13,244	252,096	6,496	38,433	191,765	90.3	19,211	89.5	26,530	117.7
10-12	384,971	108.4	107,692	103.0	277,279	110.7	407,990	767,825	13,877	77,319	239,689	97.6	14,146	261,222	6,521	37,392	210,118	102.2	20,039	98.8	26,267	116.1
2025 1-3	385,445	106.8	115,027	102.3	270,418	108.9	460,870	692,400														115.6
2023 10	112,053	79.4	33,644	75.5	78,409	81.3	119,344	809,495	4,101	27,294	76,668	87.9	4,360	81,980	7,384	38,447	69,480	97.0	7,820	87.2	26,867	115.5
11	115,899	86.4	32,696	71.6	83,203	94.0	128,275	797,119	4,001	26,608	78,031	83.2	4,179	79,910	7,266	40,077	58,553	69.0	6,360	100.0	26,682	114.9
12	127,088	90.4	38,251	90.5	88,837	90.4	158,104	785,775	4,483	30,276	90,952	98.5	4,687	100,829	7,129	38,613	77,571	93.3	6,104	81.1	26,800	113.9
2024 1	110,960	86.0	30,603	70.5	80,357	93.8	107,998	788,737	3,781	23,384	66,483	79.5	3,864	69,943	7,160	39,812	50,645	96.0	5,735	66.9	26,686	113.6
2	114,208	92.0	32,543	83.6	81,665	95.9	117,730	785,215	4,214	26,376	76,268	82.0	4,270	81,143	7,216	40,660	63,995	86.9	6,508	110.6	26,619	115.1
3	135,650	96.2	49,257	99.8	86,393	94.3	163,862	757,003	4,484	27,952	85,039	75.9	5,504	107,618	6,345	35,804	73,460	82.5	5,627	96.1	26,600	115.5
4	120,902	91.1	36,372	87.2	84,530	92.9	96,612	781,293	3,557	21,979	62,817	72.3	3,388	60,685	6,631	38,189	59,506	94.2	5,963	85.5	26,432	115.9
5	124,530	104.2	34,837	92.1	89,693	109.8	113,085	792,738	3,709	22,723	65,757	81.5	3,707	69,753	6,736	38,991	53,530	87.2	7,165	86.6	26,514	116.6
6	133,816	109.7	40,810	99.9	93,006	114.6	119,420	807,134	3,961	24,027	72,839	78.5	4,313	80,283	6,441	38,802	58,720	81.1	5,366	65.5	26,574	117.2
7	123,942	108.4	35,703	90.7	88,239	117.7	117,361	813,715	4,232	24,029	72,409	86.2	4,113	74,319	6,704	40,801	60,701	89.3	6,796	103.6	26,576	118.0
8	110,770	96.5	32,192	90.1	78,578	99.4	123,952	800,533	4,062	23,241	73,632	92.0	3,995	76,489	6,893	41,440	65,109	101.7	4,905	85.7	26,536	117.2
9	125,360	93.6	41,529	92.2	83,831	94.3	125,167	767,716	4,570	27,059	86,368	92.7	5,136	101,288	6,496	38,433	65,955	82.1	7,510	81.9	26,479	117.9
10	122,550	109.4	33,441	99.4	89,109	113.6	115,081	775,185	4,457	24,405	74,697	97.4	4,313	75,003	6,760	40,444	66,289	95.4				

NET NEW ORDERS – METAL CUTTING MACHINE TOOLS IN JAPAN

(Value: in Millions of Yen)

Period		Total 2024	24/23 (%)	24/10–24/12	25/01–25/03	Previous Quarter (%)	year-to-year (%)	25/01–25/03	year-to-year (%)	March '25	Mar. 25/Feb. 25 (%)	Mar. 25/Mar. 24 (%)
Industry												
1. Primary Metals		15,172	92.8	4,254	3,602	84.7	96.1	3,602	96.1	1,917	229.3	86.5
2. Fabricated Metal Products		37,200	101.1	9,411	10,718	113.9	113.5	10,718	113.5	4,537	161.8	95.6
Machinery & Equipment Industries	3. Industrial Machinery	181,041	88.9	44,717	43,542	97.4	94.7	43,542	94.7	19,152	152.8	96.8
	(of which construction machinery)	8,449	67.9	1,688	2,804	166.1	96.2	2,804	96.2	1,622	370.3	159.2
	(of which dies and molds)	15,761	55.9	3,037	3,316	109.2	62.3	3,316	62.3	1,200	98.4	81.2
	4. Motor Vehicles	91,025	90.5	21,034	24,891	118.3	107.3	24,891	107.3	11,929	170.7	125.1
	(of which auto parts)	62,400	84.9	13,255	16,197	122.2	94.7	16,197	94.7	7,161	133.6	100.2
	5. Electrical Machinery	31,506	86.9	7,011	6,931	98.9	72.3	6,931	72.3	3,509	233.5	73.1
	6. Precision Machinery	23,227	108.4	6,103	5,977	97.9	108.6	5,977	108.6	1,828	105.2	78.0
	5 – 6. Electrical & Precision Machinery (Sub Total)	54,733	94.9	13,114	12,908	98.4	85.6	12,908	85.6	5,337	164.7	74.7
	7. Aircraft, Shipbuilding & Transport equipment	24,218	120.1	6,433	9,338	145.2	187.7	9,338	187.7	3,111	74.3	176.0
	(of which aircraft)	13,183	154.9	4,106	4,575	111.4	198.1	4,575	198.1	1,675	75.5	203.3
3 – 7. Sub total		351,017	91.9	85,298	90,679	106.3	101.6	90,679	101.6	39,529	146.6	103.4
8. Other Machinery & Equipment		18,793	82.2	4,733	5,921	125.1	116.8	5,921	116.8	1,568	85.2	72.7
9. Government, Public Agencies & Schools		2,532	128.1	418	333	79.7	79.5	333	79.5	134	88.7	84.8
10. Others		11,917	98.0	2,738	2,805	102.4	87.3	2,805	87.3	1,152	122.0	94.2
11. Trading Companies		4,907	105.9	840	969	115.4	77.6	969	77.6	427	180.2	80.3
1–11. Domestic Total		441,538	92.6	107,692	115,027	106.8	102.3	115,027	102.3	49,264	145.9	100.0
12. Foreign		1,043,571	103.4	277,279	270,418	97.5	108.9	270,418	108.9	101,837	120.6	117.9
1–12. Grand Total		1,485,109	99.9	384,971	385,445	100.1	106.8	385,445	106.8	151,101	127.8	111.4
(of which: NC machines)		1,461,592	99.9	378,755	378,749	100.0	106.5	378,749	106.5	148,942	128.4	111.1

Sales	1,526,187	94.4	407,990	460,870	113.0	118.3	460,870	118.3	218,642	167.0	133.4
(of which: NC machines)	1,503,335	94.5	402,999	454,718	112.8	119.0	454,718	119.0	215,737	167.2	134.3
Order Backlog	767,825	97.7	767,825	692,400	90.2	91.5	692,400	91.5	692,400	91.1	91.5
(of which: NC machines)	746,270	98.1	746,270	670,301	89.8	91.3	670,301	91.3	670,301	90.9	91.3

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	2,587	131.1																		8,257	132.9	
		Taiwan	1,285	76.9	1,683	119.8	2,182	108.9																		5,150	101.4	
		China	27,600	121.7	26,684	116.9	36,087	142.2																		90,371	127.5	
		Other	42	-	0	-	0	-																		42	16.2	
		East Asia Total	31,556	117.6	31,408	120.8	40,856	138.0																		103,820	125.9	
	Other Asia	Thailand	1,057	47.0	1,125	67.5	1,200	79.1																		3,382	62.3	
		Malaysia	334	33.8	634	75.1	559	56.9																		1,527	54.3	
		Sigapore	542	59.6	525	144.2	814	171.0																		1,881	107.5	
		Philippine	370	445.8	137	39.7	149	62.6																		656	98.5	
		Indonesia	632	123.4	696	175.8	480	221.2																		1,808	160.7	
		Vietnam	1,743	171.9	1,187	71.7	1,621	137.1																		4,551	118.2	
		India	8,387	198.1	5,388	104.4	9,821	227.5																		23,596	172.1	
		Other	178	8900.0	8	266.7	8	61.5																		194	1077.8	
		Other Asia Total	13,243	132.6	9,700	93.0	14,652	163.8																		37,595	128.0	
	Sub Total	44,799	121.7	41,108	112.9	55,508	144.0																		141,415	126.5		
Europe	EU	Germany	3,042	83.0	3,789	91.5	3,483	85.1																		10,314	86.7	
		Italy	1,508	60.8	1,644	97.0	2,740	136.2																		5,892	95.2	
		France	1,923	143.7	1,634	69.5	1,939	120.7																		5,496	103.8	
		Central Europe	851	64.9	1,262	63.6	1,487	86.5																		3,600	71.8	
		Other	2,098	51.5	2,615	86.8	2,480	70.7																		7,193	67.9	
	Sub Toal		9,422	73.2	10,944	83.0	12,129	93.7																		32,495	83.3	
	Other West Europe		3,617	95.2	4,133	110.2	4,296	102.8																			12,046	102.7
		U. K.	1,592	123.3	1,703	105.3	1,902	122.3																			5,197	116.4
		Turkey	980	57.7	1,704	117.8	1,341	83.2																			4,025	84.6
		Switzerland	536	66.0	575	88.1	769	103.8																			1,880	85.2
		East Europe	169	241.4	328	164.0	82	62.6																			579	144.4
	Russia - Other		10	250.0	17	212.5	14	233.3																		41	227.8	
	Sub Total		13,218	79.0	15,422	90.0	16,521	95.7																		45,161	88.3	
North America	U. S. A.		20,768	98.7	23,026	102.0	24,703	102.1																		68,497	101.0	
	Canada		1,839	105.2	1,719	122.5	593	41.0																		4,151	90.3	
	Mexico		1,551	101.7	997	60.2	1,981	76.7																		4,529	78.6	
	Sub Total		24,158	99.3	25,742	100.4	27,277	96.7																		77,177	98.7	
S & C America	Brazil		699	153.6	611	55.9	1,552	125.1																		2,862	102.6	
	Other		29	13.6	439	2195.0	106	392.6																		574	220.8	
	Sub Total		728	109.0	1,050	94.3	1,658	130.8																		3,436	112.7	
Oceania	Australia		701	114.7	466	78.3	611	115.1																		1,778	102.4	
	Other		2	1.4	1	1.1	0	-																		3	1.1	
	Sub Total		703	93.9	467	68.3	611	107.6																		1,781	89.0	
Middle East		376	37.5	477	88.3	262	78.4																			1,115	59.4	
Africa		168	305.5	165	141.0	0	-																			333	91.5	
Grand Total		84,150	104.7	84,431	103.4	101,837	117.9																			270,418	108.9	
Of which NC		83,878	105.6	83,727	103.0	101,272	117.9																			268,877	109.0	

(Note) It will be described as “-”, if the actual value is “negative” or “0” or no actual value.

Japan Machine Tool Builders' Association

From January 2021, the UK was moved from the “EU” to “other Western Europe”.