



NEWS RELEASE

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The Current Condition of the Japanese Machine Tool Industry

Monthly Machine Tool Orders (July 2025)

The total value of machine tool orders in July was 128.36 billion yen. This decreased 3.6% compared to June 2025 and marked the first month of month-on-month decline in two months. However, this figure represented an increase of 3.6% compared to the same month of the previous year and marked the first month of year-on-year growth in two months.

The total number of orders exceeded 120 billion yen for the fifth consecutive month. It was the 53rd consecutive month that the total amount exceeded 110 billion yen, and compared to the same period last year, this was the first increase in two months.

Regarding the outlook for machine tool orders, while the global economic situation remains highly uncertain and the impact of U.S. tariff measures is easing, it is expected that domestic and foreign demand will remain strong, but it is also necessary to be mindful of downside risks.

Domestic orders fell by 11.1% from June to 35.45 billion yen. Furthermore, this figure showed a decrease of 0.7% from the same month of the previous year. Although it exceeded 35 billion yen for two consecutive months, the growth rate decreased both compared to the previous month and the previous year.

Looking at major industries, orders compared to June fell by 18.4% in industrial machinery, rose by 15.9% in motor vehicles, fell by 31.2% in electrical & precision machinery, and rose by 30.7% in aircraft, shipbuilding & transport equipment.

Foreign orders fell by 0.4% from June to 92.91 billion yen, marked the fourth consecutive month of month-on-month decline. Nevertheless, foreign orders showed an increase of 5.3% over the same month of the previous year, and this marked the tenth consecutive month of year-on-year growth. By region, orders from Asia rose by 1.9% over June to 47.55 billion yen. This increased 8.6% over the same month of the previous year. Orders from Europe rose by 3.3% over June to 16.44 billion yen. This was an increase of 11.8% over the same month of the previous year. Orders from North America fell by 5.4% from June, amounting to 26.71 billion yen. This figure showed a decrease of 0.9% 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	50,449	298,113	901,336	85.7	52,440	982,874	6,521	37,392	761,738	91.7	75,614	88.5	26,477	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	54,104	343,009	991,036	90.9	56,540	1,067,662	6,347	35,863	802,996	91.7	83,042	97.4	26,970	113.9
2024	1,509,736	103.9	444,162	97.1	1,065,574	107.0	1,597,467	692,400	53,417	301,254	927,525	93.6	55,510	1,010,335	6,512	32,753	793,252	98.8	74,334	89.5	26,372	116.6
2022 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
2024 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
1-3	360,818	91.5	112,403	85.3	248,415	94.6	389,590	757,003	12,481	77,736	227,825	78.9	13,640	258,798	6,347	35,863	188,100	87.3	17,871	88.0	26,605	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	11,410	210,758	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
2025 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
1-3	385,445	106.8	115,027	102.3	270,418	108.9	460,870	692,400	15,449	80,877	254,014	111.5	16,710	286,259	6,512	32,753	219,614	116.8	16,591	92.8	26,184	115.9
4-6	392,095	103.4	107,264	95.8	284,831	106.6	366,974	717,521	12,375	70,255	219,911	109.2	12,715	233,164	5,446	33,668	191,466	111.5	16,796	90.8	26,405	119.0
2024 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	40,705	63,995	86.9	6,508	110.6	26,589	115.1
3	135,650	96.2	49,257	99.8	86,393	94.3	163,862	757,003	4,486	27,976	85,074	76.0	5,504	107,618	6,347	35,863	73,460	82.5	5,627	96.1	26,570	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	3,390	60,722	6,631	38,185	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	158,177	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	7,523	96.2	26,271	117.2
11	119,327	103.0	34,328	105.0	84,999	102.2	124,510	770,002	4,765	26,310	80,299	102.9	4,404	81,207	7,212	42,818	61,683	105.3	6,334	99.6	26,282	116.0
2025 12	143,094	112.6	39,923	104.4	103,171	116.1	168,399	767,825	4,655	26,604	84,693	93.1	5,429	105,012	6,521	37,392	82,145	105.9	6,182	101.3	26,248	115.2
1	116,146	104.7	31,996	104.6	84,150	104.7	111,314	772,657	4,761	24,825	79,000	118.14	4,308	78,042	7,046	39,727	55,992	110.6	6,949	121.2	26,200	116.2

NET NEW ORDERS – METAL CUTTING MACHINE TOOLS IN JAPAN

(Value: in Millions of Yen)

Period		Total 2024	24/23 (%)	01/25-03/25	04/25-06/25	Previous Quarter (%)	year-to-year (%)	01/25-06/25	year-to-year (%)	July ' 25	July25/June 25 (%)	July 25/July 24 (%)
Industry												
1. Primary Metals		15,172	92.8	3,602	2,636	73.2	67.5	7,355	86.3	1,117	150.1	127.9
2. Fabricated Metal Products		37,200	101.1	10,718	9,836	91.8	129.0	22,906	113.8	2,352	50.9	76.7
Machinery & Equipment Industries	3. Industrial Machinery	181,041	88.9	43,542	46,020	105.7	105.4	103,170	98.1	13,608	81.6	87.8
	(of which construction machinery)	8,449	67.9	2,804	3,129	111.6	139.8	6,225	112.8	292	43.0	80.0
	(of which dies and molds)	15,761	55.9	3,316	3,729	112.5	92.2	8,674	83.2	1,629	130.2	153.7
	4. Motor Vehicles	91,025	90.5	24,891	16,973	68.2	65.8	49,890	90.1	8,026	115.9	126.0
	(of which auto parts)	62,400	84.9	16,197	10,996	67.9	63.0	32,715	84.7	5,522	128.3	134.7
	5. Electrical Machinery	31,506	86.9	6,931	10,218	147.4	168.6	19,338	100.7	2,189	54.8	61.6
	6. Precision Machinery	23,227	108.4	5,977	5,294	88.6	79.2	13,114	94.7	1,843	98.8	110.8
	5－6. Electrical & Precision Machinery (Sub Total)	54,733	94.9	12,908	15,512	120.2	121.7	32,452	98.2	4,032	68.8	77.3
	7. Aircraft, Shipbuilding & Transport equipment	24,218	120.1	9,338	6,578	70.4	88.3	18,190	131.8	2,274	130.7	165.4
	(of which aircraft)	13,183	154.9	4,575	3,407	74.5	78.0	9,424	128.3	1,442	207.8	215.5
	3－7. Sub total	351,017	91.9	90,679	85,083	93.8	94.9	203,702	98.2	27,940	89.6	98.2
8. Other Machinery & Equipment		18,793	82.2	5,921	5,146	86.9	108.2	12,965	111.6	1,898	125.9	105.9
9. Government, Public Agencies & Schools		2,532	128.1	333	545	163.7	94.6	1,248	91.1	370	158.1	98.7
10. Others		11,917	98.0	2,805	2,901	103.4	85.9	7,166	95.2	1,460	132.0	155.0
11. Trading Companies		4,907	105.9	969	1,117	115.3	52.4	2,395	67.0	309	67.5	157.7
1-11. Domestic Total		441,538	92.6	115,027	107,264	93.3	95.8	257,737	99.1	35,446	88.9	99.3
12. Foreign		1,043,571	103.4	270,418	284,831	105.3	106.6	648,160	107.3	92,911	99.6	105.3
1-12. Grand Total		1,485,109	99.9	385,445	392,095	101.7	103.4	905,897	104.8	128,357	96.4	103.6
(of which: NC machines)		1,461,592	99.9	378,749	386,160	102.0	103.8	890,925	104.8	126,016	96.1	103.3

Sales	1,526,187	94.4	460,870	366,974	79.6	111.5	948,012	113.4	120,168	93.3	102.4
(of which: NC machines)	1,503,335	94.5	454,718	361,763	79.6	111.4	935,040	113.6	118,559	93.8	102.2
Order Backlog	767,825	97.7	692,400	717,521	103.6	88.9	725,104	89.1	725,104	101.1	89.1
(of which: NC machines)	746,270	98.1	670,301	694,698	103.6	88.9	701,549	89.1	701,549	101.0	89.1

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	3,238	102.4	2,396	80.1	1,941	81.7	1,841	82.4											17,673	104.1	
		Taiwan	1,285	76.9	1,683	119.8	2,182	108.9	1,825	83.9	1,619	72.8	1,268	44.3	1,550	71.2											11,412	78.6	
		China	27,600	121.7	26,684	116.9	36,087	142.2	33,980	127.9	30,954	110.6	32,177	101.5	31,954	108.3											219,436	117.6	
		Other	42	-	0	-	0	-	65	185.7	0	-	0	-	0	-											107	36.3	
		East Asia Total	31,556	117.6	31,408	120.8	40,856	138.0	39,108	122.5	34,969	105.3	35,386	95.8	35,345	104.2											248,628	113.8	
	Other Asia	Thailand	1,057	47.0	1,125	67.5	1,200	79.1	1,267	115.0	2,662	121.8	1,500	58.6	1,030	65.0												9,841	76.5
		Malaysia	334	33.8	634	75.1	559	56.9	969	84.2	922	84.8	670	71.8	903	80.8												4,991	70.3
		Sigapore	542	59.6	525	144.2	814	171.0	986	365.2	442	70.4	513	152.2	800	261.4											4,622	140.5	
		Philippine	370	445.8	137	39.7	149	62.6	84	56.4	142	125.7	152	49.5	68	111.5											1,102	85.0	
		Indonesia	632	123.4	696	175.8	480	221.2	223	45.7	453	241.0	353	70.2	364	58.2											3,201	109.3	
		Vietnam	1,743	171.9	1,187	71.7	1,621	137.1	851	64.9	1,034	108.3	2,923	382.6	2,923	247.7											12,282	152.3	
		India	8,387	198.1	5,388	104.4	9,821	227.5	4,744	85.5	4,527	107.8	5,143	110.5	6,111	122.5											44,121	133.3	
		Other	178	8900.0	8	266.7	8	61.5	6	200.0	16	27.6	35	1166.7	1	33.3											252	296.5	
	Other Asia Total	13,243	132.6	9,700	93.0	14,652	163.8	9,130	91.1	10,198	108.4	11,289	112.2	12,200	123.7											80,412	117.0		
	Sub Total	44,799	121.7	41,108	112.9	55,508	144.0	48,238	115.0	45,167	106.0	46,675	99.3	47,545	108.6											329,040	114.6		
Europe	EU	Germany	3,042	83.0	3,789	91.5	3,483	85.1	3,379	98.3	3,627	103.1	3,551	79.5	3,435	93.3											24,306	90.0	
		Italy	1,508	60.8	1,644	97.0	2,740	136.2	2,356	85.1	3,257	135.3	2,026	95.3	2,553	133.0											16,084	104.4	
		France	1,923	143.7	1,634	69.5	1,939	120.7	1,371	79.9	2,138	111.8	2,171	83.0	2,034	93.8											13,210	96.4	
		Central Europe	851	64.9	1,262	63.6	1,487	86.5	673	54.2	1,347	86.3	1,097	109.0	1,176	90.3											7,893	77.9	
		Other	2,098	51.5	2,615	86.8	2,480	70.7	2,160	64.8	2,566	71.9	2,763	75.8	3,140	131.6											17,822	75.8	
	Sub Toal	9,422	73.2	10,944	83.0	12,129	93.7	9,939	79.5	12,935	99.7	11,608	83.8	12,338	107.7											79,315	88.3		
	Other West Europe	3,617	95.2	4,133	110.2	4,296	102.8	3,701	83.4	2,768	65.0	3,469	104.2	3,967	132.0											25,951	97.0		
	U. K.	1,592	123.3	1,703	105.3	1,902	122.3	1,517	89.3	1,058	57.1	1,704	111.6	1,854	157.9											11,330	105.7		
	Turkey	980	57.7	1,704	117.8	1,341	83.2	1,361	65.2	901	47.7	1,030	73.6	-71	-											7,246	64.3		
	Switzerland	536	66.0	575	88.1	769	103.8	626	158.1	627	164.1	692	270.3	1,004	210.0											4,829	129.9		
	East Europe	169	241.4	328	164.0	82	62.6	123	1230.0	99	380.8	828	773.8	132	55.2											1,761	224.9		
	Russia - Other	10	250.0	17	212.5	14	233.3	13	185.7	31	442.9	13	185.7	2	28.6											100	217.4		
Sub Total	13,218	79.0	15,422	90.0	16,521	95.7	13,776	81.3	15,833	91.7	15,918	92.0	16,439	111.8											107,127	91.3			
North America	U. S. A.	20,768	98.7	23,026	102.0	24,703	102.1	27,226	144.1	28,990	122.8	24,929	116.5	23,791	103.6											173,433	112.1		
	Canada	1,839	105.2	1,719	122.5	593	41.0	831	38.3	1,260	75.6	948	71.1	1,118	74.1											8,308	73.7		
	Mexico	1,551	101.7	997	60.2	1,981	76.7	3,968	243.1	2,541	107.4	2,364	269.9	1,804	73.1											15,206	116.0		
	Sub Total	24,158	99.3	25,742	100.4	27,277	96.7	32,025	141.1	32,791	118.7	28,241	119.7	26,713	99.1											196,947	110.0		
S & C America	Brazil	699	153.6	611	55.9	1,552	125.1	650	38.1	853	123.1	896	139.6	952	94.0											6,213	90.8		
	Other	29	13.6	439	2195.0	106	392.6	177	536.4	50	39.1	52	1.5	107	148.6											960	24.3		
	Sub Total	728	109.0	1,050	94.3	1,658	130.8	827	47.6	903	110.0	948	23.1	1,059	97.6											7,173	66.4		
Oceania	Australia	701	114.7	466	78.3	611	115.1	520	163.5	435	50.1	1,043	123.9	468	68.3											4,244	95.4		
	Other	2	1.4	1	1.1	0	-	59	88.1	180	216.9	82	328.0	72	124.1											396	79.7		
	Sub Total	703	93.9	467	68.3	611	107.6	579	150.4	615	64.7	1,125	129.8	540	72.7											4,640	93.8		
Middle East	376	37.5	477	88.3	262	78.4	228	30.8	259	67.4	386	294.7	590	65.4											2,578	63.9			
Africa	168	305.5	165	141.0	0	-	162	265.6	134	496.3	1	-	25	30.5											655	122.7			
Grand Total	84,150	104.7	84,431	103.4	101,837	117.9	95,835	113.4	95,702	106.7	93,294	100.3	92,911	105.3											648,160	107.3			
Of which NC	83,878	105.6	83,727	103.0	101,272	117.9	95,157	113.0	94,721	106.2	92,916	100.4	92,525	105.5											644,196	107.3			

(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”.