



NEWS RELEASE

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The Current Condition of the Japanese Machine Tool Industry

Monthly Machine Tool Orders (August 2025)

The total value of machine tool orders in August was 120.17 billion yen. This decreased 6.4% compared to July 2025 and marked the second consecutive month of month-on-month decline. However, this figure represented an increase of 8.5% compared to the same month of the previous year and marked the second consecutive month of year-on-year growth.

The total number of orders exceeded 120 billion yen for the sixth consecutive month. It was the 54th consecutive month that the total amount exceeded 110 billion yen, and compared to the same period last year, this was the second consecutive month of month-on-month growth. As for the outlook for machine tool orders, we expect them to improve in the second half of the year, while keeping in mind the gradual movement in domestic and overseas demand and the risk of a downturn amid the uncertainty in the global economy and the easing impact of U.S. tariff measures.

Domestic orders fell by 10.0% from July to 31.90 billion yen. Furthermore, this figure showed a decrease of 0.9% from the same month of the previous year. It fell below 35 billion yen for the first time in three months, thus the growth rate decreased both compared to the previous month and the previous year.

Looking at major industries, orders compared to July fell by 2.4% in industrial machinery, by 23.9% in motor vehicles, by 17.4% in electrical & precision machinery, and rose by 13.5% in aircraft, shipbuilding & transport equipment.

Foreign orders fell by 5.0% from July to 88.28 billion yen, marked the fifth consecutive month of month-on-month decline. Nevertheless, foreign orders showed an increase of 12.3% over the same month of the previous year, and this marked the eleventh consecutive month of year-on-year growth. By region, orders from Asia fell by 9.1% from July to 43.20 billion yen. This decreased 1.0% from the same month of the previous year. Orders from Europe fell by 14.0% from July to 14.14 billion yen. This was an increase of 32.1% over the same month of the previous year. Orders from North America rose by 8.8% over July, amounting to 29.08 billion yen. This figure showed an increase of 26.5% over 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	116.5	
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	116.8
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
2024	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
	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	118.0
	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	116.7
2025	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	116.1
	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	119.8
2024	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	8																	

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 (%)	01/25-08/25	year-to-year (%)	August ' 25	Aug. 25/July 25 (%)	Aug. 25/Aug. 24 (%)
Industry												
1. Primary Metals		15,172	92.8	3,602	2,636	73.2	67.5	8,856	93.3	1,501	134.4	155.5
2. Fabricated Metal Products		37,200	101.1	10,718	9,836	91.8	129.0	24,956	111.7	2,050	87.2	92.8
Machinery & Equipment Industries	3. Industrial Machinery	181,041	88.9	43,542	46,020	105.7	105.4	116,451	97.1	13,281	97.6	89.9
	(of which construction machinery)	8,449	67.9	2,804	3,129	111.6	139.8	6,978	113.9	753	257.9	123.2
	(of which dies and molds)	15,761	55.9	3,316	3,729	112.5	92.2	9,690	85.1	1,016	62.4	105.4
	4. Motor Vehicles	91,025	90.5	24,891	16,973	68.2	65.8	55,997	89.5	6,107	76.1	85.2
	(of which auto parts)	62,400	84.9	16,197	10,996	67.9	63.0	37,273	85.2	4,558	82.5	89.5
	5. Electrical Machinery	31,506	86.9	6,931	10,218	147.4	168.6	21,404	103.0	2,066	94.4	130.2
	6. Precision Machinery	23,227	108.4	5,977	5,294	88.6	79.2	14,377	96.6	1,263	68.5	123.1
	5 – 6. Electrical & Precision Machinery (Sub Total)	54,733	94.9	12,908	15,512	120.2	121.7	35,781	100.3	3,329	82.6	127.4
	7. Aircraft, Shipbuilding & Transport equipment	24,218	120.1	9,338	6,578	70.4	88.3	20,770	132.2	2,580	113.5	134.7
	(of which aircraft)	13,183	154.9	4,575	3,407	74.5	78.0	10,904	135.4	1,480	102.6	209.6
	3 – 7. Sub total	351,017	91.9	90,679	85,083	93.8	94.9	228,999	97.9	25,297	90.5	95.6
8. Other Machinery & Equipment		18,793	82.2	5,921	5,146	86.9	108.2	14,406	113.3	1,441	75.9	131.5
9. Government, Public Agencies & Schools		2,532	128.1	333	545	163.7	94.6	1,701	91.7	453	122.4	93.6
10. Others		11,917	98.0	2,805	2,901	103.4	85.9	8,033	97.7	867	59.4	124.9
11. Trading Companies		4,907	105.9	969	1,117	115.3	52.4	2,681	69.7	286	92.6	106.7
1-11. Domestic Total		441,538	92.6	115,027	107,264	93.3	95.8	289,632	99.1	31,895	90.0	99.1
12. Foreign		1,043,571	103.4	270,418	284,831	105.3	106.6	736,437	107.9	88,277	95.0	112.3
1-12. Grand Total		1,485,109	99.9	385,445	392,095	101.7	103.4	1,026,069	105.3	120,172	93.6	108.5
(of which: NC machines)		1,461,592	99.9	378,749	386,160	102.0	103.8	1,009,798	105.3	118,873	94.3	108.5

Sales	1,526,187	94.4	460,870	366,974	79.6	111.5	1,064,148	110.8	116,136	96.6	93.7
(of which: NC machines)	1,503,335	94.5	454,718	361,763	79.6	111.4	1,049,585	111.0	114,545	96.6	93.6
Order Backlog	767,825	97.7	692,400	717,521	103.6	88.9	729,202	91.1	729,202	100.6	91.1
(of which: NC machines)	746,270	98.1	670,301	694,698	103.6	88.9	705,939	91.1	705,939	100.6	91.1

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	2,086	54.5									19,759	95.0
		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	1,118	98.6									12,530	80.0
		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	29,324	102.8									248,760	115.6
		Other	42	-	0	-	0	-	65	185.7	0	-	0	-	0	-	0	-									107	27.5
		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	32,528	96.8									281,156	111.6
	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	1,787	172.2									11,628	83.6
		Malaysia	334	33.8	634	75.1	559	56.9	969	84.2	922	84.8	670	71.8	903	80.8	925	125.0									5,916	75.4
		Sigapore	542	59.6	525	144.2	814	171.0	986	365.2	442	70.4	513	152.2	800	261.4	564	191.2									5,186	144.7
		Philippine	370	445.8	137	39.7	149	62.6	84	56.4	142	125.7	152	49.5	68	111.5	105	87.5									1,207	85.2
		Indonesia	632	123.4	696	175.8	480	221.2	223	45.7	453	241.0	353	70.2	364	58.2	455	112.3									3,656	109.7
		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	1,848	85.1									14,130	138.1
		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	4,982	94.6									49,103	128.0
		Other	178	8900.0	8	266.7	8	61.5	6	200.0	16	27.6	35	1166.7	1	33.3	3	42.9									255	277.2
	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	10,669	106.2									91,081	115.6	
	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	43,197	99.0									372,237	112.5	
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	2,720	107.3									27,026	91.5
		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	1,733	178.1									17,817	108.8
		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	928	71.7									14,138	94.2
		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	1,898	170.8									9,791	87.1
		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	2,340	130.7									20,162	79.6
	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	9,619	124.9									88,934	91.2	
	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	4,433	151.0									30,384	102.3	
	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	2,049	180.4									13,379	112.9	
	Turkey	980	57.7	1,704	117.8	1,341	83.2	1,361	65.2	901	47.7	1,030	73.6	-71	-	1,650	140.3									8,896	71.4	
	Switzerland	536	66.0	575	88.1	769	103.8	626	158.1	627	164.1	692	270.3	1,004	210.0	519	169.6									5,348	132.9	
	East Europe	169	241.4	328	164.0	82	62.6	123	1230.0	99	380.8	828	773.8	132	55.2	86	136.5									1,847	218.3	
	Russia - Other	10	250.0	17	212.5	14	233.3	13	185.7	31	442.9	13	185.7	2	28.6	5	100.0									105	205.9	
	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	14,143	132.1									121,270	94.7	
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	24,080	117.4									197,513	112.7	
	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	3,597	402.3									11,905	97.8	
	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	1,400	88.7									16,606	113.1	
	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	29,077	126.5									226,024	111.9	
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	1,018	247.7									7,231	99.7	
	Other	29	13.6	439	2195.0	106	392.6	177	536.4	50	39.1	52	1.5	107	148.6	33	91.7									993	24.9	
	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	1,051	235.1									8,224	73.1	
Oceania	Australia	701	114.7	466	78.3	611	115.1	520	163.5	435	50.1	1,043	123.9	468	68.3	455	84.1									4,699	94.1	
	Other	2	1.4	1	1.1	0	-	59	88.1	180	216.9	82	328.0	72	124.1	87	202.3									483	89.4	
	Sub Total	703	93.9	467	68.3	611	107.6	579	150.4	615	64.7	1,125	129.8	540	72.7	542	92.8									5,182	93.7	
Middle East	376	37.5	477	88.3	262	78.4	228	30.8	259	67.4	386	294.7	590	65.4	225	234.4									2,803	67.8		
Africa	168	305.5	165	141.0	0	-	162	265.6	134	496.3	1	-	25	30.5	42	32.6									697	105.1		
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	88,277	112.3									736,437	107.9		
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	87,917	112.4									732,113	107.9		

(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”.