



NEWS RELEASE

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The Current Condition of the Japanese Machine Tool Industry

Monthly Machine Tool Orders (July 2026)

The total value of machine tool orders in July was ¥193.09 billion yen, down 5.1% from June 2026. This marked the first month of month-on-month decline in two months. Nevertheless, orders increased 50.4% from the same month a year earlier, marking the thirteenth consecutive month of year-on-year growth.

Total orders exceeded ¥120 billion for the 17th consecutive month, reaching third-highest level since record began. Although both domestic and foreign orders declined month-on-month, they remained at a high level, with both recording year-on-year growth of more than 50%.

Looking ahead, demand for capital equipment is expected to grow further. In the domestic market, policy support is expected to drive growth, while overseas demand is likely to benefit from the boom in AI- and robotics-related sectors, which could help ease uncertainty stemming from the international situation. However, it is also necessary to remain mindful of the potential impact that inflation concerns could have on capital investment.

Domestic orders fell by 8.2% from June to ¥53.24 billion yen. Despite the monthly decline, orders increased 50.2% from the same month a year earlier.

By major industries, orders for industrial machinery declined 0.3% from June, while those for motor vehicles fell 39.3% and electrical & precision machinery declined 15.5%. In contrast, orders for aircraft, shipbuilding & transport equipment increased 15.7%.

Foreign orders fell 3.8% from June to ¥139.85 billion, marking the first month of month-on-month decline in two months. Nevertheless, foreign orders increased for the 22nd consecutive month on a year-on-year basis, reaching the third-highest level since record began. By region, orders from Asia fell by 8.3% from June to ¥74.68 billion but increased 57.1% from the same month a year earlier. Orders from Europe rose 9.5% from June to ¥23.13 billion, representing a 40.7% year-on-year increase. Orders from North America declined 0.5% from June to ¥40.44 billion, while increasing to 51.4% from the same month a year earlier.

JAPAN MACHINE TOOL BUILDERS' ASSOCIATION

Kikai Shinko Kaikan, 3-5-8, Shibakoen, Minato-ku Tokyo 105-0011, Japan

Tel : +81-3-3434-3961

URL : <http://www.jmtba.or.jp>

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. 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	1,568,550	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	75,615	88.5	26,477	116.5
2025	1,604,319	108.0	440,862	99.8	1,163,457	111.5	1,633,205	757,430	53,445	304,152	982,645	109.0	56,042	1,069,220	5,209	32,338	845,355	111.0	68,092	90.1	26,285	119.8
F.Y. 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	53,409	301,283	927,723	93.6	55,505	1,010,297	6,514	32,756	793,252	98.8	74,334	89.5	26,372	116.8
2025	1,704,667	112.9	446,096	100.4	1,258,571	118.1	1,603,953	811,605	51,730	302,883	994,178	107.2	53,827	1,077,810	5,012	29,477	841,863	106.1	73,742	99.2	26,316	121.2
2023 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	12,481	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	19,209	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	20,041	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	15,441	80,906	254,212	111.6	16,705	286,221	6,514	32,756	219,614	116.8	16,591	92.8	26,183	116.1
4-6	392,095	103.4	107,264	95.8	284,831	106.6	366,974	717,521	12,372	70,251	219,904	109.2	12,711	232,963	5,447	33,683	191,234	111.3	16,796	90.8	26,405	119.8
7-9	387,675	107.7	110,986	101.4	276,689	110.4	371,577	732,958	12,617	76,160	250,122	107.6	12,842	263,069	5,601	35,180	208,690	108.8	15,417	80.3	26,021	122.2
10-12	439,104	114.1	107,585	99.9	331,519	119.6	433,784	757,430	13,015	76,835	258,407	107.8	13,784	286,967	5,209	32,338	225,818	107.5	19,288	96.2	26,533	121.2
2026 1-3	485,793	126.0	120,261	104.6	365,532	135.2	431,618	811,605	13,726	79,637	265,745	104.5	14,490	294,811	5,012	29,477	216,122	98.4	22,240	134.1	26,307	121.7
4-6	569,348	145.2	152,635	142.3	416,713	146.3	413,834	966,502	13,686	76,153	253,591	115.3	13,618	264,582	5,424	32,413	222,485	116.3	22,365	133.2	25,874	119.5
2025 2	118,198	103.5	33,767	103.8	84,431	103.4	130,914	759,941	5,091	26,648	80,183	105.1	5,703	91,716	6,508	38,002	76,687	119.8	5,097	78.3	26,194	115.7
3	151,101	111.4	49,264	100.0	101,837	117.9	218,642	692,400	5,595	29,399	94,823	111.5	6,697	116,493	6,514	32,756	86,935	118.3	4,545	80.8	26,159	115.9
4	130,214	107.7	34,379	94.5	95,835	113.4	126,854	695,760	4,492	23,647	71,398	113.7	4,250	71,312	5,807	34,811	61,953	104.1	5,367	90.0	26,336	116.6
5	128,718	103.4	33,016	94.8	95,702	106.7	111,352	713,126	3,867	22,131	71,017	108.0	4,415	77,972	5,366	34,307	61,262	114.4	5,573	77.8	26,401	118.7
6	133,163	99.5	39,869	97.7	93,294	100.3	128,768	717,521	4,013	24,473	77,489	106.4	4,046	83,679	5,447	33,683	68,019	115.8	5,857	109.1	26,477	124.2
7	128,357	103.6	35,446	99.3	92,911	105.3	120,168	725,104	4,117	25,929	82,963	114.6	4,056	80,115	5,617	36,298	68,896	113.5	5,897	86.8	26,051	122.8
8	120,172	108.5	31,895	99.1	88,277	112.3	116,136	729,202	3,931	23,800	76,863	104.4	4,062	79,537	5,597	37,167	61,611	94.6	4,384	89.4	26,045	121.6
9	139,146	111.0	43,645	105.1	95,501	113.9	135,273	732,958	4,569	26,431	90,296	104.5	4,724	103,417	5,601	35,180	78,183	118.5	5,136	68.4	25,967	122.2
10	143,456	117.1	35,693	106.7	107,763	120.9	119,967	756,481	4,278	26,110	84,235	112.8	4,450	86,846	5,530	35,959	73,552	111.0	6,525	86.7	26,612	120.6
11	137,005	114.8	31,987	93.2	105,018	123.6	133,711	759,478	4,216	24,319	81,020	100.9	4,217	89,753	5,623	35,514	71,748	116.3	6,464	102.1	26,511	120.2
12	158,643	110.9	39,905	100.0	118,738	115.1	180,106	757,430	4,521	26,406	93,152	110.0	5,117	110,368	5,209	32,338	80,519	98.0	6,299	101.9	26,475	122.9
2026 1	145,579	125.3	32,624	102.0	112,955	134.2	175,089	775,039	4,074	24,717	78,489	99.2	4,158	83,703	5,326	32,801	62,284	111.2</				

NET NEW ORDERS – METAL CUTTING MACHINE TOOLS IN JAPAN

(Value: in Millions of Yen)

Period		Total 2025	25/24 (%)	01/23-03/26	04/26-06/26	Previous Quarter (%)	year-to-year (%)	01/26-07/26	year-to-year (%)	July ' 26	July 26/June 26 (%)	July 26/July 25 (%)
Industry												
1. Primary Metals		14,468	95.4	4,168	6,219	149.2	235.9	12,152	165.2	1,765	142.8	158.0
2. Fabricated Metal Products		35,369	95.1	11,072	11,623	105.0	118.2	26,641	116.3	3,946	121.9	167.8
Machinery & Equipment Industries	3. Industrial Machinery	175,881	97.1	44,530	53,506	120.2	116.3	121,178	117.5	23,142	99.7	170.1
	(of which construction machinery)	9,448	111.8	2,385	3,031	127.1	96.9	5,927	95.2	511	47.8	175.0
	(of which dies and molds)	16,043	101.8	3,701	4,072	110.0	109.2	8,683	100.1	910	78.0	55.9
	4. Motor Vehicles	87,073	95.7	22,804	35,825	157.1	211.1	67,885	136.1	9,256	60.7	115.3
	(of which auto parts)	56,876	91.1	16,157	21,874	135.4	198.9	45,258	138.3	7,227	84.1	130.9
	5. Electrical Machinery	31,900	101.3	12,998	15,475	119.1	151.4	34,871	180.3	6,398	89.9	292.3
	6. Precision Machinery	20,626	88.8	5,371	7,186	133.8	135.7	14,383	109.7	1,826	69.7	99.1
	5 – 6. Electrical & Precision Machinery (Sub Total)	52,526	96.0	18,369	22,661	123.4	146.1	49,254	151.8	8,224	84.5	204.0
	7. Aircraft, Shipbuilding & Transport equipment	35,318	145.8	8,571	13,497	157.5	205.2	24,926	137.0	2,858	115.7	125.7
	(of which aircraft)	17,759	134.7	5,649	7,386	130.7	216.8	14,169	150.4	1,134	75.5	78.6
3 – 7. Sub total		350,798	99.9	94,274	125,489	133.1	147.5	263,243	129.2	43,480	85.8	155.6
8. Other Machinery & Equipment		21,000	111.7	5,522	4,329	78.4	84.1	11,973	92.3	2,122	180.6	111.8
9. Government, Public Agencies & Schools		3,515	138.8	925	705	76.2	129.4	2,018	161.7	388	155.8	104.9
10. Others		11,513	96.6	3,096	3,027	97.8	104.3	7,032	98.1	909	83.2	62.3
11. Trading Companies		4,199	85.6	1,204	1,243	103.2	111.3	3,074	128.4	627	170.4	202.9
1-11. Domestic Total		440,862	99.8	120,261	152,635	126.9	142.3	326,133	126.5	53,237	91.8	150.2
12. Foreign		1,163,457	111.5	365,532	416,713	114.0	146.3	922,098	142.3	139,853	96.2	150.5
1-12. Grand Total		1,604,319	108.0	485,793	569,348	117.2	145.2	1,248,231	137.8	193,090	94.9	150.4
(of which: NC machines)		1,579,239	108.0	478,693	561,784	117.4	145.5	1,229,722	138.0	189,245	94.2	150.2

Sales	1,633,205	107.0	431,618	413,834	95.9	112.8	995,902	105.1	150,450	91.1	125.2
(of which: NC machines)	1,607,246	106.9	424,517	408,498	96.2	112.9	981,140	104.9	148,125	90.8	124.9
Order Backlog	757,430	98.6	811,605	966,502	119.1	134.7	1,009,142	139.2	1,009,142	104.4	139.2
(of which: NC machines)	736,066	98.6	790,242	942,911	119.3	135.7	984,031	140.3	984,031	104.4	140.3

NET NEW ORDERS BY DESTINATION

(Value in Millions of yen)

2026		Jan.		Feb.		Mar.		Apr.		May		June		July		Aug.		Sep.		Oct.		Nov.		Dec.		Total			
			%		%		%		%		%		%		%		%		%		%		%		%	2026	%		
Asia	East Asia	Korea	2,835	107.8	2,996	98.5	2,655	102.6	3,751	115.8	1,975	82.4	3,349	172.5	5,004	271.8											22,565	127.7	
		Taiwan	3,356	261.2	1,898	112.8	2,199	100.8	3,384	185.4	4,940	305.1	3,583	282.6	4,048	261.2											23,408	205.1	
		China	43,298	156.9	37,456	140.4	51,353	142.3	53,333	157.0	51,246	165.6	56,489	175.6	48,626	152.2											341,801	155.8	
		Other	0	–	0	–	0	–	17	26.2	0	–	0	–	0	–											17	15.9	
		East Asia Total	49,489	156.8	42,350	134.8	56,207	137.6	60,485	154.7	58,161	166.3	63,421	179.2	57,678	163.2											387,791	156.0	
	Other Asia	Thailand	1,832	173.3	1,125	100.0	2,221	185.1	1,353	106.8	2,018	75.8	1,869	124.6	1,801	174.9												12,219	124.2
		Malaysia	874	261.7	512	80.8	1,107	198.0	2,053	211.9	1,246	135.1	2,270	338.8	1,354	149.9											9,416	188.7	
		Sigapore	726	133.9	1,126	214.5	579	71.1	936	94.9	648	146.6	1,438	280.3	2,489	311.1											7,942	171.8	
		Philippine	245	66.2	484	353.3	1,055	708.1	1,192	1419.0	300	211.3	241	158.6	325	477.9											3,842	348.6	
		Indonesia	414	65.5	609	87.5	409	85.2	523	234.5	1,108	244.6	461	130.6	909	249.7											4,433	138.5	
		Vietnam	1,312	75.3	803	67.6	1,142	70.5	1,650	193.9	5,250	507.7	1,999	68.4	1,870	64.0											14,026	114.2	
		India	5,839	69.6	7,877	146.2	11,663	118.8	7,657	161.4	5,773	127.5	9,156	178.0	7,284	119.2											55,249	125.2	
		Other	1,123	630.9	314	3925.0	708	8850.0	420	7000.0	528	3300.0	567	1620.0	973	97300.0											4,633	1838.5	
	Other Asia Total	12,365	93.4	12,850	132.5	18,884	128.9	15,784	172.9	16,871	165.4	18,001	159.5	17,005	139.4											111,760	139.0		
	Sub Total	61,854	138.1	55,200	134.3	75,091	135.3	76,269	158.1	75,032	166.1	81,422	174.4	74,683	157.1											499,551	151.8		
Europe	EU	Germany	3,808	125.2	3,948	104.2	4,291	123.2	4,469	132.3	3,221	88.8	3,256	91.7	4,677	136.2											27,670	113.8	
		Italy	2,173	144.1	2,171	132.1	3,498	127.7	2,729	115.8	3,078	94.5	2,437	120.3	3,206	125.6											19,292	119.9	
		France	1,519	79.0	1,095	67.0	2,735	141.1	3,113	227.1	1,809	84.6	2,356	108.5	3,441	169.2											16,068	121.6	
		Central Europe	1,643	193.1	1,407	111.5	3,016	202.8	1,797	267.0	1,772	131.6	2,373	216.3	2,469	209.9											14,477	183.4	
		Other	2,687	128.1	3,923	150.0	3,287	132.5	3,391	157.0	2,828	110.2	3,339	120.8	3,925	125.0											23,380	131.2	
	Sub Toal	11,830	125.6	12,544	114.6	16,827	138.7	15,499	155.9	12,708	98.2	13,761	118.5	17,718	143.6											100,887	127.2		
	Other West Europe	3,101	85.7	4,094	99.1	5,439	126.6	4,420	119.4	3,683	133.1	5,231	150.8	5,065	127.7											31,033	119.6		
	U.K.	1,355	85.1	1,804	105.9	2,093	110.0	2,153	141.9	1,589	150.2	2,105	123.5	2,232	120.4											13,331	117.7		
	Turkey	1,089	111.1	1,705	100.1	2,410	179.7	1,420	104.3	693	76.9	1,613	156.6	1,835	–											10,765	148.6		
	Switzerland	435	81.2	511	88.9	715	93.0	770	123.0	867	138.3	1,048	151.4	649	64.6											4,995	103.4		
	East Europe	107	63.3	71	21.6	106	129.3	357	290.2	159	160.6	170	20.5	37	28.0											1,007	57.2		
	Russia - Other	13	130.0	3	17.6	5	35.7	5	38.5	250	806.5	193	1484.6	313	15650.0											782	782.0		
Sub Total	15,051	113.9	16,712	108.4	22,377	135.4	20,281	147.2	16,800	106.1	19,355	121.6	23,133	140.7											133,709	124.8			
North America	U.S.A.	31,094	149.7	31,211	135.5	39,265	158.9	35,805	131.5	30,350	104.7	35,998	144.4	37,114	156.0											240,837	138.9		
	Canada	1,849	100.5	2,429	141.3	2,259	380.9	3,264	392.8	3,220	255.6	2,704	285.2	1,775	158.8											17,500	210.6		
	Mexico	1,611	103.9	2,129	213.5	1,540	77.7	1,987	50.1	3,789	149.1	1,951	82.5	1,547	85.8											14,554	95.7		
	Sub Total	34,554	143.0	35,769	139.0	43,064	157.9	41,056	128.2	37,359	113.9	40,653	144.0	40,436	151.4											272,891	138.6		
S & C America	Brazil	642	91.8	840	137.5	982	63.3	628	96.6	827	97.0	962	107.4	691	72.6											5,572	89.7		
	Other	138	475.9	43	9.8	16	15.1	35	19.8	87	174.0	135	259.6	193	180.4											647	67.4		
	Sub Total	780	107.1	883	84.1	998	60.2	663	80.2	914	101.2	1,097	115.7	884	83.5											6,219	86.7		
Oceania	Australia	387	55.2	621	133.3	940	153.8	983	189.0	470	108.0	558	53.5	759	162.2											4,718	111.2		
	Other	4	200.0	40	4000.0	174	–	18	30.5	20	11.1	237	289.0	85	118.1											578	146.0		
	Sub Total	391	55.6	661	141.5	1,114	182.3	1,001	172.9	490	79.7	795	70.7	844	156.3											5,296	114.1		
Middle East	302	80.3	170	35.6	234	89.3	394	172.8	1,053	406.6	1,825	472.8	–161	–											3,817	148.1			
Africa	23	13.7	185	112.1	119	–	17	10.5	29	21.6	208	20800.0	34	136.0											615	93.9			
Grand Total	112,955	134.2	109,580	129.8	142,997	140.4	139,681	145.8	131,677	137.6	145,355	155.8	139,853	150.5											922,098	142.3			
Of which NC	111,969	133.5	108,563	129.7	141,779	140.0	138,161	145.2	130,435	137.7	144,084	155.1	138,046	149.2											913,037	141.7			

(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”.