

PRESS RELEASE

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International projects hold up machine tool order levels China and US switch places again in the rankings of the top customers in the first quarter

Frankfurt am Main, 21 May 2025. – Orders received by the German machine tool industry in the first quarter of 2025 were 10 percent down on the same period last year. Domestic orders fell by 30 percent, while orders from abroad remained at the previous year's level.

"After a generally weak start to the year, March brought a small ray of hope," explains Dr. Markus Heering, Executive Director of the VDW (German Machine Tool Builders' Association) in Frankfurt am Main. "Orders increased by 2 percent – an initial positive signal that is primarily due to demand from abroad, particularly from the eurozone. By contrast, the German domestic market continues to fall well short of expectations," continues Heering.

Europe remained the top sales market for the German machine tool industry in the first quarter. There was a noticeable increase in demand from many key countries. Overall, the region grew by almost a third, albeit from a low level.

The downward trend in Asia also came to an end in the first quarter. Increasing by 6 percent, the region saw positive growth again for the first time. It is particularly gratifying that China recorded slight growth again after a long hiatus. China thus replaced the US as the most important single market.

On the American continent, positive impetus came above all from projects in Mexico. Orders from the US, on the other hand, fell by a tenth. "Nothing has changed, however: US industry requires German manufacturing technology in order to modernize – there are not enough suitable domestic suppliers," Heering emphasizes.

Among the top customer industries, medical technology and aviation are the sectors with the strongest demand, according to an economic survey of machine tool and component manufacturers conducted in the first quarter of 2025. There are also signs of recovery in the engineering sector as a whole, with encouraging growth in the first quarter of this year. The automotive industry remains the biggest worry.

"It's too soon to speak of a trend reversal, especially in the face of increased international uncertainty due to the erratic tariff policy of the US administration," concludes Heering. The sector sees this – along with export controls and high costs – as the biggest obstacle to a turnaround.

Background

The German machine tool industry ranks among the five largest specialist groupings in the mechanical engineering sector. It provides production technology for metalworking applications in all branches of industry and makes a crucial contribution towards innovation and enhanced productivity in the industrial sector as a whole. Due to its absolutely key role for industrial production, its development is an important indicator for the economic dynamism of the industrial sector as such. In 2024, with an average of 65,300 employees (firms with more than 50 staff), the sector produced machines and services worth around 14.7 billion euros.

Picture:

Dr. Markus Heering, Executive Director of the VDW (German Machine Tool Builders' Association), Frankfurt am Main

Graphic: Order bookings in the German machine tool industry

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