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U.S. MANUFACTURING TECHNOLOGY ORDERS

Press Release

FOR IMMEDIATE RELEASE
February 9, 2026

Manufacturing Technology Orders Set Record in December 2025

McLean, Va. (February 9, 2026) — New orders of metalworking machinery, measured by the U.S. Manufacturing Technology Orders Report published by AMT – The Association For Manufacturing Technology, totaled $814.3 million in December 2025, the highest monthly order value on record. The value of December 2025 orders grew 86.7% over November 2025 and 59.9% over December 2024. Through November 2025, the annual total had already surpassed the value of all 2024 orders by 5.1%. December orders brought the 2025 total value of machinery orders to $5.74 billion, beating 2024 by 22.5%.

While demand for manufacturing technology quickly rebounded from the 2020 COVID-19 recession, growing by more than half in 2021, it was followed by three years of decline, reaching a trough in the summer of 2024. The industry began to recover in September 2024 on the heels of IMTS – The International Manufacturing Technology Show. That pickup in demand at the end of 2024 was amplified in 2025 by a less restrictive interest rate environment, an easing of the uncertainty that gripped the middle of the year, and the passage of tax provisions favorable to capital investment.

Through 2025, the value of manufacturing technology investments followed a relatively linear upward path, whereas the count of units ordered had a slightly choppier journey: January had the lowest order value of the year, while unit trends showed a modest slump from May to August. These divergent trends indicate that the heightened uncertainty following the April 2 tariff announcement may have delayed some orders, but that large, longer-term investments were undeterred by rising uncertainty and political noise.

While the May-August 2025 slump in units ordered was easily attributable to the heightened uncertainty of the time, it also extended a longer-running trend of loosening correlation between the number of machines ordered and their value, which began in the latter half of 2021. Instances of two data series deviating from a normally correlated path have cropped up so frequently in the analysis of economic data that a December 2025 New York Times article asked, “When did everything become K-shaped?” These bifurcated trends in machinery orders are largely due to increased demand for automation and divergent buying patterns across customer industries.

Orders from **contract machine shops**, the largest customer of manufacturing technology, grew 19.1% in 2025. This industry is a strong driver of unit growth, so its underperformance relative to the total market growth of 22.5% has contributed to the growing divergence between dollar value and unit trends. Conversely, the **aerospace** sector typically purchases high-value machinery that

drives dollar-value growth without moving the needle on units as much as other customer industries. Growing factory shipments in 2025, along with ongoing capacity constraints, have led to 45.1% growth in manufacturing technology orders from aerospace manufacturers compared to 2024.

Investment in manufacturing technology from **auto manufacturers** has varied wildly over the last several years, after the industry made headline-grabbing forays into electric vehicle production and an equally publicized retreat that required further retooling of production lines. This change in response to consumer preferences led to a 22.2% increase in machinery investment in 2024. The fastest-growing industry in 2025 was **commercial and service machinery**, which grew 121.5% over 2024 levels. Among other equipment used throughout the service sector, this industry also manufactures inspection equipment heavily used in chip fabs.

The forces that propelled investment in manufacturing technology to new heights at the end of 2025 will continue to drive the market well into 2026, with single-digit annual growth expected. The race to build AI capacity is creating opportunities to further sales in the industries that support **electricity generation and distribution**. Amid a global decline in steel production, the United States stands as an outlier, with production increasing. Coupling this increase with strong investments in machinery by **primary metal producers** could point to further manufacturing capacity needs in the coming months and years. Machinery ordered in 2025 will begin to hit shop floors throughout the first quarter of 2026 and, combined with increased levels of industrial activity, are expected to push cutting tool consumption up nearly 5% in 2026.

Continued consumer demand and elevated investment in manufacturing technology lend credence to the Federal Reserve's assertion that interest rates are approaching, if not at, the neutral rate as supply and demand forces in the economy move closer to alignment. If these factors persist as expected, a quite rationally exuberant manufacturing sector will convene in Chicago from Sept. 14 through 19, when IMTS – The International Manufacturing Technology Show opens.

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The United States Manufacturing Technology Orders (USMTO) Report is based on the totals of actual data reported by companies participating in the USMTO program. This report, compiled by AMT – The Association For Manufacturing Technology, provides regional and national U.S. orders data of domestic and imported machine tools and related equipment. Analysis of manufacturing technology orders provides a reliable leading economic indicator as manufacturing industries invest in capital metalworking equipment to increase capacity and improve productivity. USMTO.com.

AMT – The Association For Manufacturing Technology represents U.S.-based providers of manufacturing technology – the advanced machinery, devices, and digital equipment that U.S. manufacturing relies on to be productive, innovative, and competitive. Located in McLean, Virginia, near the nation's capital, AMT acts as the industry's voice to accelerate the pace of innovation, increase global competitiveness, and develop manufacturing's advanced workforce of tomorrow. With extensive expertise in industry data and market intelligence, as well as a full complement of international business operations, AMT offers its members an unparalleled level of support. AMT also produces IMTS – The International Manufacturing Technology Show, the premier manufacturing technology event in North America. Learn more at AMTonline.org.

IMTS – The International Manufacturing Technology Show is where the creators, builders, sellers, and drivers of manufacturing technology come to connect and achieve the impossible. Attendees discover advanced manufacturing solutions that include innovations in CNC machining, automation, robotics, additive, software, AI, and transformative digital technologies that are driving the industry forward. Owned and produced by AMT – The Association For Manufacturing Technology, IMTS is the largest and most defining trade event for manufacturing technology in the Western Hemisphere. With more than 1.2 million square feet of exhibit space, the show attracts visitors from more than 110 countries. IMTS 2024 had 89,020 registrants, featured 1,609 exhibiting companies, and included a Student Summit that attracted 14,713 visitors. IMTS 2026 will be held Sept. 14-19, 2026, at McCormick Place in Chicago. Discover more at IMTS.com and connect with IMTS on social.

(USMTO data is also available at www.AMTonline.org.)

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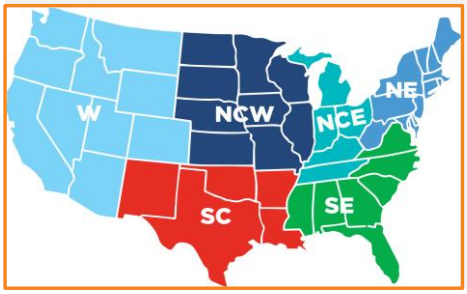
USMTO POWERED BY AMT | TOTAL U.S. MANUFACTURING TECHNOLOGY ORDERS

Orders Through December 2025 — **Published February 2026**

	DEC-25	Previous Month	% Change	Year Ago Month	% Change	YTD 2025	YTD 2024	% Change YTD
National	814.3	436.2	86.7%	509.3	59.9%	5,737.6	4,685.2	22.5%
Regional								
Northeast	$140.5	$79.9	75.9%	$105.0	33.8%	$946.7	$815.3	16.1%
Southeast	$123.5	$77.9	58.6%	$80.6	53.2%	$782.9	$632.2	23.8%
North Central-East	$146.4	$104.5	40.1%	$100.0	46.3%	$1,252.8	$1,099.5	13.9%
North Central-West	$104.8	$64.6	62.3%	$80.7	29.8%	$899.3	$886.5	1.4%
South Central	$103.5	$30.6	238.3%	$48.9	111.6%	$610.2	$408.9	49.2%
West	$195.7	$78.8	148.3%	$94.1	107.9%	$1,245.7	$842.8	47.8%

$ – Millions of dollars

D – Dollar values are not disclosed in accordance with established confidentiality rules to protect the confidentiality of individual participant data.



Net New Orders for U.S. Consumption

	Cutting Machines		*Metal Forming & Fabricating*	
Date	Units	Value	Units	Value
2024 DEC	1,972	$496,716	22	$12,589
2025 JAN	1,525	$350,230	18	$4,234
2025 FEB	1,657	$377,841	17	$5,763
2025 MAR	1,891	$505,403	17	$12,481
2025 APR	1,756	$438,232	16	$5,895
2025 MAY	1,501	$381,474	21	$11,218
2025 JUN	1,592	$421,160	16	D
2025 JUL	1,576	$387,377	8	D
2025 AUG	1,843	$530,028	18	$4,512
2025 SEP	1,794	$481,733	28	$12,428
2025 OCT	2,007	$544,323	18	$4,961
2025 NOV	1,643	$432,440	20	$3,729
2025 DEC	2,577	$806,315	20	$7,938
Average	1,795	$473,328	18	$7,795

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