

## **Naval Vessel Maintenance, Repair, And Overhaul (MRO) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 168 pages | Mordor Intelligence

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### **Report description:**

The Naval Vessel Maintenance, Repair, And Overhaul Market size is estimated at USD 59.48 billion in 2025, and is expected to reach USD 65.96 billion by 2030, at a CAGR of 2.09% during the forecast period (2025-2030).

The naval vessel maintenance, repair, and overhaul (MRO) market is pivotal in ensuring naval vessels' operational readiness and longevity. This sector has witnessed sustained growth, primarily fueled by escalating naval budgets and the pressing need to modernize fleets in response to evolving global security challenges. As aging vessels undergo technological upgrades, a notable shift toward sustainability and energy efficiency has emerged as a significant market driver.

Heightened geopolitical tensions and the escalating threats to maritime security globally have prompted nations to enhance their naval capabilities, consequently driving the demand for MRO services. Moreover, the adoption of cutting-edge technologies like predictive maintenance and 3D printing enhances operational efficiency and reduces downtimes, further propelling the market's growth trajectory.

However, the naval vessel MRO market faces challenges, notably the substantial costs linked to upgrading and maintaining advanced naval systems, which demand specialized technical know-how. Additionally, navigating regulatory frameworks and environmental concerns introduces complexities that could potentially hinder innovation speed within the sector.

Despite these challenges, the market outlook remains positive, especially with burgeoning opportunities in nations expanding their naval fleets and modernizing existing vessels. Advancements in cybersecurity for maritime systems and integrating AI and IoT technologies into MRO operations are set to play pivotal roles, providing a competitive edge to forward-thinking enterprises.

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### The Destroyers Segment is Expected to Dominate the Market During the Forecast Period

Destroyers have dominated the naval vessel MRO market. They are poised to maintain this lead during the forecast period, primarily due to their pivotal role in national and allied defense strategies. Their versatility in conducting anti-aircraft, anti-submarine, and anti-surface operations underscores their significance. Given the continuous modernization efforts, including integrating cutting-edge missile systems, radar technologies, and electronic warfare, the demand for their maintenance and upgrades is rising.

As destroyers significantly bolster naval power projection capabilities, nations increasingly invest in their MRO. Many countries focus on maintaining their existing destroyer fleets and expanding them to counter evolving maritime threats. The shift toward autonomous and network-centric operations also mandates frequent communication and combat systems updates, further propelling the MRO market.

For instance, in July 2023, the Directorate of Naval Armaments of the Secretariat General of Defence / National Armaments Directorate awarded Orizzonte Sistemi Navali (OSN) a substantial contract valued at around USD 205 million. This contract, focusing on maintenance in operational conditions, is specifically for the Italian Navy's flagship aircraft carrier, Cavour, and the Horizon class destroyers, Andrea Doria and Caio Duilio.

OSN, with this framework agreement running through 2028, is tasked with extensive maintenance, covering both the platform and combat systems of the mentioned naval units. The goal isn't just to maintain these vessels but also to enhance the technical proficiency of the Navy personnel operating them. The initial contract, spanning the first two years, is set to be finalized shortly.

OSN is a joint venture, with Fincantieri and Leonardo holding 51% and 49% stakes, respectively. This collaboration not only strengthens the integrated maintenance requirements for intricate naval vessels but also significantly bolsters the operational readiness and strategic capabilities of the Italian Navy. Beyond solidifying OSN's position as a key player in naval MRO services, this project underscores the unity among Europe's major defense entities in safeguarding maritime security.

These trends underscore the growing reliance and heightened investments in destroyer MRO services, solidifying the segment's growth trajectory. Service providers must maintain high readiness levels and swiftly adapt to emerging technologies to capitalize on the sector's expanding opportunities.

### Asia-Pacific is Projected to Witness the Highest Growth During the Forecast Period

The Asia-Pacific naval vessel MRO market is surging, driven by escalating maritime security challenges and a persistent arms race. Major global powers are pivoting strategically toward the Indo-Pacific, heightening the region's geopolitical importance. Consequently, regional navies bolstered their sea capabilities, responding to mounting territorial disputes in the South China Sea and beyond.

With defense budgets rising, many countries in Asia-Pacific are allocating a significant portion to bolstering and modernizing their naval fleets. This financial injection is a primary driver of the naval vessel MRO market. The Department of Defense is also focusing on enhancing vessels' technological prowess through advanced MRO practices. For instance, integrating AI and machine learning for predictive maintenance reduces idle time, boosts operational efficiency, and extends naval assets' lifespan.

Strategic collaborations between local governments and global MRO service providers are rising, aiming to transfer technology and bolster local naval defense capabilities. These partnerships foster innovation in local MRO services, propelling the market's

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growth. Additionally, a shift toward ecological sustainability is evident, with more services adopting green technologies to reduce their environmental impact.

Recent contracts in the Asia-Pacific highlight the evolving market dynamics. For instance, in September 2023, Mazagon Dock Shipbuilders Ltd (MDL), a government-owned entity in India, inked a significant Master Ship Repair Agreement with the United States, marking a milestone. This agreement positioned MDL as the second Indian firm, following Larsen and Toubro, to clinch a similar deal with the US Navy, with NAVSUP FLC Yokosuka as its counterpart. Notably, just a month prior, in July 2023, Larsen and Toubro had sealed a similar pact, permitting US Navy vessels to be serviced at the Kattupalli Shipyard near Chennai.

The Master Ship Repair Agreement (MSRA) serves as a pivotal, albeit non-binding, framework. It specifically designates private shipyards for the repair of US Navy vessels, a privilege typically reserved for nations with robust defense ties to the United States. This underscores the deepening defense relations between India and the United States. Furthermore, this collaboration not only bolsters the operational readiness of the US Navy but also elevates India's shipyard industry to international standards.

This surge in MRO activities signals a strategic shift toward more advanced naval postures in Asia-Pacific. With a focus on technological advancements and strategic partnerships, the Asia-Pacific naval vessel MRO market is poised for continued growth.

### Naval Vessel MRO Industry Overview

The naval vessel MRO market is fragmented, with many international and domestic players supporting navies across the world. Some of the prominent players in the market are General Dynamics Corporation, ThyssenKrupp AG, Naval Group, BAE Systems PLC, and Huntington Ingalls Industries.

Companies in the naval maintenance sector are increasingly leveraging advanced technologies to cut maintenance costs and secure lucrative, long-term contracts from global navies. A prime example is NASSCO, a subsidiary of General Dynamics, which, in January 2024, clinched a significant contract modification from the US Navy valued at around USD 438.5 million. This contract is specifically tailored for the continuous maintenance, modernization, and repair of two Arleigh Burke-class destroyers, the USS Chung-Hoon (DDG 93) and the USS James E. Williams (DDG 95). It covers these vessels' FY2024 Depot Maintenance Period, with operations set in Norfolk, Virginia, and San Diego, California. This contract, managed by the Naval Sea Systems Command, highlights these vessels' pivotal role in the US naval fleet.

Additional Benefits:

- <li> The market estimate (ME) sheet in Excel format </li>
- <li> 3 months of analyst support </li>

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