

United States Maintenance, Repair, And Operations (MRO) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The United States Maintenance, Repair, And Operations Market size is estimated at USD 93.17 billion in 2025, and is expected to reach USD 101.71 billion by 2030, at a CAGR of 1.77% during the forecast period (2025-2030).

MRO, short for maintenance, repair, and operations, encompasses all the activities essential for maintaining a facility and ensuring the smooth operation of the production process without directly engaging in production. This umbrella term covers everything from managing MRO inventory to implementing predictive, preventive, and corrective maintenance strategies. Given their significance, MRO processes play a pivotal role in sustaining factory operations.

Key Highlights

- The US MRO market is witnessing a surge in interest due to a heightened focus on internal efficiency, the rise of digitization, and amplified investments in maintenance operations. As companies increasingly recognize the cost-saving potential of MRO, particularly in streamlining processes and enhancing supply chain efficiency, their investments in this market have been on the rise.
- Moreover, the United States is experiencing economic and manufacturing growth, especially owing to the renewed focus of the government on restoring some of the critical industries, thereby further fueling the demand for maintenance and repair services. The advent of Industry 4.0 is also catalyzing advancements in the MRO sector.
- Aging equipment in manufacturing, utility, and other industrial facilities leads to reduced productivity, efficiency, and heightened costs due to increased downtime. While all equipment faces unplanned downtime, older equipment is prone to more frequent planned and unplanned downtimes, with risks escalating as they age.
- Industry 4.0, a product of the ongoing industrial revolution, marks a significant departure from the traditional linear supply chain model. It ushers in an era of interconnected, agile supply operations within manufacturing. This evolution in manufacturing, from

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the First Industrial Revolution to the current Industry 4.0, is reshaping the sector. Industry 4.0 is not just about upgrading from legacy systems to smart machines; it's about creating digital factories and fostering a network of interconnected enterprises.

- While the industrial MRO market in the United States continues to present lucrative opportunities, distributors grapple with persistent pricing pressures. Many vendors lean heavily on scale and SKU variety, a strategy that doesn't shield them from the threat of commoditization. Vendors in the MRO market also usually focus on ramping up their SKU offerings to attract a broader customer base. However, merely expanding SKU numbers doesn't equate to higher profits. It necessitates forging partnerships with multiple suppliers, often requiring vendors to share profit margins and cost benefits with both suppliers and customers.

USA Maintenance Repair & Operations (MRO) Market Trends

Manufacturing (Industrial MRO) Accounts for the Largest Share

- The adoption of industrial MRO equipment in the manufacturing industry in the country has been impacted by various driving factors, which include the surging demand to reduce cost, ramping market maturity, cyclical fluctuations in new equipment sales, as well as the growing need to enhance product quality. With enterprises in the manufacturing sector continuously looking forward to achieving large profit margins, they have been looking to increase return on net assets (RONA).
- Next to a safety or environmental mishap, unscheduled or unplanned downtime has emerged as one of the costliest events at any manufacturing plant. According to Forbes, an average manufacturer confronts 800 hours of equipment downtime per year, which turns out to be more than 15 hours per week. That downtime arrives at a cost, and it's quite hefty. For instance, the average automotive manufacturer loses USD 22,000 per minute when the manufacturing line stops, and that swiftly adds up. Collectively, unplanned downtime costs industrial manufacturers as much as USD 50 billion a year.
- Furthermore, manufacturers in the country have been looking towards optimizing their processes to reduce their overall energy consumption in adherence to government regulations. As part of President Biden's Investing in America agenda, the US Department of Energy (DOE) announced up to USD 6 billion for 33 projects across more than 20 states to decarbonize energy-intensive industries, reduce industrial greenhouse gas emissions, support good-paying union jobs, revitalize industrial communities, and strengthen the nation's manufacturing competitiveness.
- The rising demand for industrial MRO services and solutions as the industrial segment has been the second largest energy consumer in the country, as per EIA. In the process, manufacturers have been conducting lifecycle assessments of their products and incorporating the required MRO equipment to practice lean manufacturing.?

Food, Beverage and Paper Processing (Electrical MRO) Segment to Witness Major Growth

- Proper and continuous functioning of the electrical systems, including control panels, distribution boards, power supplies, circuit breakers, and emergency stop systems, is of utmost importance in the food & beverage industry, which may result in significant product wastage and production downtime.
- The US food processing industry is a global giant. In 2023, retail food and beverage stores in the United States reported annual sales of USD 985.3 billion, as per the US Census Bureau. This figure has been on a consistent upward trajectory for decades. Beyond its financial might, the industry is a cornerstone of the US economy, offering employment to millions and driving substantial revenue.
- Maintaining stringent hygiene standards is paramount in electrical systems to avert contamination risks. Components require frequent cleaning, and precise temperature regulation is crucial for food safety. As the industry's machinery grows in size and complexity, electrical systems must adapt, demanding robust and dependable components. Given the propensity of paper processing to generate dust, which can harm electrical equipment, regular cleaning, and maintenance are imperative to prevent

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failures due to buildup.

- In March 2024, the US government awarded USD 170 million to Kraft Heinz to upgrade ten facilities. Kraft Heinz plans to use the funds to install a range of technologies, including heat pumps, electric heaters, electric boilers, anaerobic digestors, biogas boilers, solar thermal, solar photovoltaic, and thermal energy storage. Similarly, in June 2024, SunOpta disclosed a USD 26 million investment to expand its California plant-based beverage processing facility. These developments, alongside numerous other expansions and upgrades in the sector, are poised to bolster demand and create opportunities in the US electrical service MRO market.

USA Maintenance Repair & Operations (MRO) Industry Overview

The United States Maintenance, Repair, and Operations (MRO) Market is fragmented and highly competitive due to multiple vendors operating in the domestic and international markets. The market appears to be moderately concentrated. The significant players adopt strategies such as mergers, acquisitions, and expansions to expand their geographic reach and stay competitive. Some of the major players in the market are DNOW Inc. (DistributionNOW), Airgas Inc. (Air Liquide SA), Ferguson PLC, Motion Industries Inc. (Genuine Parts Company), and HD Supply Holdings Inc., among others.

- May 2024 - Ferguson PLC bolstered its offerings by acquiring AVCO Supply Inc. This move underscores Ferguson's dedication to offering tailored solutions to mechanical contractors. Moreover, it enhances Ferguson's existing prowess in commercial pipe, valve, and fitting products, as well as in the hydronic categories, particularly in the Philadelphia market.
- March 2024 - The MSC Industrial Direct Co. Inc. successfully finalized the acquisition of intellectual property (IP) assets from Schmitz Manufacturing Research & Technology LLC (SMRT). These assets are specifically tailored to enhance MSC's technology offerings for the US manufacturing sector.

Additional Benefits:

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

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