Commercial Aircraft Maintenance, Repair, And Overhaul (MRO) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

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Report description:

Commercial Aircraft Maintenance, Repair, And Overhaul (MRO) Market Analysis

The commercial aircraft MRO market stood at USD 96.29 billion in 2025 and is forecasted to reach a market size of USD 122.55 billion by 2030, advancing at a 4.94% CAGR. Fleet operators continued to extend asset lives, so heavy checks and engine shop visits remained the dominant spending categories. Growing investment by original equipment manufacturers (OEMs) in global service networks and airlines' focus on rapid aircraft-turn capability added structural demand for digital line-maintenance solutions. Consolidation among independent providers accelerated because scale is essential for supply-chain resilience and data-driven services. At the same time, technician shortages and engine-shop bottlenecks limited near-term capacity expansion despite solid traffic recovery.

Global Commercial Aircraft Maintenance, Repair, And Overhaul (MRO) Market Trends and Insights

Aging Global Fleet Necessitating Heavy Checks

Average fleet age climbed as carriers deferred retirements because new-delivery slots stayed scarce. Older jets require deeper structural inspections, corrosion control, and component replacements, which lift heavy-maintenance labour hours per airframe. Independent hangars in North America and Europe continued to book multi-year heavy-check contracts, securing stable revenue visibility for the aircraft MRO market.

OEM Aftermarket Strategy Expansion

OEMs invested more than USD 2 billion in service-network additions spanning the United States, Europe, and Asia. GE Aerospace alone committed USD 1 billion to enlarge its overhaul footprint, while Safran earmarked EUR 1 billion (USD 1.18 billion) to lift annual LEAP-engine shop-visit capacity to 1,200 units. These moves tightened OEM control of proprietary repair data and attracted airline power-by-the-hour contracts that enlarge the aircraft MRO market.

Acute Shortage of Licensed A&P Technicians

Retirement-driven attrition outpaced new entrants, especially in the United States, where training enrolments trended flat. Airlines offered premium overtime rates and accelerated apprenticeship programs, but labour scarcity still stretched turnaround times and limited incremental hangar capacity, holding back aircraft MRO market growth.

Other drivers and restraints analyzed in the detailed report include:

Surging Narrow-Body Utilization Post-COVID / Regional Government Incentives for Indigenous MRO / Persistent Engine Shop-Visit Capacity Crunch /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Engine overhaul generated 46.80% of 2024 revenue, underscoring the capital-intensive nature of powerplant maintenance within the aircraft MRO market. OEM-certified centres expanded tooling lines for LEAP and GTF variants, while independents specialised in mature engine families to retain competitiveness. The commercial aircraft MRO market size linked to engine work is expected to advance as shop-visit intervals settle into post-pandemic patterns.

Line maintenance showed the highest 5.71% CAGR outlook because quick-turn services maximise operator revenue days. Tablet-based inspection apps and wearable head-up displays shortened routine checks, improving gate-time discipline. As airline schedules densified, providers with on-airport teams captured incremental share and reinforced the broader commercial aircraft MRO market growth trajectory.

Fixed-wing fleets held 95.45% revenue share in 2024 and continue to anchor demand owing to the scale of commercial jet operations. Narrowbody aircraft drive a sizable portion of the commercial aircraft MRO market size, with utilisation patterns increasing task card frequency on airframe and component lines. Widebody heavy checks remained steady because long-haul traffic recovery continued at a measured pace.

The demand for rotary-wing aircraft is smaller yet resilient because defence modernisation and offshore energy programs need helicopters with high availability. Specialised rotor-blade overhaul capability, strict airworthiness requirements, and government budget visibility produce stable margins. Providers that secured military contracts added a predictable revenue stream that buffers cyclicality in the fixed-wing dominated commercial aircraft MRO market.

The Commercial Aircraft Maintenance, Repair, and Overhaul (MRO) Market Report is Segmented by MRO Type (Airframe Maintenance, Engine Overhaul, and More), Aircraft Type (Fixed-Wing and Rotary Wing), End User (Commercial Passenger Airlines, Cargo Operators, and More), Service Provider Type (Airline-Affiliated MROs, and More), and Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America generated 38.98% of 2024 revenue from the region's large active fleets and mature maintenance ecosystems. Major Atlanta, Dallas, and Miami hubs offered comprehensive engine, component, and heavy-check capability and efficient logistics. Recent investments, such as Pratt & Whitney's agreement with Delta TechOps to lift GTF throughput by 30%, reinforced capacity. Strong certification standards and digital adoption sustained productivity growth, keeping the commercial aircraft MRO market competitive despite higher labour rates.

Asia-Pacific delivered the fastest 5.12% CAGR outlook as carriers expanded fleets and governments incentivised domestic maintenance. Singapore Aero Engine Services announced USD 242 million in new facilities, while Air India started work on a 35-acre Bengaluru campus, which is expected to create 1,200 jobs. These expansions help retain regional spend that previously moved to Europe or the Middle East and raise Asia's contribution to the commercial aircraft MRO market.

Europe remained a technology leader but faced cost pressure. Lufthansa Technik approved a multi-billion euro investment program that included a new heavy-maintenance site in Portugal to secure future wide-body workload. Eastern European countries offered competitive labour costs, attracting engine-overhaul facilities such as XEOS in Poland. The Middle East used geographic connectivity to attract transit-related checks. South America developed niche component-repair clusters to support cargo fleets, ensuring balanced commercial aircraft MRO market development worldwide.

List of Companies Covered in this Report:

Lufthansa Technik AG / AAR CORP. / Singapore Technologies Engineering Ltd. / Delta Air Lines, Inc. / Hong Kong Aircraft Engineering Company Limited (HAECO) / General Electric Company / Rolls-Royce plc / Safran SA / RTX Corporation / Air France-KLM Group / MTU Aero Engines AG / StandardAero Aviation Holdings, Inc. / SR Technics Switzerland Ltd. / Turkish Airlines Technic Inc. / Aircraft Maintenance and Engineering Corporation (Ameco) / Guangzhou Aircraft Maintenance Engineering Co.,Ltd. / SIA Engineering Company Limited / Emirates Engineering (Emirates Group) / TAP Maintenance and Engineering (TAP ME) / GMF AeroAsia / AI Engineering Services Ltd. (AIESL) /

Additional Benefits:

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

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