

United States Maintenance, Repair, And Operations (MRO) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

United States Maintenance, Repair, And Operations (MRO) Market Analysis

The United States Maintenance, Repair, And Operations Market was valued at USD 93.17 billion in 2025 and estimated to grow from USD 94.72 billion in 2026 to reach USD 102.86 billion by 2031, at a CAGR of 1.66% during the forecast period (2026-2031). This outlook reflects the market's maturity, limited by structural labor shortages yet supported by federal infrastructure spending and rapid digitalization of procurement. Moderate growth is anchored by an expanding installed base of industrial assets, rising demand for energy-efficient retrofits, and wider use of predictive maintenance software. Policy incentives from the Infrastructure Investment and Jobs Act, the CHIPS and Science Act, and the Inflation Reduction Act continue to stimulate capital investment in semiconductor fabs, battery plants, and clean-energy projects, all of which rely on high-value MRO services. At the same time, e-commerce penetration accelerates as buyers migrate to integrated online platforms that streamline sourcing, reduce transaction volume, and improve inventory visibility. Despite these opportunities, the market contends with acute skilled-labor shortages, shrinking distributor gross margins, and ongoing supply-chain volatility that inflates carrying costs and lengthens lead times. Consolidation among rental and distribution companies remains a primary competitive response, with more than USD 15 billion in recent acquisitions aimed at scale efficiencies and expanded geographic coverage.

United States Maintenance, Repair, And Operations (MRO) Market Trends and Insights

Predictive Maintenance Driven Cost Savings

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Organizations adopting predictive programs report eliminating more than 50% of unplanned downtime and cutting defects by over 70%, shifting MRO from a cost center to a value generator. Aviation operators increasingly embed condition-based monitoring in fleet management contracts, and industrial facilities pair IoT sensors with analytics platforms to secure service-level guarantees. Vendors capable of delivering data-backed uptime commitments command premium rates, while buyers benefit from lower lifecycle costs and higher equipment availability. The growing roster of government-funded Industrial Assessment Centers further diffuses predictive know-how across mid-sized manufacturers. As predictive solutions scale, software fees and sensor retrofits become recurring revenue streams for service providers, reinforcing the positive CAGR contribution.

Aging Industrial Assets Increasing Repair Cycles

A large share of U.S. industrial machinery installed during the 1950s-1960s is now operating beyond its design life, driving more frequent maintenance events and higher spend per asset. Chemical and petrochemical facilities in the Gulf Coast face heightened regulatory scrutiny, prompting mandated overhauls of pressure vessels and piping systems. Public transit agencies report a USD 50-80 billion backlog for railcar, track, and facility rehabilitation. In aviation, the average certified mechanic age of 54 years underscores the urgency of asset-integrity management programs that minimize safety risks while extending service life. These dynamics collectively increase demand for inspection services, condition assessments, and refurbishment parts, supporting steady revenue growth for the United States MRO market.

Margin Pressure from Product Commoditization

Price transparency on digital platforms reduces distributor mark-ups across standard fasteners, bearings, and consumables. During 2024, leading distributors reported sequential gross-margin declines as customers migrated to lowest-cost suppliers and expanded use of private-label alternatives. With market leader Grainger holding only 7% share, no participant wields sufficient scale to set industry pricing. Distributors increasingly emphasize value-added services, such as on-site vending, kitting, and technical training, to preserve margins, yet these services entail upfront investment and longer payback periods that strain near-term profitability.

Other drivers and restraints analyzed in the detailed report include:

E-commerce Penetration of MRO Supplies
Reshoring Investments Expanding Installed Base
Supply-Chain Volatility and Inventory Shortages

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

Segment Analysis

Industrial MRO generated 45.32% of 2025 revenue, underpinned by the extensive machinery base in manufacturing, mining, and process industries. The United States maintenance, repair, and operations market size for industrial applications is fueled by reshoring investments in semiconductor fabrication, automotive electrification, and aerospace assembly. High-hour utilization rates create steady replacement cycles for seals, bearings, and hydraulic components. Electrical MRO, projected to grow at 2.75% CAGR to 2031, benefits from grid-modernization grants and plant electrification mandates that boost demand for switchgear, drives, and sensors. As federal incentives accelerate energy-efficiency upgrades, service providers specializing in electrical retrofits capture incremental market share.

The facility MRO segment maintains stable demand from building-system upkeep, including HVAC, roofing, and plumbing, while the "other" category comprises specialized niches such as medical-device calibration and telecom-equipment servicing. Convergence of operational technology and IT blurs traditional boundaries, particularly as interconnected systems require

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technicians who can manage both mechanical and cyber-security tasks. Providers that integrate multi-disciplinary teams secure longer-term service agreements at favorable margins.

Manufacturing commanded 37.62% of the United States maintenance, repair, and operations market share in 2025, supported by USD 57 billion in machinery upkeep and additional fault-related spending. Heavy-industry clusters in the Great Lakes and Gulf Coast create consistent demand for pump, valve, and gearbox overhauls. Yet healthcare leads in growth, advancing at 2.56% CAGR through 2031 as hospitals retrofit aging infrastructure and comply with stringent equipment-maintenance standards. Federal funding under the Infrastructure Investment and Jobs Act earmarks billions for hospital energy upgrades, further expanding the healthcare serviceable market.

Energy and utilities remain steady contributors, driven by pipeline-integrity programs and power-plant life-extension projects. Aerospace and defense demand rebounds alongside higher fleet-utilization rates, with engine-maintenance services surfacing as a high-margin niche. Construction cycles introduce volatility, but the rising prevalence of modular and off-site fabrication increases opportunities for pre-emptive maintenance planning and aftermarket parts supply.

The United States Maintenance, Repair, and Operations (MRO) Market Report is Segmented by MRO Type (Industrial, Electrical, and More), End-User Industry (Manufacturing, Energy and Utilities, and More), Sourcing Model (In-House, Outsourced, and More), Maintenance Approach (Preventive, Corrective, and More), and Distribution Channel (Offline, Online, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Ferguson PLC Motion Industries Inc. (Genuine Parts Company) Airgas Inc. (Air Liquide SA) DNOW Inc. (DistributionNOW) HD Supply Holdings Inc. MRC Global Inc. Fastenal Company MSC Industrial Direct Co. Inc. Applied Industrial Technologies WESCO International Inc. Sonepar SA Rexel Holdings USA (Rexel) Eastern Power Technologies Inc. Consolidated Electrical Distributors Inc. Elliot Electric Supply Border States Industrial Inc. Ferguson PLC W.W. Grainger Inc. Fastenal Company MSC Industrial Direct Co. Inc. Distribution Solutions Group Inc. The Home Depot Inc. (Interline Brands Inc.) Builders Firstsource Bluelinx Holdings

Additional Benefits:

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

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