

Global Hydropower MRO Service Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hydropower MRO Service market size is expected to reach \$ 14348 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Hydropower MRO (Maintenance, Repair, and Overhaul) services encompass the routine maintenance, troubleshooting, periodic overhauls, component refurbishment, and technical upgrades performed on turbine-generator units, hydraulic structures, electrical systems, and auxiliary facilities after a hydropower plant enters the operational phase. These services aim to ensure unit safety, power generation efficiency, equipment reliability, and the plant's service life. The scope covers conventional, pumped-storage, run-of-river, and small-scale hydropower plants, but excludes the primary EPC construction of new plants.

Core equipment subject to hydropower MRO includes turbines, generators, main shafts, bearings, wicket gates (guide vane mechanisms), governors, excitation systems, transformers, switchgear, and automation control systems. Typical tasks involve runner and blade repair, cavitation and erosion treatment, shaft alignment, bearing replacement, stator and rotor inspection, winding rewinding, sealing system maintenance, vibration monitoring, insulation testing, equipment calibration, and spare parts replacement. Major overhauls typically require unit shutdown and disassembly to conduct systematic inspections, repairs, reassembly, and performance testing of the turbines and generators. Beyond electromechanical equipment, hydropower MRO also covers hydraulic assets such as intakes, penstocks, water diversion tunnels, gates, hoist mechanisms, dam monitoring systems, and flood discharge facilities; key activities include corrosion protection, weld inspection, crack repair, structural reinforcement, underwater inspection, and metal structure refurbishment. As aging plants continue to

operate, MRO services have progressively expanded to include capacity upgrades, efficiency improvements, digital control system upgrades, conversions to unmanned operation, and plant life extension projects.

The continued expansion of global installed hydropower capacity is generating steady, incremental demand for hydropower MRO (maintenance, repair, and operations) services. By 2025, global installed hydropower capacity reached approximately 1,469 GW, with an annual addition of about 28 GW—including roughly 11.7 GW of pumped-storage capacity—while another 243 GW of pumped-storage projects were under construction worldwide. As new units come online and enter their scheduled maintenance cycles, they drive demand for the maintenance, spare part replacement, and major overhauls of turbines, generators, governors, excitation systems, gates, and auxiliary equipment.

The aging of existing hydropower units and the need for life-extension retrofits are core drivers of industry growth. Many traditional hydropower plants have been in operation for decades, leading to an increase in issues such as cavitation and erosion of turbine blades, generator insulation aging, bearing wear, penstock corrosion, and the obsolescence of instrumentation and control systems. Compared to building new plants, refurbishing units, upgrading capacity, and improving efficiency at existing facilities typically offer the advantages of shorter construction periods and lower investment risks; consequently, MRO services are evolving from simple breakdown repairs to encompass equipment refurbishment, performance restoration, capacity upgrades, and full-lifecycle management.

The rising share of intermittent power sources, such as wind and solar, is altering the operating conditions for hydropower equipment. Conventional hydropower and pumped-storage units must participate more frequently in peak shaving, frequency regulation, rapid start-stop operations, and grid reserve services, shifting operational modes from relatively stable base-load operation to high-frequency variable-load operation. This increases the risk of fatigue and wear on components such as runners, guide vanes, main shafts, bearings, and generator parts, prompting operators to intensify vibration monitoring, fatigue assessment, condition-based maintenance, and the preventive replacement of critical components; notably, the maintenance of bidirectional rotating equipment in pumped-storage units is emerging as a key growth area.

Report Scope

This report studies the global Hydropower MRO Service demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Hydropower MRO Service, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Hydropower MRO Service that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Hydropower MRO Service total market, 2021-2032, (USD Million)

Global Hydropower MRO Service total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Hydropower MRO Service total market, key domestic companies, and share, (USD Million)

Global Hydropower MRO Service revenue by player, revenue and market share 2021-2026, (USD Million)

Global Hydropower MRO Service total market by Type, CAGR, 2021-2032, (USD Million)

Global Hydropower MRO Service total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Hydropower MRO Service market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include GE Vernova, ANDRITZ GROUP, Hydro Operation International, Global Hydro, Renewables First, Hydro Maintain, Goltens, HYDRO Exploitation SA, MB Century, AFRY, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Hydropower MRO Service market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Hydropower MRO Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Hydropower MRO Service Market, Segmentation by Type:

Maintenance

Repair

Operations

Global Hydropower MRO Service Market, Segmentation by Equipment System:

Hydraulic Turbine System MRO

Generator System MRO

Electrical System MRO

Automation and Control System MRO

Others

Global Hydropower MRO Service Market, Segmentation by Contract Models:

One-off Project Maintenance Service

Annual Maintenance Contract

Long-term Service Agreement

Vessel Full-lifecycle Management Service

Global Hydropower MRO Service Market, Segmentation by Service Coverage:

Equipment and Component-Level MRO

System and Island-Level MRO

Integrated MRO for Single Units

Global Hydropower MRO Service Market, Segmentation by Application:

Conventional Reservoir-type Hydropower Plants

Run-of-river Hydropower Plants

Pumped-storage Power Plants

Small-scale Hydropower Plants

Others

Companies Profiled:

GE Vernova

ANDRITZ GROUP

Hydro Operation International

Global Hydro

Renewables First

Hydro Maintain

Goltens

HYDRO Exploitation SA

MB Century

AFRY

RESA Power

Gracon

Metalock Engineering

Chalmers & Kubeck

Hydropower & Dams International

Chesterton

Renewable Energy Systems

In-Place Machining Company

Stantec

Hydropower Solutions

PLN Nusantara Power

TRC Companies

Hyngal

Statkraft

AMServ

Key Questions Answered

1. How big is the global Hydropower MRO Service market?
2. What is the demand of the global Hydropower MRO Service market?
3. What is the year over year growth of the global Hydropower MRO Service market?
4. What is the total value of the global Hydropower MRO Service market?
5. Who are the Major Players in the global Hydropower MRO Service market?
6. What are the growth factors driving the market demand?

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