

Global Hydropower MRO Service Market 2026 by Company, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GD8ACF13B820EN.html>

Date: September 2026

Pages: 149

Price: US\$ 3,480.00 (Single User License)

ID: GD8ACF13B820EN

Abstracts

According to our (Global Info Research) latest study, the global Hydropower MRO Service market size was valued at US\$ 9698 million in 2025 and is forecast to a readjusted size of US\$ 14348 million by 2032 with a CAGR of 6.0% during review period.

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 is a detailed and comprehensive analysis for global Hydropower MRO Service market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Hydropower MRO Service market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Hydropower MRO Service market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Hydropower MRO Service market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Hydropower MRO Service market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Hydropower MRO Service
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key 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.

Hydropower MRO Service market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

Maintenance

Repair

Operations

Market segment by Equipment System

Hydraulic Turbine System MRO

Generator System MRO

Electrical System MRO

Automation and Control System MRO

Others

Market segment by Contract Models

One-off Project Maintenance Service

Annual Maintenance Contract

Long-term Service Agreement

Vessel Full-lifecycle Management Service

Market segment by Service Coverage

Equipment and Component-Level MRO

System and Island-Level MRO

Integrated MRO for Single Units

Market segment by Application

Conventional Reservoir-type Hydropower Plants

Run-of-river Hydropower Plants

Pumped-storage Power Plants

Small-scale Hydropower Plants

Others

Market segment by players, this report covers

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

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Hydropower MRO Service product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Hydropower MRO Service, with revenue, gross margin, and global market share of Hydropower MRO Service from 2021 to 2026.

Chapter 3, the Hydropower MRO Service competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.

Hydropower MRO Service market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Hydropower MRO Service.

Chapter 13, to describe Hydropower MRO Service research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Classification of Hydropower MRO Service by Type

1.3.1 Overview: Global Hydropower MRO Service Market Size by Type: 2021 Versus 2025 Versus 2032

1.3.2 Global Hydropower MRO Service Consumption Value Market Share by Type in 2025

1.3.3 Maintenance

1.3.4 Repair

1.3.5 Operations

1.4 Classification of Hydropower MRO Service by Equipment System

1.4.1 Overview: Global Hydropower MRO Service Market Size by Equipment System: 2021 Versus 2025 Versus 2032

1.4.2 Global Hydropower MRO Service Consumption Value Market Share by Equipment System in 2025

1.4.3 Hydraulic Turbine System MRO

1.4.4 Generator System MRO

1.4.5 Electrical System MRO

1.4.6 Automation and Control System MRO

1.4.7 Others

1.5 Classification of Hydropower MRO Service by Contract Models

1.5.1 Overview: Global Hydropower MRO Service Market Size by Contract Models: 2021 Versus 2025 Versus 2032

1.5.2 Global Hydropower MRO Service Consumption Value Market Share by Contract Models in 2025

1.5.3 One-off Project Maintenance Service

1.5.4 Annual Maintenance Contract

1.5.5 Long-term Service Agreement

1.5.6 Vessel Full-lifecycle Management Service

1.6 Classification of Hydropower MRO Service by Service Coverage

1.6.1 Overview: Global Hydropower MRO Service Market Size by Service Coverage: 2021 Versus 2025 Versus 2032

1.6.2 Global Hydropower MRO Service Consumption Value Market Share by Service Coverage in 2025

1.6.3 Equipment and Component-Level MRO

- 1.6.4 System and Island-Level MRO
- 1.6.5 Integrated MRO for Single Units
- 1.7 Global Hydropower MRO Service Market by Application
 - 1.7.1 Overview: Global Hydropower MRO Service Market Size by Application: 2021 Versus 2025 Versus 2032
 - 1.7.2 Conventional Reservoir-type Hydropower Plants
 - 1.7.3 Run-of-river Hydropower Plants
 - 1.7.4 Pumped-storage Power Plants
 - 1.7.5 Small-scale Hydropower Plants
 - 1.7.6 Others
- 1.8 Global Hydropower MRO Service Market Size & Forecast
- 1.9 Global Hydropower MRO Service Market Size and Forecast by Region
 - 1.9.1 Global Hydropower MRO Service Market Size by Region: 2021 VS 2025 VS 2032
 - 1.9.2 Global Hydropower MRO Service Market Size by Region, (2021-2032)
 - 1.9.3 North America Hydropower MRO Service Market Size and Prospect (2021-2032)
 - 1.9.4 Europe Hydropower MRO Service Market Size and Prospect (2021-2032)
 - 1.9.5 Asia-Pacific Hydropower MRO Service Market Size and Prospect (2021-2032)
 - 1.9.6 South America Hydropower MRO Service Market Size and Prospect (2021-2032)
 - 1.9.7 Middle East & Africa Hydropower MRO Service Market Size and Prospect (2021-2032)

2 COMPANY PROFILES

- 2.1 GE Vernova
 - 2.1.1 GE Vernova Details
 - 2.1.2 GE Vernova Major Business
 - 2.1.3 GE Vernova Hydropower MRO Service Product and Solutions
 - 2.1.4 GE Vernova Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.1.5 GE Vernova Recent Developments and Future Plans
- 2.2 ANDRITZ GROUP
 - 2.2.1 ANDRITZ GROUP Details
 - 2.2.2 ANDRITZ GROUP Major Business
 - 2.2.3 ANDRITZ GROUP Hydropower MRO Service Product and Solutions
 - 2.2.4 ANDRITZ GROUP Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.2.5 ANDRITZ GROUP Recent Developments and Future Plans
- 2.3 Hydro Operation International

- 2.3.1 Hydro Operation International Details
- 2.3.2 Hydro Operation International Major Business
- 2.3.3 Hydro Operation International Hydropower MRO Service Product and Solutions
- 2.3.4 Hydro Operation International Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
- 2.3.5 Hydro Operation International Recent Developments and Future Plans
- 2.4 Global Hydro
 - 2.4.1 Global Hydro Details
 - 2.4.2 Global Hydro Major Business
 - 2.4.3 Global Hydro Hydropower MRO Service Product and Solutions
 - 2.4.4 Global Hydro Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.4.5 Global Hydro Recent Developments and Future Plans
- 2.5 Renewables First
 - 2.5.1 Renewables First Details
 - 2.5.2 Renewables First Major Business
 - 2.5.3 Renewables First Hydropower MRO Service Product and Solutions
 - 2.5.4 Renewables First Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.5.5 Renewables First Recent Developments and Future Plans
- 2.6 Hydro Maintain
 - 2.6.1 Hydro Maintain Details
 - 2.6.2 Hydro Maintain Major Business
 - 2.6.3 Hydro Maintain Hydropower MRO Service Product and Solutions
 - 2.6.4 Hydro Maintain Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.6.5 Hydro Maintain Recent Developments and Future Plans
- 2.7 Goltens
 - 2.7.1 Goltens Details
 - 2.7.2 Goltens Major Business
 - 2.7.3 Goltens Hydropower MRO Service Product and Solutions
 - 2.7.4 Goltens Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Goltens Recent Developments and Future Plans
- 2.8 HYDRO Exploitation SA
 - 2.8.1 HYDRO Exploitation SA Details
 - 2.8.2 HYDRO Exploitation SA Major Business
 - 2.8.3 HYDRO Exploitation SA Hydropower MRO Service Product and Solutions
 - 2.8.4 HYDRO Exploitation SA Hydropower MRO Service Revenue, Gross Margin and

Market Share (2021-2026)

2.8.5 HYDRO Exploitation SA Recent Developments and Future Plans

2.9 MB Century

2.9.1 MB Century Details

2.9.2 MB Century Major Business

2.9.3 MB Century Hydropower MRO Service Product and Solutions

2.9.4 MB Century Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 MB Century Recent Developments and Future Plans

2.10 AFRY

2.10.1 AFRY Details

2.10.2 AFRY Major Business

2.10.3 AFRY Hydropower MRO Service Product and Solutions

2.10.4 AFRY Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 AFRY Recent Developments and Future Plans

2.11 RESA Power

2.11.1 RESA Power Details

2.11.2 RESA Power Major Business

2.11.3 RESA Power Hydropower MRO Service Product and Solutions

2.11.4 RESA Power Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 RESA Power Recent Developments and Future Plans

2.12 Gracon

2.12.1 Gracon Details

2.12.2 Gracon Major Business

2.12.3 Gracon Hydropower MRO Service Product and Solutions

2.12.4 Gracon Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Gracon Recent Developments and Future Plans

2.13 Metalock Engineering

2.13.1 Metalock Engineering Details

2.13.2 Metalock Engineering Major Business

2.13.3 Metalock Engineering Hydropower MRO Service Product and Solutions

2.13.4 Metalock Engineering Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Metalock Engineering Recent Developments and Future Plans

2.14 Chalmers & Kubeck

2.14.1 Chalmers & Kubeck Details

- 2.14.2 Chalmers & Kubeck Major Business
- 2.14.3 Chalmers & Kubeck Hydropower MRO Service Product and Solutions
- 2.14.4 Chalmers & Kubeck Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
- 2.14.5 Chalmers & Kubeck Recent Developments and Future Plans
- 2.15 Hydropower & Dams International
 - 2.15.1 Hydropower & Dams International Details
 - 2.15.2 Hydropower & Dams International Major Business
 - 2.15.3 Hydropower & Dams International Hydropower MRO Service Product and Solutions
 - 2.15.4 Hydropower & Dams International Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.15.5 Hydropower & Dams International Recent Developments and Future Plans
- 2.16 Chesterton
 - 2.16.1 Chesterton Details
 - 2.16.2 Chesterton Major Business
 - 2.16.3 Chesterton Hydropower MRO Service Product and Solutions
 - 2.16.4 Chesterton Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.16.5 Chesterton Recent Developments and Future Plans
- 2.17 Renewable Energy Systems
 - 2.17.1 Renewable Energy Systems Details
 - 2.17.2 Renewable Energy Systems Major Business
 - 2.17.3 Renewable Energy Systems Hydropower MRO Service Product and Solutions
 - 2.17.4 Renewable Energy Systems Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.17.5 Renewable Energy Systems Recent Developments and Future Plans
- 2.18 In-Place Machining Company
 - 2.18.1 In-Place Machining Company Details
 - 2.18.2 In-Place Machining Company Major Business
 - 2.18.3 In-Place Machining Company Hydropower MRO Service Product and Solutions
 - 2.18.4 In-Place Machining Company Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
 - 2.18.5 In-Place Machining Company Recent Developments and Future Plans
- 2.19 Stantec
 - 2.19.1 Stantec Details
 - 2.19.2 Stantec Major Business
 - 2.19.3 Stantec Hydropower MRO Service Product and Solutions
 - 2.19.4 Stantec Hydropower MRO Service Revenue, Gross Margin and Market Share

(2021-2026)

2.19.5 Stantec Recent Developments and Future Plans

2.20 Hydropower Solutions

2.20.1 Hydropower Solutions Details

2.20.2 Hydropower Solutions Major Business

2.20.3 Hydropower Solutions Hydropower MRO Service Product and Solutions

2.20.4 Hydropower Solutions Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 Hydropower Solutions Recent Developments and Future Plans

2.21 PLN Nusantara Power

2.21.1 PLN Nusantara Power Details

2.21.2 PLN Nusantara Power Major Business

2.21.3 PLN Nusantara Power Hydropower MRO Service Product and Solutions

2.21.4 PLN Nusantara Power Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 PLN Nusantara Power Recent Developments and Future Plans

2.22 TRC Companies

2.22.1 TRC Companies Details

2.22.2 TRC Companies Major Business

2.22.3 TRC Companies Hydropower MRO Service Product and Solutions

2.22.4 TRC Companies Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.22.5 TRC Companies Recent Developments and Future Plans

2.23 Hyngal

2.23.1 Hyngal Details

2.23.2 Hyngal Major Business

2.23.3 Hyngal Hydropower MRO Service Product and Solutions

2.23.4 Hyngal Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.23.5 Hyngal Recent Developments and Future Plans

2.24 Statkraft

2.24.1 Statkraft Details

2.24.2 Statkraft Major Business

2.24.3 Statkraft Hydropower MRO Service Product and Solutions

2.24.4 Statkraft Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)

2.24.5 Statkraft Recent Developments and Future Plans

2.25 AMServ

2.25.1 AMServ Details

- 2.25.2 AMServ Major Business
- 2.25.3 AMServ Hydropower MRO Service Product and Solutions
- 2.25.4 AMServ Hydropower MRO Service Revenue, Gross Margin and Market Share (2021-2026)
- 2.25.5 AMServ Recent Developments and Future Plans

3 MARKET COMPETITION, BY PLAYERS

- 3.1 Global Hydropower MRO Service Revenue and Share by Players (2021-2026)
- 3.2 Market Share Analysis (2025)
 - 3.2.1 Market Share of Hydropower MRO Service by Company Revenue
 - 3.2.2 Top 3 Hydropower MRO Service Players Market Share in 2025
 - 3.2.3 Top 6 Hydropower MRO Service Players Market Share in 2025
- 3.3 Hydropower MRO Service Market: Overall Company Footprint Analysis
 - 3.3.1 Hydropower MRO Service Market: Region Footprint
 - 3.3.2 Hydropower MRO Service Market: Company Product Type Footprint
 - 3.3.3 Hydropower MRO Service Market: Company Product Application Footprint
- 3.4 New Market Entrants and Barriers to Market Entry
- 3.5 Mergers, Acquisition, Agreements, and Collaborations

4 MARKET SIZE SEGMENT BY TYPE

- 4.1 Global Hydropower MRO Service Consumption Value and Market Share by Type (2021-2026)
- 4.2 Global Hydropower MRO Service Market Forecast by Type (2027-2032)

5 MARKET SIZE SEGMENT BY APPLICATION

- 5.1 Global Hydropower MRO Service Consumption Value Market Share by Application (2021-2026)
- 5.2 Global Hydropower MRO Service Market Forecast by Application (2027-2032)

6 NORTH AMERICA

- 6.1 North America Hydropower MRO Service Consumption Value by Type (2021-2032)
- 6.2 North America Hydropower MRO Service Market Size by Application (2021-2032)
- 6.3 North America Hydropower MRO Service Market Size by Country
 - 6.3.1 North America Hydropower MRO Service Consumption Value by Country (2021-2032)

6.3.2 United States Hydropower MRO Service Market Size and Forecast (2021-2032)

6.3.3 Canada Hydropower MRO Service Market Size and Forecast (2021-2032)

6.3.4 Mexico Hydropower MRO Service Market Size and Forecast (2021-2032)

7 EUROPE

7.1 Europe Hydropower MRO Service Consumption Value by Type (2021-2032)

7.2 Europe Hydropower MRO Service Consumption Value by Application (2021-2032)

7.3 Europe Hydropower MRO Service Market Size by Country

7.3.1 Europe Hydropower MRO Service Consumption Value by Country (2021-2032)

7.3.2 Germany Hydropower MRO Service Market Size and Forecast (2021-2032)

7.3.3 France Hydropower MRO Service Market Size and Forecast (2021-2032)

7.3.4 United Kingdom Hydropower MRO Service Market Size and Forecast
(2021-2032)

7.3.5 Russia Hydropower MRO Service Market Size and Forecast (2021-2032)

7.3.6 Italy Hydropower MRO Service Market Size and Forecast (2021-2032)

8 ASIA-PACIFIC

8.1 Asia-Pacific Hydropower MRO Service Consumption Value by Type (2021-2032)

8.2 Asia-Pacific Hydropower MRO Service Consumption Value by Application
(2021-2032)

8.3 Asia-Pacific Hydropower MRO Service Market Size by Region

8.3.1 Asia-Pacific Hydropower MRO Service Consumption Value by Region
(2021-2032)

8.3.2 China Hydropower MRO Service Market Size and Forecast (2021-2032)

8.3.3 Japan Hydropower MRO Service Market Size and Forecast (2021-2032)

8.3.4 South Korea Hydropower MRO Service Market Size and Forecast (2021-2032)

8.3.5 India Hydropower MRO Service Market Size and Forecast (2021-2032)

8.3.6 Southeast Asia Hydropower MRO Service Market Size and Forecast
(2021-2032)

8.3.7 Australia Hydropower MRO Service Market Size and Forecast (2021-2032)

9 SOUTH AMERICA

9.1 South America Hydropower MRO Service Consumption Value by Type (2021-2032)

9.2 South America Hydropower MRO Service Consumption Value by Application
(2021-2032)

9.3 South America Hydropower MRO Service Market Size by Country

9.3.1 South America Hydropower MRO Service Consumption Value by Country (2021-2032)

9.3.2 Brazil Hydropower MRO Service Market Size and Forecast (2021-2032)

9.3.3 Argentina Hydropower MRO Service Market Size and Forecast (2021-2032)

10 MIDDLE EAST & AFRICA

10.1 Middle East & Africa Hydropower MRO Service Consumption Value by Type (2021-2032)

10.2 Middle East & Africa Hydropower MRO Service Consumption Value by Application (2021-2032)

10.3 Middle East & Africa Hydropower MRO Service Market Size by Country

10.3.1 Middle East & Africa Hydropower MRO Service Consumption Value by Country (2021-2032)

10.3.2 Turkey Hydropower MRO Service Market Size and Forecast (2021-2032)

10.3.3 Saudi Arabia Hydropower MRO Service Market Size and Forecast (2021-2032)

10.3.4 UAE Hydropower MRO Service Market Size and Forecast (2021-2032)

11 MARKET DYNAMICS

11.1 Hydropower MRO Service Market Drivers

11.2 Hydropower MRO Service Market Restraints

11.3 Hydropower MRO Service Trends Analysis

11.4 Porters Five Forces Analysis

11.4.1 Threat of New Entrants

11.4.2 Bargaining Power of Suppliers

11.4.3 Bargaining Power of Buyers

11.4.4 Threat of Substitutes

11.4.5 Competitive Rivalry

12 INDUSTRY CHAIN ANALYSIS

12.1 Hydropower MRO Service Industry Chain

12.2 Hydropower MRO Service Upstream Analysis

12.3 Hydropower MRO Service Midstream Analysis

12.4 Hydropower MRO Service Downstream Analysis

13 RESEARCH FINDINGS AND CONCLUSION

14 APPENDIX

14.1 Methodology

14.2 Research Process and Data Source

14.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Hydropower MRO Service Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Hydropower MRO Service Consumption Value by Equipment System, (USD Million), 2021 & 2025 & 2032

Table 3. Global Hydropower MRO Service Consumption Value by Contract Models, (USD Million), 2021 & 2025 & 2032

Table 4. Global Hydropower MRO Service Consumption Value by Service Coverage, (USD Million), 2021 & 2025 & 2032

Table 5. Global Hydropower MRO Service Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 6. Global Hydropower MRO Service Consumption Value by Region (2021-2026) & (USD Million)

Table 7. Global Hydropower MRO Service Consumption Value by Region (2027-2032) & (USD Million)

Table 8. GE Vernova Company Information, Head Office, and Major Competitors

Table 9. GE Vernova Major Business

Table 10. GE Vernova Hydropower MRO Service Product and Solutions

Table 11. GE Vernova Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 12. GE Vernova Recent Developments and Future Plans

Table 13. ANDRITZ GROUP Company Information, Head Office, and Major Competitors

Table 14. ANDRITZ GROUP Major Business

Table 15. ANDRITZ GROUP Hydropower MRO Service Product and Solutions

Table 16. ANDRITZ GROUP Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 17. ANDRITZ GROUP Recent Developments and Future Plans

Table 18. Hydro Operation International Company Information, Head Office, and Major Competitors

Table 19. Hydro Operation International Major Business

Table 20. Hydro Operation International Hydropower MRO Service Product and Solutions

Table 21. Hydro Operation International Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 22. Global Hydro Company Information, Head Office, and Major Competitors

Table 23. Global Hydro Major Business
Table 24. Global Hydro Hydropower MRO Service Product and Solutions
Table 25. Global Hydro Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 26. Global Hydro Recent Developments and Future Plans
Table 27. Renewables First Company Information, Head Office, and Major Competitors
Table 28. Renewables First Major Business
Table 29. Renewables First Hydropower MRO Service Product and Solutions
Table 30. Renewables First Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 31. Renewables First Recent Developments and Future Plans
Table 32. Hydro Maintain Company Information, Head Office, and Major Competitors
Table 33. Hydro Maintain Major Business
Table 34. Hydro Maintain Hydropower MRO Service Product and Solutions
Table 35. Hydro Maintain Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 36. Hydro Maintain Recent Developments and Future Plans
Table 37. Goltens Company Information, Head Office, and Major Competitors
Table 38. Goltens Major Business
Table 39. Goltens Hydropower MRO Service Product and Solutions
Table 40. Goltens Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 41. Goltens Recent Developments and Future Plans
Table 42. HYDRO Exploitation SA Company Information, Head Office, and Major Competitors
Table 43. HYDRO Exploitation SA Major Business
Table 44. HYDRO Exploitation SA Hydropower MRO Service Product and Solutions
Table 45. HYDRO Exploitation SA Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 46. HYDRO Exploitation SA Recent Developments and Future Plans
Table 47. MB Century Company Information, Head Office, and Major Competitors
Table 48. MB Century Major Business
Table 49. MB Century Hydropower MRO Service Product and Solutions
Table 50. MB Century Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 51. MB Century Recent Developments and Future Plans
Table 52. AFRY Company Information, Head Office, and Major Competitors
Table 53. AFRY Major Business
Table 54. AFRY Hydropower MRO Service Product and Solutions

Table 55. AFRY Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 56. AFRY Recent Developments and Future Plans

Table 57. RESA Power Company Information, Head Office, and Major Competitors

Table 58. RESA Power Major Business

Table 59. RESA Power Hydropower MRO Service Product and Solutions

Table 60. RESA Power Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 61. RESA Power Recent Developments and Future Plans

Table 62. Gracon Company Information, Head Office, and Major Competitors

Table 63. Gracon Major Business

Table 64. Gracon Hydropower MRO Service Product and Solutions

Table 65. Gracon Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 66. Gracon Recent Developments and Future Plans

Table 67. Metalock Engineering Company Information, Head Office, and Major Competitors

Table 68. Metalock Engineering Major Business

Table 69. Metalock Engineering Hydropower MRO Service Product and Solutions

Table 70. Metalock Engineering Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 71. Metalock Engineering Recent Developments and Future Plans

Table 72. Chalmers & Kubeck Company Information, Head Office, and Major Competitors

Table 73. Chalmers & Kubeck Major Business

Table 74. Chalmers & Kubeck Hydropower MRO Service Product and Solutions

Table 75. Chalmers & Kubeck Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 76. Chalmers & Kubeck Recent Developments and Future Plans

Table 77. Hydropower & Dams International Company Information, Head Office, and Major Competitors

Table 78. Hydropower & Dams International Major Business

Table 79. Hydropower & Dams International Hydropower MRO Service Product and Solutions

Table 80. Hydropower & Dams International Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 81. Hydropower & Dams International Recent Developments and Future Plans

Table 82. Chesterton Company Information, Head Office, and Major Competitors

Table 83. Chesterton Major Business

Table 84. Chesterton Hydropower MRO Service Product and Solutions
Table 85. Chesterton Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 86. Chesterton Recent Developments and Future Plans
Table 87. Renewable Energy Systems Company Information, Head Office, and Major Competitors
Table 88. Renewable Energy Systems Major Business
Table 89. Renewable Energy Systems Hydropower MRO Service Product and Solutions
Table 90. Renewable Energy Systems Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Renewable Energy Systems Recent Developments and Future Plans
Table 92. In-Place Machining Company Company Information, Head Office, and Major Competitors
Table 93. In-Place Machining Company Major Business
Table 94. In-Place Machining Company Hydropower MRO Service Product and Solutions
Table 95. In-Place Machining Company Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 96. In-Place Machining Company Recent Developments and Future Plans
Table 97. Stantec Company Information, Head Office, and Major Competitors
Table 98. Stantec Major Business
Table 99. Stantec Hydropower MRO Service Product and Solutions
Table 100. Stantec Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 101. Stantec Recent Developments and Future Plans
Table 102. Hydropower Solutions Company Information, Head Office, and Major Competitors
Table 103. Hydropower Solutions Major Business
Table 104. Hydropower Solutions Hydropower MRO Service Product and Solutions
Table 105. Hydropower Solutions Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 106. Hydropower Solutions Recent Developments and Future Plans
Table 107. PLN Nusantara Power Company Information, Head Office, and Major Competitors
Table 108. PLN Nusantara Power Major Business
Table 109. PLN Nusantara Power Hydropower MRO Service Product and Solutions
Table 110. PLN Nusantara Power Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 111. PLN Nusantara Power Recent Developments and Future Plans

Table 112. TRC Companies Company Information, Head Office, and Major Competitors

Table 113. TRC Companies Major Business

Table 114. TRC Companies Hydropower MRO Service Product and Solutions

Table 115. TRC Companies Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. TRC Companies Recent Developments and Future Plans

Table 117. Hyngal Company Information, Head Office, and Major Competitors

Table 118. Hyngal Major Business

Table 119. Hyngal Hydropower MRO Service Product and Solutions

Table 120. Hyngal Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Hyngal Recent Developments and Future Plans

Table 122. Statkraft Company Information, Head Office, and Major Competitors

Table 123. Statkraft Major Business

Table 124. Statkraft Hydropower MRO Service Product and Solutions

Table 125. Statkraft Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Statkraft Recent Developments and Future Plans

Table 127. AMServ Company Information, Head Office, and Major Competitors

Table 128. AMServ Major Business

Table 129. AMServ Hydropower MRO Service Product and Solutions

Table 130. AMServ Hydropower MRO Service Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 131. AMServ Recent Developments and Future Plans

Table 132. Global Hydropower MRO Service Revenue (USD Million) by Players (2021-2026)

Table 133. Global Hydropower MRO Service Revenue Share by Players (2021-2026)

Table 134. Breakdown of Hydropower MRO Service by Company Type (Tier 1, Tier 2, and Tier 3)

Table 135. Market Position of Players in Hydropower MRO Service, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 136. Head Office of Key Hydropower MRO Service Players

Table 137. Hydropower MRO Service Market: Company Product Type Footprint

Table 138. Hydropower MRO Service Market: Company Product Application Footprint

Table 139. Hydropower MRO Service New Market Entrants and Barriers to Market Entry

Table 140. Hydropower MRO Service Mergers, Acquisition, Agreements, and Collaborations

Table 141. Global Hydropower MRO Service Consumption Value (USD Million) by Type

(2021-2026)

Table 142. Global Hydropower MRO Service Consumption Value Share by Type
(2021-2026)

Table 143. Global Hydropower MRO Service Consumption Value Forecast by Type
(2027-2032)

Table 144. Global Hydropower MRO Service Consumption Value by Application
(2021-2026)

Table 145. Global Hydropower MRO Service Consumption Value Forecast by
Application (2027-2032)

Table 146. North America Hydropower MRO Service Consumption Value by Type
(2021-2026) & (USD Million)

Table 147. North America Hydropower MRO Service Consumption Value by Type
(2027-2032) & (USD Million)

Table 148. North America Hydropower MRO Service Consumption Value by Application
(2021-2026) & (USD Million)

Table 149. North America Hydropower MRO Service Consumption Value by Application
(2027-2032) & (USD Million)

Table 150. North America Hydropower MRO Service Consumption Value by Country
(2021-2026) & (USD Million)

Table 151. North America Hydropower MRO Service Consumption Value by Country
(2027-2032) & (USD Million)

Table 152. Europe Hydropower MRO Service Consumption Value by Type (2021-2026)
& (USD Million)

Table 153. Europe Hydropower MRO Service Consumption Value by Type (2027-2032)
& (USD Million)

Table 154. Europe Hydropower MRO Service Consumption Value by Application
(2021-2026) & (USD Million)

Table 155. Europe Hydropower MRO Service Consumption Value by Application
(2027-2032) & (USD Million)

Table 156. Europe Hydropower MRO Service Consumption Value by Country
(2021-2026) & (USD Million)

Table 157. Europe Hydropower MRO Service Consumption Value by Country
(2027-2032) & (USD Million)

Table 158. Asia-Pacific Hydropower MRO Service Consumption Value by Type
(2021-2026) & (USD Million)

Table 159. Asia-Pacific Hydropower MRO Service Consumption Value by Type
(2027-2032) & (USD Million)

Table 160. Asia-Pacific Hydropower MRO Service Consumption Value by Application
(2021-2026) & (USD Million)

Table 161. Asia-Pacific Hydropower MRO Service Consumption Value by Application (2027-2032) & (USD Million)

Table 162. Asia-Pacific Hydropower MRO Service Consumption Value by Region (2021-2026) & (USD Million)

Table 163. Asia-Pacific Hydropower MRO Service Consumption Value by Region (2027-2032) & (USD Million)

Table 164. South America Hydropower MRO Service Consumption Value by Type (2021-2026) & (USD Million)

Table 165. South America Hydropower MRO Service Consumption Value by Type (2027-2032) & (USD Million)

Table 166. South America Hydropower MRO Service Consumption Value by Application (2021-2026) & (USD Million)

Table 167. South America Hydropower MRO Service Consumption Value by Application (2027-2032) & (USD Million)

Table 168. South America Hydropower MRO Service Consumption Value by Country (2021-2026) & (USD Million)

Table 169. South America Hydropower MRO Service Consumption Value by Country (2027-2032) & (USD Million)

Table 170. Middle East & Africa Hydropower MRO Service Consumption Value by Type (2021-2026) & (USD Million)

Table 171. Middle East & Africa Hydropower MRO Service Consumption Value by Type (2027-2032) & (USD Million)

Table 172. Middle East & Africa Hydropower MRO Service Consumption Value by Application (2021-2026) & (USD Million)

Table 173. Middle East & Africa Hydropower MRO Service Consumption Value by Application (2027-2032) & (USD Million)

Table 174. Middle East & Africa Hydropower MRO Service Consumption Value by Country (2021-2026) & (USD Million)

Table 175. Middle East & Africa Hydropower MRO Service Consumption Value by Country (2027-2032) & (USD Million)

Table 176. Global Key Players of Hydropower MRO Service Upstream (Raw Materials)

Table 177. Global Hydropower MRO Service Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Hydropower MRO Service Picture

Figure 2. Global Hydropower MRO Service Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Hydropower MRO Service Consumption Value Market Share by Type in 2025

Figure 4. Maintenance

Figure 5. Repair

Figure 6. Operations

Figure 7. Global Hydropower MRO Service Consumption Value by Equipment System, (USD Million), 2021 & 2025 & 2032

Figure 8. Global Hydropower MRO Service Consumption Value Market Share by Equipment System in 2025

Figure 9. Hydraulic Turbine System MRO

Figure 10. Generator System MRO

Figure 11. Electrical System MRO

Figure 12. Automation and Control System MRO

Figure 13. Others

Figure 14. Global Hydropower MRO Service Consumption Value by Contract Models, (USD Million), 2021 & 2025 & 2032

Figure 15. Global Hydropower MRO Service Consumption Value Market Share by Contract Models in 2025

Figure 16. One-off Project Maintenance Service

Figure 17. Annual Maintenance Contract

Figure 18. Long-term Service Agreement

Figure 19. Vessel Full-lifecycle Management Service

Figure 20. Global Hydropower MRO Service Consumption Value by Service Coverage, (USD Million), 2021 & 2025 & 2032

Figure 21. Global Hydropower MRO Service Consumption Value Market Share by Service Coverage in 2025

Figure 22. Equipment and Component-Level MRO

Figure 23. System and Island-Level MRO

Figure 24. Integrated MRO for Single Units

Figure 25. Global Hydropower MRO Service Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 26. Hydropower MRO Service Consumption Value Market Share by Application

in 2025

Figure 27. Conventional Reservoir-type Hydropower Plants Picture

Figure 28. Run-of-river Hydropower Plants Picture

Figure 29. Pumped-storage Power Plants Picture

Figure 30. Small-scale Hydropower Plants Picture

Figure 31. Others Picture

Figure 32. Global Hydropower MRO Service Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 33. Global Hydropower MRO Service Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 34. Global Market Hydropower MRO Service Consumption Value (USD Million) Comparison by Region (2021 VS 2025 VS 2032)

Figure 35. Global Hydropower MRO Service Consumption Value Market Share by Region (2021-2032)

Figure 36. Global Hydropower MRO Service Consumption Value Market Share by Region in 2025

Figure 37. North America Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 38. Europe Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 39. Asia-Pacific Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 40. South America Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 41. Middle East & Africa Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 42. Company Three Recent Developments and Future Plans

Figure 43. Global Hydropower MRO Service Revenue Share by Players in 2025

Figure 44. Hydropower MRO Service Market Share by Company Type (Tier 1, Tier 2, and Tier 3) in 2025

Figure 45. Market Share of Hydropower MRO Service by Player Revenue in 2025

Figure 46. Top 3 Hydropower MRO Service Players Market Share in 2025

Figure 47. Top 6 Hydropower MRO Service Players Market Share in 2025

Figure 48. Global Hydropower MRO Service Consumption Value Share by Type (2021-2026)

Figure 49. Global Hydropower MRO Service Market Share Forecast by Type (2027-2032)

Figure 50. Global Hydropower MRO Service Consumption Value Share by Application (2021-2026)

Figure 51. Global Hydropower MRO Service Market Share Forecast by Application (2027-2032)

Figure 52. North America Hydropower MRO Service Consumption Value Market Share by Type (2021-2032)

Figure 53. North America Hydropower MRO Service Consumption Value Market Share by Application (2021-2032)

Figure 54. North America Hydropower MRO Service Consumption Value Market Share by Country (2021-2032)

Figure 55. United States Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 56. Canada Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 57. Mexico Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 58. Europe Hydropower MRO Service Consumption Value Market Share by Type (2021-2032)

Figure 59. Europe Hydropower MRO Service Consumption Value Market Share by Application (2021-2032)

Figure 60. Europe Hydropower MRO Service Consumption Value Market Share by Country (2021-2032)

Figure 61. Germany Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 62. France Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 63. United Kingdom Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 64. Russia Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 65. Italy Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 66. Asia-Pacific Hydropower MRO Service Consumption Value Market Share by Type (2021-2032)

Figure 67. Asia-Pacific Hydropower MRO Service Consumption Value Market Share by Application (2021-2032)

Figure 68. Asia-Pacific Hydropower MRO Service Consumption Value Market Share by Region (2021-2032)

Figure 69. China Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 70. Japan Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Million)

Figure 71. South Korea Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 72. India Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 73. Southeast Asia Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 74. Australia Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 75. South America Hydropower MRO Service Consumption Value Market Share by Type (2021-2032)

Figure 76. South America Hydropower MRO Service Consumption Value Market Share by Application (2021-2032)

Figure 77. South America Hydropower MRO Service Consumption Value Market Share by Country (2021-2032)

Figure 78. Brazil Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 79. Argentina Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 80. Middle East & Africa Hydropower MRO Service Consumption Value Market Share by Type (2021-2032)

Figure 81. Middle East & Africa Hydropower MRO Service Consumption Value Market Share by Application (2021-2032)

Figure 82. Middle East & Africa Hydropower MRO Service Consumption Value Market Share by Country (2021-2032)

Figure 83. Turkey Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 84. Saudi Arabia Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 85. UAE Hydropower MRO Service Consumption Value (2021-2032) & (USD Million)

Figure 86. Hydropower MRO Service Market Drivers

Figure 87. Hydropower MRO Service Market Restraints

Figure 88. Hydropower MRO Service Market Trends

Figure 89. Porters Five Forces Analysis

Figure 90. Hydropower MRO Service Industrial Chain

Figure 91. Methodology

Figure 92. Research Process and Data Source

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