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# Global Military and Defense MRO Service Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Military and Defense MRO Service market size is expected to reach $ 113873 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

MRO (Maintenance, Repair, and Overhaul) services in the military and defense sectors encompass activities carried out throughout the lifecycle of weapon systems and defense assets, with the core objective of maintaining equipment safety, reliability, mission availability, and combat readiness. The scope of these services covers military aircraft and helicopters, naval vessels and submarines, tanks and armored vehicles, missile and weapon systems, radar and electronic warfare equipment, communication and command systems, unmanned systems, and related ground support facilities.

In terms of service content, military and defense MRO typically includes routine inspections, preventive maintenance, fault diagnosis, component repair and replacement, engine and powertrain overhauls, airframe or hull structural repairs, avionics and mission system maintenance, software upgrades, spare parts supply, equipment refurbishment, and service-life extension modifications. Maintenance is categorized by echelon—organizational (field) level, intermediate level, and depot (base) level—and by implementation method, ranging from organic military support and support provided by defense enterprises or original equipment manufacturers (OEMs) to third-party professional MRO and civil-military integrated support. Compared to general industrial maintenance, military MRO is characterized by stringent safety and security requirements, complex equipment technology, rigorous certification systems, long contract cycles, and high customer concentration. Maintenance providers generally require authorization from defense authorities, the military, or OEMs, and must comply with standards regarding personnel background checks, technical data confidentiality,

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component traceability, and quality management systems. Maintenance for certain core equipment must be performed in controlled facilities, while cross-border services and spare parts supply may be subject to export controls and end-user verification. From an industrial perspective, military and defense MRO is not merely about fixing breakdowns but constitutes a vital defense service that ensures equipment combat readiness. As a vast number of global military assets enter the mid-to-late stages of their service lives—and with the proliferation of unmanned, digital, and software-defined equipment—the industry is shifting from scheduled maintenance toward condition monitoring, predictive maintenance, and long-term, performance-based support contracts. While the market scope typically excludes new equipment manufacturing, ammunition procurement, fuel consumption, and operational costs, equipment modernization upgrades and service-life extension modifications are generally included within MRO statistics.

The military and defense MRO (Maintenance, Repair, and Overhaul) sector is primarily driven by the growth of global defense budgets, shifting geopolitical security landscapes, and increased equipment usage intensity. Global military spending reached approximately $2.89 trillion in 2025, marking the eleventh consecutive year of growth, with particularly notable increases in defense investment across Europe, Asia, and Oceania. While not all defense budget increases translate directly into MRO revenue, they typically drive demand for combat readiness inspections, training support, breakdown repairs, spare parts replenishment, and depot-level overhauls—especially for high-value assets such as military aircraft, naval vessels, armored vehicles, and missile defense systems.

The aging of existing equipment fleets and the extension of service lives represent the industry's most stable growth drivers. Given the high procurement costs and long replacement cycles associated with military hardware, many nations prefer to maintain the operational capabilities of current assets through structural repairs, engine overhauls, avionics upgrades, component refurbishment, and system life-extension programs. The U.S. Government Accountability Office (GAO) has noted that the operating and support costs for weapon systems account for approximately 70% of their total lifecycle costs; while this figure includes non-MRO expenses such as personnel, fuel, and facilities, it underscores the critical importance of aftermarket support within the equipment lifecycle. Future MRO operations will increasingly encompass the replacement of obsolete components, ensuring compatibility for legacy systems, reverse engineering, and technical configuration management.

The digitalization, software integration, and increasing complexity of military equipment

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are driving a shift in MRO practices from traditional scheduled maintenance to condition-based and predictive maintenance. Next-generation aircraft, naval vessels, unmanned systems, and command-and-control networks integrate vast arrays of sensors, software, and electronic equipment; consequently, the scope of maintenance is expanding beyond mechanical components to include avionics, mission systems, software versions, and cybersecurity. The industry is accelerating the adoption of health monitoring, fault prediction, digital maintenance records, remote technical support, and automated inspection technologies, while also prioritizing maintainability and spare parts support during the equipment design phase. The U.S. Department of Defense has identified condition-based maintenance as a key pathway for transitioning from reactive repairs to predictive maintenance.

In terms of service models, military MRO is evolving from one-off repair orders toward long-term support contracts, availability-based contracts, and performance-based logistics (PBL), fostering closer collaboration among military maintenance depots, original equipment manufacturers (OEMs), and specialized contractors. However, challenges such as spare parts shortages, a scarcity of skilled maintenance personnel, and difficulties in accessing proprietary technical data remain significant constraints on industry growth. In the future, nations will place greater emphasis on domestic maintenance capabilities, regional support centers, the localization of critical spare parts, and supply chain security; the focus of competition will shift from mere maintenance pricing to mission availability, delivery lead times, security capabilities, technical data control, and full life-cycle cost management.

## Report Scope

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

This report is a detailed and comprehensive analysis of the world market for Military and Defense 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 Military and Defense MRO Service that contribute to its increasing demand across many markets.

## Highlights and key features of the study

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Global Military and Defense MRO Service total market, 2021-2032, (USD Million)

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

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

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

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

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

This report profiles major players in the global Military and Defense 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 STS Aviation Group, NMG Aerospace, Ametek MRO, IMP Aerospace & Defence, AMS, RAM Aerospace & Defense Solutions, AllClear Aerospace & Defense, Al Taif, Thomas Global Systems, TrueChoice Defense, 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 Military and Defense 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.

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### Global Military and Defense MRO Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Military and Defense MRO Service Market, Segmentation by Type:

Maintenance

Repair

Operations

### Global Military and Defense MRO Service Market, Segmentation by Maintenance Level:

Organizational-level Maintenance

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Intermediate-level Maintenance

Depot-level Maintenance

## Global Military and Defense 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 Military and Defense MRO Service Market, Segmentation by Service Coverage:

Individual Component MRO

Core Assembly MRO

Subsystem-Level MRO

Complete Unit or Vessel MRO

## Global Military and Defense MRO Service Market, Segmentation by Application:

Military Aircraft

Naval Vessels and Submarines

Tanks and Armored Vehicles

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Missiles and Weapon Systems

Radar and Electronic Warfare Equipment

Communication and Command Systems

Unmanned Systems

Others

## Companies Profiled:

STS Aviation Group

NMG Aerospace

Ametek MRO

IMP Aerospace & Defence

AMS

RAM Aerospace & Defense Solutions

AllClear Aerospace & Defense

Al Taif

Thomas Global Systems

TrueChoice Defense

Aviation Repair Technologies

Israel Aerospace Industries

S&K Technologies Inc

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StandardAero

Hydraulics International

Insta Group

Serco

ALLSERV

Airbus DS Military Aircraft

GE Aviation

Airbus

Lufthansa Technik

AFI KLM E&M

MTU Maintenance

Rolls-Royce

AAR

ST Aerospace

SIA Engineering

## Key Questions Answered

1. How big is the global Military and Defense MRO Service market?
2. What is the demand of the global Military and Defense MRO Service market?
3. What is the year over year growth of the global Military and Defense MRO Service market?
4. What is the total value of the global Military and Defense MRO Service market?

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5. Who are the Major Players in the global Military and Defense MRO Service market?
6. What are the growth factors driving the market demand?

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