

Electric Commercial Vehicle MRO (Maintenance, Repair, Overhaul) Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Abstracts

The Global Electric Commercial Vehicle MRO Market was valued at USD 977 million in 2024 and is estimated to grow at a CAGR of 21.5% to reach USD 6.7 billion by 2034. The market is gaining robust momentum as electric commercial vehicles (ECVs) become more widely accepted across various industries. The shift from internal combustion engine (ICE) vehicles to electric alternatives is accelerating due to rising environmental concerns, stringent emissions regulations, and government-backed EV incentives. Fleets are increasingly moving toward electrification to meet sustainability goals and reduce the total cost of ownership. As electric commercial vehicles continue to penetrate public and private transport systems, especially in sectors such as last-mile delivery, logistics, and public transit, the demand for reliable, fast, and specialized MRO services is expanding rapidly. Alongside vehicle maintenance, the ecosystem supporting ECVs—including charging infrastructure and diagnostic tools—is also evolving. The rising need for customized maintenance programs, parts replacement, and software-based diagnostics has added new layers of complexity, driving MRO providers to adopt next-gen tools and technologies to remain competitive in a dynamic landscape.

A significant contributor to this market expansion is the widespread development of EV charging infrastructure, which directly supports greater adoption of electric commercial vehicles. As more charging stations emerge, particularly in remote or underserved regions, fleet operators find it increasingly feasible to switch from traditional fuel-powered systems to electric mobility. Maintaining this infrastructure—such as chargers, connectors, internal cabling, and software—further contributes to the growing demand for MRO services. As ECVs become integral to logistics, delivery, and public transport operations, they require tailored repair and service support, pushing growth across regions including North America, Asia Pacific, Latin America, Europe, and the Middle

East & Africa.

By component, the market includes electric drivetrain, thermal management systems, charging systems, battery systems, and others. In 2024, battery systems held a dominant 30% market share, valued at USD 315 million. These components are critical to a vehicle's range and efficiency, and their performance directly impacts operational uptime. Repeated charging cycles, exposure to extreme temperatures, and usage wear often degrade batteries, prompting routine assessments and timely replacements. Fleet operators prioritize battery health to avoid costly downtimes, ensuring steady demand for expert MRO providers that offer focused battery management services.

Segmented by service type, the market includes maintenance, repair, and overhaul, with maintenance commanding a 47% share in 2024. Even though ECVs have fewer mechanical components than traditional vehicles, they require precise care such as software diagnostics, brake inspections, and component calibration. Scheduled maintenance remains essential to prolonging vehicle life, enhancing safety, and optimizing performance. Fleet operators rely heavily on preventive maintenance programs, which provide predictable costs and minimal disruptions, supporting a consistent revenue stream for service providers.

China's Electric Commercial Vehicle MRO Market generated USD 92.1 million in 2024. Strong domestic production, policy support, and rapid fleet deployment have made the country a global frontrunner. Its booming urban delivery, public transport, and logistics sectors continue to elevate the need for robust, tech-enabled MRO services—from diagnostics to complex repairs.

Key industry players such as Daimler, Element Fleet Management, ATS Euromaster, BP Pulse, Ferdotti Motor Services, Scania, Lion Electric, MAN Global, Merchants Fleet, and Volvo are expanding their MRO portfolios. These companies are establishing dedicated EV service centers, enhancing technician training programs, and leveraging telematics for predictive maintenance. Strategic partnerships with automakers and fleet operators help them ensure efficient service delivery. AI-powered diagnostics and remote monitoring are becoming standard tools to accelerate repair cycles and minimize vehicle downtime.

Contents

CHAPTER 1 METHODOLOGY & SCOPE

- 1.1 Research Design
 - 1.1.1 Research Approach
 - 1.1.2 Data Collection Methods
- 1.2 Base Estimates & Calculations
 - 1.2.1 Base Year Calculation
 - 1.2.2 Key Trends For Market estimation
- 1.3 Forecast model
- 1.4 Primary research and validation
 - 1.4.1 Primary sources
 - 1.4.2 Data mining sources
- 1.5 Market scope & definition

CHAPTER 2 EXECUTIVE SUMMARY

- 2.1 Industry 360° synopsis, 2021 - 2034

CHAPTER 3 INDUSTRY INSIGHTS

- 3.1 Industry ecosystem analysis
- 3.2 Supplier landscape
 - 3.2.1 Original equipment manufacturers
 - 3.2.2 Independent service providers
 - 3.2.3 Component suppliers
 - 3.2.4 Technology providers
 - 3.2.5 End use
- 3.3 Profit margin analysis
- 3.4 Technology & innovation landscape
- 3.5 Patent analysis
- 3.6 Case study
- 3.7 Key news & initiatives
- 3.8 Regulatory landscape
- 3.9 Impact forces
 - 3.9.1 Growth drivers
 - 3.9.1.1 Increased adoption of electric commercial fleets
 - 3.9.1.2 Expansion of charging infrastructure

- 3.9.1.3 Declining costs of electric vehicles and batteries
- 3.9.1.4 Rise in demand for clean and sustainable transportation
- 3.9.2 Industry pitfalls & challenges
 - 3.9.2.1 High Initial cost of electric commercial vehicles
 - 3.9.2.2 Limited availability of skilled workforce
- 3.10 Growth potential analysis
- 3.11 Porter's analysis
- 3.12 PESTEL analysis

CHAPTER 4 COMPETITIVE LANDSCAPE, 2024

- 4.1 Introduction
- 4.2 Company market share analysis
- 4.3 Competitive positioning matrix
- 4.4 Strategic outlook matrix

CHAPTER 5 MARKET ESTIMATES & FORECAST, BY VEHICLE, 2021 - 2034 (\$BN)

- 5.1 Key trends
- 5.2 LCV
- 5.3 MCV
- 5.4 HCV

CHAPTER 6 MARKET ESTIMATES & FORECAST, BY COMPONENT, 2021 - 2034 (\$BN)

- 6.1 Key trends
- 6.2 Battery systems
- 6.3 Thermal management systems
- 6.4 Charging system
- 6.5 Electric drivetrain
- 6.6 Others

CHAPTER 7 MARKET ESTIMATES & FORECAST, BY SERVICE, 2021 - 2034 (\$BN)

- 7.1 Key trends
- 7.2 Maintenance
- 7.3 Repair
- 7.4 Overhaul

CHAPTER 8 MARKET ESTIMATES & FORECAST, BY SERVICE PROVIDER, 2021 - 2034 (\$BN)

- 8.1 Key trends
- 8.2 OEM service centers
- 8.3 Independent service providers
- 8.4 Fleet maintenance operations

CHAPTER 9 MARKET ESTIMATES & FORECAST, BY REGION, 2021 - 2034 (\$BN)

- 9.1 Key trends
- 9.2 North America
 - 9.2.1 U.S.
 - 9.2.2 Canada
- 9.3 Europe
 - 9.3.1 UK
 - 9.3.2 Germany
 - 9.3.3 France
 - 9.3.4 Italy
 - 9.3.5 Spain
 - 9.3.6 Russia
 - 9.3.7 Nordics
- 9.4 Asia Pacific
 - 9.4.1 China
 - 9.4.2 India
 - 9.4.3 Japan
 - 9.4.4 Australia
 - 9.4.5 South Korea
 - 9.4.6 Southeast Asia
- 9.5 Latin America
 - 9.5.1 Brazil
 - 9.5.2 Mexico
 - 9.5.3 Argentina
- 9.6 MEA
 - 9.6.1 UAE
 - 9.6.2 South Africa
 - 9.6.3 Saudi Arabia

CHAPTER 10 COMPANY PROFILES

- 10.1 ATS Euromaster
- 10.2 BP Pulse
- 10.3 Daimler
- 10.4 Element Fleet Management
- 10.5 Ferdotti Motor Services
- 10.6 Kerlin Bus Sales & Leasing
- 10.7 Lightning eMotors
- 10.8 Lion Electric
- 10.9 MAN Global
- 10.10 Merchants Fleet
- 10.11 Northeastern Bus Rebuilders
- 10.12 Orange EV
- 10.13 Scania
- 10.14 Sonny Merryman
- 10.15 Transdev
- 10.16 VDL Company
- 10.17 VEV Services Limited
- 10.18 Volvo
- 10.19 WattEV
- 10.20 YES EU

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