

Global Hydropower MRO Service Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Hydropower MRO Service market size is predicted to grow from US\$ 9220 million in 2025 to US\$ 13930 million in 2032; it is expected to grow at a CAGR of 6.3% from 2026 to 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

LPI (LP Information)' newest research report, the “Hydropower MRO Service Industry

Forecast” looks at past sales and reviews total world Hydropower MRO Service sales in 2025, providing a comprehensive analysis by region and market sector of projected Hydropower MRO Service sales for 2026 through 2032. With Hydropower MRO Service sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Hydropower MRO Service industry.

This Insight Report provides a comprehensive analysis of the global Hydropower MRO Service landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Hydropower MRO Service portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Hydropower MRO Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Hydropower MRO Service and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Hydropower MRO Service.

This report presents a comprehensive overview, market shares, and growth opportunities of Hydropower MRO Service market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Maintenance

Repair

Operations

Segmentation by Equipment System:

Hydraulic Turbine System MRO

Generator System MRO

Electrical System MRO

Automation and Control System MRO

Others

Segmentation by Contract Models:

One-off Project Maintenance Service

Annual Maintenance Contract

Long-term Service Agreement

Vessel Full-lifecycle Management Service

Segmentation by Service Coverage:

Equipment and Component-Level MRO

System and Island-Level MRO

Integrated MRO for Single Units

Segmentation by Application:

Conventional Reservoir-type Hydropower Plants

Run-of-river Hydropower Plants

Pumped-storage Power Plants

Small-scale Hydropower Plants

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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