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

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Abstracts

The global Military and Defense MRO Service market size is predicted to grow from US$ 73980 million in 2025 to US$ 110414 million in 2032; it is expected to grow at a CAGR of 5.9% from 2026 to 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

LPI (LP Information)' newest research report, the “Military and Defense MRO Service Industry Forecast” looks at past sales and reviews total world Military and Defense MRO Service sales in 2025, providing a comprehensive analysis by region and market sector of projected Military and Defense MRO Service sales for 2026 through 2032. With Military and Defense MRO Service sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Military and Defense MRO Service industry.

This Insight Report provides a comprehensive analysis of the global Military and Defense 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 Military and Defense MRO Service portfolios and capabilities, market entry

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strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Military and Defense MRO Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Military and Defense 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 Military and Defense MRO Service.

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

Market Segmentation

Segmentation by Type:

Maintenance

Repair

Operations

Segmentation by Maintenance Level:

Organizational-level Maintenance

Intermediate-level Maintenance

Depot-level Maintenance

Segmentation by Contract Models:

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One-off Project Maintenance Service

Annual Maintenance Contract

Long-term Service Agreement

Vessel Full-lifecycle Management Service

Segmentation by Service Coverage:

Individual Component MRO

Core Assembly MRO

Subsystem-Level MRO

Complete Unit or Vessel MRO

Segmentation by Application:

Military Aircraft

Naval Vessels and Submarines

Tanks and Armored Vehicles

Missiles and Weapon Systems

Radar and Electronic Warfare Equipment

Communication and Command Systems

Unmanned Systems

Others

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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

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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.

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

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S&K Technologies Inc

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

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