

# **Gas Turbine MRO Market Forecasts to 2032 – Global Analysis By Provider Type (Original Equipment Manufacturers (OEMs), Independent Service Providers and In-House Maintenance Teams), Service Type (Maintenance, Repair and Overhaul), Capacity, Technology, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Gas Turbine MRO Market is accounted for \$16.36 billion in 2025 and is expected to reach \$21.95 billion by 2032 growing at a CAGR of 4.29% during the forecast period. Gas turbine maintenance, repair, and overhaul (MRO) is the umbrella term for the full range of services intended to guarantee the longevity, safety, and peak performance of gas turbines used in industrial, aviation, and power generation applications. Routine inspections, part replacements, engine disassembly and reassembly, performance testing, and turbine component upgrades are all examples of MRO activities. Regular MRO is crucial to preventing failures, increasing efficiency, and adhering to regulatory requirements because gas turbines operate in extremely high and low temperatures.

According to the Offshore and Onshore Reliability Data (OREDA) project, a joint industry initiative established in 1981 with the Norwegian Petroleum Directorate, gas turbines are among the critical equipment monitored for reliability in the oil and gas sector.

Market Dynamics:

Driver:

## Deteriorating gas turbine fleet

The 1990s and early 2000s saw the installation of a sizable percentage of the gas turbines currently in use, especially in developed nations. The frequency and complexity of maintenance requirements increase as these units get closer to or surpass their anticipated service lives. Blades, bearings, and combustion chambers are examples of aging parts that need to be inspected, repaired, or replaced. As a result, there is a greater need for comprehensive MRO services to maintain operational effectiveness, prevent unscheduled outages, and prolong the life of equipment.

### Restraint:

#### High maintenance and overhaul costs

The complexity of turbine systems and the specialized nature of necessary services make gas turbine maintenance and repair (MRO) capital-intensive. Significant overhauls can cost millions of dollars, particularly for heavy-duty turbines. These costs cover testing, disassembly, inspection, and part replacement. Additionally, such high expenses may cause small-scale businesses or emerging economies to postpone maintenance plans or choose less expensive options, which could hinder market expansion. Having access to OEM parts and qualified technicians further increases the cost of overall maintenance.

### Opportunity:

#### Utilizing predictive maintenance and digital twin technologies

The MRO landscape is changing as a result of the incorporation of AI, digital twins, and predictive analytics into gas turbine operations. By replacing calendar-based schedules with condition-based maintenance, these technologies optimize maintenance cycles, minimize unplanned outages, and enable early fault detection. Furthermore, businesses that provide digital monitoring and analytics platforms can capitalize on the rising demand for smart maintenance solutions, particularly from operators looking to lower maintenance costs and increase uptime.

### Threat:

#### Energy market volatility and geopolitical instability

Geopolitics has a significant impact on global energy trends, which are closely linked to the installation and maintenance of gas turbines. Fuel supply disruptions, delays in infrastructure projects, and changes in investment priorities can result from conflicts in regions that produce or consume gas, such as the Russia-Ukraine war or tensions in the Middle East. Moreover, cross-border maintenance and repair (MRO) operations can also be complicated by political unpredictability, trade restrictions, or sanctions, particularly when sourcing spare parts or sending technicians to countries.

#### Covid-19 Impact:

The COVID-19 pandemic had a major short-term effect on the gas turbine maintenance and repair (MRO) market, mostly because of labour shortages, extensive disruptions in global supply chains, and delays in planned maintenance. During times of lower energy demand, many power plants and industrial facilities postponed non-essential MRO operations in order to minimize on-site staff and cut expenses. Additionally, travel restrictions made it more difficult to deploy specialized technicians, particularly for international service contracts. The backlog of deferred maintenance, however, caused a spike in post-pandemic MRO activity as economies and energy demand started to recover.

The heavy duty segment is expected to be the largest during the forecast period

The heavy duty segment is expected to account for the largest market share during the forecast period. Large-scale power generation is the main application for these turbines, especially in base-load and combined cycle applications in the utility and industrial sectors. Regular maintenance is necessary to guarantee efficiency and dependability because of their high output capacity, continuous operation, and crucial role in national power grids. Heavy-duty turbines need comprehensive MRO services, such as hot gas path inspections, component overhauls, and performance upgrades, because of their size and complexity. Furthermore, the dominance of this market has been largely fueled by the growing demand for electricity worldwide and the extensive use of heavy-duty gas turbines.

The aviation segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the aviation segment is predicted to witness the highest growth rate. The expansion of airline fleets, the rise in international air traffic, and the growing need for dependable and fuel-efficient aircraft engines are the main factors driving this growth. Because they work in harsh environments, aviation gas

turbines—especially jet engines—need regular, highly precise maintenance to maintain their performance and safety. Additionally, the demand for specialized MRO services has increased due to the recovery of air travel following COVID-19 and investments in newer, more sophisticated aircraft models. Technological developments in digital diagnostics specifically designed for aviation engines and predictive maintenance are also advantageous to this segment.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share. This dominance is fueled by expanding oil and gas infrastructure in nations like China, India, and Japan, as well as fast industrialization and rising power generation demands. The modernization of aging gas turbine fleets and greater investments in renewable energy also support the region's thriving MRO industry. Major gas turbine manufacturers and service providers are present, which further boosts the market. Moreover, growing urbanization and government programs to increase energy efficiency also contribute to the region's consistent expansion, making Asia-Pacific the world's largest market for gas turbine maintenance and repair.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa region is anticipated to exhibit the highest CAGR. The region's growing oil and gas industry, rising power generation capabilities, and significant infrastructure development investments are the main drivers of this growth. In order to meet their expanding industrial and energy demands, nations such as Saudi Arabia, the United Arab Emirates, and Qatar are concentrating on modernizing and maintaining their gas turbine fleets. Additionally, the MEA region's gas turbine MRO market is expanding quickly due to the adoption of digital solutions and advanced maintenance technologies, which improve operational efficiency and decrease downtime.

Key players in the market

Some of the key players in Gas Turbine MRO Market include Baker Hughes Company, Ethos Energy LLC, Doosan Heavy Industries, General Electric Company (GE), Ansaldo Energia SpA, Sulzer Ltd, Kawasaki Heavy Industries, Ltd., Mitsubishi Heavy Industries, Ltd., Siemens Energy AG, Harbin Electric International Company Limited, Bharat Heavy Electricals Limited (BHEL), Solar Turbines Incorporated, MTU Aero Engines AG / Vericor Power Systems LLC, RWG (Repair & Overhauls) Limited and Metalock

Engineering Group.

Key Developments:

In June 2025, Baker Hughes announced that it entered an agreement with Cactus Inc., a U.S.-based manufacturer of pressure control equipment, to establish a joint venture (JV) that provides surface pressure control (SPC) services. SPC services include oilfield services and equipment used to safely manage and contain pressure during drilling, well intervention, completion, and production operations at the surface.

In May 2025, EthosEnergy announced the acquisition of Turbine Services, Ltd. (TSL), a global, specialized manufacturer and supplier of aftermarket parts for heavy-duty gas and steam turbines. TSL has over 50 years of experience and has supplied parts to more than 1,000 customers around the world. Known for their engineering, product quality, and competitive pricing, TSL has established itself as a leading non-OEM manufacturer for turbine parts.

In September 2024, Kawasaki Heavy Industries, Ltd. (Kawasaki) and CB&I announced their signing of a strategic agreement for promoting a commercial-use liquefied hydrogen (LH2) supply chain and realizing a zero-carbon-emission society. The signing ceremony took place at Gastech Exhibition & Conference in Houston.

Provider Types Covered:

Original Equipment Manufacturers (OEMs)

Independent Service Providers

In-House Maintenance Teams

Service Types Covered:

Maintenance

Repair

Overhaul

### Capacities Covered:

Less than 30 MW

31-120 MW

Above 120 MW

### Technologies Covered:

Heavy Duty

Light Industrial

Aero-derivative

### End Users Covered:

Power Generation

Oil & Gas

Manufacturing

Aviation

Other End Users

### Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

## Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

## Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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