

UNITED STATES MRO MARKET TRENDS REPORT

2024



- **Market Size & Trends**
- **Demand Forecasts by Product**
- **Segmentation by Product, Territory & End-Market Demand**
- **Competitive Landscape & Industry Concentration Analysis**

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About the Authors

The analysis in this report and its underlying market segmentation framework was created by Thomas P. Gale, strategic advisor and former CEO of Modern Distribution Management, and analyst of U.S. MRO markets since 1984. It was produced under the MDM Research brand of Modern Distribution Management (www.mdm.com), the market research, analytics and media division of the National Association of Wholesaler-Distributors (NAW). Customized datasets and forecasting were developed by MDM Analytics Data Analyst Tim Walters.

Since 1967, MDM has been the definitive resource for distribution management best practices, business strategies, market trend analysis and intelligence. MDM Analytics provides proprietary market research, software and analytic services to profile market share and account potential for North American industrial and construction product markets. For more information, see [page 59](#).

NAW is one of America’s leading trade associations, representing the \$8-trillion wholesale distribution industry. NAW’s mission is to deliver world-class programs and services to help the wholesale distribution industry’s most dynamic companies succeed.

National Association of Wholesaler-Distributors

1325 G Street, Suite 1000

Washington, DC 10005

202-872-0885

analytics@mdm.com

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Highlights

- This report gives marketers of industrial MRO, construction and facility maintenance supplies, electrical, electronics, commercial packaging and plastics products a tool to define market size, end-market segmentations and to evaluate relative growth opportunities across a range of MRO product portfolios.
- The U.S. market demand for MRO products in 2024 is estimated to total \$907 billion, according to analysis by MDM Research and MDM Analytics. North American MRO markets are highly fragmented. This report profiles five primary segments defined by product category; the first section provides an analysis of the total MRO market.

U.S. MRO Market Demand by Product Category Segment: 2024

Segment	Estimated Demand (\$ billions)	Section Page
1. Total MRO Markets Overview		5
2. Industrial MRO	\$303	15
3. Construction/Facility MRO		25
4. Electrical MRO	\$300	34
5. Electronics MRO		43
6. Commercial MRO	\$300	50

- In spite of the extreme volatility of the global economy due to the impacts of the COVID-19 pandemic onset in the second quarter of 2020, U.S. MRO markets overall demonstrated their resiliency with a decline of 2.0% in 2020. This was followed by two years of double-digit growth, 12.5% in 2021 and 15.9% in 2022.
- U.S. MRO markets have now entered into a more stabilized phase. As inflationary and supply chain pressures eased, 2023 MRO markets experienced a slight 2.3% decline, with the 2024-2028 five-year compound annual growth rate estimated to be 2.8%.
- Industrial MRO products account for about one-third (\$303 billion) of the total \$907-billion annual U.S. MRO market size in 2024. It is the most fragmented sector in terms of products, market channels and customer segments. A discussion of market concentration across the competitive landscape of distribution is provided in the Industrial (p. 18) and Electrical (p. 36) sections of this report.
- MRO product marketers will find this report valuable to benchmark current core product portfolios with the segmentation profiles in this report, as well as identify growth opportunity across tangential products, customer segments and territories.

About This Report

This report presents historical demand trends and forecasts for the U.S. Maintenance, Repair & Operations (MRO) product markets across the following dimensions:

- Market size & trends
- Segmentation by product category, geographic territory & end-market demand
- Demand forecasts by product category: 2017-2028
- Competitive landscape & concentration analysis for select sectors

How to Use This Report

This report is organized into six sections that profile five primary product category segments; the first section provides an analysis of the aggregated MRO market and its respective segments. These sections as well as the Table of Contents can be accessed via the hyperlinked bar at the top of this page and each page of every section. Just click on the section you'd like to view from any page in this report.

1. **Total MRO Market:** Overview of size, segmentation and channel dynamics for the following four sections.
2. **Industrial MRO** product categories include a portfolio of consumable MRO products used in the manufacturing process. It includes safety products (see note below).
3. **Construction/Facility MRO** product categories include those products used in new construction as well as repair and replace applications, including fasteners, contractor supplies, HVACR, plumbing and janitorial supplies. Facility maintenance is characterized as a service-providing industry under NAICS taxonomy.
4. **Electrical MRO** product categories are grouped together even though they largely operate as discrete channels through distribution; see section 4 for a detailed explanation.
5. **Electronics MRO** product categories are grouped together even though they largely operate as discrete channels through distribution; see section 4 for a detailed explanation.
6. **Commercial MRO** product categories include packaging and plastics MRO products sold across all end markets, including service industries, information, technology and others.

Within each of the above sections, there are end-market demand segmentations at two-digit, three-digit and six-digit NAICS levels (see p. 7 for more detail on NAICS code structures). This end-market segmentation provides insight into the demand patterns of "crossover" product categories, such as safety, janitorial supplies and other MRO products consumed across all economic sectors.

A vast majority of MRO product consumption takes place across five high-level customer segments as defined by two-digit NAICS code: Mining, Quarrying and Oil & Gas Extraction (NAICS 21); Utilities (NAICS 22); Construction (NAICS 23); Manufacturing (NAICS 31-33); and Institutional/Commercial/Government (all other NAICS). Transportation and Warehousing (NAICS 48-49) and Wholesale Trade (NAICS 42) are also important end-market segments for select MRO products such as material handling equipment and other moving equipment replacement parts.

The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing and publishing statistical data related to the U.S. business economy. NAICS was developed under the auspices of the Office of Management and Budget (OMB), and adopted in 1997 to replace the Standard Industrial Classification (SIC) system.

Introduction

Model Description

Due to the highly fragmented nature of the U.S. economy in general and the spectrum of products sold through all channels, this report uses a customized segmentation taxonomy based primarily on the major two-digit consuming sectors for MRO products as outlined above.

However, because MRO products flow overwhelmingly through wholesale distribution channels — segmented primarily by product category portfolio, a more nuanced analytical framework is deployed in this report. This cross-sectional approach across product category and NAICS-defined end markets provides the most meaningful representation for how real-world MRO, aftermarket, repair & replace markets operate.

For that reason, the two-digit industry sector NAICS taxonomy is further subdivided based on how the primary vertical product-based distribution channels are defined (historically through the primary wholesale distribution associations serving these respective vertical channels, i.e. ISA, NAED, STAFDA, HARDI, PTDA, NFPA, FPDA, NAHAD, ASA, MHEDA, NFDA, GAWDA, etc.)



This is far from a perfect science, and well-founded arguments can be made for using a simpler analytical approach based on either NAICS end-use market taxonomy or a strictly product-based analysis. We feel that the three-dimensional model serves the target audience for this report: marketers of MRO products,

regardless of channel position. It provides the best way to compare the shape of not only the linear Total Available Market size by customer segments, but the true three-dimensional nature of how these end markets are served across the range of traditional specialty and general-line wholesale distribution channels that developed the product portfolios these niche end-market consumers required.

These distribution verticals dominate how MRO products flow through the channel to end-market customers. This dynamic — unique to MRO product channels — offers deeper insight into what the competitive landscape looks like today, as well as a more accurate gauge of market potential and Addressable Market based on your channel position.

UNDERSTANDING NAICS CODES

The North American Industry Classification System (NAICS) has 20 primary two-digit Economic Sector codes. For example, all Construction businesses are under the NAICS two-digit code of 23. Your search begins with these first two numbers. The more numbers inputted up to six-digits, the narrower the search.

The NAICS hierarchy includes 96 three-digit Subsectors and 308 four-digit Industry Groups. There are 689 five-digit NAICS codes; at this level there is comparability in code and definitions for most of the NAICS sectors providing more Industry detail. In total, there are 1,012 six-digit level NAICS, which allows for the U.S., Canada and Mexico each to have Country-Specific detail. Each specific classification NAICS code drills down to a six-digit number.

Methodology

The data throughout this report represents estimated total consumption at the end-user level of MRO products in the U.S., according to MDM Analytics. These represent demand at the end-user level in U.S. dollars and include an estimated distributor margin based on specific product category. MDM Analytics estimates market demand at the end-user level using its proprietary predictive market model and a combination of government, private and industry databases.

MDM Analytics' methodology for estimating industrial and other MRO consumable products uses a combination of public and private databases to estimate a total market size as well as the segmented demand by end-use markets. The foundation for this approach is called ratio marketing/analysis, which uses an estimated annual dollar value consumption per employee to approximate total demand for a given product. These are validated periodically through independent market research, customer feedback and third-party benchmarking, through associations or other trade groups by industry.

Among the primary databases used to develop MDM Analytics' predictive market models:

- U.S. Census Bureau: Economic Census, Census of Manufactures
- U.S. Bureau of Economic Analysis
- Dun & Bradstreet (MDM licenses the North American D&B database for the model framework, with more than 18 million business location records, which it uses to create proprietary demand models)
- Bureau of Labor Statistics to validate labor market changes at a state level
- Specific available economic and market data for triangulation/validation

Starting with the U.S. Economic Census, conducted every five years, MDM Analytics is able to determine an estimated total production of a given product category. MDM Analytics then applies its defined algorithms, in part developed through government input-output tables measuring product flow through economy sectors, to define consumption by industry sector, as defined at the 6-digit NAICS code level. Then the total employment of that industry is divided into the total consumption to arrive at the dollar-per-employee ratio. By using all available data, many industry products can be profiled throughout the entire consuming NAICS codes. When verified against national commercial databases, 85-90 percent of the actual market can be defined.

MDM Analytics has developed key data components for deriving accurate market potential reports. The Economic Census database contains current information on total output for all key industrial goods. This "bottom-line" information represents the total value of an industry's output or production, and serves as a control point for subsequent modeling. To ensure consistency and verifiability, MDM Analytics employs information available through various data resources of the federal government. In addition, estimates for specific industries are refined through the use of private databases.

A secondary database allows MDM Analytics to track cross-industry transactional relationships. The foundation for this database is the benchmark Input-Output accounts for the United States produced by the Bureau of Economic Analysis (BEA). Input-Output (I-O) analysis examines the relationships between all industries within an economy, based on the relatively simple idea that the purchases, or inputs, of one industry are the sales, or output, of another industry. The I-O accounts reveal, for a given point in time, the consumption and identity of all commodities used by a given industry, and, conversely, the consumption and identity of all large industries using a given commodity.

It is this important property that enables MDM Analytics to determine how the production of specific industrial goods is distributed throughout the U.S. economy, and by extension of the model, to other countries as well. The manufacturing industries in the BEA's I-O accounts (i.e., sectors) are defined according to the NAICS taxonomy.

This same methodology is applied to Canada and Mexico to determine market potential by product category, defined territory and end-markets. The assumption is made that manufacturing processes are similar to those used in the United States, and that consumption patterns parallel those of the United States across all industries.

The power of the MDM Analytics model is its ability to estimate demand based on the type of industry, either at a defined geographic level or at a specific account. This type of modeling allows for profiling the unique MRO consumption patterns of specific locations or territories based on the type of business.

To accomplish this, MDM Analytics licenses a subset of the North American Dun & Bradstreet database, which contains 20 million records of individual business locations, or accounts, including its NAICS identifying code and employee count.

Example: An automotive manufacturing plant, NAICS 336111, has 1000 employees. The MDM Analytics model estimates that this type of NAICS manufacturing process consumes \$95 of coated abrasives per employee per year. Therefore, this plant's estimated consumption of coated abrasives annually is \$95,000 per year.

Because MDM Analytics defines estimated potential at the account level, it is possible to aggregate these data estimates to specific geographic territories, and identify the unique demand patterns based on the types of businesses that are located in a specific area. Additionally, it is possible to use this model to estimate share of spend with existing accounts, as well as identify target accounts, and rank them based on their estimated annual spend on specific product categories.

Product Category Definition

MDM Analytics defines the U.S. market based on a portfolio of 39 major MRO product categories and 122 subcategories (see category list on p. 9 and complete subcategory lists at beginning of each report section). Each of the product categories are built using the North American Product Classification System (NAPCS) taxonomy and data from the Economic Census and Annual Survey of Manufactures collected by the U.S. Census Bureau.

The North American Product Classification System (NAPCS) is a comprehensive, market- or demand-based, hierarchical classification system for products (goods and services) that (a) is not industry-of-origin based but can be linked to the NAICS industry structure, (b) is consistent across the three North American countries, and (c) promotes improvements in the identification and classification of service products across international classification systems, such as the Central Product Classification System (CPCS) of the United Nations.

DEFINING MRO

This report defines "MRO" in the broadest of terms. The acronym is used to describe Maintenance, Repair and Operations products – typically consumable products used in the day-to-day operations of businesses and facilities. MRO products are used in production and plant maintenance and may include maintenance supplies (such as cleaning materials), parts or consumables used during production (such as lubricants, safety equipment or tools).

This report includes what are commonly termed as "new" and "repair/replace" products typically sold into construction end markets. These terms are often used to segment the demand patterns and customer segments for HVACR, plumbing, electrical and other construction supplies.

Traditionally, companies have not paid as much attention to the procurement of these materials as they have to OEM (Original Equipment Manufacturing) materials or parts and components that are assembled to create a finished product. However, in a trend that began with the Great Recession between 2007-2009, the longest recession since World War II, customers increasingly have managed indirect purchases more strategically. Wholesale-distributors have correspondingly capitalized on this shift to provide value-added services that help customers save money and improve processes surrounding MRO procurement.

U.S. Market: Total MRO

SECTION 1

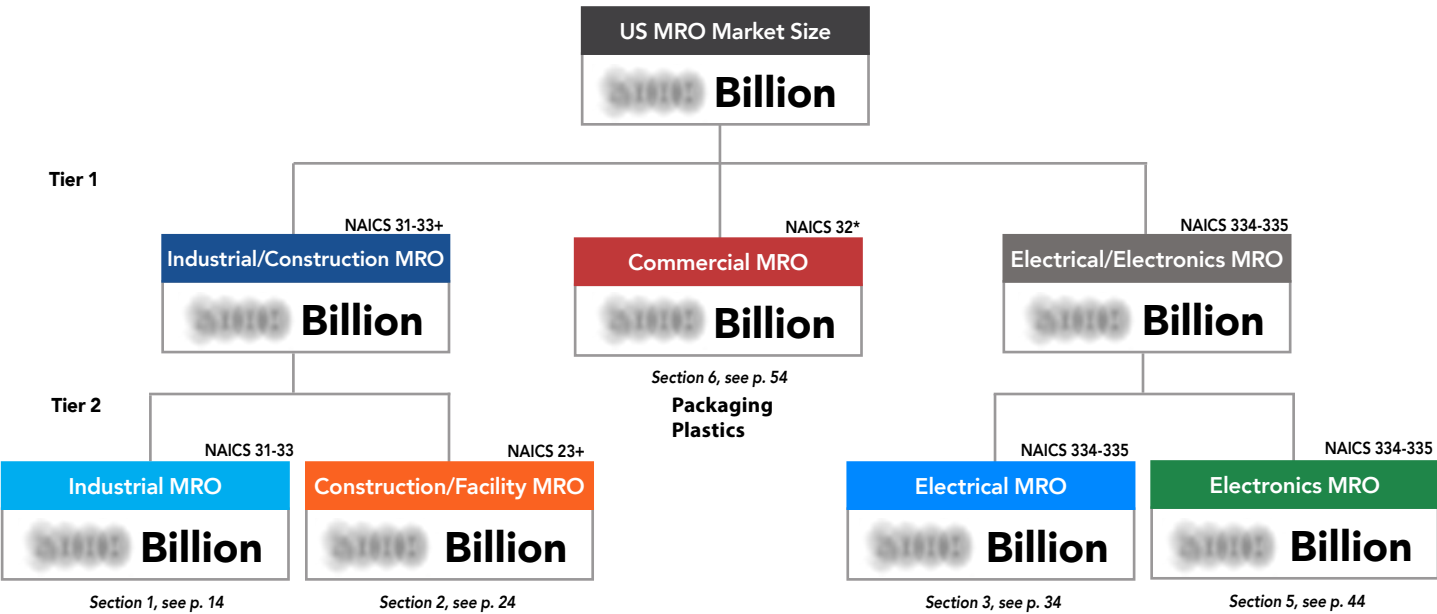


Market Size & Trends

Demand for maintenance, repair and operations (MRO) products in the U.S. is estimated to total \$907 billion in 2024 across five major product market sectors: Industrial, Construction/Facility, Electrical, Electronics and Commercial MRO. As shown below, this report sizes and segments the end-user market demand for MRO products across two tiers.

The first-tier segmentation divides the MRO market into three broad categories: Industrial/Construction MRO, Commercial MRO and Other MRO. The second-tier segmentation refines these into four discrete channels that reflect – as closely as possible in a highly fragmented market environment – the channel dynamics and primary customer end markets for these products.

The following four sections of this report provide comprehensive segmentations by product category, end markets and territory for each of the Tier 2 segments profiled below. The rationale for this schematic segmentation follows.



- Industrial**
- Abrasives
 - Brushes-Industrial
 - Chemicals
 - Controls-Industrial
 - Cutting Tools
 - Fluid Power
 - Hand Tools
 - Industrial PVF
 - Machine Tool Accessories
 - Material Handling
 - Power Tools
 - Power Transmission
 - Rubber Products
 - Safety
 - Saws
 - Welding Equipment & Gases

- Construction/Facility**
- Fasteners
 - HVACR
 - Plumbing Supplies
 - Construction PVF
 - Janitorial Supplies
 - Contractor Supplies
 - Paint-Maintenance
 - Brushes-Maintenance

- Electrical**
- Switchgear, Transformers & Generator Sets
 - Wire & Circuit Protection
 - Light Bulbs & Fixtures
 - DataComm

- Electronics**
- Components Modules
 - Controls-PLCs General Industrial
 - Controls-Specialty Industrial
 - Monitoring Panel Equipment
 - Assembly Tools-Electrical/ Electronics
 - Test Instruments-Portable/ Bench

Source: [MDM Analytics](#)

The five discreet MRO sectors profiled in this report are defined by their specific product category portfolios. These are defined broadly on the previous page, and in more granular detail within each report section. While there is no industry standard, MDM Analytics has served for decades as a defining reference for industry associations and national distributors to size and segment these markets by product category, territory and end-market customer segments.

The schematic structure was created to show the relationships between closely aligned sectors, as well as the relative size of each. For example, there is close alignment between industrial and construction/facility maintenance product sectors. The same is true for electrical and electronics product channels. Commercial MRO profiles two distinct product categories — Packaging and Plastics — that have very distinct demand profiles by industry sector. And as noted later in this section, the walls that used to define these discreet market channels have been increasingly breached as distributors and alternate channels pursue category expansion strategies.

Within Industrial/Construction MRO sectors, there have been strong cross-sell and line expansion trends across the more highly commoditized safety, JanSan and general MRO supplies categories. Across Electrical/Electronics segments, increased demand for automation has similarly driven line expansion across all Tier 2 MRO product sectors.

The impacts of these cross-sector trends can be analyzed in this report as many products classified in one of the five sectors have significant crossover demand patterns. For example, cutting tools, abrasives, safety PPE products and others — classified under Industrial MRO — are heavily consumed across construction and facility maintenance customer segments. The estimated demand patterns for these types of products are included in the segmentation profiles throughout this report.

U.S. MRO Market Demand Segment Profile: 2017-2028

Demand for MRO products in the U.S. totaled \$907 billion in 2024, according to estimates by MDM Analytics. After two strong rebound growth years following a small decline in 2020, demand has stabilized and forecast to grow from \$907 billion in 2024 to more than \$1 trillion in 2028, a compound annual growth rate (CAGR) of 2.8%.



U.S. MRO Market Demand Segment Profile: 2017-2028

Segment	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Industrial MRO	100	100	100	100	100	100	100	100	100	100	100	100
Construction/Facility MRO	20	20	20	20	20	20	20	20	20	20	20	20
Electrical MRO	10	10	10	10	10	10	10	10	10	10	10	10
Electronics MRO	5	5	5	5	5	5	5	5	5	5	5	5
Commercial MRO	5	5	5	5	5	5	5	5	5	5	5	5
Total MRO	140	140	140	140	140	140	140	140	140	140	140	140
YoY Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: [MDM Analytics](#)

U.S. Total MRO Products Trends & Forecast: 2017-2028

MRO markets experienced the most extended period of volatility in the five-year period from 2019-2024 since the Great Recession of 2007-2009. A combination of pandemic shutdowns, exponential demand for PPE products, the fastest recovery on record and ongoing supply chain, employment and inflation pressures have created a significantly altered landscape. However, a more stable market environment is expected over the next five years as the forecast table above illustrates.

MDM Research produces a two-year quarterly forecast and monthly wholesale distribution revenue data by specific NAICS sector. The most recent quarterly forecast (Q3 2024) for Machinery, Equipment and Supplies Merchant Wholesalers (NAICS 4238) indicates overall low single-digit growth through the end of 2025. These businesses include the core industrial, construction and facilities maintenance product categories, and distribute machinery, equipment and supplies for construction, mining, farms, gardens, industries, service establishments and transportation.

U.S. Industrial MRO (NAICS 4238) Distribution Revenue Trends & Forecast: 2022-2025 (YoY)



Source: MDM Research; U.S. Census Bureau, Monthly Wholesale Trade; 2024 MDM Economic Outlook Report; Forecasts developed by the Business Research Division, Leeds School of Business, University of Colorado.

Industry Structure & Channel Dynamics

This report provides a comprehensive demand analysis of the U.S. MRO market in 2024 and forecast through 2028. To fully understand the state of MRO market dynamics today, a deeper analysis is presented here of the competitive landscape, evolution and challenges to traditional MRO product channels.

Demand Factors Impacting U.S. MRO Markets

Several key indicators for MRO products demand are used depending on end-market sector. While overall Gross Domestic Product (GDP) provides a general trending and forecasting basis, more granular indices are used for specific product categories.

The Industrial Production Index is the most widely used demand-based indicator for industrial MRO products but additional indices are used to triangulate specific industry activity, including the Purchasing Managers Index (PMI), Manufacturers and Machinery Shipments, as well as Motor Vehicles & Part Shipments among others.

Several public and private construction-related indices are used to monitor spending and project starts across residential and non-residential sectors. The Architecture Billings Index (ABI), leading indicator of nonresidential activity (NRI), NAHB Housing Market Index, Single Family Housing Starts, Bridge Contracts and Private Non-Residential Index are some reference measures. By most estimates, more than 80% of MRO products today are sold through a wide range of discrete MRO product wholesale distribution vehicles. This benchmark has not changed significantly, but is difficult to quantify due to the fragmentation characteristics of the industry, types of products and degree of commoditization. For a deeper understanding of the MRO competitive landscape, see the 2024 edition of the [MDM Top Distributors](#) directory details at bottom of page.

The nature of the U.S. MRO marketplace is such that a vast majority of products has traditionally been sold through some form of independent distribution network versus direct by the manufacturers of these types of products or other channels to market. The reason is simple: With the industrialization and overall expansion of the U.S. economy throughout the late 18th and early 20th century, suppliers to every economic sector increasingly specialized based on the needs of their core customers, whether in mining, manufacturing, construction or other growing economic sectors.

These end markets needed a reliable supply of the critical parts, equipment and consumable items at the specific location of their daily operations — and often highly remote to places of manufacture. The 19th and post-war expansion fueled the growth of a more fragmented supplier base beyond the original rail supply houses and distribution models continued to evolve to serve ongoing economic expansion. But with the advances of reducing

MDM 2024 Top Distributors Report

MDM's annual Top Distributors directory illustrates the industry's largest North American-based distributors of industrial, commercial and building supply products, ranked by their fiscal revenue within 20 different product verticals. Industrial MRO is one of these verticals, with its ranked list numbering out to 25 distributors. W.W. Grainger has cemented its position atop this MRO list ever since the feature provided a dedicated list for the vertical in 2020.

MDM's Top Distributors — its 15th annual edition — can be found and downloaded at www.mdm.com/top_distributors.

According to the 1980s, competitive channels and supply models emerged to challenge traditional distribution channels. Integrated supply emerged and grew rapidly in the 1990s as an alternate channel for MRO products with specific value added attributes, followed by the Internet and rudimentary digital and e-commerce channels.

MRO market channels are complex and have been misunderstood by many forms of alternate channel competition for decades. Private equity "discovered" MRO distribution as an attractive investment proposition in the late 1990s as a mature market sector ripe for consolidation and value creation through a range of MRO playbooks. Economic cycles fueled a shifting competitive advantage between strategic and financial acquisition based on a set of variables across the cost of and access to investment vehicles, valuations and overall competitive landscape.

Digitalization & Commoditization Disrupt Traditional MRO Channels

Digitalization over the past 20 years has continued to empower customers with increasing access to product knowledge, pricing transparency and more proactive indirect materials and MRO spend management. The emergence and disrupting growth of Amazon Business and its digital marketplace model from 2011 to the end of the decade has equally been the most significant commoditization driver of MRO products. But access to and deployment of private label product strategies have not a parallel and complementary growth path.

The trajectory of the utility products and Personal Protective Equipment (PPE) channel in the past decade offers an illustration of the combined impacts of digitalization, commoditization and the rise of alternate channels. As one of the most highly commoditized product categories with a high percentage of imported products, it became an attractive target for digital channels as well as product line expansion opportunity for traditional distribution in adjacent verticals.

With the advent of the pandemic in 2020, a volatile and MRO "gold rush" boosted MRO channels and helped many distribution bridge a loss of revenues across other product categories as economic activity across many sector of the economy slowed.

These interesting channel trends have shaped how the dominant market channel — wholesale distribution — has responded to adapt, differentiate and elevate its value proposition. Since the entrance and emergence of Amazon Business and subsequent alternate channels, distribution has focused on strengthening go-to-market models and government channel position across cost to serve equations, digital capabilities and a range of value added services. These have ranged across the spectrum of challenges customers have faced from the same manufacturers, from longer inventory management solutions, total procurement cost control, longer product and engineering services specialization and increasingly embedded technology solutions that improve their customers' competitive value proposition with their own end market customers.

Just as channel dynamics have continually shifted in favor of the customer, MRO product manufacturers have also leveraged digital — across communication, e-commerce, marketplace — to engage and even sell more directly with end user customers. By 2018, the MRO marketplace was a truly "battered landscape" with a multitude of firms in the role of the primary channel. "A death by a thousand paper cuts" has often been cited by distribution leaders across every MRO product vertical to describe their perceived challenges across the dimensions of both revenue growth and margin erosion.

Just then the COVID pandemic disrupted this increasingly complex and fluid MRO market environment.

MRO Supply Chain Resilience

Since the second quarter of 2020, a succession of challenges to MRO market channels — lockdowns, collapsed markets, fat and recovery, supply chain inflation, labor, domestic political and global unrest — have continued to create highly destabilized market conditions across many economic and market sectors.

And yet, MRO supply chain and distribution channels were remarkably resilient to business back and support customers and what has emerged is the strongest economy globally as of October 2024. Why?

Many MRO distribution employ a business that taps into some form of the theme “right part, right place, at the right time.” The MRO channel is defined by product and service delivery at the point of use. While many national distributors have developed effective coverage into larger size customer segments, smaller local distributors offer coverage into more highly fragmented MRO customers and often offer the most direct competition to national distributors through a combination of relationship, knowledge and responsiveness. While Amazon Business and other alternate supply sources may take share across more commoditized product categories, the “localization” factor dominates MRO channel dynamics.

In spite of several macroeconomic factors discussed above that have eroded channel share and customer loyalty, distributors have maintained and in some cases strengthened their market positions. As discussed in the following sections, a vast majority of distribution networks have relatively low concentration ratios. And as the chart below illustrates, 10% of the 20,000 firms across the 19 product networks that make up the \$8 trillion U.S. wholesale distribution sector have 20 employees or more. A highly fragmented channel of diverse suppliers across the most highly fragmented and diverse economy globally.

Employment Size Segmentation of Wholesale Distribution Companies (Firms)



Source: MDM Research; U.S. Census Bureau, 2021 County Business Patterns; 2024 MDM Economic Outlook Report; Business Research Division, Leeds School of Business, University of Colorado.



2024 MDM Economic Outlook Report

For a more complete view of the entire \$8-trillion U.S. wholesale distribution industry profiled in the chart above, refer to the [2024 MDM Economic Outlook Report](#), which provides financial and firmographic benchmarks for the 19 major sectors and 109 subsectors of wholesale distribution.

U.S. Market: Industrial MRO

SECTION 2



U.S. Industrial MRO Products Trends & Forecast: 2017-2028

This section sizes and segments the U.S. Industrial MRO market as defined by the 16 product categories and 74 subcategories listed on the following page. MDM Analytics builds its product categories based on the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

U.S. Industrial MRO Products Trends & Forecast: 2017-2028



Source: [MDM Analytics](#)

Created with DataWrapper

Demand for industrial MRO products in the U.S. totaled \$100 billion in 2020, according to estimates by MDM Analytics. After strong rebound growth over following a decline in 2020, demand has stabilized and forecast to grow from \$100 billion in 2020 to \$105 billion in 2028, a compound annual growth rate (CAGR) of 0.5%.

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Industrial MRO Product Category Profile

The Industrial MRO product portfolio, as defined for this report, is composed of a broad set of consumable product categories and tools. While there is no official industry standardization, MDM Analytics for decades has provided benchmark datasets and product category definitions that industry associations, consulting firms and leading national distributors have used to profile the size and segmentation characteristics of specific MRO product market channels.

Abrasives

Abrasives Grain-Grit-Shot
Abrasives Coated
Abrasives Super
Abrasives Bonded

Brushes

Brushes General Maintenance
Brushes Industrial

Chemicals

Adhesives MRO
Packaging-Adhesives
Petro Refined Lubricants
Petro Hydraulic Oils
Petro Industrial Oil & Grease
Petro Metal Cutting
Petro Metal Forming
Petro Surface Coatings
Sealants MRO

Controls & Gauges

Controls Genl. Industrial Eqpt. MRO
Controls Process Instruments MRO
Gauges Industrial Instrument MRO

Cutting Tools

Tools Cutting-Carbide
Tools Cutting-High Speed Steel

Fluid Power

Hydraulic Pumps-Motors MRO
Hydraulic Cylinders MRO
Hydraulic Valves-Filters-Misc MRO
Pneumatic Cylinders MRO
Pneumatic Valves-FRLs MRO
Pumps Industrial MRO

Hand Tools

Tools Files
Tools General Hand
Tools Hand-Precision Measurement
Tools Storage

Industrial Pipes, Valves, Fittings

PVF Metal MRO
Industrial Valves
Control Valves

Machine Tool Accessories

Machine Tool Accessories

Material Handling

Hoists, Cranes & Monorails
Conveyors-Conveying Equipment
Casters Industrial MRO
Shelving Racks-Lockers-Benches
Wire Rope and Slings

Power Tools

Compressors Industrial All
Tools Power-Air
Tools Power-Electric

Power Transmission

Bearings Ball MRO
Bearings Mounted MRO
Bearings Roller MRO
Chain Link MRO
Chain Roller MRO
Clutches & Brakes MRO
Controls Motor & Drive MRO
Controls Variable Speed Drives MRO
Couplings Flexible MRO
Gauges Industrial Instrument MRO
Gear Drives & Speed Reducers MRO
Linear Accessories MRO
Linear Actuators & Positioners MRO
Motors Fractional HP MRO
Motors Integral HP MRO
Sheaves MRO
Sprockets MRO

Rubber Products

Belting Conveyor Flat MRO
Belts Transmission MRO
Gaskets & Packings MRO
Hose Hydraulic MRO
Hose Industrial MRO
O-Rings MRO
Pneumatic Tube & Ftgs
Seals Mechanical-Automotive MRO
Seals Mechanical-Industrial MRO

Safety

Safety PPE
Safety Test-Eqpt and Respirators

Saws

Saw Blades

Welding Equipment & Gases

Gases Industrial Non-Welding
Gases Industrial Welding
Welding Eqpt Cstn&Maint MRO

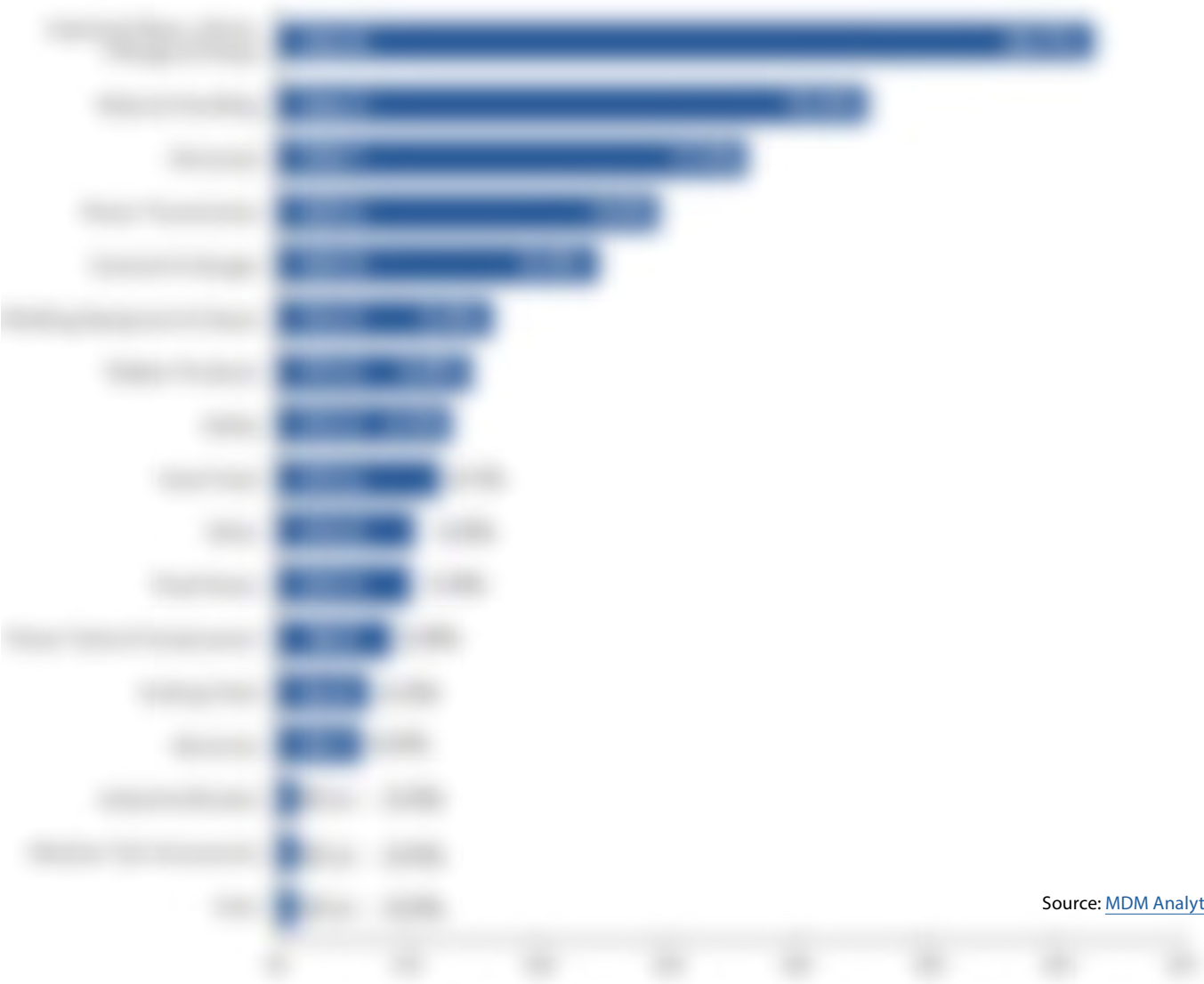
Product Category Segmentation

The dollar value for the Industrial MRO product categories defined on the previous page and their relative percentage contribution to the estimated U.S. market size of \$303 billion are presented below.

Note that many product categories represented here also have significant demand profiles across the other MRO categories and end markets included in this report. For example, safety PPE, abrasives, cutting tools, power and hand tools are consumed heavily across construction and facility management end markets. The following pages in this section present segmentation analysis of the major consuming end markets for all Industrial MRO product categories, including manufacturing, construction and commercial sectors, as well as geographic segmentation by region and state.



Industrial MRO



Source: [MDM Analytics](#)

U.S. Market Concentration

The following analysis provides an estimate of market share concentration in the U.S. Industrial MRO market sector, as defined by the product categories on the previous page. The top five Industrial MRO distributors, as ranked in [MDM's 2024 Top Distributors ranking](#), represent approximately a 16% share of the addressable MRO market in 2024.



Industrial MRO



Any meaningful analysis of MRO market concentration has to be quantified by the specific product categories that aggregate into a Total Available Market size estimate. This is a moving target. It is a qualitative exercise with a wide range of variables that have to be factored. MDM Analytics has been the definitive benchmarking resource for market size definition by many of the leading MRO distributors across most product sectors for decades.

This report defines sector size based on a core set of product categories that constitute how the U.S. MRO marketplace operates, predominantly through wholesale distribution channels to the end user customer. As noted elsewhere, traditional distribution channels are experiencing their erosion as nearly every sector seeks targeted category expansion as a growth strategy, and alternate channels such as digital marketplaces and procurement platforms expand their reach.

But no two distributors are alike. For the purposes of forming a more accurate market concentration, it's perhaps most useful to view the MRO competitive landscape as a Venn diagram, rather than as a definitive set of product category verticals with well-defined boundaries. These walls have been increasingly lowered over the past two decades.

As the largest franchise North American MRO distributor, W.W. Grainger is a good example to provide some context for how to best analyze market concentration with a broad lens. Grainger holds less than 1% market share, according to how MDM Research has formed the size of core industrial MRO. But Grainger's product portfolio extends into the construction, facility maintenance, electrical and even electronics product sectors profiled elsewhere in this report.

In its February 2024 investor presentation, Grainger estimates its share at roughly 1% for its High Touch Solutions segment, which uses a more conservative estimate for a current addressable market size of ~ \$140 billion. Even with an addressable market size of \$140 billion, the top five companies would represent 20% or less in market share. As a benchmark, an industry market concentration ratio of less than 10% is generally considered low to moderate.

The five largest industrial MRO distributors in the U.S. above are testimony to the fragmented nature of industrial

MRO markets and diverse go-to market models. McWorther's core product portfolio and expertise centers on power transmission/motion control products. McWorther Corp is a "talent house" that has increasingly digitalized. The Home Depot, after several iterations, has focused on expansion of its professional contracting, construction and housing markets, while Fastenal has migrated over the past 10 years from a traditional branch based distributor to a hybrid omni and digital model.

The rise of e-commerce, Amazon Business and alternate channels have significantly impacted traditional channels for more commoditized and targeted MRO product categories, with safety and service products as prime examples. Distributors with a product specialization have increasingly focused growth strategies on wider share and product portfolio expansion.

These factors have contributed to maintaining a relatively stable concentration rate for traditional industrial MRO distribution channels over the past five years, in spite of the continued strong overall pace of consolidation. A parallel consolidation trend has been taking place across all sectors of independent industrial and construction products channels.

Affiliated Distributors, North America's largest marketing/trading group for these verticals, reported a record 17% increase in member 2023 sales, an increase of 1% over the previous year. A21's 2023 members span nine industrial and construction product verticals, and in late 2023 merged with its historically competitive marketing group, MMRB. The result, the combination will expand A21's total company membership base to more than 1,400 independent distributors.

Industrial End Markets Segmentation (2-Digit NAICS)



Source: MDM Analytics
Created with DataWrapper

The following table segments estimated annual demand (2024 baseline) at the 3-digit NAICS end-user level for the top 20 industries across all economic sectors consuming Industrial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

Source: MDM Analytics

Top 20 Manufacturing End Market Segmentation (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top 20 manufacturing sectors (NAICS 31-33) consuming Industrial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
3111	Textile Mills	11,100
3112	Textile Millenry and Apparel Manufacturing	10,000
3113	Textile, Apparel and Leather Manufacturing	10,000
3114	All Other Textile, Apparel and Leather Manufacturing	10,000
3120	Other Textile Mills and Leather Manufacturing	10,000
3131	Food Processing	10,000
3141	Chemical and Allied Products	10,000
3142	Plastics and Rubber Products	10,000
3151	Nonmetallic Mineral Products	10,000
3161	Metals and Metal Products	10,000
3171	Primary Metal Industries	10,000
3172	Other Metal Industries	10,000
3199	Other Manufacturing	10,000
3211	Wood Product Manufacturing	10,000
3212	Furniture and Home Furnishings Manufacturing	10,000
3213	Other Wood Product Manufacturing	10,000
3221	Food Processing	10,000
3222	Food and Beverage Manufacturing	10,000
3223	Food and Beverage Manufacturing	10,000
3224	Food and Beverage Manufacturing	10,000
3225	Food and Beverage Manufacturing	10,000
3226	Food and Beverage Manufacturing	10,000
3227	Food and Beverage Manufacturing	10,000
3228	Food and Beverage Manufacturing	10,000
3229	Food and Beverage Manufacturing	10,000
3231	Textile, Apparel and Leather Manufacturing	10,000
3232	Textile, Apparel and Leather Manufacturing	10,000
3233	Textile, Apparel and Leather Manufacturing	10,000
3234	Textile, Apparel and Leather Manufacturing	10,000
3235	Textile, Apparel and Leather Manufacturing	10,000
3236	Textile, Apparel and Leather Manufacturing	10,000
3237	Textile, Apparel and Leather Manufacturing	10,000
3238	Textile, Apparel and Leather Manufacturing	10,000
3239	Textile, Apparel and Leather Manufacturing	10,000
3241	Chemical and Allied Products	10,000
3242	Chemical and Allied Products	10,000
3243	Chemical and Allied Products	10,000
3244	Chemical and Allied Products	10,000
3245	Chemical and Allied Products	10,000
3246	Chemical and Allied Products	10,000
3247	Chemical and Allied Products	10,000
3248	Chemical and Allied Products	10,000
3249	Chemical and Allied Products	10,000
3251	Plastics and Rubber Products	10,000
3252	Plastics and Rubber Products	10,000
3253	Plastics and Rubber Products	10,000
3254	Plastics and Rubber Products	10,000
3255	Plastics and Rubber Products	10,000
3256	Plastics and Rubber Products	10,000
3257	Plastics and Rubber Products	10,000
3258	Plastics and Rubber Products	10,000
3259	Plastics and Rubber Products	10,000
3261	Nonmetallic Mineral Products	10,000
3262	Nonmetallic Mineral Products	10,000
3263	Nonmetallic Mineral Products	10,000
3264	Nonmetallic Mineral Products	10,000
3265	Nonmetallic Mineral Products	10,000
3266	Nonmetallic Mineral Products	10,000
3267	Nonmetallic Mineral Products	10,000
3268	Nonmetallic Mineral Products	10,000
3269	Nonmetallic Mineral Products	10,000
3271	Metals and Metal Products	10,000
3272	Metals and Metal Products	10,000
3273	Metals and Metal Products	10,000
3274	Metals and Metal Products	10,000
3275	Metals and Metal Products	10,000
3276	Metals and Metal Products	10,000
3277	Metals and Metal Products	10,000
3278	Metals and Metal Products	10,000
3279	Metals and Metal Products	10,000
3281	Primary Metal Industries	10,000
3282	Primary Metal Industries	10,000
3283	Primary Metal Industries	10,000
3284	Primary Metal Industries	10,000
3285	Primary Metal Industries	10,000
3286	Primary Metal Industries	10,000
3287	Primary Metal Industries	10,000
3288	Primary Metal Industries	10,000
3289	Primary Metal Industries	10,000
3291	Other Manufacturing	10,000
3292	Other Manufacturing	10,000
3293	Other Manufacturing	10,000
3294	Other Manufacturing	10,000
3295	Other Manufacturing	10,000
3296	Other Manufacturing	10,000
3297	Other Manufacturing	10,000
3298	Other Manufacturing	10,000
3299	Other Manufacturing	10,000

Source: [MDM Analytics](#)

Top 10 Construction End Market (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top construction sectors (NAICS 23) consuming Industrial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
23000	Building, remodeling, and nonresidential construction	117,000
23000	Construction of structures and other building construction	117,000
23000	Construction of nonresidential buildings	117,000
23000	Highway, street, and bridge construction	75,000
23000	Transportation, communication, and utilities construction	75,000
23000	Site preparation construction	75,000
23000	Water and sewer line and related structures construction	75,000
23000	Industrial building construction	75,000
23000	Other heavy and civil engineering construction	75,000
23000	Non-high-traffic building construction except other	75,000

Source: [MDM Analytics](#)

Top 5 Commercial End Market (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top 5 commercial sectors (all other NAICS) consuming Industrial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
53000	General Merchandise and Variety Stores	117,000
53000	Food and Beverage Stores	117,000
53000	Drug Stores	117,000
53000	Other Retail Stores	117,000
53000	Engineering Services	75,000
53000	Health and Medical Services	75,000
53000	Other Health and Medical Services	75,000
53000	Building and Construction	75,000
53000	Transportation and Logistics Services	75,000
53000	Construction and Maintenance of Transportation	75,000

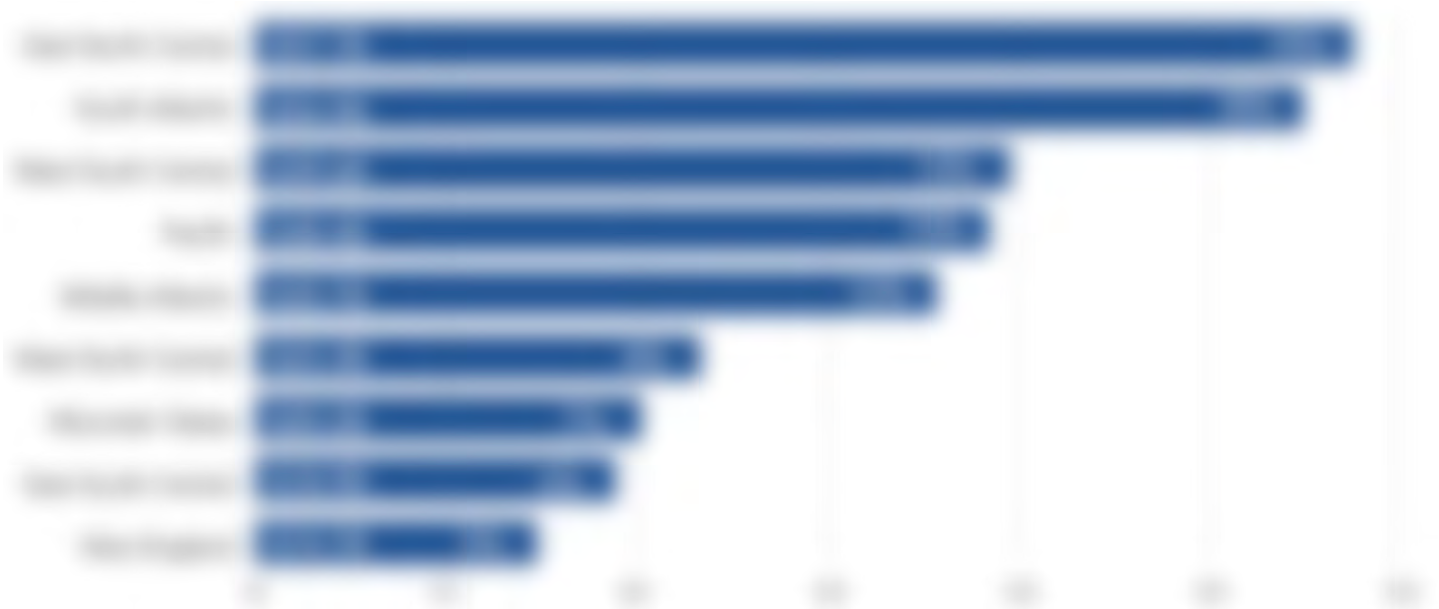
Source: [MDM Analytics](#)

Market Segmentation by U.S. Region

The following table segments estimated annual demand (2024 baseline) at the end-user level by U.S. region of Industrial MRO products in the U.S. based on the industrial MRO market size of \$303 billion. These estimates represent purchases at the end-user level in U.S. dollars and include the distributor margin. IMI estimates market demand at the end-user level using its proprietary predictive market model and a combination of government, private and industry databases.

U.S. Industrial MRO Products Regional Market Analysis (\$B)

Source: [MDM Analytics](#)



Estimated market demand for this product category is segmented across nine defined government regions. All market size segmentations in this report represent estimated annual demand in U.S. dollars at the end-user market level or “street price,” with an average distributor margin included. Together with the demand segmentation by end-user customers (as defined by NAICS definition), a clearer picture emerges of how these product markets are concentrated by geography and industry sector.

States included in each of the nine U.S. regions, as defined by the U.S. Census Bureau:		
East North Central Illinois, Indiana, Michigan, Ohio, Wisconsin	Pacific Alaska, California, Hawaii, Oregon, Washington	South East Central Alabama, Kentucky, Mississippi, Tennessee
South Atlantic Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia	Middle Atlantic New Jersey, New York, Pennsylvania	Mountain Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
West South Central Arkansas, Louisiana, Oklahoma, Texas	West North Central Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota	New England Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Market Segmentation by U.S. State

The following shows the consumption of Industrial MRO products at the end-user level by state.

State	Est. Demand (millions)	State	Est. Demand (millions)
Alabama	10.5	Connecticut	10.5
Alaska	1.0	Delaware	10.5
Arizona	10.5	District of Columbia	10.5
Arkansas	10.5	Florida	10.5
California	10.5	Georgia	10.5
Colorado	10.5	Hawaii	10.5
Connecticut	10.5	Idaho	10.5
Delaware	10.5	Illinois	10.5
District of Columbia	10.5	Indiana	10.5
Florida	10.5	Iowa	10.5
Georgia	10.5	Kansas	10.5
Hawaii	10.5	Kentucky	10.5
Idaho	10.5	Louisiana	10.5
Illinois	10.5	Maine	10.5
Indiana	10.5	Maryland	10.5
Iowa	10.5	Massachusetts	10.5
Kansas	10.5	Michigan	10.5
Kentucky	10.5	Minnesota	10.5
Louisiana	10.5	Mississippi	10.5
Maine	10.5	Montana	10.5
Maryland	10.5	Nebraska	10.5
Massachusetts	10.5	Nevada	10.5
Michigan	10.5	New Hampshire	10.5
Minnesota	10.5	New Jersey	10.5
Mississippi	10.5	New Mexico	10.5
Montana	10.5	New York	10.5
Nebraska	10.5	North Carolina	10.5
Nevada	10.5	North Dakota	10.5
New Hampshire	10.5	Ohio	10.5
New Jersey	10.5	Oklahoma	10.5
New Mexico	10.5	Oregon	10.5
New York	10.5	Pennsylvania	10.5
North Carolina	10.5	Rhode Island	10.5
North Dakota	10.5	South Carolina	10.5
Ohio	10.5	South Dakota	10.5
Oklahoma	10.5	Tennessee	10.5
Oregon	10.5	Texas	10.5
Pennsylvania	10.5	Utah	10.5
Rhode Island	10.5	Vermont	10.5
South Carolina	10.5	Virginia	10.5
South Dakota	10.5	Washington	10.5
Tennessee	10.5	West Virginia	10.5
Texas	10.5	Wisconsin	10.5
Utah	10.5	Wyoming	10.5
Vermont	10.5		
Virginia	10.5		
Washington	10.5		
West Virginia	10.5		
Wisconsin	10.5		
Wyoming	10.5		

Source: [MDM Analytics](#)

U.S. Market: Construction/Facility Maintenance MRO

SECTION 3



U.S. Construction/Facility Maintenance MRO Products Trends & Forecast: 2017-2028

This section sizes and segments the U.S. Construction/Facility Maintenance MRO market as defined by the six product categories and component subcategories listed on the following page. MDM Analytics builds its product categories based on the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

U.S. Construction/Facility Maintenance MRO Products Trends & Forecast: 2017-2028



Source: [MDM Analytics](#)

Created with DataWrapper

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Construction/Facility Maintenance MRO Product Category Profile

The product portfolio defined below was developed to create a discrete Construction/Facility Maintenance MRO profile — a core product assortment consumed primarily by contractor and facility maintenance end-user markets. Many product categories profiled in the Construction/Facility Maintenance MRO section of this report are also core product categories consumed in industrial and other MRO end markets.

As noted elsewhere, this report defines "MRO" in the broadest of terms. The acronym is used to describe Maintenance, Repair and Operations products — typically consumable products used in the day-to-day operations of businesses and facilities. MRO products are used in production and plant maintenance and may include maintenance supplies (such as cleaning materials), parts or consumables used during production (such as lubricants, safety equipment or tools).

This report includes what are commonly termed as "new" and "repair/replace" products typically sold into construction end markets. These terms are often used to segment the demand patterns and customer segments for HVACR, plumbing, electrical and other construction supplies.

There is no standardized definition for MRO market channels. The Construction/Facility Maintenance MRO portfolio below is heavily weighted by the HVACR product category, which represents 43% of the total grouping of products profiled in this section, as detailed on the following page. For that reason, the market segmentation pages that follow are skewed proportionately to the end markets that consume HVACR products.

Overall, the combination of HVACR, JanSan (24%) and Plumbing (24%) products comprise more than 90% of the Construction/Facility Maintenance MRO portfolio created for this report to analyze the distinct characteristics of these end markets compared to the industrial end-markets profiled in the previous section.

Contact MDM Analytics to discuss more granular market segmentation and account potential profiling by specific product category and customized product portfolios.

Heating/Ventilation/Air Conditioning/Refrigeration (HVACR)

New construction and repair/replace heating equipment, heat transfer equipment, warm air furnaces, unitary air conditioners, air source heat pumps, AC/warm air heating equipment, other misc refrigeration and air-conditioning equipment

New construction and repair/replace commercial/industrial refrigeration, related equipment; heat transfer equipment, compressors and units, parts and accessories for air-conditioning and heat transfer equipment, condensing units and all refrigerants, except ammonia

Janitorial Supplies

Soaps and detergents, industrial/commercial/institutional; sanitary tissues paper products; specialty cleaning/sanitation products; polyethylene refuse bags; broom, brush and mops; vacuum cleaners; brushes, brooms and mops

Plumbing Products

New construction and repair/replace plumbing fixtures, fittings, other metal valve and pipe fittings; plastics plumbing fixtures, pipe and fittings; vitreous china fixtures

Fasteners

Fasteners Non-Threaded MRO
Fasteners Threaded MRO

Chemicals

Paint-Maintenance MRO
Paint-Spray Equipment MRO

Contractor Supplies

Rope, shovels, ladders, other

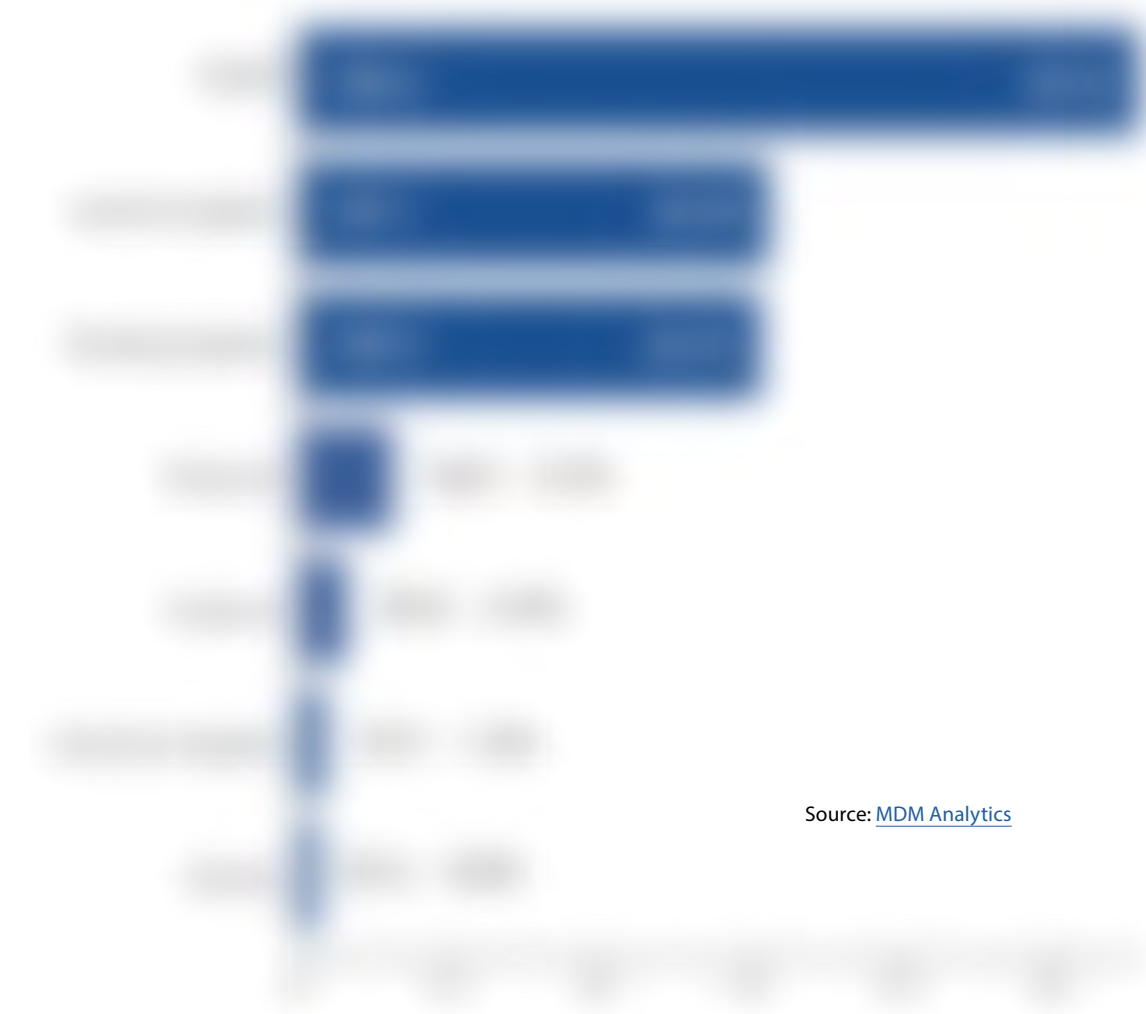
Product Category Segmentation

The dollar value for the Construction/Facility Maintenance MRO product categories defined on the previous page and their relative percentage contribution to the estimated U.S. market size of \$128 billion are presented below.

Note that many product categories represented here also have significant demand profiles across the other MRO categories and end markets included in this report. For example, safety PPE, abrasives, cutting tools, power and hand tools are consumed heavily across construction and facility management end markets. The following pages in this section present segmentation analysis of the major consuming end markets for all Industrial MRO product categories, including manufacturing, construction and commercial sectors, as well as geographic segmentation by region and state.



Construction/Facility MRO



Source: [MDM Analytics](#)

End Market Segmentation (2-Digit NAICS)

Construction/Facility Maintenance MRO products, as defined in this report, are consumed across every end-market sector of the economy. The 2-digit NAICS segmentation on this page estimates the annual market size (2024 baseline) across the three major industry sectors.

As noted on p. 15, many Industrial MRO product categories also have significant demand profiles across the other MRO categories and end markets included in this report. For example, safety PPE, abrasives, cutting tools, power and hand tools are consumed heavily across construction and facility management end markets.

Construction/Facility Maintenance MRO End Markets Segmentation (2-Digit NAICS)



Source: [MDM Analytics](#)
Created with DataWrapper

Top 20 End Market Segmentation (3-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 3-digit NAICS end-user level for the top 20 industries across all economic sectors consuming Construction/Facility MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
238	Specialty Trade Contractors	100,000
480	Highways	97,000
491	Transportation Services	95,000
720	Food Services and Drinking Places	90,000
800	Professional, Scientific, and Technical Services	85,000
236	Construction of Building	80,000
801	Administrative and Support Services	75,000
802	Religious, Health Care Services	70,000
331	Food Manufacturing	65,000
332	Textile Mill Manufacturing	60,000
333	Text and Textile Mill Product Manufacturing	55,000
334	Chemical and Allied Product Manufacturing	50,000
335	Plastic and Rubber Product Manufacturing	45,000
336	Nonmetallic Mineral Product Manufacturing	40,000
337	Metal Product Manufacturing	35,000
338	Electrical, Electronic and Computer Equipment Manufacturing	30,000
339	Transportation Equipment Manufacturing	25,000
340	Other Manufacturing	20,000
350	Wholesale Trade	15,000
360	Retail Trade	10,000
440	Food and Beverage Stores	5,000
450	General Merchandise Stores	5,000
460	Wholesale Trade, Durable Goods	5,000
470	Wholesale Trade, Nondurable Goods	5,000
480	Wholesale Trade, Computer and Office Equipment	5,000
490	Wholesale Trade, Transportation Equipment	5,000
500	Wholesale Trade, Other	5,000
510	Information	5,000
520	Finance and Insurance	5,000
530	Real Estate and Rental and Leasing	5,000
540	Management, Scientific, and Technical Consulting	5,000
550	Administrative and Support Services	5,000
560	Waste Management and Remediation Services	5,000
570	Other Services	5,000
580	Food and Beverage Services	5,000
590	Retail Trade	5,000
600	Health Care	5,000
610	Educational Services	5,000
620	Arts, Entertainment, and Recreation	5,000
630	Accommodation and Food Services	5,000
640	Other Services	5,000
650	Real Estate and Rental and Leasing	5,000
660	Finance and Insurance	5,000
670	Information	5,000
680	Management, Scientific, and Technical Consulting	5,000
690	Administrative and Support Services	5,000
700	Food Services and Drinking Places	5,000
710	Food and Beverage Services	5,000
720	Food Services and Drinking Places	5,000
730	Food Services and Drinking Places	5,000
740	Food Services and Drinking Places	5,000
750	Food Services and Drinking Places	5,000
760	Food Services and Drinking Places	5,000
770	Food Services and Drinking Places	5,000
780	Food Services and Drinking Places	5,000
790	Food Services and Drinking Places	5,000
800	Professional, Scientific, and Technical Services	5,000
810	Administrative and Support Services	5,000
820	Religious, Health Care Services	5,000
830	Food Services and Drinking Places	5,000
840	Food Services and Drinking Places	5,000
850	Food Services and Drinking Places	5,000
860	Food Services and Drinking Places	5,000
870	Food Services and Drinking Places	5,000
880	Food Services and Drinking Places	5,000
890	Food Services and Drinking Places	5,000
900	Food Services and Drinking Places	5,000
910	Food Services and Drinking Places	5,000
920	Food Services and Drinking Places	5,000
930	Food Services and Drinking Places	5,000
940	Food Services and Drinking Places	5,000
950	Food Services and Drinking Places	5,000
960	Food Services and Drinking Places	5,000
970	Food Services and Drinking Places	5,000
980	Food Services and Drinking Places	5,000
990	Food Services and Drinking Places	5,000

Source: [MDM Analytics](#)

Top 20 Construction End Market Segmentation (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top 20 Construction sectors (NAICS 23) consuming Construction/Facility MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
23000	Building, remodeling, and nonresidential construction	101,000
23000	Building and nonresidential construction	101,000
23000	Commercial and institutional building construction	101,000
23000	Building construction and other building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000
23000	Nonresidential building construction	101,000

Source: [MDM Analytics](#)

Top 10 Manufacturing End-Markets (31-33)

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 construction (NAICS 31- 33) industries consuming Construction/Facility Maintenance MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

NAICs	End-Market	Est. Demand (millions)
3110	Food Processing	15.0
3120	Textile Mill	12.0
3130	Textile Mill	10.0
3140	Textile Mill	8.0
3150	Textile Mill	7.0
3160	Textile Mill	6.0
3170	Textile Mill	5.0
3180	Textile Mill	4.0
3190	Textile Mill	3.0
3200	Textile Mill	2.0

Source: [MDM Analytics](#)

Top 10 Other End-Markets

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 Other (by NAICS) industries consuming Construction/Facility Maintenance MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

NAICs	End-Market	Est. Demand (millions)
3300	Construction	15.0
3310	Construction	12.0
3320	Construction	10.0
3330	Construction	8.0
3340	Construction	7.0
3350	Construction	6.0
3360	Construction	5.0
3370	Construction	4.0
3380	Construction	3.0
3390	Construction	2.0

Source: [MDM Analytics](#)

Market Segmentation by U.S. Region

The following table segments estimated annual demand (2024 baseline) at the end-user level by U.S. region of Construction/Facility Maintenance MRO products in the U.S. based on the segment MRO market size of \$128 billion. These estimates represent purchases at the end-user level in U.S. dollars and include the distributor margin. MDM Analytics estimates market demand at the end-user level using its proprietary predictive market model and a combination of government, private and industry databases.

U.S. Construction/Facility MRO Regional Market Analysis (\$B)

Source: [MDM Analytics](#)



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States included in each of the nine U.S. regions, as defined by the U.S. Census Bureau:

East North Central Illinois, Indiana, Michigan, Ohio, Wisconsin	Pacific Alaska, California, Hawaii, Oregon, Washington	South East Central Alabama, Kentucky, Mississippi, Tennessee
South Atlantic Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia	Middle Atlantic New Jersey, New York, Pennsylvania	Mountain Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
West South Central Arkansas, Louisiana, Oklahoma, Texas	West North Central Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota	New England Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Construction/Facility MRO Consumption by U.S. State

The following table segments estimated annual demand (2024 baseline) by state consuming Construction/Facility Maintenance MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

State	Est. Demand (millions)	State	Est. Demand (millions)
Alabama	1.2	North Carolina	1.8
Alaska	0.1	Ohio	1.5
Arizona	0.8	Oklahoma	0.5
Arkansas	0.3	Oregon	0.7
California	2.5	Pennsylvania	1.6
Colorado	0.6	Rhode Island	0.2
Connecticut	0.4	South Carolina	0.9
Delaware	0.2	South Dakota	0.3
District of Columbia	0.1	Tennessee	1.1
Florida	1.9	Texas	2.2
Georgia	1.3	Utah	0.4
Hawaii	0.05	Vermont	0.1
Idaho	0.2	Virginia	1.0
Illinois	1.7	Washington	1.4
Indiana	1.0	Washington DC	0.1
Iowa	0.5	West Virginia	0.3
Kansas	0.4	Wisconsin	0.8
Kentucky	0.7	Wyoming	0.2
Louisiana	0.6		
Maine	0.1		
Maryland	0.5		
Massachusetts	0.3		
Michigan	1.4		
Minnesota	0.9		
Mississippi	0.4		
Missouri	0.8		
Montana	0.1		
Nebraska	0.3		
Nevada	0.2		
New Hampshire	0.1		
New Jersey	0.7		
New Mexico	0.2		
New York	1.6		
North Dakota	0.2		
Ohio	1.5		
Oklahoma	0.5		
Oregon	0.7		
Pennsylvania	1.6		
Rhode Island	0.2		
South Carolina	0.9		
South Dakota	0.3		
Tennessee	1.1		
Texas	2.2		
Utah	0.4		
Vermont	0.1		
Virginia	1.0		
Washington	1.4		
Washington DC	0.1		
West Virginia	0.3		
Wisconsin	0.8		
Wyoming	0.2		

Source: [MDM Analytics](#)

U.S. Market: Electrical MRO

SECTION 4



U.S. Electrical MRO Products Trends & Forecast: 2017-2028

This section sizes and segments the U.S. Electrical MRO market as defined by the two major product categories of Electrical and DataComm composed of the 15 product subcategories listed on the following page. MDM Analytics builds its product categories based on the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

U.S. Electrical MRO Products Trends & Forecast: 2017-2028



Source: [MDM Analytics](#)

Created with DataWrapper

Demand for Electrical MRO products in the U.S. totaled \$205 billion in 2024, according to estimates by MDM Analytics. After strong rebound growth in 2022, demand has stabilized and forecast to grow from \$205 billion in 2024 to \$218 billion in 2028, a compound annual growth rate (CAGR) of 1.5%.

ELECTRICAL MRO SECTION CONTENTS

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Electrical MRO Product Category Profile

The product categories on this page represent a core portfolio of electrical and datacomm products used to define the U.S. market size. Note that certain product categories traditionally sold through electrical distribution channels are not included in this electrical product portfolio. Examples include motors and controls, which are profiled in the Industrial MRO section of this report.

Other research entities estimate the U.S. electrical product Total Addressable Market size in the range of \$250 billion. The rationale MDM Analytics applies across all MRO product sectors is a conservative one to define a core set of common products to establish reliable comparative benchmarks. As discussed in the market concentration analysis on the following page, the market leaders differentiate in their relative market focus as well as the product portfolio strengths they strategically build to serve these diverse market segments.

From our perspective, adopting a core product portfolio methodology yields a more accurate analytical tool to define market size, end-market segmentations and to evaluate Total Available Market (TAM), Serviceable Available Market (SAM), and Serviceable Obtainable Market (SOM).

DataComm

- Computers Business MRO
- Computers & Peripherals
- Computers Processing MRO
- DataComm Equipment MRO
- Wire DataComm MRO
- Wire Small Diameter MRO

Switchgear, Transformers & Generator Set - Power Supply

- Switchgear Equipment
- Transformers Power
- Generator Set-Power Supply

Wire & Circuit Protection

- Circuit Protection Devices
- Wiring Devices Current
- Wiring Devices Non-Current
- Wire & Cable

Light Bulbs & Light Fixtures

- Light Fixtures
- Light Bulbs

Product Category Segmentation

The dollar value for the Electrical MRO product categories defined above and their relative percentage contribution to the estimated U.S. market size of \$205 billion are presented below.



U.S. Market Concentration

MDM Analytics estimates the U.S. Electrical MRO core products market at \$205 billion in 2024, with the top five U.S. electrical distributors, as ranked in [MDM's 2024 Top Distributors ranking](#), holding an approximate 34% market share overall. Electrical product channels are typically defined across new construction, repair and replace, and MRO products sold into industrial, construction, utility, commercial and institutional market sectors.



Electrical MRO

Company	2023 Revenue
Wesco International	\$55.0 million
Strategic North America	\$50.0 million
Consolidated Electrical Distributors	\$45.0 million
Traylor	\$40.0 million
Westcoast North America	\$35.0 million

The top five electrical distributors account for approximately 34% of the total market share, according to MDM Analytics. This concentration is driven by several factors, including the high volume of sales and the long history of these companies in the industry. The top five distributors are Wesco International, Strategic North America, Consolidated Electrical Distributors, Traylor, and Westcoast North America. These companies have a strong presence in the market and are well-positioned to serve a wide range of customers. The market is highly competitive, and the top five distributors are expected to continue to dominate the market in the future.

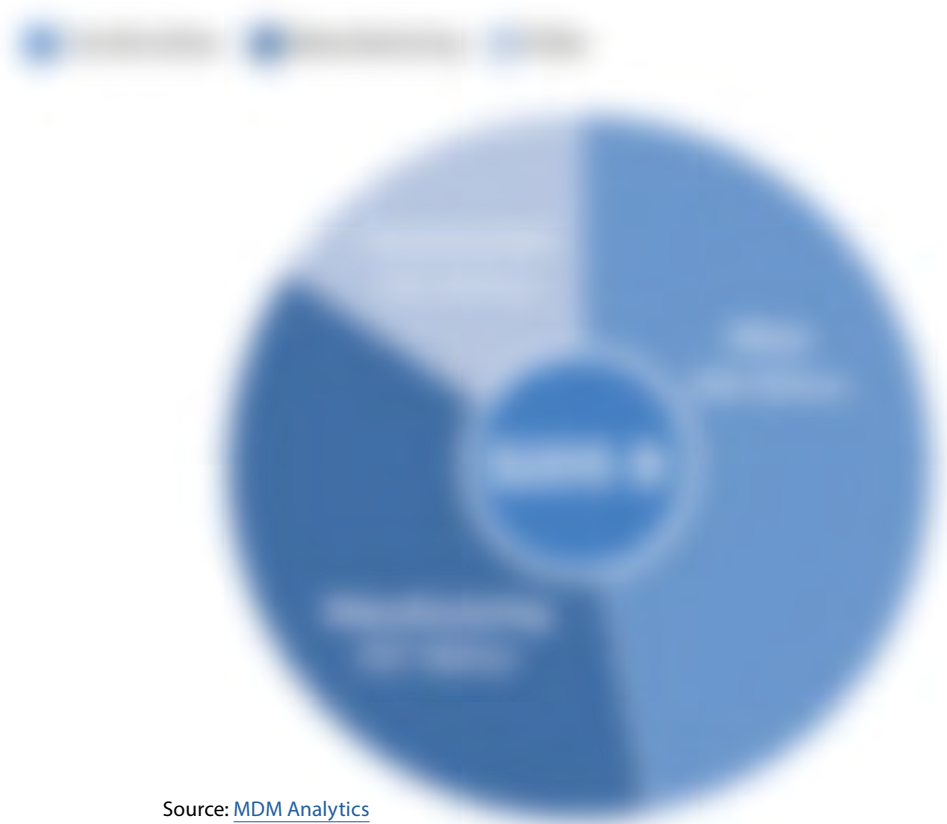
The market is highly competitive, and the top five distributors are expected to continue to dominate the market in the future. The market is highly competitive, and the top five distributors are expected to continue to dominate the market in the future. The market is highly competitive, and the top five distributors are expected to continue to dominate the market in the future.

End Market Segmentation (2-Digit NAICS)

Electrical MRO products are consumed across every end-market sector of the economy, not just core construction, industrial and manufacturing entities. The 2-digit NAICS segmentation on this page estimates the annual market size (2024 baseline) across the three major consuming industry sectors.

As noted, many MRO product categories also have significant demand profiles across the other MRO categories and end markets included in this report. For example, motors are a highly fragmented product category from fractional to integral horsepower, with specific demand profiles across power transmission, electrical and facility maintenance applications. For consistency, this report has categorized certain proudct categories within a single section; motors are profiled in the Industrial MRO section.

Electrical MRO End Markets Segmentation (2-Digit NAICS)



Source: [MDM Analytics](#)
Created with DataWrapper

DATA METHODOLOGY NOTE

The data throughout this report represents estimated total consumption at the end-user level of MRO products in the U.S., according to MDM Analytics. These represent estimated purchases at the end-user level in U.S. dollars and include an estimated distributor margin based on specific product category. MDM Analytics estimates market demand at the end-user level using its proprietary predictive market model and a combination of government, private and industry databases.

Top 20 End Market Segmentation (3-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 3-digit NAICS end-user level for the top 20 industries across all economic sectors consuming Electrical MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
22	Electric, Electronic, and Communications Equipment Manufacturing	151.2
33	Manufacturing	147.5
332	Computer and Electronic Product Manufacturing	112.8
334	Electronic Equipment Manufacturing	112.8
335	Electronics Manufacturing	112.8
336	Electronic Equipment, Instruments, and Related Device Manufacturing	112.8
337	Transportation Equipment Manufacturing	112.8
338	Transportation Equipment, Engines, and Component Manufacturing	112.8
339	Transportation Equipment Manufacturing	112.8
34	Chemical and Allied Product Manufacturing	112.8
35	Transportation Equipment Manufacturing	112.8
36	Transportation Equipment Manufacturing	112.8
37	Transportation Equipment Manufacturing	112.8
38	Transportation Equipment Manufacturing	112.8
39	Transportation Equipment Manufacturing	112.8
40	Transportation Equipment Manufacturing	112.8
41	Transportation Equipment Manufacturing	112.8
42	Transportation Equipment Manufacturing	112.8
43	Transportation Equipment Manufacturing	112.8
44	Transportation Equipment Manufacturing	112.8
45	Transportation Equipment Manufacturing	112.8
46	Transportation Equipment Manufacturing	112.8
47	Transportation Equipment Manufacturing	112.8
48	Transportation Equipment Manufacturing	112.8
49	Transportation Equipment Manufacturing	112.8
50	Transportation Equipment Manufacturing	112.8
51	Transportation Equipment Manufacturing	112.8
52	Transportation Equipment Manufacturing	112.8
53	Transportation Equipment Manufacturing	112.8
54	Transportation Equipment Manufacturing	112.8
55	Transportation Equipment Manufacturing	112.8
56	Transportation Equipment Manufacturing	112.8
57	Transportation Equipment Manufacturing	112.8
58	Transportation Equipment Manufacturing	112.8
59	Transportation Equipment Manufacturing	112.8
60	Transportation Equipment Manufacturing	112.8
61	Transportation Equipment Manufacturing	112.8
62	Transportation Equipment Manufacturing	112.8
63	Transportation Equipment Manufacturing	112.8
64	Transportation Equipment Manufacturing	112.8
65	Transportation Equipment Manufacturing	112.8
66	Transportation Equipment Manufacturing	112.8
67	Transportation Equipment Manufacturing	112.8
68	Transportation Equipment Manufacturing	112.8
69	Transportation Equipment Manufacturing	112.8
70	Transportation Equipment Manufacturing	112.8
71	Transportation Equipment Manufacturing	112.8
72	Transportation Equipment Manufacturing	112.8
73	Transportation Equipment Manufacturing	112.8
74	Transportation Equipment Manufacturing	112.8
75	Transportation Equipment Manufacturing	112.8
76	Transportation Equipment Manufacturing	112.8
77	Transportation Equipment Manufacturing	112.8
78	Transportation Equipment Manufacturing	112.8
79	Transportation Equipment Manufacturing	112.8
80	Transportation Equipment Manufacturing	112.8
81	Transportation Equipment Manufacturing	112.8
82	Transportation Equipment Manufacturing	112.8
83	Transportation Equipment Manufacturing	112.8
84	Transportation Equipment Manufacturing	112.8
85	Transportation Equipment Manufacturing	112.8
86	Transportation Equipment Manufacturing	112.8
87	Transportation Equipment Manufacturing	112.8
88	Transportation Equipment Manufacturing	112.8
89	Transportation Equipment Manufacturing	112.8
90	Transportation Equipment Manufacturing	112.8
91	Transportation Equipment Manufacturing	112.8
92	Transportation Equipment Manufacturing	112.8
93	Transportation Equipment Manufacturing	112.8
94	Transportation Equipment Manufacturing	112.8
95	Transportation Equipment Manufacturing	112.8
96	Transportation Equipment Manufacturing	112.8
97	Transportation Equipment Manufacturing	112.8
98	Transportation Equipment Manufacturing	112.8
99	Transportation Equipment Manufacturing	112.8

Source: [MDM Analytics](#)

Top 20 Manufacturing End Market Segmentation (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top 20 Manufacturing sectors (NAICS 31-33) consuming Electrical MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
3111	Food and kindred product manufacturing	11.1
3112	Meat and poultry processing	10.8
3113	Dairy and other animal product manufacturing	10.5
3114	Textile mill	10.2
3115	Textile mill, except cotton	10.0
3116	Textile mill, except cotton, except mill	9.8
3117	Textile mill, except cotton, except mill, except mill	9.6
3118	Textile mill, except cotton, except mill, except mill, except mill	9.4
3119	Textile mill, except cotton, except mill, except mill, except mill, except mill	9.2
3121	Chemical and allied product manufacturing	9.0
3122	Chemical and allied product manufacturing	8.8
3123	Chemical and allied product manufacturing	8.6
3124	Chemical and allied product manufacturing	8.4
3125	Chemical and allied product manufacturing	8.2
3126	Chemical and allied product manufacturing	8.0
3127	Chemical and allied product manufacturing	7.8
3128	Chemical and allied product manufacturing	7.6
3129	Chemical and allied product manufacturing	7.4
3131	Stone, clay and glass product manufacturing	7.2
3132	Plastic and rubber, metal, and other inorganic product manufacturing	7.0
3133	Plastic and rubber, metal, and other inorganic product manufacturing	6.8
3134	Plastic and rubber, metal, and other inorganic product manufacturing	6.6
3135	Plastic and rubber, metal, and other inorganic product manufacturing	6.4
3136	Plastic and rubber, metal, and other inorganic product manufacturing	6.2
3137	Plastic and rubber, metal, and other inorganic product manufacturing	6.0
3138	Plastic and rubber, metal, and other inorganic product manufacturing	5.8
3139	Plastic and rubber, metal, and other inorganic product manufacturing	5.6
3141	Nonmetallic mineral product manufacturing	5.4
3142	Nonmetallic mineral product manufacturing	5.2
3143	Nonmetallic mineral product manufacturing	5.0
3144	Nonmetallic mineral product manufacturing	4.8
3145	Nonmetallic mineral product manufacturing	4.6
3146	Nonmetallic mineral product manufacturing	4.4
3147	Nonmetallic mineral product manufacturing	4.2
3148	Nonmetallic mineral product manufacturing	4.0
3149	Nonmetallic mineral product manufacturing	3.8
3151	Other nonmetallic mineral product manufacturing	3.6
3152	Other nonmetallic mineral product manufacturing	3.4
3153	Other nonmetallic mineral product manufacturing	3.2
3154	Other nonmetallic mineral product manufacturing	3.0
3155	Other nonmetallic mineral product manufacturing	2.8
3156	Other nonmetallic mineral product manufacturing	2.6
3157	Other nonmetallic mineral product manufacturing	2.4
3158	Other nonmetallic mineral product manufacturing	2.2
3159	Other nonmetallic mineral product manufacturing	2.0

Source: [MDM Analytics](#)

Top 10 Construction End-Markets (31-33)

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 Construction (NAICS 23) industries consuming Electrical MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

NAICs	End-Market	Est. Demand (millions)
236110	Highway, Street, and Bridge Construction	10,000
236210	Water Supply Construction	10,000
236310	Sewer, Waste Water, and Storm Drainage Construction	10,000
236410	Electric, Gas, and Communications Construction	10,000
236510	Transportation and Communications Construction	10,000
236610	Other Nonresidential Building Construction	10,000
236710	Other Nonresidential Building Construction	10,000
236810	Other Nonresidential Building Construction	10,000
236910	Other Nonresidential Building Construction	10,000
237110	Other Nonresidential Building Construction	10,000
237210	Other Nonresidential Building Construction	10,000
237310	Other Nonresidential Building Construction	10,000
237410	Other Nonresidential Building Construction	10,000
237510	Other Nonresidential Building Construction	10,000
237610	Other Nonresidential Building Construction	10,000
237710	Other Nonresidential Building Construction	10,000
237810	Other Nonresidential Building Construction	10,000
237910	Other Nonresidential Building Construction	10,000
238110	Other Nonresidential Building Construction	10,000
238210	Other Nonresidential Building Construction	10,000
238310	Other Nonresidential Building Construction	10,000
238410	Other Nonresidential Building Construction	10,000
238510	Other Nonresidential Building Construction	10,000
238610	Other Nonresidential Building Construction	10,000
238710	Other Nonresidential Building Construction	10,000
238810	Other Nonresidential Building Construction	10,000
238910	Other Nonresidential Building Construction	10,000
239110	Other Nonresidential Building Construction	10,000
239210	Other Nonresidential Building Construction	10,000
239310	Other Nonresidential Building Construction	10,000
239410	Other Nonresidential Building Construction	10,000
239510	Other Nonresidential Building Construction	10,000
239610	Other Nonresidential Building Construction	10,000
239710	Other Nonresidential Building Construction	10,000
239810	Other Nonresidential Building Construction	10,000
239910	Other Nonresidential Building Construction	10,000

Source: [MDM Analytics](#)

Top 10 Other End-Markets

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 Other (all other NAICS) industries consuming Electrical MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

Source: [MDM Analytics](#)

NAICs	End-Market	Est. Demand (millions)
281110	Other Nonresidential Building Construction	10,000
281210	Other Nonresidential Building Construction	10,000
281310	Other Nonresidential Building Construction	10,000
281410	Other Nonresidential Building Construction	10,000
281510	Other Nonresidential Building Construction	10,000
281610	Other Nonresidential Building Construction	10,000
281710	Other Nonresidential Building Construction	10,000
281810	Other Nonresidential Building Construction	10,000
281910	Other Nonresidential Building Construction	10,000
282110	Other Nonresidential Building Construction	10,000
282210	Other Nonresidential Building Construction	10,000
282310	Other Nonresidential Building Construction	10,000
282410	Other Nonresidential Building Construction	10,000
282510	Other Nonresidential Building Construction	10,000
282610	Other Nonresidential Building Construction	10,000
282710	Other Nonresidential Building Construction	10,000
282810	Other Nonresidential Building Construction	10,000
282910	Other Nonresidential Building Construction	10,000
283110	Other Nonresidential Building Construction	10,000
283210	Other Nonresidential Building Construction	10,000
283310	Other Nonresidential Building Construction	10,000
283410	Other Nonresidential Building Construction	10,000
283510	Other Nonresidential Building Construction	10,000
283610	Other Nonresidential Building Construction	10,000
283710	Other Nonresidential Building Construction	10,000
283810	Other Nonresidential Building Construction	10,000
283910	Other Nonresidential Building Construction	10,000
284110	Other Nonresidential Building Construction	10,000
284210	Other Nonresidential Building Construction	10,000
284310	Other Nonresidential Building Construction	10,000
284410	Other Nonresidential Building Construction	10,000
284510	Other Nonresidential Building Construction	10,000
284610	Other Nonresidential Building Construction	10,000
284710	Other Nonresidential Building Construction	10,000
284810	Other Nonresidential Building Construction	10,000
284910	Other Nonresidential Building Construction	10,000
285110	Other Nonresidential Building Construction	10,000
285210	Other Nonresidential Building Construction	10,000
285310	Other Nonresidential Building Construction	10,000
285410	Other Nonresidential Building Construction	10,000
285510	Other Nonresidential Building Construction	10,000
285610	Other Nonresidential Building Construction	10,000
285710	Other Nonresidential Building Construction	10,000
285810	Other Nonresidential Building Construction	10,000
285910	Other Nonresidential Building Construction	10,000
286110	Other Nonresidential Building Construction	10,000
286210	Other Nonresidential Building Construction	10,000
286310	Other Nonresidential Building Construction	10,000
286410	Other Nonresidential Building Construction	10,000
286510	Other Nonresidential Building Construction	10,000
286610	Other Nonresidential Building Construction	10,000
286710	Other Nonresidential Building Construction	10,000
286810	Other Nonresidential Building Construction	10,000
286910	Other Nonresidential Building Construction	10,000
287110	Other Nonresidential Building Construction	10,000
287210	Other Nonresidential Building Construction	10,000
287310	Other Nonresidential Building Construction	10,000
287410	Other Nonresidential Building Construction	10,000
287510	Other Nonresidential Building Construction	10,000
287610	Other Nonresidential Building Construction	10,000
287710	Other Nonresidential Building Construction	10,000
287810	Other Nonresidential Building Construction	10,000
287910	Other Nonresidential Building Construction	10,000
288110	Other Nonresidential Building Construction	10,000
288210	Other Nonresidential Building Construction	10,000
288310	Other Nonresidential Building Construction	10,000
288410	Other Nonresidential Building Construction	10,000
288510	Other Nonresidential Building Construction	10,000
288610	Other Nonresidential Building Construction	10,000
288710	Other Nonresidential Building Construction	10,000
288810	Other Nonresidential Building Construction	10,000
288910	Other Nonresidential Building Construction	10,000
289110	Other Nonresidential Building Construction	10,000
289210	Other Nonresidential Building Construction	10,000
289310	Other Nonresidential Building Construction	10,000
289410	Other Nonresidential Building Construction	10,000
289510	Other Nonresidential Building Construction	10,000
289610	Other Nonresidential Building Construction	10,000
289710	Other Nonresidential Building Construction	10,000
289810	Other Nonresidential Building Construction	10,000
289910	Other Nonresidential Building Construction	10,000

Market Segmentation by U.S. Region

The following table segments estimated annual demand (2024 baseline) at the end-user level by U.S. region of Electrical MRO products in the U.S. based on the Electrical MRO market size of \$205 billion. These estimates represent purchases at the end-user level in U.S. dollars and include the distributor margin. MDM Analytics estimates market demand at the end-user level using a proprietary market model and a combination of government, private and industry databases.

U.S. Electrical MRO Products Regional Market Analysis (\$B)

Source: [MDM Analytics](#)



States included in each of the nine U.S. regions, as defined by the U.S. Census Bureau:

East North Central Illinois, Indiana, Michigan, Ohio, Wisconsin	Pacific Alaska, California, Hawaii, Oregon, Washington	South East Central Alabama, Kentucky, Mississippi, Tennessee
South Atlantic Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia	Middle Atlantic New Jersey, New York, Pennsylvania	Mountain Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
West South Central Arkansas, Louisiana, Oklahoma, Texas	West North Central Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota	New England Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Market Segmentation by U.S. State

The following table segments estimated annual demand (2024 baseline) by state consuming Electrical MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

State	Est. Demand (millions)	State	Est. Demand (millions)
Alabama	\$11.5	North Carolina	\$11.5
Alaska	\$0.5	North Dakota	\$0.5
Arizona	\$11.5	Oklahoma	\$0.5
Arkansas	\$0.5	Oregon	\$0.5
California	\$11.5	Pennsylvania	\$11.5
Colorado	\$0.5	Rhode Island	\$0.5
Connecticut	\$0.5	South Carolina	\$0.5
Delaware	\$0.5	South Dakota	\$0.5
District of Columbia	\$0.5	Tennessee	\$0.5
Florida	\$11.5	Texas	\$11.5
Georgia	\$0.5	Utah	\$0.5
Hawaii	\$0.5	Vermont	\$0.5
Idaho	\$0.5	Virginia	\$0.5
Illinois	\$11.5	Washington	\$0.5
Indiana	\$0.5	Washington State	\$0.5
Iowa	\$0.5	West Virginia	\$0.5
Kansas	\$0.5	Wisconsin	\$0.5
Kentucky	\$0.5	Wyoming	\$0.5
Louisiana	\$0.5		
Maine	\$0.5		
Maryland	\$0.5		
Massachusetts	\$0.5		
Michigan	\$0.5		
Minnesota	\$0.5		
Mississippi	\$0.5		
Missouri	\$0.5		
Montana	\$0.5		
Nebraska	\$0.5		
Nevada	\$0.5		
New Hampshire	\$0.5		
New Jersey	\$0.5		
New Mexico	\$0.5		
New York	\$11.5		
Ohio	\$0.5		
Oklahoma	\$0.5		
Oregon	\$0.5		
Pennsylvania	\$11.5		
Rhode Island	\$0.5		
South Carolina	\$0.5		
South Dakota	\$0.5		
Tennessee	\$0.5		
Texas	\$11.5		
Utah	\$0.5		
Vermont	\$0.5		
Virginia	\$0.5		
Washington	\$0.5		
Washington State	\$0.5		
West Virginia	\$0.5		
Wisconsin	\$0.5		
Wyoming	\$0.5		

Source: [MDM Analytics](#)

U.S. Market: Electronics MRO

SECTION 5



U.S. Electronics MRO Products Trends & Forecast: 2017-2028

This section sizes and segments the U.S. Electronics MRO market as defined by the six product subcategories listed on the following page. MDM Analytics builds its product categories based on the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

U.S. Electronics MRO Products Trends & Forecast: 2017-2028



Source: [MDM Analytics](#)

Created with DataWrapper

Demand for Electronics MRO products in the U.S. totaled \$136 billion in 2024, according to estimates by MDM Analytics. After strong rebound growth in 2022, demand has stabilized and forecast to grow from \$136 billion in 2024 to \$152 billion in 2028, a compound annual growth rate (CAGR) of 2.8%.

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Electronics MRO Product Category Profile

This section sizes and segments the U.S. Electronics MRO market as defined by the six electronics product categories listed on this page. MDM Analytics builds its product categories based on the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

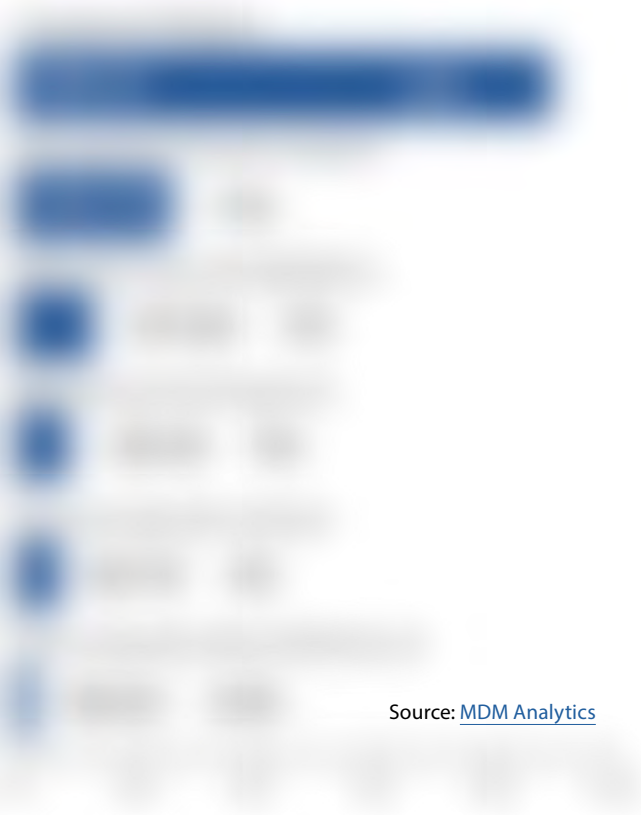
Electronics MRO

- Components Modules
- Controls–PLCs General Industrial
- Controls–Specialty Industrial
- Tools Assembly–Electrical/Electronics
- Test Instruments–Portable/Bench
- Monitoring Panel Equipment



Product Category Segmentation

The dollar value for the Electronics MRO product categories defined on the previous page and their relative percentage contribution to the estimated U.S. market size of \$136 billion are presented below.



Source: [MDM Analytics](#)

End Market Segmentation (2-Digit NAICS)

Electronics MRO products are consumed across every end-market sector of the economy, not just core construction, industrial and manufacturing entities. The 2-digit NAICS segmentation on this page estimates the annual market size (2024 baseline) across the three major consuming industry sectors.

Electronics MRO End Markets Segmentation (2-Digit NAICS)



Source: [MDM Analytics](#)
Created with DataWrapper

Top 20 End Market Segmentation (3-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 3-digit NAICS end-user level for the top 20 industries across all economic sectors consuming Electronics MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
334	Computer and Electronic Product Manufacturing	11,100
336	Transportation Equipment Manufacturing	10,900
332	Metals and Metal Product Manufacturing	11,100
335	Plastic and Rubber Product Manufacturing	10,900
333	Food Manufacturing	11,100
337	Chemical and Allied Product Manufacturing	10,900
331	Textile Mill Manufacturing	11,100
339	Other Manufacturing	10,900
334	Computer and Electronic Product Manufacturing	11,100
336	Transportation Equipment Manufacturing	10,900
332	Metals and Metal Product Manufacturing	11,100
335	Plastic and Rubber Product Manufacturing	10,900
333	Food Manufacturing	11,100
337	Chemical and Allied Product Manufacturing	10,900
331	Textile Mill Manufacturing	11,100
339	Other Manufacturing	10,900
334	Computer and Electronic Product Manufacturing	11,100
336	Transportation Equipment Manufacturing	10,900
332	Metals and Metal Product Manufacturing	11,100
335	Plastic and Rubber Product Manufacturing	10,900
333	Food Manufacturing	11,100
337	Chemical and Allied Product Manufacturing	10,900
331	Textile Mill Manufacturing	11,100
339	Other Manufacturing	10,900

Source: [MDM Analytics](#)

Top 20 Manufacturing End Market Segmentation (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top 20 Manufacturing sectors (NAICS 31-33) consuming Electronics MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICs	End-Market	Est. Demand (millions)
334412	Radio and Mobile Equipment Manufacturing	\$11.9M
334413	Telex, Telegraph, Telegraphic, Building, Signaling, and Related System and Equipment Manufacturing	\$8.4M
334414	Computer Terminals and Other Computer Equipment Manufacturing	\$6.4M
334415	Radio and Wireless Broadcasting and Wireless Communication Equipment Manufacturing	\$6.4M
334416	Telex Sets	\$5.4M
334417	Electronic Computer Manufacturing	\$5.4M
334418	Computer Storage Device Manufacturing	\$5.1M
334419	Other Communications Equipment Manufacturing	\$5.4M
334420	Commercial and Service Industry Machinery Manufacturing	\$5.4M
334421	Other Sound, Music and Imaging Equipment Manufacturing	\$5.4M
334422	Television and Video Disc Manufacturing	\$5.2M
334423	Radio and Industrial Control Manufacturing	\$5.4M
334424	Sound Manufacturing	\$5.4M
334425	Other Measuring and Controlling Device Manufacturing	\$5.4M
334426	Other Music Device Parts Manufacturing	\$5.1M
334427	Industrial Electronic Equipment Manufacturing	\$5.4M
334428	Photocopier Manufacturing	\$5.4M
334429	All Other Music Product Manufacturing	\$5.4M
334430	All Other Miscellaneous Electronic Equipment and Component Manufacturing	\$5.4M
334431	Telephone Sets	\$5.4M

Source: [MDM Analytics](#)

Top 10 Construction End-Markets

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 Construction (NAICS 23) industries consuming Electronics MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

NAICs	End-Market	Est. Demand (millions)
236110	Highway, Street, and Bridge Construction	15,100
236210	Building, Building Addition, and Nonbuilding Construction	10,100
236310	Commercial and Institutional Building Construction	9,100
236120	New Single-Family Housing Construction (except Mobile Homes)	8,100
236130	Other and Heavy and Medium Residential Construction	7,100
236220	Highway, Street, and Bridge Construction	6,100
236230	Building Construction	5,100
236240	Nonbuilding Construction	4,100
236140	New Single-Family Housing Construction (except Mobile Homes)	3,100
236150	Other and Medium Residential Construction	2,100

Source: [MDM Analytics](#)

Top 10 Other End-Markets

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 Other (all other NAICS) industries consuming Electronics MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

Source: [MDM Analytics](#)

NAICs	End-Market	Est. Demand (millions)
333110	Transportation Equipment	15,100
333210	Other Transportation Equipment	10,100
333310	Other Transportation Equipment	9,100
333410	Other Transportation Equipment	8,100
333510	Other Transportation Equipment	7,100
333610	Other Transportation Equipment	6,100
333710	Other Transportation Equipment	5,100
333810	Other Transportation Equipment	4,100
333910	Other Transportation Equipment	3,100
334110	Other Transportation Equipment	2,100

Market Segmentation by U.S. Region

The following table segments estimated annual demand (2024 baseline) at the end-user level by U.S. region of Electronics MRO products in the U.S. based on the Electronics MRO market size of \$136 billion. These estimates represent purchases at the end-user level in U.S. dollars and include the distributor margin.

U.S. Electronics MRO Products Regional Market Analysis (\$B)

Source: [MDM Analytics](#)



States included in each of the nine U.S. regions, as defined by the U.S. Census Bureau:

East North Central Illinois, Indiana, Michigan, Ohio, Wisconsin	Pacific Alaska, California, Hawaii, Oregon, Washington	South East Central Alabama, Kentucky, Mississippi, Tennessee
South Atlantic Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia	Middle Atlantic New Jersey, New York, Pennsylvania	Mountain Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
West South Central Arkansas, Louisiana, Oklahoma, Texas	West North Central Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota	New England Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Market Segmentation by U.S. State

The following table segments estimated annual demand (2024 baseline) by state consuming Electronics MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

State	Est. Demand (millions)	State	Est. Demand (millions)
Alabama	1.1	West Virginia	0.3
Alaska	0.1	Wisconsin	0.8
Arizona	1.2	Wyoming	0.1
Arkansas	0.7	X	X
California	10.5		
Colorado	1.5		
Connecticut	0.5		
Delaware	0.2		
District of Columbia	0.1		
Florida	2.8		
Georgia	1.8		
Hawaii	0.1		
Idaho	0.4		
Illinois	2.2		
Indiana	1.0		
Iowa	0.6		
Kansas	0.5		
Kentucky	0.8		
Louisiana	0.9		
Maine	0.2		
Maryland	0.6		
Massachusetts	0.5		
Michigan	1.4		
Minnesota	0.9		
Mississippi	0.6		
Missouri	1.1		
Montana	0.2		
Nebraska	0.4		
Nevada	0.3		
New Hampshire	0.2		
New Jersey	0.8		
New Mexico	0.3		
New York	2.5		
North Carolina	1.6		
North Dakota	0.2		
Ohio	1.3		
Oklahoma	0.5		
Oregon	0.4		
Pennsylvania	1.7		
Rhode Island	0.2		
South Carolina	0.7		
South Dakota	0.2		
Tennessee	1.0		
Texas	3.5		
Utah	0.4		
Vermont	0.1		
Virginia	0.9		
Washington	1.2		
Washington DC	0.1		
West Virginia	0.3		
Wisconsin	0.8		
Wyoming	0.1		

Source: [MDM Analytics](#)

U.S. Market: Commercial MRO

SECTION 6



U.S. Commercial MRO Products Trends & Forecast: 2017-2028

This section sizes and segments the U.S. Commercial MRO market (Packaging/Plastics) as defined by the two product categories and 12 product subcategories listed on the following page. MDM Analytics builds its product categories based on the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

U.S. Commercial MRO Products Trends & Forecast: 2017-2028



Source: [MDM Analytics](#)

Created with DataWrapper

Demand for Commercial MRO products (Packaging/Plastics) in the U.S. totaled \$135 billion in 2024, according to estimates by MDM Analytics. After growth years in 2021 and 2022, demand moderated and is forecast to grow from \$135 billion in 2024 to \$156 billion in 2028, a compound annual growth rate (CAGR) of 3.7%.

COMMERCIAL MRO SECTION CONTENTS

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Commercial MRO Product Category Profile

This section sizes and segments the U.S. Commercial MRO market as defined by the product categories and subcategories listed on this page. MDM Analytics uses the North American Product Classification System (NAPCS) taxonomy and periodic survey data by the U.S. Census Bureau to inform its market size and segmentation modeling.

Plastics

- Plastic Flex-Tube MRO
- Plastic Flex-Film&Sht MRO
- Plastic Rigid-Sht&Plate MRO
- Plastic Rigid-Sht&Plate Pkg
- Plastic Shapes-Tube_Rod_Bar MRO
- Plastic Shapes-Tube_Rod_Bar Pkg

Packaging

- Packaging-Plastic Film&Sht
- Packaging-Bags Industrial
- Packaging-Bottles Cans&Drums All
- Packaging-Containers Plastic
- Packaging-Containers Paper
- Packaging-Containers Paper Specialty

Product Category Segmentation

The dollar value for the Commercial MRO product categories defined on the previous page and their relative percentage contribution to the estimated U.S. market size of \$135 billion are presented below.



Source: [MDM Analytics](#)

End Market Segmentation (2-Digit NAICS)

Commercial MRO products are consumed across every end-market sector of the economy. The 2-digit NAICS segmentation on this page estimates the annual market size (2024 baseline) across the three major industry sectors.

Commercial MRO End Markets Segmentation (2-Digit NAICS)



Source: [MDM Analytics](#)
Created with DataWrapper

Top 20 End Market Segmentation (3-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 3-digit NAICS end-user level for the top 20 industries across all economic sectors consuming Commercial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
331	Food Manufacturing	281,215
282	Chemical and Allied Product Manufacturing	271,285
332	Textile Mill Manufacturing	271,125
281	Chemical Manufacturing	261,125
333	Metals and Metal Products Manufacturing	251,215
334	Metals and Metal Products Manufacturing	251,215
335	Food and Beverage Products	251,215
336	Food and Beverage Products	251,215
337	Food and Beverage Products	251,215
338	Food and Beverage Products	251,215
339	Food and Beverage Products	251,215
340	Food and Beverage Products	251,215
341	Food and Beverage Products	251,215
342	Food and Beverage Products	251,215
343	Food and Beverage Products	251,215
344	Food and Beverage Products	251,215
345	Food and Beverage Products	251,215
346	Food and Beverage Products	251,215
347	Food and Beverage Products	251,215
348	Food and Beverage Products	251,215
349	Food and Beverage Products	251,215

Source: [MDM Analytics](#)

Top 20 Manufacturing End Market Segmentation (6-Digit NAICS)

The following table segments estimated annual demand (2024 baseline) at the 6-digit NAICS end-user level for the top 20 manufacturing sectors (NAICS 31-33) consuming Commercial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

NAICS	End-Market	Est. Demand (millions)
3111	Food and Kindred Product Manufacturing	28,100
3112	Food and Kindred Product Manufacturing	28,100
3113	Food and Kindred Product Manufacturing	28,100
3114	Food and Kindred Product Manufacturing	28,100
3115	Food and Kindred Product Manufacturing	28,100
3116	Food and Kindred Product Manufacturing	28,100
3117	Food and Kindred Product Manufacturing	28,100
3118	Food and Kindred Product Manufacturing	28,100
3119	Food and Kindred Product Manufacturing	28,100
3120	Food and Kindred Product Manufacturing	28,100
3121	Food and Kindred Product Manufacturing	28,100
3122	Food and Kindred Product Manufacturing	28,100
3123	Food and Kindred Product Manufacturing	28,100
3124	Food and Kindred Product Manufacturing	28,100
3125	Food and Kindred Product Manufacturing	28,100
3126	Food and Kindred Product Manufacturing	28,100
3127	Food and Kindred Product Manufacturing	28,100
3128	Food and Kindred Product Manufacturing	28,100
3129	Food and Kindred Product Manufacturing	28,100
3130	Food and Kindred Product Manufacturing	28,100

Source: [MDM Analytics](#)

Top 10 Other End-Markets: Commercial MRO Products

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 end-market industries consuming Commercial MRO products in the U.S., according to MDM Analytics estimates.

NAICs	End-Market	Est. Demand (millions)
440000	Supermarkets and other grocery stores (except convenience stores)	10,000
440000	General Merchandise and Department Stores	10,000
440000	Food, Beverage, and Lodging Accommodations	10,000
440000	Pharmacies and Drug Stores	10,000
440000	Convenience and Discount Stores	10,000
440000	Specialty Stores	10,000
440000	Offices	10,000
440000	Non-Specialty Retailing (except food and beverage)	10,000
440000	Department Stores	10,000
440000	Food Stores	10,000

Source: [MDM Analytics](#)

Top 10 Wholesale Trade End-Markets Consuming Commercial MRO Products

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 Wholesale Trade end-market industries consuming Commercial MRO products in the U.S., according to MDM Analytics estimates.

NAICs	End-Market	Est. Demand (millions)
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000
440000	Wholesale Trade (except Motor Vehicle)	10,000

Source: [MDM Analytics](#)

Top 10 End-Markets Consuming Packaging MRO Products

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 end-market industries consuming Packaging MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

NAICs	End-Market	Est. Demand (millions)
28211	Plastic Bottle, Jar, and Container Manufacturing	10.5
28212	Plastic Film and Sheet Manufacturing	10.5
28213	Plastic Pipe and Profile Manufacturing	10.5
28214	Plastic Profile Manufacturing	10.5
28215	Plastic Pipe Manufacturing	10.5
28216	Plastic Profile Manufacturing	10.5
28217	Plastic Profile Manufacturing	10.5
28218	Plastic Profile Manufacturing	10.5
28219	Plastic Profile Manufacturing	10.5
28220	Plastic Profile Manufacturing	10.5
28221	Plastic Profile Manufacturing	10.5
28222	Plastic Profile Manufacturing	10.5
28223	Plastic Profile Manufacturing	10.5
28224	Plastic Profile Manufacturing	10.5
28225	Plastic Profile Manufacturing	10.5

Source: [MDM Analytics](#)

Top 10 End-Markets Consuming Plastics MRO Products

The following data represent consumption at the 6-digit NAICS end-user level for the top 10 end-market industries consuming Plastics MRO products in the U.S., according to MDM Analytics estimates. These estimates represent purchases at the end-user level and include the distributor margin.

NAICs	End-Market	Est. Demand (millions)
28211	Plastic Bottle, Jar, and Container Manufacturing	10.5
28212	Plastic Film and Sheet Manufacturing	10.5
28213	Plastic Pipe and Profile Manufacturing	10.5
28214	Plastic Profile Manufacturing	10.5
28215	Plastic Pipe Manufacturing	10.5
28216	Plastic Profile Manufacturing	10.5
28217	Plastic Profile Manufacturing	10.5
28218	Plastic Profile Manufacturing	10.5
28219	Plastic Profile Manufacturing	10.5
28220	Plastic Profile Manufacturing	10.5
28221	Plastic Profile Manufacturing	10.5
28222	Plastic Profile Manufacturing	10.5
28223	Plastic Profile Manufacturing	10.5
28224	Plastic Profile Manufacturing	10.5
28225	Plastic Profile Manufacturing	10.5

Source: [MDM Analytics](#)

Market Segmentation by U.S. Region

The following table segments estimated annual demand (2024 baseline) at the end-user level by U.S. region of Commercial MRO products in the U.S. based on the segment MRO market size of \$135 billion. These estimates represent purchases at the end-user level in U.S. dollars and include the distributor margin. MDM Analytics estimates market demand at the end-user level using its proprietary predictive market model and a combination of government, private and industry databases.

U.S. Commercial MRO Regional Market Analysis (\$B)

Source: [MDM Analytics](#)



States included in each of the nine U.S. regions, as defined by the U.S. Census Bureau:

East North Central Illinois, Indiana, Michigan, Ohio, Wisconsin	Pacific Alaska, California, Hawaii, Oregon, Washington	South East Central Alabama, Kentucky, Mississippi, Tennessee
South Atlantic Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia	Middle Atlantic New Jersey, New York, Pennsylvania	Mountain Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
West South Central Arkansas, Louisiana, Oklahoma, Texas	West North Central Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota	New England Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Commercial MRO Consumption by U.S. State

The following table segments estimated annual demand (2024 baseline) by state consuming Commercial MRO products in the U.S., according to MDM Analytics estimates. These estimates represent annual demand at the end-user level and include a distributor margin factor.

State	Est. Demand (millions)	State	Est. Demand (millions)
Alabama	\$1.2	North Carolina	\$1.2
Alaska	\$0.1	North Dakota	\$0.1
Arizona	\$0.5	Oklahoma	\$0.1
Arkansas	\$0.2	Oregon	\$0.2
California	\$2.5	Pennsylvania	\$0.8
Colorado	\$0.3	Rhode Island	\$0.1
Connecticut	\$0.2	South Carolina	\$0.2
Delaware	\$0.1	South Dakota	\$0.1
Florida	\$1.5	Tennessee	\$0.3
Georgia	\$0.8	Texas	\$1.8
Hawaii	\$0.1	Utah	\$0.2
Idaho	\$0.1	Vermont	\$0.1
Illinois	\$0.7	Virginia	\$0.3
Indiana	\$0.4	Washington	\$0.3
Iowa	\$0.2	Washington DC	\$0.1
Kansas	\$0.1	West Virginia	\$0.1
Kentucky	\$0.2	Wisconsin	\$0.2
Louisiana	\$0.2	Wyoming	\$0.1
Maine	\$0.1		
Maryland	\$0.2		
Massachusetts	\$0.2		
Michigan	\$0.5		
Minnesota	\$0.3		
Mississippi	\$0.1		
Missouri	\$0.3		
Montana	\$0.1		
Nebraska	\$0.1		
Nevada	\$0.1		
New Hampshire	\$0.1		
New Jersey	\$0.3		
New Mexico	\$0.1		
New York	\$0.6		
Ohio	\$0.4		
Oklahoma	\$0.1		
Oregon	\$0.2		
Pennsylvania	\$0.8		
Rhode Island	\$0.1		
South Carolina	\$0.2		
South Dakota	\$0.1		
Tennessee	\$0.3		
Texas	\$1.8		
Utah	\$0.2		
Vermont	\$0.1		
Virginia	\$0.3		
Washington	\$0.3		
Washington DC	\$0.1		
West Virginia	\$0.1		
Wisconsin	\$0.2		
Wyoming	\$0.1		

Source: [MDM Analytics](#)



MDM Analytics is a leading market analytics firm for electrical, industrial and construction products in North America. Since 1987, MDM Analytics has helped clients target high potential customers and markets to reach their full market potential with market size and segmentation reports, software and data services.

MDM Analytics is an essential resource for manufacturers, distributors and private equity seeking to:

- identify market penetration & untapped potential;
- target the highest potential geographic regions, customer segments & product categories;
- assess individual customer & prospect potential;
- more effectively deploy resources; and
- improve sales growth, margins and return on capital.

MDM Analytics' capabilities are built on a team of seasoned professionals and a proprietary database delivering reliable market size and segmentation modeling for more than 200 MRO/OEM product categories across the following major product groups:

Chemicals	MRO & Production
Construction	Packaging
Controls	Plastics
DataComm	Power Transmission & Motion Control
Electrical	Rubber Products
Fluid Power	Safety
Jan/San	Steel
Material Handling	Welding/Gases

MDM Analytics, through its original founding firm, Industrial Market Information (IMI), has researched and modeled North American industrial and construction product markets since the 1980s. IMI founder Rusty Duncan researched ways to increase the efficiency of his sales team in his family's third-generation industrial distribution company before starting and leading IMI at the end of the decade.

Over the next 25 years, he continued to refine the statistical market model, informed by his deep industry experience and insight, until his retirement in 2010, when IMI became an operating unit of Modern Distribution Management and rebranded as MDM Analytics.

For more information on how MDM Analytics can help you profile market opportunity for your unique product portfolio, visit the [MDM Analytics](#) website or email us at analytics@mdm.com.

Or contact our team directly:

Donnie Williamson Director of Analytics donnie@mdm.com 248-894-1340	Chris Greiner VP Corporate Development cgreiner@naw.org 202-263-4075
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