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MARKET ANALYSIS: MRO Product Consumption in the U.S. & Canada

According to the MDM/Industrial Market Information MRO Market Analysis, the U.S. market size in 2010 for the 126 MRO product groups is \$506 billion.

(Some prior-year data available at www.mdm.com/databank are not directly comparable due to slight variations in product groups included, as well as recent updates to the U.S. government database.)

Three aggregate subgroups were measured in the U.S., as well, for the top 10 industries con-

suming MRO (see charts on next page).

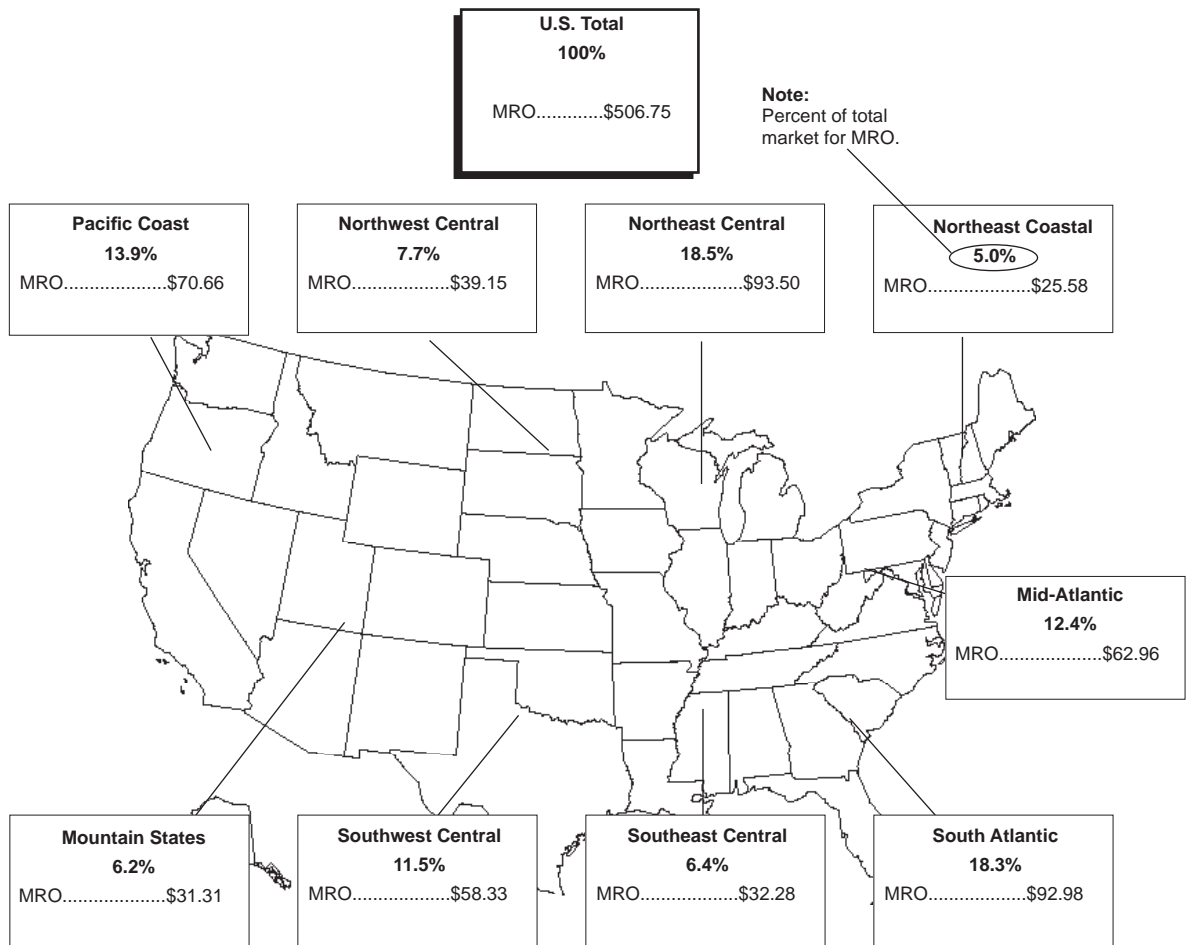
The market size in 2010 for Canada was \$55.6 billion. See province and end-user breakout on page 8 of this issue.

Estimates are based on data compiled by Industrial Market Information, Boulder, CO, and analyzed by MDM.

Definitions for the 126 individual product categories used to estimate the market size are on p. 4 of the Industrial and Construction Markets Update.

■ End-User Consumption of MRO Products by U.S. Region

End-user consumption of MRO Products by region, in billions of \$ (2010 estimates).



Learn more about how this market data was derived at Industrial Market Information's new website: www.imidata.com.

Or call 1-877-224-9677.

Data on pages 6-8 of this issue of MDM © 2011 Industrial Market Information, Inc., Boulder, CO. All rights reserved. IMI has more than 200 industrial MRO/OEM product profiles available at national, state, county and zip level.

■ U.S. End-User Consumption of MRO Products by Industry: Top 10

Manufacturing

Top 10 industries in \$ volume, by SIC code, consuming MRO Products (2010 estimates)

SIC Code	Manufacturing MRO (in \$billions)	Company Count
2621 Paper Mills	10.32	2,200
2086 Bottled & Canned Soft Drinks/Carb. Waters	8.49	1,880
2834 Pharmaceutical Preparations	7.59	3,887
2033 Canned Fruits, Vegetables, Preserves, etc.	6.25	1,102
2631 Paperboard Mills	5.72	654
4911 Electric Services	5.68	8,239
3089 Plastics Products, nec	4.72	9,518
2869 Industrial Organic Chemicals, nec	4.48	2,043
3714 Motor Vehicles Parts & Accessories	4.43	5,057
2082 Malt Beverages	4.31	838

Construction

Top industries in \$ volume, by SIC, consuming MRO Products (2010 estimates)

SIC Code	Construction MRO (in \$billions)	Company Count
1731 Electrical Work	34.05	118,229
1711 Plumbing, Heating & Air Cond.	22.01	174,678
8062 General Medical & Surgical Hospitals	12.62	9,416
1542 Gen. Contractors-Nonresidential Const.	11.26	52,263
2621 Paper Mills	10.32	2,200
2086 Bottled & Canned Soft Drinks/Carb. Waters	8.49	1,880
2834 Pharmaceutical Preparations	7.60	3,887
1521 Gen. Contractors-Single Family Housing	7.35	420,658
2033 Canned Fruits, Vegetables, Preserves, etc.	6.25	1,102
5411 Grocery Stores	6.07	176,662

Utilities & Mining

Top industries in \$ volume, by SIC, consuming MRO Products (2010 estimates)

SIC Code	Utilities & Mining MRO (in \$billions)	Company Count
1731 Electrical Work	34.05	118,229
1711 Plumbing Heating & Air Cond.	22.01	174,678
1542 Gen. Contractors-Nonresidential Const.	11.26	52,263
1521 Gen. Contractors-Single Family Housing	7.35	420,658
1623 Water, Sewer, Pipe, Comm., Power Line Const.	5.48	12,302
1541 Gen. Contractors-Ind. Bldg/Warehouses	5.42	12,898
1611 Highway & Street Construction	5.42	26,053
1629 Heavy Construction, nec	4.90	17,032
1771 Concrete Work	4.52	43,285
1522 Gen. Contractors-Residential, excl Single-Family	2.63	52,605

■ End-User Consumption of MRO Products in Canada by Industry



Access an archive of market analysis at www.mdm.com/market-analysis.

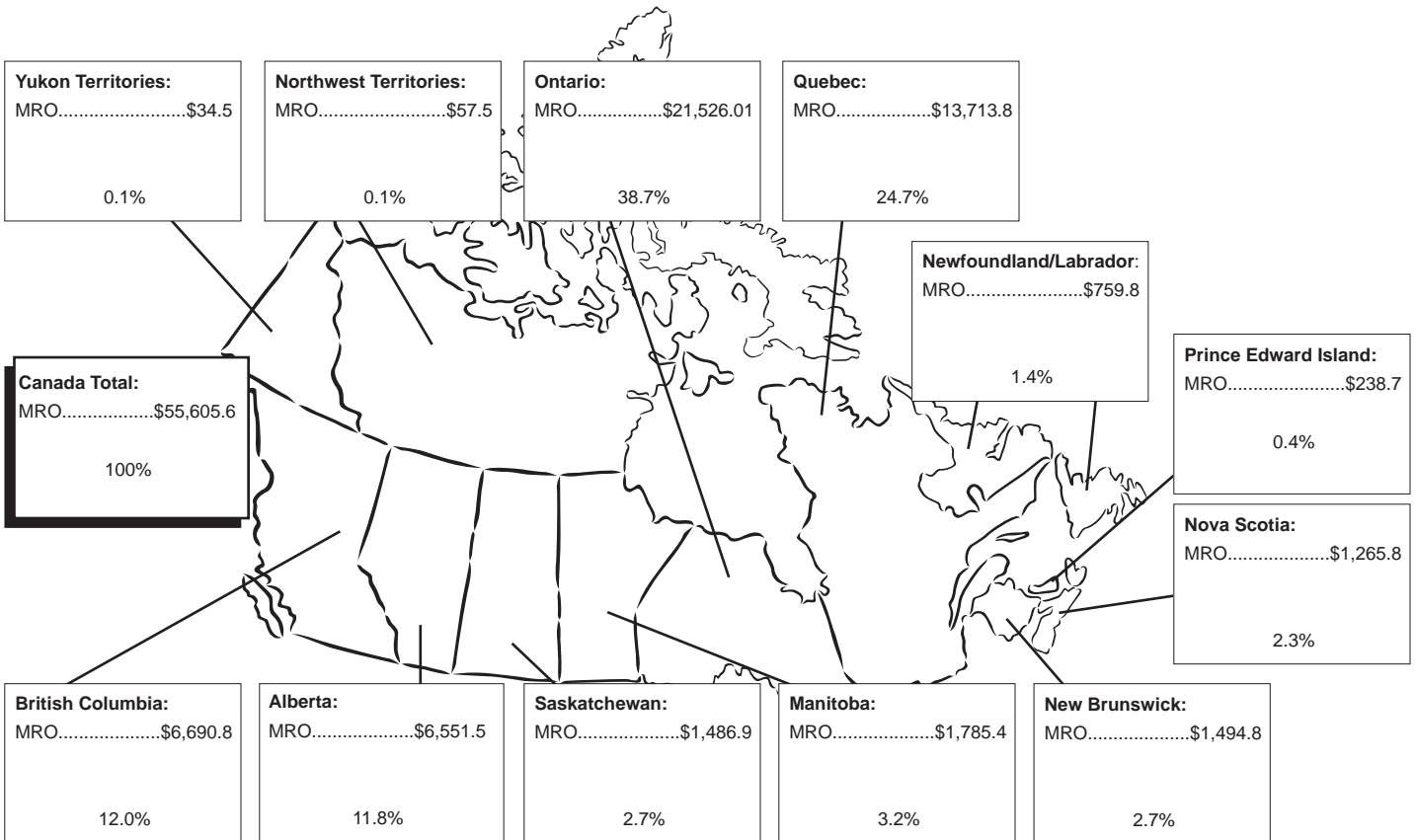
Top 10 Industries Overall

In \$ volume, by SIC, consuming MRO Products (2010 estimates)

SIC CODE	Companies	Total Volume in \$millions
1731 Electrical Work	9,609	2,765.6
2621 Paper Mills	218	2,237.0
1711 Plumbing Heating & Air Conditioning	11,974	1,684.9
2611 Pulp Mills	107	1,477.2
2082 Malt Beverages	345	1,310.4
2011 Meat Packing Plants	505	844.9
2834 Pharmaceutical Preparations	65	822.7
8062 General Medical & Surgical Hospitals	773	738.3
5411 Grocery Stores	18,355	734.6

■ End-User Consumption of MRO Products in Canada by Province

In millions of \$ (2010 estimates)



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Defining the MRO Product Markets

How big is the market for MRO products? The answer depends on what products you include in the market basket.

Industrial Market Information, Boulder, CO, provided data based on 126 MRO products. Here are the products used in the market analysis on pages 6-8.

Abrasive Grain Grit Shot	Controls Vari-Spd Drvs MRO	Light-Fxtr W/O-Trans MRO	Sealants MRO
Abrasives Bonded	Conveyor Belting Flat MRO	Linear Accsories MRO	Seals Mech Auto MRO
Abrasives Coated	Conveyors & Conveyg Eqpt	Linear_Act & Positnrs MRO	Seals Mech Indst MRO
Abrasives Super (Dia&Cbn)	Couplings Flex-Hyd-U MRO		Sheaves MRO
Adhesives MRO		Machine Tool Access'res	Shelvg Rcks-Lkrs-Bnchs
Adhesives Packaging	Fasteners Non-Trhded MRO	Monitoring Panel Eqpt/Ind MRO	Sprockets MRO
	Fasteners Threaded MRO	Motors Fractional HP MRO	Steel Alloy MRO
Bearings Ball MRO	Files	Motors Integral HP MRO	Steel Carb_Bars MRO
Bearings Mounted MRO			Steel Carb_Pipe MRO
Bearings Roller MRO	Gases-Indl Non-Weldng	O-Rings MRO	Steel Carb_Plate MRO
Bottles Cans & Drums All	Gases-Indl Welding		Steel Carb_Sheet MRO
Brushes General Maint	Gaskets & Packings MRO	Packaging Tape	Steel Carb_Tube MRO
Brushes Industrial	Gauges Indst Inst-MRO	Paint Maint MRO	Steel Cbn-Strctl MRO
Brushes Painting & Prep	Gear Drives & Spd Rducurs MRO	Paint Spray-Eqpt MRO	Steel Stainless MRO
		Petro Highly-Ref Lubs&Synt	Switchgear Equipment MRO
Casters MRO	Generatr Set-Power Spply MRO	Petro Hydraulic Oils	
Chain Roller MRO		Petro Indst-Oil & Grease	Tape
Chain Link MRO	Hoists	Petro Metal Cutting	Telecommunication Eqpt MRO
Circuit Protection Dev MRO	Hose&Ftgs Hyd/H-P MRO	Petro Metal Forming	Test-Instr Elec Prtbl-Bnch
Clutches & Brakes MRO	Hose&Ftgs Non-Hyd/Pn MRO	Petro Surface Coatings	Tool Boxes & Chests
Components Modules MRO	HVAC Maint-MRO	Pkg-Bags Industrial Papr&Plstc	Tools Assmly For Electronics
Compressor Indst MRO	Hydr Pumps & Motors MRO	Pkg-Plastic Containers X-Bot	Tools Cutting Carbide
Computers Business MRO	Hydraulic Cyl MRO	Pkg-Ship Containers Paper	Tools Cutting H.S. Steel
Computers Processing MRO	Hydr-Valve Fltrs Misc MRO	Pkg-Spclty Boxes Paper	Tools General Hand
Const-Supl: Rope Ldrs Shvl		Plastic Flexbl Tube MRO	Tools Power Air
Contrlrs Gen-Indst P/C MRO	Janitorial Supplies	Plastic Rigid Sht&Plate MRO	Tools Power Electric
Contrlrs Specialty Indst-MRO		Plastic Rigid Sht&Plate Pkg	Tools-Hand Precisn Measr
Controls Gen-Indst Eqpt MRO	Light Bulbs(W/O Trans) MRO	Plastic Shape Tube/Rod/Bar MRO	Transfrmrs Power MRO
Controls Motor & Drive MRO	Light-Bulb Transprtn MRO	Plastic Shape Tube/Rod/Bar Pkg	Transmssn Belts MRO
Controls Process Inst MRO	Light-Fxtr Transprtn MRO	Plastic Flex_Film&Sht MRO	
		Plastic Flex_Film&Sht Pkg	Valves Pipe Ftgs-MRO
		Plastic PVF MRO	
		Plumb-Fixt Ftgs-Trim Maint MRO	Weldng_Equ Cstn&Maint MRO
		Pneumatic Cylinders MRO	Wire Communications MRO
		Pneumatic Tube & Ftg All	Wire Elect/Pwr X-Comm MRO
		Pneumatic Vlvs-FRL's MRO	Wire Small-Diam MRO
		Pumps Industrial MRO	Wire-Rope Slings Chain-Ftg
		Refrigratn Com'l/Ind Maint MRO	Wiring-Dev Current MRO
			Wiring-Dev Non-Cur'nt MRO
		Safety Persnl Protectn	
		Safety Test-Eqpt & Resprtrrs	
		Saw Blades	

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