

U.S. MARKET ANALYSIS: MRO Product Consumption in 2007

According to the MDM/Industrial Market Information MRO Market Analysis, the U.S. market size in 2007 for the 126 MRO industrial product groups is \$445.7 billion. (Prior-year data available at www.mdm.com/databank are not directly comparable due to slight variations in product groups included.)

Estimates are based on data compiled by Industrial Market Information, Minneapolis, MN, and analyzed by MDM. Definitions for the 126 individual product categories used to estimate the market size are on p. 6 of this section.

Two aggregate subgroups were measured as well (see charts on next page). **Manufactur-**

ing & Utilities sectors consumed \$229.8 billion in MRO products across these 126 product groups.

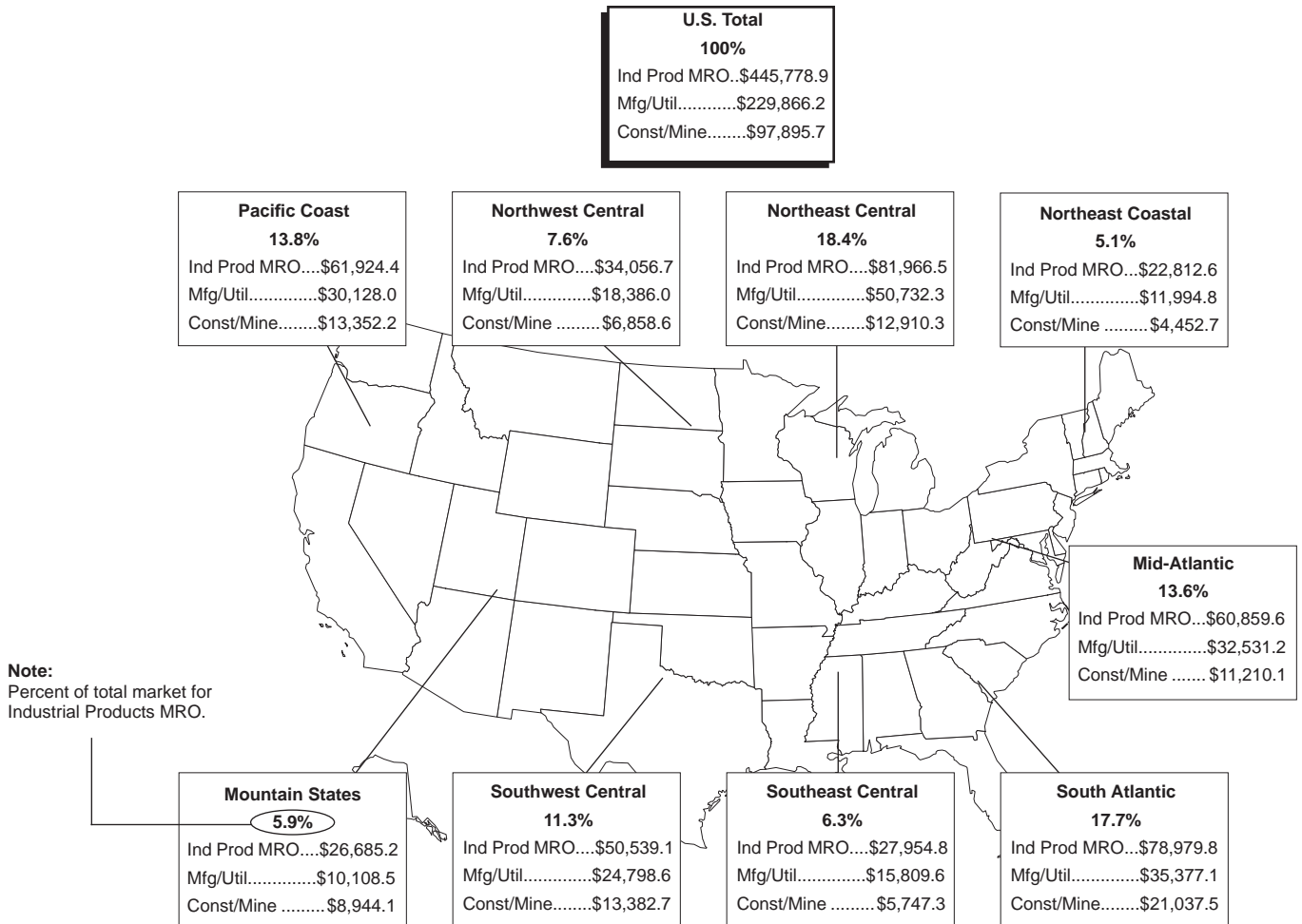
Construction & Mining sectors consumed \$97.8 billion in these MRO products. The graphic below shows consumption by region. The charts on the next page show consumption by industry.

Note that the two subgroups above don't total the total **Industrial Products MRO** estimate, as this \$445.7-billion total market estimate includes additional industries and service sectors beyond the Manufacturing/Utilities and Construction/Mining groupings.

Regional Market Analysis: MRO Products 2007

End-user consumption of MRO Products by region, in millions of \$ (2007 estimates).

Note: The top line total for each region includes additional industries and service sectors beyond the Manufacturing/Utilities and Construction/Mining groupings provided below. Therefore the top line IS NOT the sum of the lower two lines.



Source: INDUSTRIAL MARKET INFORMATION, INC. (763) 535-7432. © 2007 Industrial Market Information, Inc., Minneapolis, MN. All rights reserved. Industrial Market Information has more than 200 industrial product profiles available at the county level. www.imidata.com

Industry Market Analysis: MRO Products 2007

Total U.S. MRO: Top 10 industries for MRO use

Top ten industries in \$ volume, by SIC code, consuming MRO Products (2007 estimates).

Note: The total U.S. consumption includes additional industries and service sectors beyond the Manufacturing/Utilities and Construction/Mining groupings provided below in the lower two charts.

SIC Code	All-MRO	Company Count
1731 Electrical Work	28,566,062,168	104,386
1711 Plumbing, Heating & Air Conditioning	17,707,429,130	150,966
8062 General Medical	12,468,494,953	10,329
2621 Paper Mills	9,113,231,914	1,956
1542 Nonresidential Construction	8,813,059,626	47,633
2834 Pharmaceutical Preparations	6,552,707,835	3,556
2086 Bottled & Canned Soft Drinks	7,282,021,975	1,901
5812 Eating Places	5,350,823,920	378,352
1521 General Contractors - Single Family Housing	5,231,119,335	305,690
5411 Grocery Stores	5,013,664,672	161,442

Manufacturing & Utilities: Top 10 industries for MRO use

Top ten Manufacturing/Utility industries in \$ volume, by SIC, consuming MRO Products (2007 est.).

SIC Code	Manufacturing & Utilities MRO	Company Count
2621 Paper Mills	9,113,231,914	1,956
2086 Bottled & Canned Soft Drinks	7,282,021,975	1,901
2834 Pharmaceutical Preparations	6,552,707,835	3,556
2033 Canned Fruits & Vegetables	4,917,392,087	1,098
4911 Electric Services	4,822,182,728	7,723
3089 Plastics Products	4,482,355,728	10,544
3714 Motor Vehicle Parts	3,953,019,033	5,257
2631 Paperboard Mills	3,865,788,790	669
2844 Perfumes, Cosmetics & Other Toilet Preparations	3,710,387,497	2,831
2033 Industrial Organic Chemicals, Not Elsewhere Classified	3,702,445,321	1,681

Construction & Mining: Top 10 industries for MRO use

Top ten Construction/Mining industries in \$ volume, by SIC, consuming MRO Products (2007 est.).

SIC Code	Construction & Mining MRO	Company Count
1731 Electrical Work	28,566,062,168	104,386
1711 Plumbing, Heating & Air Conditioning	17,707,429,130	150,966
1542 Nonresidential Construction	8,813,059,626	47,633
1521 Single Family Housing	5,231,119,335	305,690
1623 Water, Sewer & Utilities	4,690,465,569	12,634
1611 Highway & Street Construction	4,272,148,991	23,997
1541 Industrial Building	4,254,501,139	11,544
1629 Heavy Construction	3,878,337,932	16,592
1771 Concrete Work	3,446,999,415	38,469
1721 Painting & Paper Hanging	2,296,668,227	76,085

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, Minneapolis, provided the data based on 126 MRO products. Here are the products used to define the market.

Source: INDUSTRIAL MARKET INFORMATION, INC. (763) 535-7432. © 2007 Industrial Market Information, Inc. www.imidata.com

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