

U.S. MARKET ANALYSIS: MRO Product Consumption in 2008

According to the MDM/Industrial Market Information MRO Market Analysis, the U.S. market size in 2008 for the 126 MRO industrial product groups is \$495.9 billion. (Some 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. 7 of this section.

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

ing & Utilities sectors consumed \$250.8 billion in MRO products across these 126 product groups.

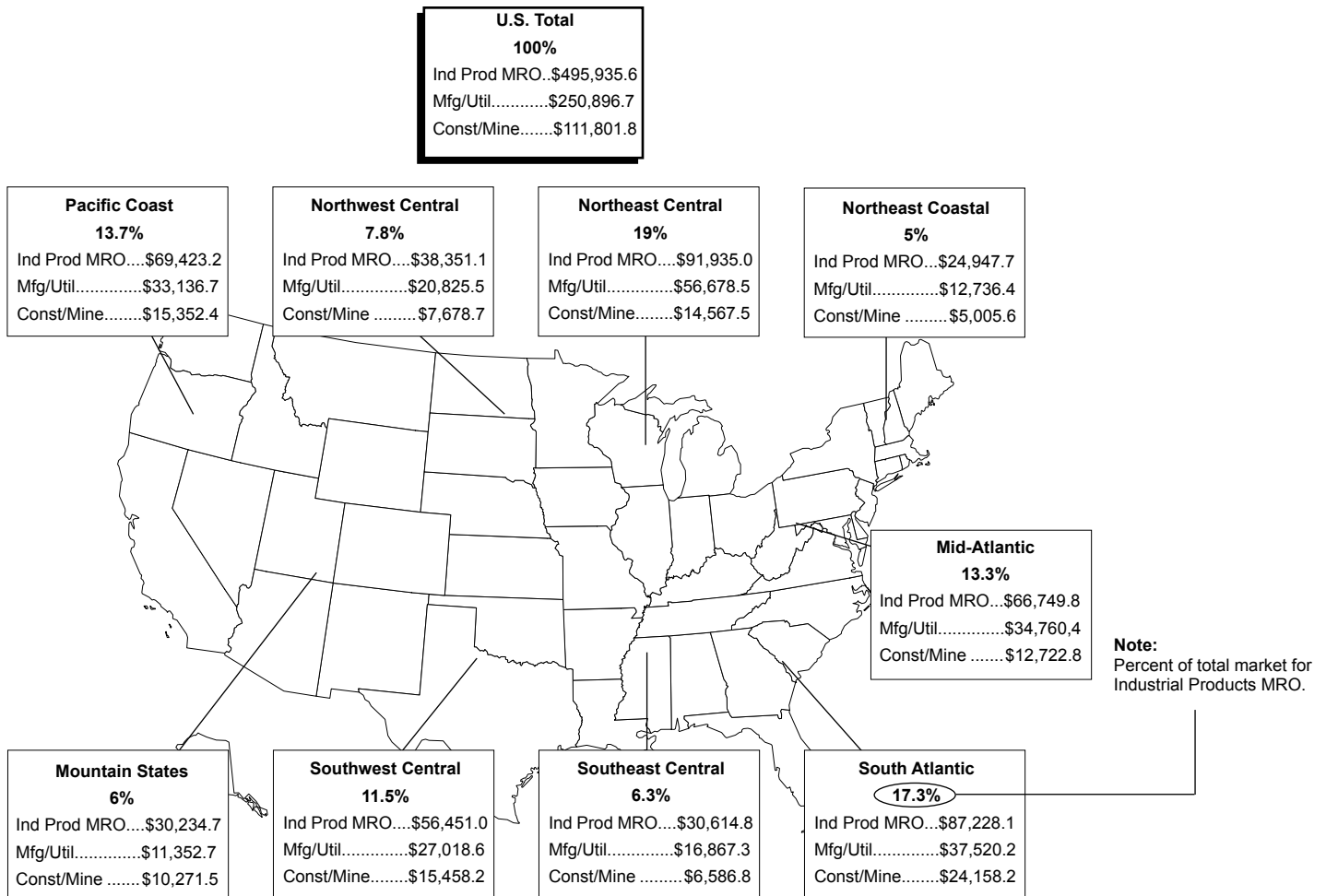
Construction & Mining sectors consumed \$111.8 billion in these MRO products. The graphic below shows consumption by region. The charts on the next page show consumption by industry.

Note that the two subgroups above don't total the total **Industrial Products MRO** estimate, as this \$495.9-billion total market estimate includes additional industries and service sectors beyond the Manufacturing/Utilities and Construction/Mining groupings.

Regional Market Analysis: MRO Products 2008

End-user consumption of MRO Products by region, in millions of \$ (2008 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. © 2009 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 2008

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

Top ten industries in \$ volume, by SIC code, consuming MRO Products (2008 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	33,746,362,275	112,431
1711 Plumbing Heating & Air Conditioning	19,392,469,799	168,931
8062 General Medical & Surgical Hospitals	13,161,359,370	9,431
2621 Paper Mills	10,960,807,267	2,315
1542 General Contractors - Nonresidential	10,133,767,506	49,119
2086 Bottled & Canned Soft Drinks	8,067,606,134	1,886
2834 Pharmaceutical Preparations	7,214,969,410	3,658
1521 General Contractors - Single-Family Housing	6,315,148,405	356,578
8211 Elementary & Secondary Schools	5,455,040,810	112,370
5411 Grocery Stores	5,394,003,274	172,155

Manufacturing & Utilities: Top 10 industries for MRO use

Top ten Manufacturing/Utility industries in \$ volume, by SIC, consuming MRO Products (2008 est.).

SIC Code	Manufacturing & Utilities MRO	Company Count
2621 Paper Mills	10,960,807,267	2,315
2086 Bottled & Canned Soft Drinks	8,067,606,134	1,886
2834 Pharmaceutical Preparations	7,214,969,410	3,658
4911 Electric Services	5,209,300,370	7,676
2033 Canned Fruits, Vegetables, Preserves, et al.	4,943,335,161	1,118
3089 Plastics Products, NEC	4,832,727,812	10,303
2631 Paperboard Mills	4,544,165,730	711
2869 Industrial Organic Chemicals, NEC	4,268,186,273	1,848
2026 Fluid Milk	4,072,794,192	525
3714 Motor Vehicle Parts & Accessories	4,061,037,794	5,252

Construction & Mining: Top 10 industries for MRO use

Top ten Construction/Mining industries in \$ volume, by SIC, consuming MRO Products (2008 est.).

SIC Code	Construction & Mining MRO	Company Count
1731 Electrical Work	33,746,362,275	112,431
1711 Plumbing Heating & Air Conditioning	19,392,469,799	168,931
1542 General Contractors - Nonresidential	10,133,767,506	49,119
1521 General Contractors - Single-Family Housing	6,315,148,405	356,578
1623 Water Sewer & Utilities	5,074,292,858	12,521
1541 General Contractors - Industrial Buildings	5,044,673,575	12,143
1611 Highway & Street Construction	4,895,878,365	26,771
1629 Heavy Construction, NEC	4,538,317,533	17,182
1771 Concrete Work	3,976,993,926	41,402
1522 General Contractors - Residential	2,459,088,209	55,606

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 in the market analysis on the previous two pages.

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