GETTING THROUGH THE CAPACITY CRUNCH

Better workforce management and digital acceleration to optimise overloaded operations are helping to create efficiencies for MRO activity in the Americas, writes Kevin Rozario

Across the globe, record numbers of air passengers – more than five billion last year – flew on increasingly ageing aircraft due to both manufacturing and MRO constraints. According to Oliver Wyman, at the start of 2026, about 17,000 unfilled aircraft orders were on the books, "a backlog that is expected to take over 12 years to clear at current rates of production".

In its latest report on the global fleet and MRO market, the management consulting firm said that global MRO demand hit $136 billion in 2025, an 8% increase year-on-year. By 2036, the expectation is for a market worth about $193 billion, and that in regions with older fleets like North America, Western Europe and Africa, maintenance spend will outpace fleet growth.

In the Americas there is a north-south divide. Between 2026 and 2036, Latin America and the Caribbean will see fleet growth of 4%, double that of North America's 2%. The market in North America will, however, remain substantially larger with 10,749 jets versus 2,832, but the gap has narrowed slightly.

Moreover, the value of the North America MRO market will grow faster than fleet sizes at 2.8%, rising from $31.8 billion this year to $42 billion in 2026, possibly due to ageing fleets and more value-added services. Latin America and the Caribbean MRO will grow roughly in line with fleets at 4.1%, from $7.4 billion to $11 billion.

Illustration by Phil Couzens

▲ Embraer facilities in Nashville

MRO Management talked to some major players in, or entering, the region, to find out how they see current and future conditions, especially the operational or structural challenges and how they are impacting the ability to meet customer needs.

Straining under demand

There is consensus that the Americas MRO market is entering one of its most capacity-constrained yet opportunity-rich phases in a decade. Fleet growth, deferred maintenance and record utilisation are converging and pushing demand beyond the region's limits.

Across OEMs, independent MROs and component specialists, the message is that the industry is expanding, but not fast enough to absorb the volume hitting shops today.

Interviews with Embraer, AAR and AMETEK MRO reveal a sector grappling with labour shortages, uneven supply chains and ageing aircraft – while simultaneously accelerating digital transformation and planning for a new wave of infrastructure investment. The next 12-18 months will be defined by how effectively the industry can convert these pressures into scalable, sustainable growth.

The most immediate challenge is the mismatch between demand and available capacity. Embraer, which supports the largest E-Jets fleet in the world within the US, is seeing the impact of both strong sales momentum and deferred maintenance from the pandemic.

"Meeting the growing demand in the Americas requires expanding maintenance capacity," says Frank Stevens, vice president of global MRO centres for Embraer Services &

1. AAR is rolling out paperless MRO processes across multiple facilities. **2.** AMETEK MRO provides MRO services for Centre Drive Units and a variety of other components

Tom Hoferer, senior vice president of repair and engineering, AAR

Support. The company's answer is a major expansion of its footprint, including a new state-of-the-art MRO facility at Fort Worth's Perot Field Alliance Airport. Scheduled to open in 2027, the site will increase Embraer's US E-Jets maintenance capacity by 53%.

Component specialists are also feeling the pressure. AMETEK MRO notes that demand is being driven not just by fleet size but by utilisation intensity. "Aircraft are flying more hours, and that translates directly into higher component removal rates," says Nic Mehas, division vice president and Americas business unit manager. The challenge is compounded by deferred removals now arriving alongside utilisation-driven failures, creating unpredictable volume spikes.

AAR's senior vice president of repair and engineering, Tom Hoferer, distils the situation bluntly: "Operational challenges remain consistent: labour and material," he says. "The availability of aviation technicians is a pressure point across the OEM and MRO landscape." AAR has put a great deal of focus and resources on recruitment and retention to ensure a strong talent pool, but technician availability remains a structural constraint across the Americas, and while supply chains are improving, they are far from stable.

EirTrade Aviation, which has an office in Dallas, Texas and is currently dismantling two aircraft in Arizona, points to continuing capacity constraints for US MROs. "They are struggling to find the workers needed to service all the inbound maintenance and modification work requests," says Bill Thompson, vice president for origination and trading in the Americas. "Securing induction slots at engine MRO facilities is becoming increasingly difficult and these come with long lead times. My educated guess is that MROs will continue to face these challenges in the foreseeable future."

Twin constraints: Labour and supply chain

Labour shortages appear to be the most persistent bottleneck across the region. For component MRO in particular, the issue is not simply headcount but depth of expertise.

"These capabilities take years to develop," Mehas explains, citing electronics, hydraulics, electromechanical systems and NDT as areas where certification and experience are critical. The result is a skills pipeline that cannot be accelerated quickly enough to match demand.

Supply chain fragility adds another layer of complexity. AMETEK MRO reports uneven availability of piece parts, castings, and proprietary materials – any one of which can stall an entire repair line. For airframe MROs, material delays continue to elongate turnaround times (TATs), even as customers push for faster delivery.

Bill Thompson, vice president for origination and trading in the Americas, EirTrade Aviation

"DIGITAL TRANSFORMATION IS EMERGING AS A POWERFUL LEVER FOR UNLOCKING EFFICIENCY AND STABILISING OPERATIONS"

Despite these constraints, activity levels remain high. "MRO capacity has been, and continues to be, limited in the Americas," Hoferer says, noting that AAR is expanding hangar space in Oklahoma City and Miami, with customers already committing to the additional slots.

AMETEK MRO describes the region as "structurally elevated" with most segments operating at high utilisation. Mehas says: "Demand continues to be driven by high fleet utilisation, ageing aircraft, and deferred maintenance from prior years, all of which are keeping our shop loads full."

Encouragingly, the company sees the market shifting from overload to "near optimal utilisation" – a healthier position from a quality and safety viewpoint.

Digitalisation: a competitive differentiator

Digital transformation is emerging as a powerful lever for unlocking efficiency and stabilising operations. Embraer is pushing hard on data-driven maintenance, with most E-Jets now connected to its AHEAD platform. The system converts operational data into actionable insights, improving planning accuracy, maintenance efficiency and aircraft availability. Innovations in composite repair, digital inspection and dent mapping are also accelerating heavy maintenance processes.

"TECHNICIAN AVAILABILITY REMAINS A STRUCTURAL CONSTRAINT ACROSS THE AMERICAS"

Boeing is "focused on providing revenue-generating digital solutions" for its MRO customers. The global OEM has a network of owned and partner commercial MRO facilities, for example, its commercial modification centre in Victorville at Southern California Logistics Airport. The facility plays a strategic role in fleet transitions and test programmes, specialising in aircraft reactivation, heavy maintenance, AOG support and flight test operations.

Digital is enhancing many of these MRO activities. A Boeing spokesperson tells *MRO Management*: "Boeing is leveraging data and digitalisation. Our digital services business delivers in three main areas: technical data and documentation (Maintenance Performance Toolbox); maintenance efficiency and analytics through our Airplane Health Management (AHM) and Insight Accelerator tools; and a small flight performance portfolio including Onboard Performance Tool, Tail Specific Performance and RouteSync."

Services like AHM and Insight Accelerator use inflight and post-flight data to fuel predictive maintenance capabilities. "The transformation in predictive maintenance is significant, moving from reactive to proactive strategies. Data is what will unlock the next step-change and improvements in operational efficiency," says the spokesperson.

1. AAR is an independent provider of aviation services to commercial and government customers worldwide **2.** AAR is exploring and implementing new technology to improve internal efficiencies

In 2019, AHM housed 34 billion records, and added one billion every three months whereas today, AHM houses 112 billion current records and adds 1.5 billion every month.

AAR is rolling out paperless MRO processes across multiple facilities, reducing administrative friction and increasing "touch time" on aircraft. The company sees this as a foundation for future AI applications, particularly as richer historical data enables standardisation across repeat aircraft and customers.

APOC Aviation is building up its North American profile, having done some business in the US and Canada. Vice president of components Craig Skilton says that digitalisation has an increasingly important role in MRO and aftermarkets. "We have been leveraging data-driven tools to optimise our acquisitions, manage rotable pools and anticipate demand spikes, allowing us to support customers with improved material availability." The company is actively implementing automation projects within its ERP system and embracing AI to eliminate repetitive tasks.

AMETEK MRO is applying analytics and selective AI to capacity planning and material forecasting, helping to stabilise schedules in a constrained labour environment. Digital job routing, electronic work instructions and embedded quality checks are reducing TATs and improving consistency. However, Mehas emphasises that technology only delivers value when paired with disciplined processes. "The strongest results come when technology is paired with standardised work practices," he notes.

Strategic growth opportunities

Looking ahead, the Americas remain one of the most attractive global markets for MRO expansion, as the Oliver Wyman data suggests. Embraer sees possibilities in diversifying its service offerings as its global presence grows, while continuing to invest in regional capacity and capabilities.

AAR's Hoferer highlights the potential of drones, robotics, and AI – but stresses that meaningful progress will require coordinated action between airlines, MROs and regulators. Funding, approval pathways and adoption frameworks will determine how quickly these technologies can scale.

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For AMETEK MRO, the next year in the Americas will be defined by three strategic levers: regional infrastructure investment to improve resilience and proximity to fleets; deeper OEM partnerships, especially around next-generation platforms and licensed aftermarket capability; and sustainability as a differentiator, with repair-over-replace strategies, DER solutions and energy-efficient operations aligning cost and environmental goals.

Nevertheless, underlying it all is staffing. "I believe that workforce development will be decisive. Over the next 12-18 months, success will be defined by scalable capability, not just volume," argues Mehas.

The Americas MRO sector is navigating a combination of high demand, constrained capacity and accelerating technological change. The next phase of growth will depend on how effectively the industry can expand infrastructure, stabilise supply chains and build a skilled workforce. ●