

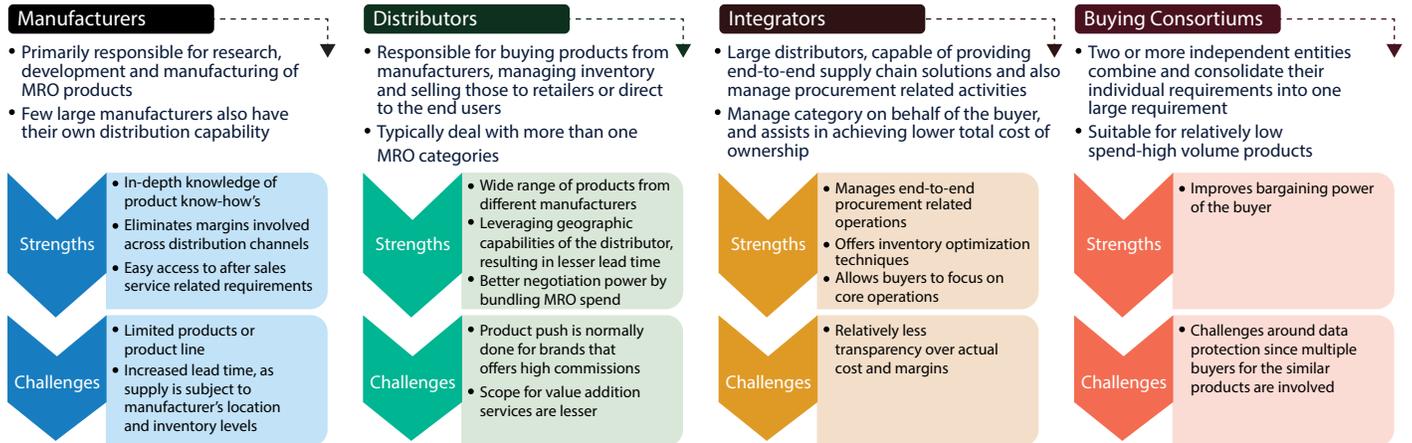
THE GLOBAL MRO MARKET



Types of Suppliers in the MRO Market

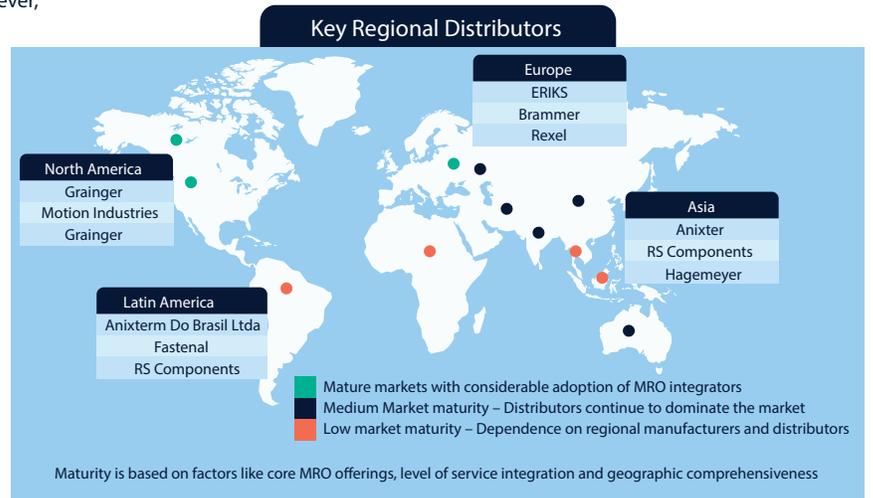
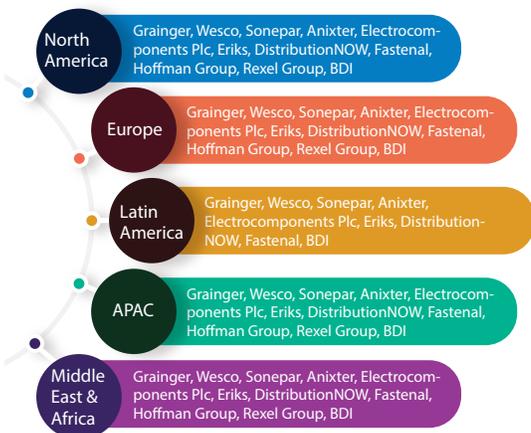
The Global Maintenance repair operations (MRO) market is segmented by different types of MRO solution providers

MRO integrators are best positioned to provide tail spend consolidation services



Suppliers' Geographic Coverage – Integrators & Large Distributors

Most large integrators have presence across the globe. However, in developing markets they function largely as a distributor



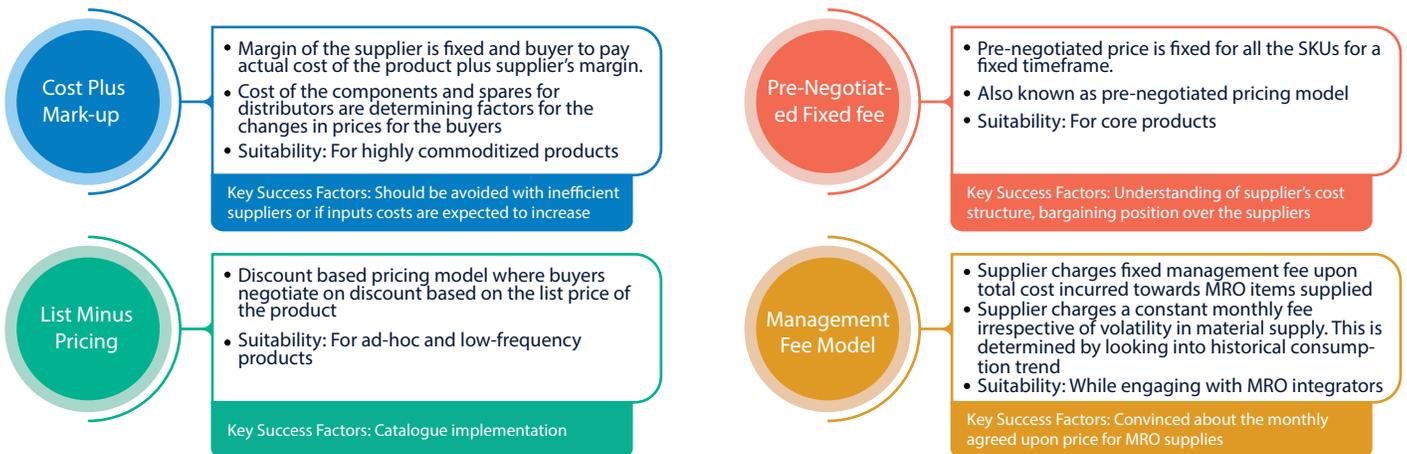
Suppliers' Portfolio Coverage – Key Global Distributors

Key Suppliers	Technical & Engineering Services	Industrial Supplies	Electrical Supplies	Material Handling Equipment	PPE	Pneumatics & Hydraulics	Adhesives & Sealants	Motors & Power Transmissions	Lubricants
Grainger	✓	✓	✓	✓	✓	✓	✓	✓	✓
Wesco	✓	✓	✓	✓	✓	✓	✓	✓	✓
Sonepar	N/A	✓	✓	✗	✓	✗	✗	✗	✗
Anixter	✓	✓	✓	✓	✓	✗	✗	✗	✗
Electro components Plc	✓	✓	✓	✓	✓	✓	✓	✓	✓
Eriks	✓	✓	✓	✓	✓	✓	✓	✓	✓
DistributionNOW	✓	✓	✓	✓	✓	✓	✓	✓	✓
Fastenal	✓	✓	✓	✓	✓	✓	✓	✓	✓
Hoffmann Group	✓	✓	✓	✓	✓	✓	✓	✗	✗
Rexel Group	✓	✓	✓	✓	✓	✗	✗	✓	✗
BDI	✓	✓	✓	✓	✓	✓	✓	✓	✓
Würth Group	✓	✓	✓	✓	✓	✓	✓	✓	✓

Capability Analysis by Supplier Type

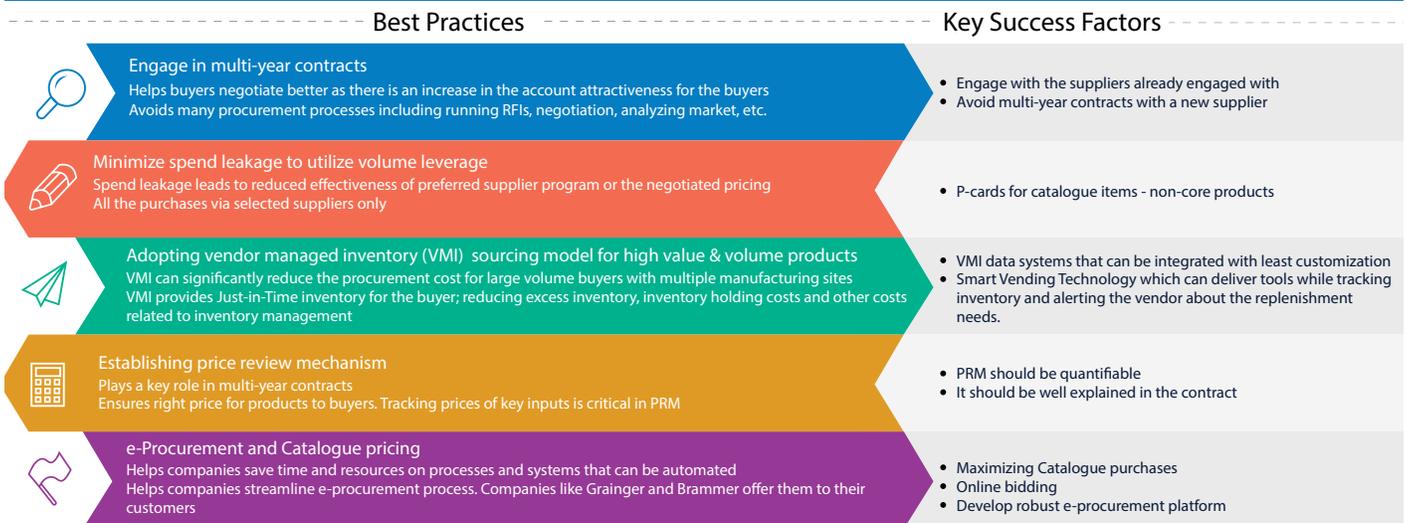
Supplier Type	Product Coverage	Geography Coverage	Technology Ownership	Spend Management	Distribution Capability	Product or Services Knowledge	Key Suppliers (Global)
Manufacturers	Low	Low	High	Low	Low	High	<ul style="list-style-type: none"> • ABB • Schneider Electric • Bosch • Siemens • Baumer
Distributors	High	High	High	Low	High	Medium	<ul style="list-style-type: none"> • Sonepar • Motion industries • Brammer • Anixter • Gexpro
Integrators	High	High	Medium	High	Medium	Medium	<ul style="list-style-type: none"> • Grainger • SDI • MAG45 • Wesco • SupplyForce
Buying Consortiums	Medium	Medium	Low	Low	Medium	Medium	Not applicable

Pricing Model Analysis



Large organizations enjoys high bargaining power while engaging with preferred suppliers. These discounts can be augmented based on site-specific agreements, commitments of sales volume, competitive situations in the geography, etc.

Procurement Best Practices



For more information, contact infosysbpm@infosys.com



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