MRO & INDUSTRIAL AUTOMATION

MARKET REPORT Q4 2025

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Top Products

- Chemicals & Solvents
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- Drives
- Electronic Components
- HVAC & Plumbing
- Hydraulics
- Industrial Supplies
- Lighting
- Mechanical Components
- Motors & Motor Control
- Pilot Devices
- PLCs & HMIs
- Pneumatics
- Robotics
- Safety Equipment
- Sensors
- Servo Products
- Switches
- Test & Measurement Equipment
- Tools & Accessories

Table of Contents

ASC Global delivers cutting-edge industry insights and trends. The following sections provide valuable information gathered from research, expert insights from our team, and reliable sources in the industry.

Lead-Time Report

The following insights stem from thorough research of ASC Global's marketing team combined with the expertise of all our departments. The information is designed to provide guidance and should be approached as such.
ASC Global excels in supply chain strategies that effectively address market volatility. For a deeper understanding, kindly reach out to your Account Manager.

MRO Supplies | Industrial Automation | Pneumatic and Hydraulic Systems | HVAC Solutions | Safety Products | Electrical Control Equipment

MRO Supplies

Category	Estimated Lead Time (Weeks)	Pricing Trend	Key Influencing Factors
General MRO Consumables	2-4 (stocked)	Increasing (Low Double-Digit)	Labor costs, Tariffs, Raw material costs
Aviation MRO Parts	Varies, potentially extended for critical parts	Increasing (Low Double-Digit)	Aging fleet, Increased utilization, Raw material/labor shortages
Electronic MRO Components (from factory)	8-52 (Electromechanical), 8-46 (Passives)	Stable to Increasing	Component-specific demand, Raw material costs
Electronic MRO Components (open market)	Stable	Stable to Increasing	Availability on open market, Tariffs

The MRO sector is investing in IoT and AI for predictive analytics to reduce downtime and improve inventory efficiency. Inflation, tariffs, and warehouse cost hikes remain challenges, pushing teams toward dynamic inventory management. Some deliberately overstock critical SKUs, while others leverage demand sensing and supplier collaboration to balance service-level risks with inventory cost control.

Industrial Automation

Equipment Type	Estimated Lead Time (Weeks)	Pricing Trend	Key Influencing Factors
Industrial Robots	8-16 (for SOM components)	Stable to Decreasing	High investment, increased production capacity, competition
Programmable Logic Controllers (PLCs)	10-39 (for MCUs)	Decreasing (avg. -6%)	Q3 2025 saw continued stabilization
Human-Machine Interfaces (HMIs)	8-16 (for SOM components)	Stable to Decreasing	Q3 2025 saw continued stabilization
Industrial Sensors	8-60 (Analog)	Stable to Decreasing	Q3 2025 saw continued stabilization
Drives (Electromechanical)	8-52 (Electromechanical)	Stable	General electromechanical trends

The industrial automation market, valued near $162.5 billion by year-end, grows steadily but faces tariff-driven cost pressures. Suppliers are passing through surcharges on imported sensors and PLC components, reversing Q2 price declines. To hedge against volatility, manufacturers regionalize supply chains, while buyers secure long-term pricing agreements and explore modular architecture for greater flexibility and reduced supplier dependence.

Pneumatic and Hydraulic Systems

System/Component Type	Estimated Lead Time (Days/Weeks)	Pricing Trend	Key Influencing Factors
Pneumatic Cylinders	2-12 weeks	Stable	Increased demand from key markets like automotive and construction
Hydraulic Pumps & Motors	4-16 weeks	Stable to Increasing	Backlogs are holding steady into Q3 2025
Hydraulic Valves	4-12 weeks	Stable to Decreasing	Production capacity has improved
Hydraulic Fittings & Tubing	2-4 weeks	Stable to Decreasing	Demand from construction and industrial sectors is slowing

Fluid power markets show ongoing contraction despite sporadic shipment gains, with tariffs dampening machinery demand and delaying investment. Manufacturers shift to localized production to reduce tariff risks and lead times. Meanwhile, electromechanical alternatives gain traction, offering resilience against supply disruptions. Procurement strategies increasingly emphasize dual sourcing and modular designs to mitigate volatility while monitoring alternative technologies for future adoption.

HVAC Solutions

HVAC Product/Component	Estimated Lead Time (Weeks)	Pricing Trend	Key Influencing Factors
Standard Rooftop Units (RTUs)	2-4 weeks	Increasing (4% to 10%+ increase)	EPA refrigerant phase-out, retooling costs, higher components
Large Tonnage/Custom RTUs & Air Handlers	18-28 weeks	Increasing (7% to 10%+ increase)	High complexity, parts shortage, new efficiency standards cost
Commercial Chillers	12-30+ weeks	Increasing (High)	Mandatory low-GWP refrigerant transition, high retooling costs
HVAC Controls & Smart Systems	12 weeks	Increasing (due to tech features)	Smart system adoption, predictive maintenance, high tech costs.
Core Components	12 weeks	Increasing (3.5% to 10%+ on select items)	Tariffs on metals, copper price rise, inflation pressure

Transitioning to low-GWP refrigerants continues to disrupt supply chains, with shortages of pre-charged systems and specialty components raising costs and lead times. Regulatory retrofits and commodity inflation further pressure prices. Suppliers are improving operational efficiencies to shorten delivery times, giving procurement teams leverage to prioritize partners offering refrigerant flexibility, proactive backlog management, and firm delivery commitments amid ongoing market disruption.

Safety Products

Product Type	Estimated Lead Time (Weeks)	Pricing Trend	Key Influencing Factors
Personal Protective Equipment (PPE)	2-3 weeks	Increasing (competitive)	Stricter regulations, raw material costs, technology integration
Steel Safety Containers	2-3 weeks	Increasing (+11.75% in July)	Cold-rolled steel prices surged in July, driven by tariffs and raw material costs
Smart Safety Equipment (e.g., helmets with sensors)	2-3 weeks	Increasing (due to tech features)	Technology integration, R&D costs, demand for advanced features
Fall Protection Systems	2-3 weeks	Increasing (due to tech/standards)	Increasing safety standards, integration with smart technologies

AI, IoT, and advanced sensors are transforming safety equipment into proactive systems that monitor risks, enhance response times, and support predictive analytics. Rising raw material costs pressure prices, yet insurers stabilize rates as data from smart systems lowers assessed risks. Companies increasingly link safety investments to insurance savings, making digital safety adoption both a compliance strategy and cost-control measure.

Electrical Control Equipment

Equipment Type	Estimated Lead Time (Weeks/Months)	Pricing Trend	Key Influencing Factors
Transformers	> 52 weeks (over a year)	Increasing	Grid modernization, data center demand, raw material costs, tariffs
Switchgear	30-50 weeks	Increasing (due to demand/tariffs)	Grid modernization, data center demand, raw material costs, tariff
Generators	10-20 weeks	Increasing (due to demand/tariffs)	High demand, raw material costs, tariffs
Control Panels (components)	Varies (e.g., MCUs 4-39 weeks)	Stable to Increasing	Component-specific trends, raw material costs
Industrial PCs (components)	Varies (e.g., MCUs 4-39 weeks)	Stable to Increasing	Component-specific trends, raw material costs

Electrical gear faces extended lead times driven by data center growth, renewable integration, and grid upgrades. Tariff exposure on imports and rising costs of copper, steel, and silicon add pressure. Manufacturers demand early commitments or escalation clauses, while procurement teams counter by diversifying suppliers, bundling orders, and planning 12–24 months ahead to secure availability and mitigate sharp cost increases.

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End of Life (EOL)

Critical Q4 2025 End-of-Life (EOL) & Migration Updates for Key Manufacturers

Manufacturer	Product Line / Software	EOL / Discontinuation Date (Q4 2025 or Near-Term Impact)	Impact on Operations	Recommended Migration Path / Successor Products
Siemens	SIMATIC S7-300 CPUs & Component Series	Oct 1, 2025 (Type Discontinuation - PM410)	Critical failures mean slow, expensive repairs, risking extended, costly, and unplanned downtime.	SIMATIC S7-1500
Siemens	SIMATIC ET 200M I/O System	Oct 1, 2025 (Type Discontinuation - PM410)	I/O failure requires entire rack replacement, forcing extensive, time-consuming re-engineering effort.	SIMATIC ET 200MP / ET 200SP
Allen-Bradley / Rockwell Automation	RSLogix 5 (for PLC-5)	Dec 31, 2025 (New Activations Discontinued)	No new licenses means a workstation failure prevents essential system programming and backups.	Studio 5000 Logix Designer
ABB	MS325/MO325 Family	Jul 2025 (Obsolete Status)	Obsolete parts cause motor protection failure, resulting in equipment damage and major downtime.	Successor varies by region/model
Omron	G8N series DC relays (e.g., G8N-1 DC12)	Sep 2025 (Discontinuation)	Component failure leads to circuit and machine stoppage; finding spare parts becomes unpredictable.	G8NB series relays

End of Life (EOL)

MRO Supplies

Product	Manufacturer	EOL	Notes
SIMATIC PCS 7 legacy components	Siemens	Dec 2025	Migrate to supported PCS 7 versions or Legacy System Services
Legacy HVAC equipment (R-410A)	Carrier	Sept 2025	Replace with R-454B refrigerant models
Gas/Electric Packaged Units	Trane	July 2025	Migrate to current Trane lineup
R-410A refrigerant-based	Industry-wide	Dec 2025	Move to low-GWP refrigerant R-454B models

Industrial Automation Equipment

Product	Manufacturer	EOL	Notes
SIMATIC HMI Comfort Panels	Siemens	Sept 2025	Switch to the SIMATIC Unified Comfort Panels.
SIMATIC S7-400 Central Signal Modules	Siemens	Oct 2025	Replace with SIMATIC ET 200MP or SIMATIC ET 200SP HA.
Yaskawa G7 Series AC Drives	Yaskawa	Aug 2025	Replace with the newer, more energy-efficient GA800 or A1000 series
Mitsubishi Electric FR-A100 Series VFD	Mitsubishi Electric	Nov 2025	Replace with the advanced FR-A800 series VFD

Pneumatic & Hydraulic Systems

Product	Manufacturer	EOL	Notes
Legacy Natural Gas-Driven Pneumatic	Fisher	Jan 2026	Replace with Instrument Air-Driven, Electric, or Low-Bleed Pneumatic Controllers.
SMC VQ Series Solenoid Valves	SMC Corporation	Aug 2025	Direct upgrade to the current generation VQZ Series or the energy-efficient SY Series.
Bosch Rexroth Fixed Displacement Vane Pumps	Bosch Rexroth	Dec 2025	Replace with newer Internal Gear Pumps or upgraded, more efficient Vane Pump Series.
Parker Series 3L/3N Hydraulic Cylinders	Parker Hannifin	Sept 2025	Migration to the next-generation or equivalent Series 3H/3A hydraulic cylinders.

End of Life (EOL)

HVAC Solutions

Product	Manufacturer	EOL	Notes
Residential R-410A Air Conditioning Units	Carrier	Jan 2026	Replace with Instrument Air-Driven, Electric, or Low-Bleed Pneumatic Controllers.
Residential R-410A Heat Pumps	Carrier	Jan 2026	Direct upgrade to the current generation VQZ Series or the energy-efficient SY Series.
Bosch Rexroth Fixed Displacement Vane Pumps	Bosch Rexroth	Dec 2025	Replace with newer Internal Gear Pumps or upgraded, more efficient Vane Pump Series.
Parker Series 3L/3N Hydraulic Cylinders	Parker Hannifin	Sept 2025	Migration to the next-generation or equivalent Series 3H/3A hydraulic cylinders.

Safety Products

Product	Manufacturer	EOL	Notes
NFPA 1971 Compliant Turnout Gear	Lion	Dec 2025	Replace with NFPA 1970 (2025 Edition)
SCBA Systems	Scott Safety	Oct 2025	Replace with units adhering to the latest NFPA 1981/1970 standards.
Legacy Non-Connected Gas Detection Monitors	Dräger	Jan 2026	Replace with Connected/IoT-Enabled Gas Detectors.
Obsolete Class A Fire Extinguishers	Amerex	Sept 2025	Replace with more modern, effective agents and units with clear K-Factor Ratings.

Electrical Control Equipment

Product	Manufacturer	EOL	Notes
700-H General Purpose Control Relays	Rockwell	July 2026	Migrate to current relay / solid state I/O families.
500-NX Contactors	Rockwell	Dec 2025	Use alternate Rockwell 500-series contactor lines
800F DeviceNet Pushbutton Stations	Rockwell	Aug 2025	Replace with newer Internal Gear Pumps or upgraded, more efficient Vane Pump Series.
SMC Plus Soft Starter, 150 A	Rockwell	Nov 2025	shift to alternative pushbutton / HMI products

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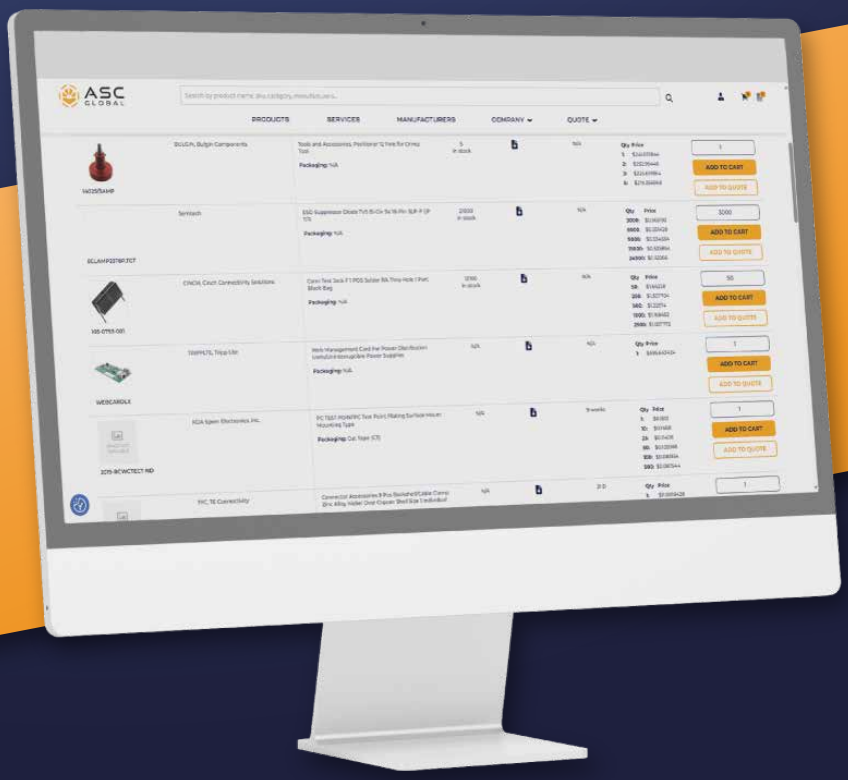

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The True Cost of Downtime

Unplanned downtime has emerged as one of the biggest financial threats to manufacturers worldwide. Across industries, every hour of halted production now costs significantly more than five years ago, outpacing inflation due to rising energy prices, increasingly complex supply chains, and more interconnected manufacturing processes. For the world's 500 largest companies, unplanned downtime now costs $1.4 trillion annually, or 11% of revenues.

Why Downtime Costs Are Rising Faster Than Inflation

- **Energy crisis & price spikes:** Global energy costs rose sharply after 2021 and spiked again in 2022 following geopolitical uncertainty, driving up operating costs.
- **Complex supply chains:** Modern manufacturing networks are highly interdependent; a halt in one area triggers delays across the line, amplifying losses.
- **Inflation vs downtime costs:** US inflation (2019–2023) = 19%; cost of an hour's downtime rose 113% in Automotive and 319% in Heavy Industry.

Sector	Cost per Hour	Key Trends
Automotive	$2.3M	Downtime doubles every 5 years; complex assembly and tight supply chains magnify losses; total plant losses now $750M/year.
Heavy Industry	$59K	Downtime costs quadrupled since 2019; supply-chain penalties flow down the line; total hours lost cut by nearly two-thirds via PdM.
FMCG	$36K	Costs stable since 2019; minor increases in overall plant downtime; still lagging in PdM adoption.
Oil & Gas	Variable ($60-$120/barrel)	Downtime costs tied directly to oil prices; 2022 record losses, 2023 decline aligned with lower prices.

Countering Rising Losses: Predictive Maintenance (PdM)

Faced with skyrocketing costs, manufacturers have embraced Predictive Maintenance (PdM) to prevent unplanned downtime while avoiding over-maintenance. PdM uses IoT sensors, condition monitoring, and AI to predict failures and optimize maintenance schedules.

Key outcomes of PdM adoption:

- Unplanned downtime incidents reduced from 42 → 25 per month (2019–2023) per plant.
- Hours lost per plant per month cut from 39 → 27, saving nearly a third annually.
- Full adoption could save Fortune 500 manufacturers 2.1M hours, $388B in productivity, and $233B in maintenance costs.

PdM adoption trends:

- Almost half of surveyed firms now have PdM teams, double 2019 levels.
- 90% conduct condition monitoring; data sources include operational systems, maintenance records, and human insights.
- Generative AI and advanced analytics improve failure prediction and decision-making.

Why PdM is essential:

- Prevents catastrophic equipment failures.
- Reduces unnecessary spares and planned maintenance costs.
- Enhances machine lifespan and supply chain reliability.
- Turns downtime management from reactive to proactive, protecting revenue in high-cost sectors.

With hourly losses exceeding $2M in Automotive and tens of millions in Heavy Industry, manufacturers cannot afford inefficiency. Predictive Maintenance, enabled by IoT, Industry 4.0, and AI, is now a mainstream solution, cutting downtime, controlling costs, and safeguarding global industrial productivity.

Product Updates

Automation

Next-Generation Cobot Offers No-Code Setup and Built-in AI Vision: A new collaborative robot (cobot) platform is launching with built-in 3D vision and no-code programming. This allows rapid deployment for CNC tending and assembly tasks, significantly reducing specialized integration time on the plant floor.

MRO Supplies

Digital MRO Systems Integrate IoT for Predictive Maintenance: New cloud-based Digital MRO platforms are incorporating advanced IoT sensors and AI. These systems enable real-time asset monitoring and data analytics, delivering predictive maintenance insights to optimize operations and minimize unexpected machinery downtime.

Pneumatic Systems

Compact Position Sensor Delivers High-Precision Actuator Stroke Detection: SMC has released the new D-MPG Compact Position Sensor for pneumatic grippers and mini actuators. The sensor's compact, modular design offers high-precision stroke detection, supporting flexible integration for complex, space-constrained, precision-driven automated applications.

Motion Control

New Servo Drive Series Focuses on Certified Functional Safety: Elmo Motion Control is showcasing its new Platinum servo drive family, emphasizing full functional safety capabilities. The launch includes the Platinum Bassoon AC drive, featuring certified safety functions essential for high-performance robotics and advanced machine applications.

Automation & Robotics

NVIDIA Platform Merges AI Acceleration with Advanced Robotics Software: NVIDIA launched the Jetson Thor platform, built on the Blackwell architecture, specifically for next-generation autonomous robots. It combines advanced GPUs and AI accelerators with specialized robotics software, enabling powerful real-time vision and planning at the edge of the industrial network.

Hydraulic Systems

Electro-Hydraulics Blend Power and Digital Precision Control: The newest electro-hydraulic systems combine powerful hydraulic force with sensitive electronic controls. This integration delivers enhanced precision and control, allowing for real-time system adjustments and greater adaptability across demanding applications like aerospace and robotics.

HVAC Solutions

Industrial HVAC Systems Adopt AI for Advanced Zoning Control: Manufacturers are rolling out industrial HVAC solutions with integrated AI-powered zoning control features. These intelligent systems monitor environmental conditions in real-time, automatically adjusting airflow and humidity in specific plant areas for optimized comfort and efficiency.

Electrical Control Equipment

Multi-Axis Motion Controllers Launching for Complex Robotics: Elmo is preparing to unveil new multi-axis servo drives and the Titanium Maestro motion controller for Q4 delivery. These control solutions are tailored to manage complex, coordinated movement in multi-axis robotic systems and high-end industrial automation machinery.

Motors & Power Transmissions

Smart Gearboxes Integrate AI for Predictive Maintenance Analytics: New industrial gearboxes are integrating advanced sensors and AI-driven edge computing to boost intelligence. This technology monitors vibration and load in real-time to optimize operating parameters and enable high-accuracy predictive maintenance, significantly extending equipment life.

Counterfit Detection

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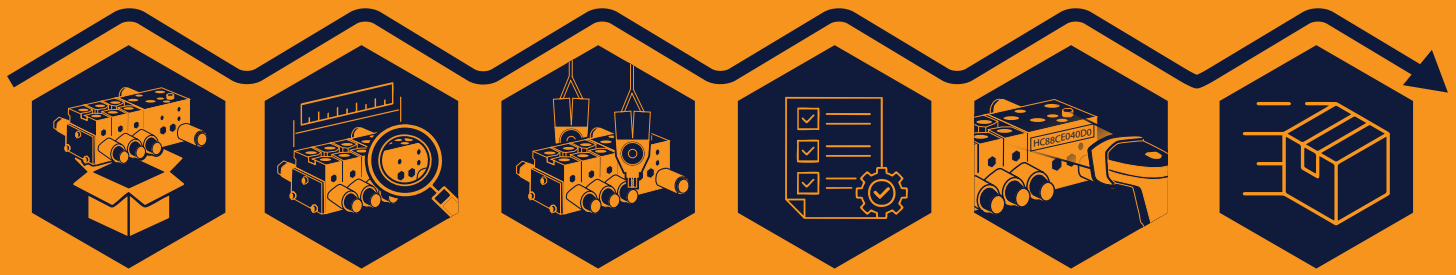

Incoming Inspection

Dimensional and Visual Inspection

Material and Mechanical Performance Testing

Documentation and Compliance Verification

Traceability Confirmation

Repackaging and shipping

Manufacturer Updates

Siemens

AI Enhances Simcenter Testlab for Faster Testing: Siemens integrates AI into Simcenter Testlab, revolutionizing modal testing and analysis processes. This advancement enables teams to execute tests more efficiently, accelerating product development timelines.

Mitsubishi Electric

Acquires Nozomi Networks to Enhance OT Security: Mitsubishi Electric plans to acquire Nozomi Networks, integrating AI-driven cybersecurity solutions for operational technology environments. The acquisition, expected to finalize in Q4 2025, aims to bolster industrial cybersecurity capabilities.

Schneider

New Reference Designs for AI Infrastructure: Schneider Electric introduces new reference designs featuring integrated power management and liquid cooling controls, co-engineered with NVIDIA, to support AI infrastructure and data center operations.

GE Vernova

Launches PlanOS for Smarter Grid Planning: GE Vernova unveils PlanOS, a unified software suite designed to empower energy planners and utilities with an integrated system planning platform for a smarter grid of the future.

Honeywell

Acquires Li-ion Tamer for Enhanced Fire Safety: Honeywell acquires Li-ion Tamer, integrating its off-gas detection solution for lithium-ion batteries into its Building Automation business to enhance fire detection and life safety solutions.

Manufacturer Updates

Emerson

Introduces Guardian Virtual Advisor for Automation Systems: Emerson launches Guardian Virtual Advisor, an AI-powered software solution combining deep domain expertise to support end-to-end lifecycle management and enhance automation system performance.

Bosch

Showcases Advanced Battery Automation Solutions: At The Battery Show 2025, Bosch Rexroth showcases smarter, faster, and best-in-class battery automation solutions, highlighting innovations in automation technology for the battery industry.

Parker Hannifin

Acquires Curtis Instruments to Expand EV Offerings: Parker Hannifin announces plans to acquire Curtis Instruments for $1 billion, enhancing its current offerings in electric vehicle motors, hydraulic systems, and electrification products.

Festo

Advances Automation with New Pneumatic Actuators: Festo introduces new pneumatic actuators designed for enhanced precision and energy efficiency, supporting advancements in automation technology across various industries.

Allen-Bradley

Releases 1715 Redundant I/O Modules for Critical Control: Allen-Bradley introduces 1715 redundant I/O modules, offering reliable control for critical systems and enhancing system uptime and safety in industrial applications.

Earnings Recap

Automation

The automation sector experienced varied performance in Q4 2025, with some companies facing challenges due to global economic factors.

Rockwell Automation

- Revenue: $1.9 billion
- Adjusted EPS: $1.83
- Adjusted operating income of $184 million

Siemens Digital Industries

- Revenue: $23.20 billion
- Industrial profit: $3.80 billion (+29% YoY)
- Net profit: $2.64 billion

Honeywell

- Revenue: $2.5 billion (–5% YoY)
- Operating income: $1.1 billion
- Operating margin: 16.5%

MRO

The MRO sector demonstrated steady growth, driven by industrial activities and infrastructure maintenance needs.

AAR Corporation

- Revenue: $739.6 million
- Adjusted EPS: $3.91
- Net income: $12.5 million

MTU Aero Engines

- Operating profit: $419 million (+41% YoY)
- Revenue: $1.76 billion
- Adjusted EPS: $5.28

H.B. Fuller

- Revenue: $2.8 billion
- Adjusted EPS: $1.26
- Operating income: $400 million

Pneumatics

The pneumatic and hydraulic systems market continued its upward trajectory, fueled by industrial automation and infrastructure projects.

Parker Hannifin

- Revenue: $5.2 billion
- Adjusted EPS: $7.15
- Net income: $923 million

Bosch Rexroth

- Revenue: $2.93 billion
- Operating income: $293 million
- Operating margin: 10%

SMC Corporation

- Revenue: $1.35 billion
- Operating income: $292 million
- Net Income: $285 million

Earnings Recap

Motion Control

The motion control industry experienced mixed results, with some companies reporting strong earnings while others faced market challenges.

Genuine Parts Company

- Revenue: $4.6 billion
- Operating income: $300 million
- Operating margin: 6.5%

Twin Disc

- Revenue: $96.7 million
- Operating income: $8.5 million
- Operating margin: 8.8%

Parker Hannifin

- Revenue: $5.2 billion
- Adjusted EPS: $7.15
- Net income: $923 million

Robotics

The robotics sector expanded steadily in Q4 2025, supported by demand in automotive, electronics, and warehouse automation.

ABB Robotics

- Revenue: $3.1 billion (+6% YoY)
- Orders: $3.4 billion (+8% YoY)
- Operating margin: 14.5%

Fanuc

- Revenue: $1.47 billion (–3% YoY)
- Net income: $225.5 million
- Operating margin: 19%

Yaskawa Electric

- Revenue: $980 million (+5% YoY)
- Operating income: $79.7 million
- Net profit: $55.35 million

Earnings Recap

HVAC Solutions

The HVAC industry experienced strong performance, driven by increased demand for heating, ventilation, and air conditioning systems.

Carrier Global

- Revenue: $5.15 billion
- Adjusted EPS: $0.54
- Operating income: $500 million

Ferguson

- Revenue: $8.5 billion
- Adjusted EPS: $3.48
- Operating income: $800 million

Johnson Controls

- Revenue: $6.5 billion
- Adjusted EPS: $1.20
- Operating income: $600 million

Electrical Control Equipment

Factories invested in circuit breakers, smart panels, and safety systems to meet regulatory standards and reduce downtime.

Schneider Electric – Industrial Automation

- Revenue: $9.89B (+6.4%)
- Adjusted EBITA: $1.55B
- Margin: 15.7%

ABB Electrification

- Revenue: $3.65B (+5% YoY)
- Orders: +6%
- Margin: 16.2%

GE Vernova – Electrical Systems

- Revenue: $2.91B (+8% YoY)
- Segment profit: $294M
- Orders rose across energy and factory customers

Electronic Components

The electronic components sector showed mixed results, with some companies exceeding expectations while others faced challenges.

Jabil

- Revenue: $8.3 billion
- Adjusted EPS: $3.29
- Operating income: $500 million

Avnet

- Revenue: $5.2 billion
- Operating income: $156 million
- Operating margin: 3%

Kimball Electronics

- Revenue: $380.5 million
- Operating income: $16.5 million
- Operating margin: 4.3%

Industry News

Automotive & Marine

JLR Cyberattack Disrupts UK Auto Supply Chain Severely: A cyberattack forced Jaguar Land Rover to suspend production in UK factories since early September, causing significant component supply chain disruption, layoffs among suppliers and urgent government support discussions.

Semiconductor & Technology

Equipment Billings Hit Record Driven By AI Demand: SEMI reports global semiconductor manufacturing equipment sales forecast at US$125.5 billion in 2025, lifted by investment in advanced logic, memory, packaging, and testing tools to support AI-related performance and capacity.

Construction

Semiconductor Fabs Under Construction Globally Adds Fab Capacity: As of September 2025, multiple semiconductor fabs in Asia, U.S., and China are being built or expanded, many focused on legacy nodes but some aiming for leading-edge nodes. Implications for HVAC, cleanroom, power, and tool maintenance services.

Energy

Rare Earths Export Controls Adding Pressure to EV Components: China's export restrictions on rare earth elements and magnets essential for electric motors and energy storage devices are triggering supply-chain risk mitigations among OEMs and parts suppliers globally.

Infrastructure

North Carolina Rebuilds Post-Helene with Resilient Infrastructure: Governor Josh Stein highlights ongoing efforts to repair roads and critical infrastructure destroyed or damaged by Hurricane Helene in western North Carolina. The state emphasizes building resilient infrastructure to ensure safer and more reliable transportation.

Industry News

Healthcare

Burnside Hospital Expansion Approved in Adelaide: The State Commission Assessment Panel has approved Burnside Hospital's expansion, including a new three-storey building with additional operating theatres, a fertility clinic, and a cancer treatment center. The project aims to enhance healthcare services in Adelaide's eastern suburbs.

Consumer Packaged Goods

TraceGains Expands Supplier Network to 100,000 Locations: TraceGains has expanded its supplier management platform to 100,000 locations worldwide, marking a significant milestone in the consumer packaged goods supply chain. This expansion aims to enhance compliance, quality, and innovation across the industry.

Aviation & Aerospace

Japan MRO Deal Expands Aircraft Component Exchange Network: Touchdown Aviation (TDA) has signed general terms agreement with MRO Japan for purchasing and exchanging aircraft parts, strengthening component availability and parts replacement for repair, overhaul operations in Japanese and regional MRO centres.

Mining & Infrastructure

Production Halted by Mudflow Disruption at Grasberg Mine: Operations at Freeport Indonesia's Grasberg copper and gold mine paused after a catastrophic mudflow on September 8 trapped seven workers; infrastructure damage requires repair and overhaul of underground haulage, ventilation systems, and safety-critical components before restart.

Defense & Military MRO

India-US Joint Venture Establishes Military Aircraft MRO Facility in Nagpur: Reliance Infrastructure is partnering with a U.S. company to open a dedicated military aircraft and equipment maintenance, repair, and overhaul facility in Nagpur's MIHAN SEZ. It will be India's first defense-sector specific MRO plant for military platforms.

MARKET REPORT

DISCLAIMER

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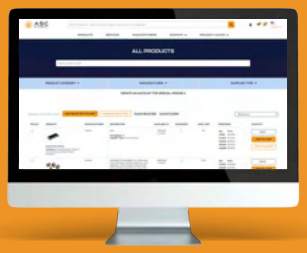

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