

IATA

4th MRO SMARTHUB FORUM

OCTOBER 14, 2025

LONDON, UNITED KINGDOM





Quantifying MRO supply chain realities with MRO SmartHub

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What is really driving the material market?

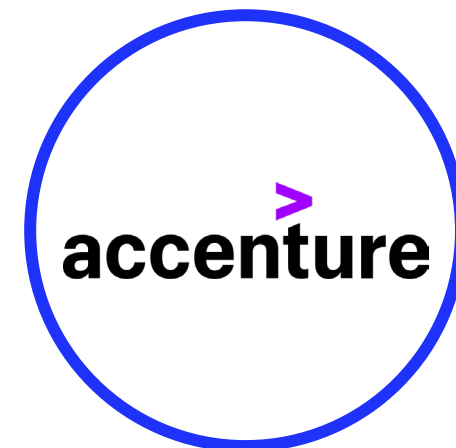


"Parts shortages and delivery delays plaguing the global aviation industry are easing, but **could take up to two years to resolve [...]**"

<https://www.reuters.com/business/aerospace-defense/supply-chain-strains-set-weigh-aviation-industry-bounce-back-2024-02-23>, accessed: 2025-09-09

"Eighty-five percent of executives **now trust their supply chains** to meet delivery and quality expectations."

<https://www.accenture.com/us-en/insights/aerospace-defense/commercial-aerospace-insight-report>, accessed: 2025-09-24



Are global supply chains truly stabilizing?

What is really driving the material market?



"There will be times when airlines **only install new for certain parts** or specific critical areas of the aircraft."

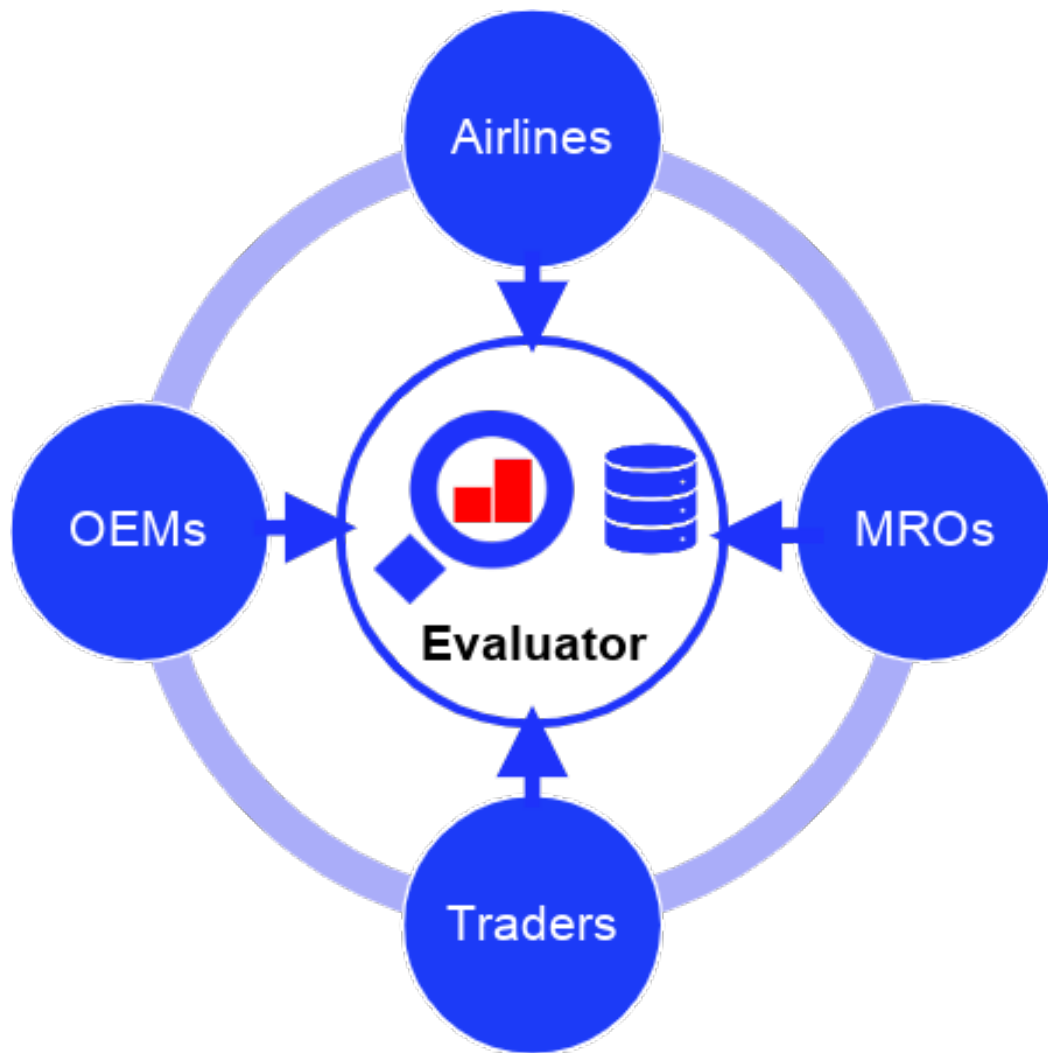
Simon Walker, SVP Technical, AerFin, <https://avitrader.com/2024/01/24/featured-article-usm-the-attractive-alternative-to-factory-new/>, accessed: 2025-09-16



Has USM matured into a strategic sourcing lever – or is it still opportunistic?



Is significant pricing volatility for USM material the new normal?



Evaluator

Anonymized customer data

- Purchase & sales orders
- Repair orders
- Generic material information

Platform data

Market data

Public data

Evaluator covers history since 2018

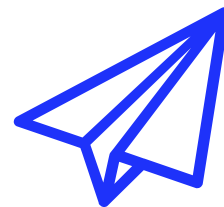


30+

companies contributing
data to Evaluator database

+ 2

since 2024



50+

aircraft and engine types
covered by material catalog

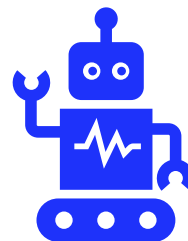


22M+

applicable datapoints for
FMV calculation

+ 4M

since 2024



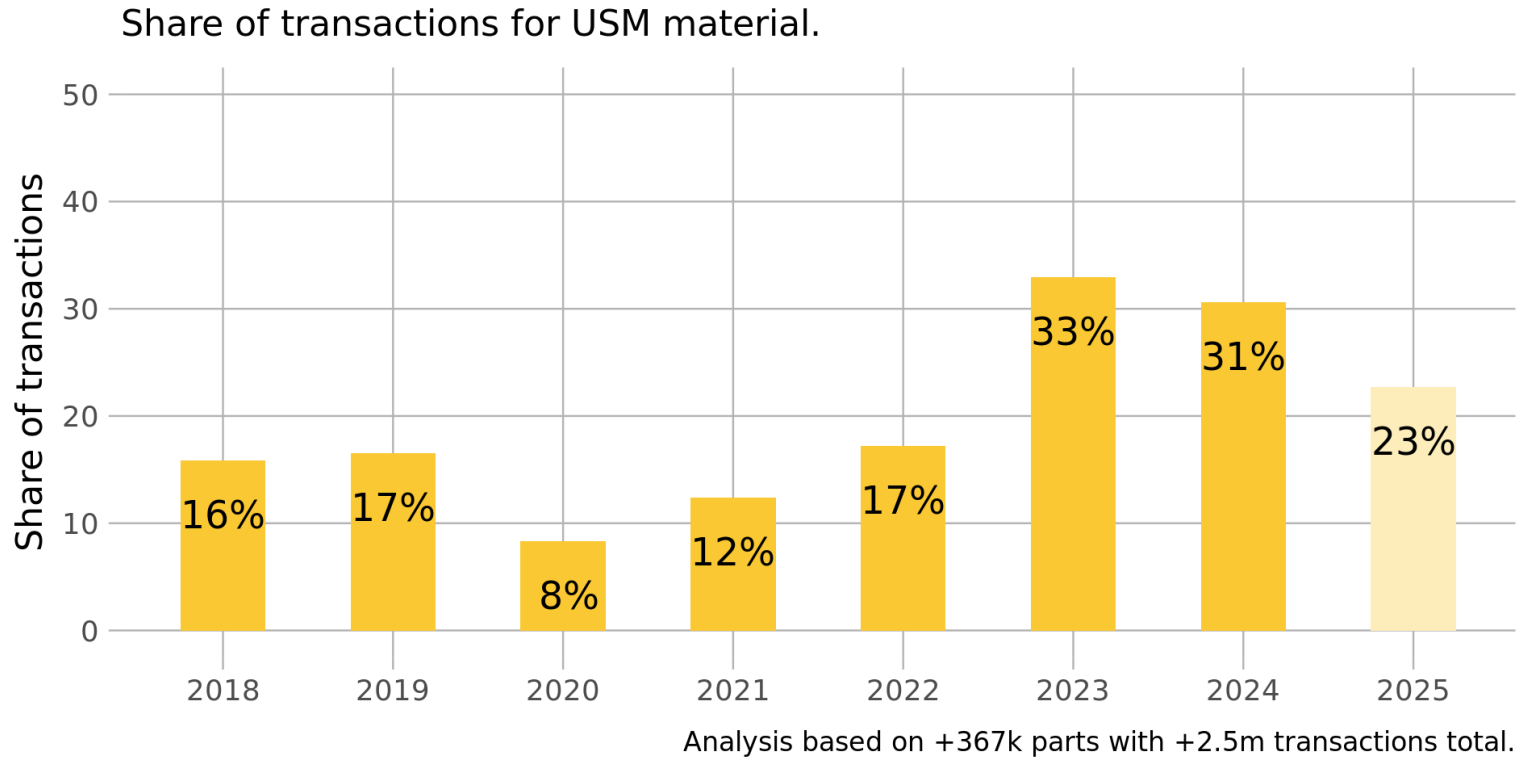
1.6M+

part numbers included in
material catalog

+ 0.1M

since 2024

USM transaction share stabilizing

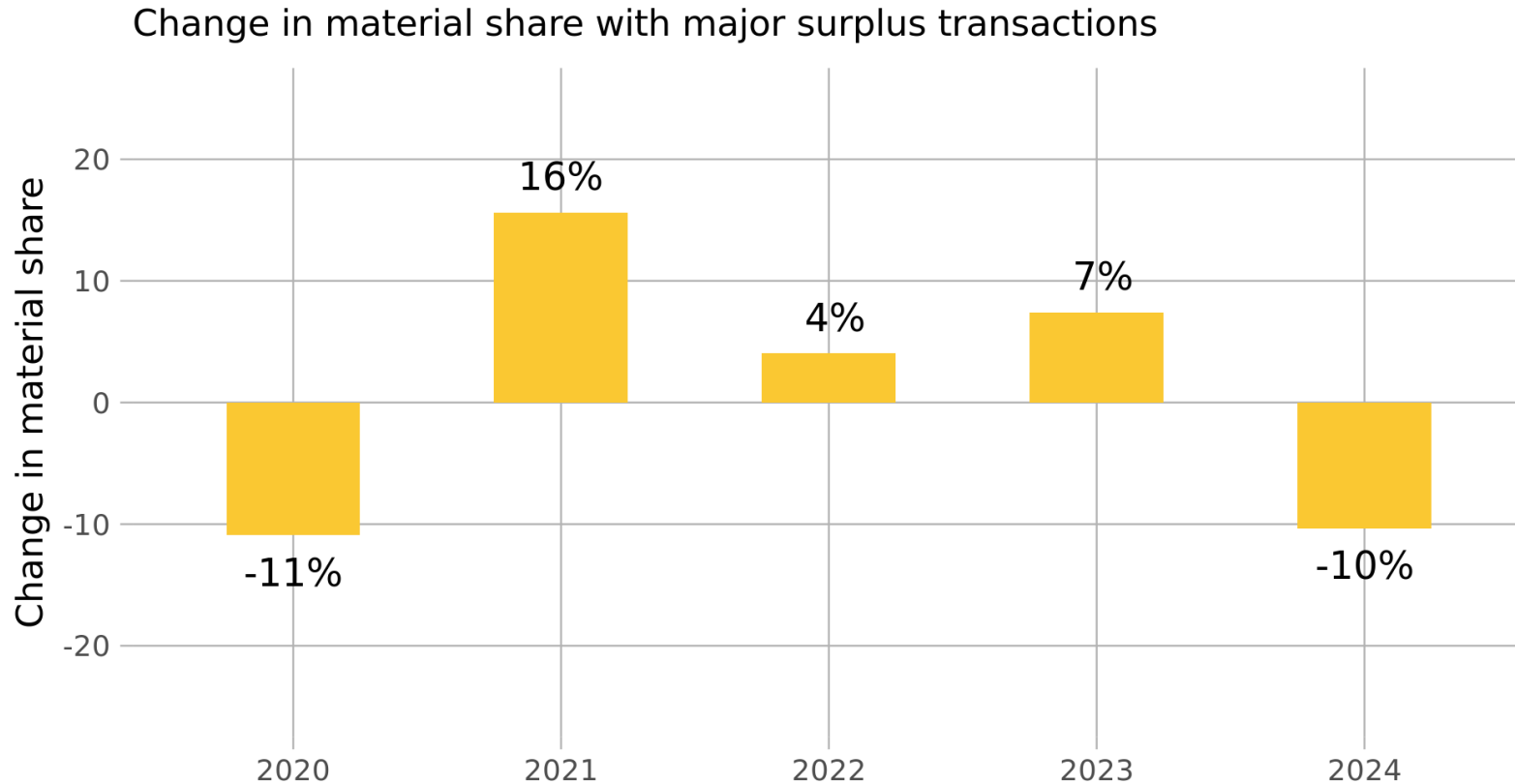


Peak USM usage in 2023 -
driven by OEM backlogs?

Normalization may reflect
improved NEW availability

Utilization rate still above
pre-pandemic levels

USM does not always offset NEW



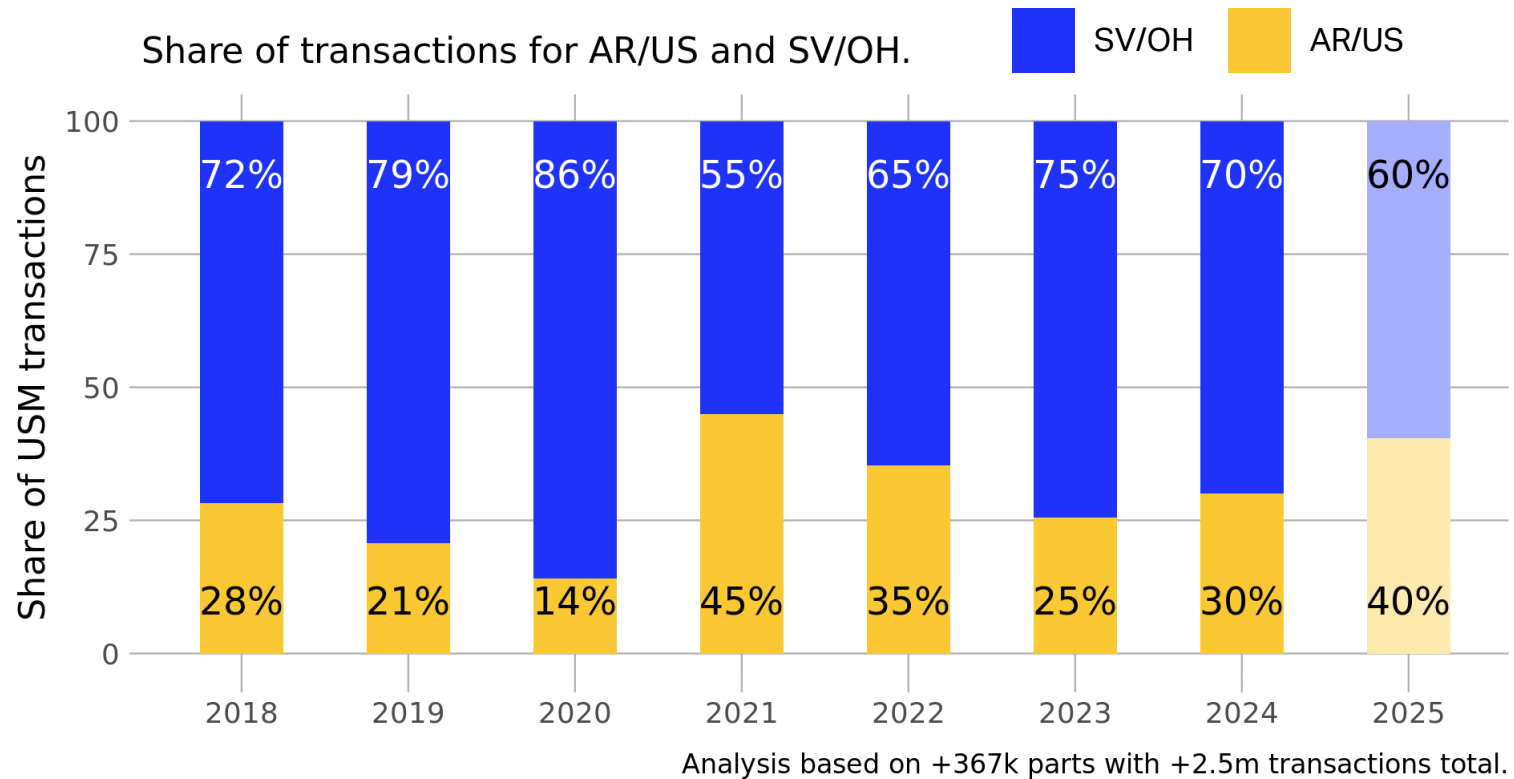
Analysis based on +367k parts with +2.5m transactions total.

Surplus availability does not always offset NEW

Persistent gaps driven by labor, certification capacity

Strategic dual-sourcing remains essential

As-Removed material gaining ground

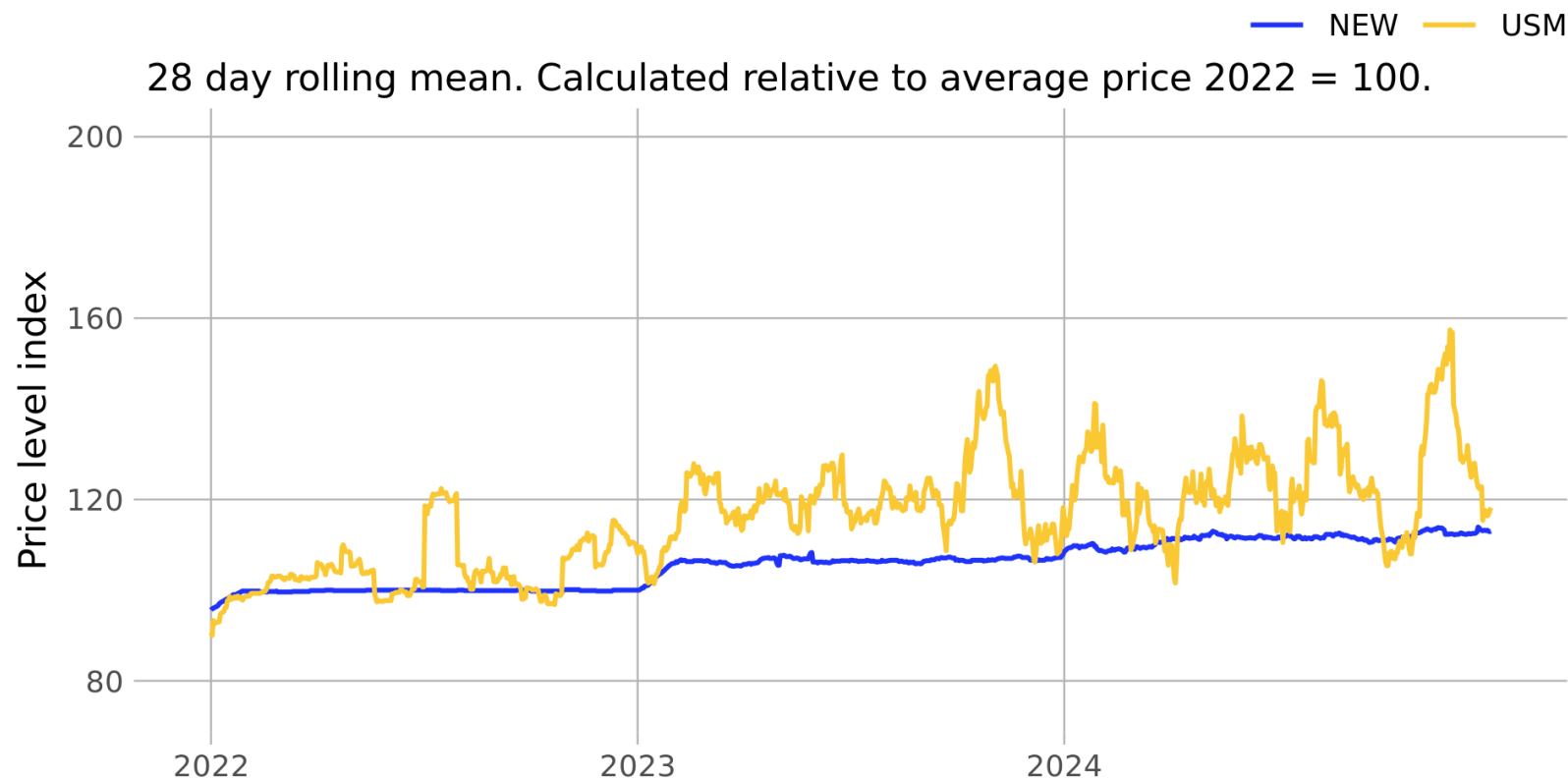


Growing reliance on AR –
cost-driven behavior?

Shop capacity & TATs
constrain SV supply

Increased teardown
activities are critical enabler

USM pricing: strategic opportunity or unpredictable exposure?



Analysis based on +53k parts with +985k transactions total.

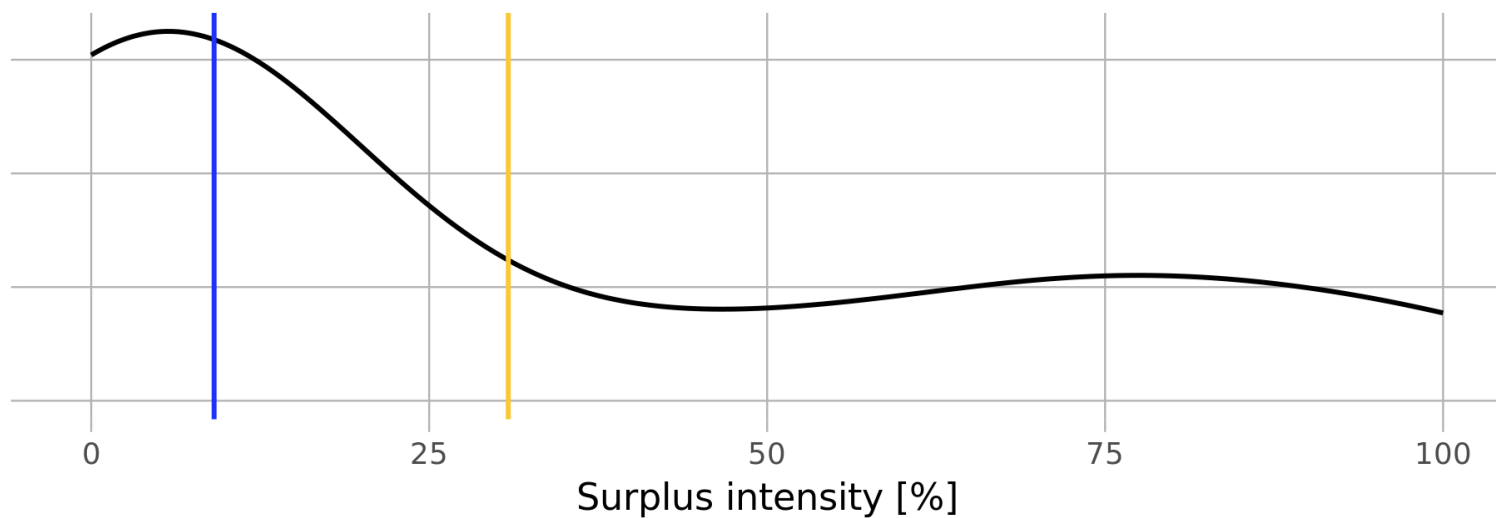
USM pricing continues to show sharp fluctuations

New parts exhibit steady price growth

Unpredictable USM pricing creates challenges, but also unlocks opportunities

Significant variation in USM sourcing practices

Surplus intensity across companies



Analysis based on +194k parts with +1.3m transactions total.

Surplus use is uneven across the MRO industry

Median contributor has ~10% surplus share

Sourcing behavior reflect internal strategy, not market uniformity



Supply chains have not fully normalized, and **price volatility continues** to affect sourcing decisions. While **USM has become a strategic tool**, adoption remains uneven across the industry. As-removed material is gaining relevance, and **teardown-driven sourcing** is increasingly essential.

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