

# Outsourced Power Maintenance and Services

## Industry Overview

- Outsourced maintenance and monitoring services for the power grid serving electric utilities and transmission operators by providing external labor, technology, and expertise
- US Market Size: \$18.1 billion<sup>1-2</sup>
- Estimated Projected Growth Rate: 7.9% CAGR<sup>1</sup> (2026-2033)
- NAICS Code(s): 237130

## Services & Segments

- Maintenance on key products and systems – boilers, generators, etc.
- Line maintenance (distribution) – repair/replacement of poles, insulators, transformers, and underground cables
- Vegetation management – tree trimming and clearing with drones
- Emergency repairs – rapid-response efforts after weather events or outages
- Monitoring platforms & analytics – vendor managed software

## Performance & Catalysts

- Trends favor more outsourcing from major utility companies to specialized companies due to expertise and cost efficiency reasons
- Increased reliance on technology and systems that require power – data centers, electric vehicles, etc.
- Rise in severe weather instances, highlighting the vulnerability of physical infrastructure, thus resulting in urgency to implement more robust repair/monitoring systems to mitigate disruptions
- Highly fragmented with low cyclicalty since grid maintenance is required regardless of economic cycles

