WHITEPAPER | 2026 EDITION

MARKTPILOT™

96% OF YOUR PARTS ARE MISPRICED. HERE'S HOW TO FIX IT.

THE EXECUTIVE'S GUIDE TO MARKET-BASED PARTS PRICING



TABLE OF CONTENTS

01 What is Market-Based Pricing? 4

02 Why Static Pricing Is Costing You More Than You Think 5

03 The B2B Buyer Has Changed. Have Your Prices? 6

04 What are the Requirements for a Market-Based Pricing Strategy? 7

05 How to: Toward a Market-Based Pricing Strategy 8

06 MP ONE™ — The Unified Pricing Performance Platform 9

About MARKT-PILOT™ & Next Steps 10

Sources & References 11

MARKT-PILOT™

FROM DATA TO DECISION TO OUTCOME — THE CONTINUOUS CYCLE THAT REPLACES STATIC PRICING.



1. COLLECT MARKET DATA

Real-time competitor prices, availability, and lead times across 33,000+ sources globally.

360 TB of crawling data processed annually (MARKT-PILOT)

2. ANALYZE YOUR PORTFOLIO

Every SKU benchmarked against market. Exclusive, underpriced, overpriced, and at-market parts identified.

Only 4.1% of parts are priced at market (MARKT-PILOT Global Parts & Service Report 2025)

3. MAKE GOVERNED DECISIONS

Pricing recommendations with full rationale. Explainable to sales, auditable by finance, defensible to customers.

34.7% of OEMs have no systematic pricing cadence (MARKT-PILOT Global Parts & Service Report 2025)

4. EXECUTE & COMMUNI-CATE

Prices updated with market context. Sales equipped to explain changes. Customer trust built through consistency.

69% of B2B buyers cite pricing opacity as their #1 frustration (Mixology Digital / G2, 2025)

5. MEASURE OUTCOMES

Revenue, margin, and win rates tracked per pricing decision. The loop closes and improves over time.

2–6% margin improvement where AI pricing is adopted (McKinsey, Aftermarket Pricing 2024)

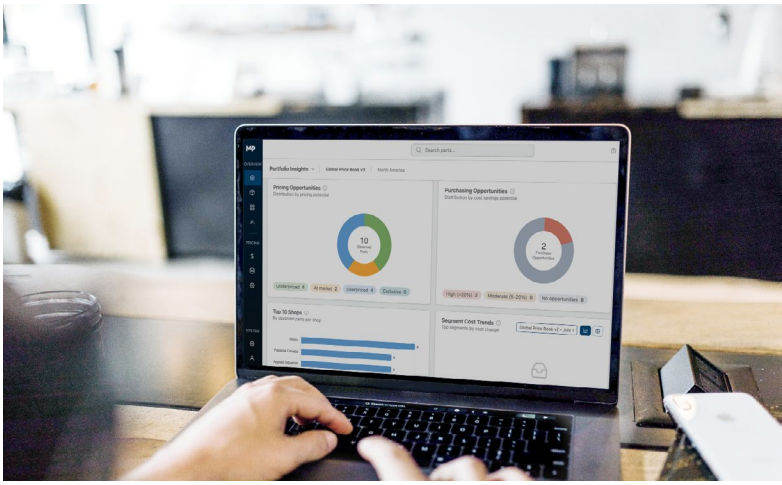
DOWNLOAD THE FULL GUIDE →

01 WHAT IS MARKET-BASED PRICING?

Market-based pricing sets part prices based on real-time market data: what competitors charge, what customers compare, and what the market will actually bear at any given moment.

For industrial machine manufacturers, aftermarket parts are disproportionately valuable. According to VDMA (Verband Deutscher Maschinen- und Anlagenbau), spare parts contribute **10% of revenue, 25% of EBIT**, and grow at 4% annually — yet for most OEMs, pricing these parts remains an afterthought governed by cost-plus logic built decades ago.

Cost-plus pricing applies a fixed markup to internal cost. It is simple to administer, but structurally blind: it ignores what competitors charge, what customers are comparing, and where true pricing power exists. In an era where buyers research prices before placing a single call, cost-plus pricing is not conservative. It is a liability.



COST-PLUS VS. MARKET-BASED PRICING

Dimension	Cost-Plus Pricing	Market-Based Pricing
Basis for price	Internal cost + markup	Real-time market data
Competitive visibility	None	Full — SKU by SKU
Response to market changes	Reactive, periodic	Continuous, automated
Pricing power utilization	Underused or unknown	Actively managed
Customer trust signal	Opaque	Transparent, defensible
Margin leakage risk	High — structural	Minimized through intelligence

> At every stage of the part lifecycle — from introduction to obsolescence — market-based pricing allows an OEM to price according to what the market will bear. It creates the foundation to develop deliberate pricing strategies: charging a premium where OEM value is defensible, staying competitive where substitutes exist.

Only **29%** of manufacturers currently use AI for pricing intelligence. (Experis Pricing Solutions / Vendavo, 2025 Pricing for Profitable Growth Outlook) The gap between those investing now and those still running cost-plus will compound over the next three years.

02 WHY STATIC PRICING IS COSTING YOU MORE THAN YOU THINK

MARKT-PILOT's analysis of over 800,000 spare part data points found that **just 4.1% of parts in a typical OEM portfolio are priced at market.** That means 96% are either leaving revenue on the table or ceding volume to independent suppliers — silently, every day. (MARKT-PILOT Global Parts & Service Report 2025)

A 1% improvement in realized price typically delivers a

7–12% improvement in operating profit.

No cost reduction or volume initiative delivers the same leverage.

Source: McKinsey & Company, Pricing Strategy Research

THE FORCES MAKING STATIC PRICING UNTENABLE

COMPETITIVE TRANSPARENCY

A typical commercial spare part competes with an average of **11.8 alternative sellers globally**, rising to 14.4 in Germany and 22.2 in Italy. In the US: 7.9 sellers per part.

Source: MARKT-PILOT Global Parts & Service Report 2025

MARGIN COMPRESSION

65% of aftermarket executives see increased margin compression risk ahead — a **22-point increase** year-over-year. AI-enabled pricing has delivered 2–6% margin improvement on sales where adopted.

Source: McKinsey, Future of Aftermarket Pricing 2024

AI ADOPTION GAP

Only **10.1%** of manufacturers rate their aftermarket operations as digitally advanced. Over 60% expect AI and IoT to reshape aftermarket operations within three years.

Source: MARKT-PILOT Global Parts & Service Report 2025

AFTERMARKET: THE HIGHEST-MARGIN ASSET YOU MAY BE UNDERVALUING

OEMs that prioritize aftermarket revenue saw margins **four times higher** than those focused on equipment sales alone. (McKinsey, AI Is Already Rewiring the Aftermarket, May 2026) The aftermarket is not a support function. It is the most defensible margin in your business — if priced correctly.

MARKT-PILOT survey data shows **34.7% of manufacturers adjust prices only "as needed"** with no systematic cadence, and the average part was repriced just once between 2023 and 2024. A full third saw no change at all. (MARKT-PILOT Global Parts & Service Report 2025) In a market where competitors reprice continuously, that is not a strategy. It is a default.



03 THE B2B BUYER HAS CHANGED. HAVE YOUR PRICES?

Your customers are not waiting for your next price list update. They are researching your parts, and your competitors', right now, before placing an order. Pricing opacity is no longer a negotiating strategy. It is a trust problem.

70%

of B2B buyers spend most of their journey in independent research before contacting a vendor

Source: Gartner, 2025

69%

cite lack of transparent pricing as their #1 frustration when evaluating suppliers

Source: Mixology Digital / G2, 2025

67%

of B2B buyers now prefer a rep-free purchasing experience, up significantly year-over-year

Source: Gartner, March 2026

80%

of B2B sales interactions now occur in digital channels where price comparisons are immediate

Source: Gartner, 2025

When buyers can find your parts across 11.8 competing platforms before calling you, pricing misalignment is not just a revenue problem. It is a signal: that your prices are either unfair, or that you don't know your own market. Neither is a position a market leader can afford.

See how Okuma America, a CNC machine manufacturer managing nearly 3 million SKUs and $60M+ in parts inventory, moved from cost-plus and Excel spreadsheets to systematic, market-driven pricing: **Read the Okuma case study →**



04 WHICH MANUFACTURERS BENEFIT MOST?

Market-based pricing works best in industries with scattered distribution — where tens to hundreds of distributors compete for parts market share and buyers have real sourcing alternatives. Price transparency is high, competitive pressure is immediate, and the cost of misalignment is measurable.

AGRICULTURE & FOOD PROCESSING

Aging fleets. Extended service lives. Price sensitivity.

Agricultural equipment fleets operate well beyond designed service lives as operators delay capital expenditure. This extends replacement part demand but intensifies price sensitivity. OEMs on cost-plus risk losing ground to independent aftermarket suppliers that have competitive intelligence. Market-based pricing identifies where OEM value justifies a premium — and where it doesn't.

Source: MARKT-PILOT Global Parts & Service Report 2025

CONSTRUCTION & HEAVY EQUIPMENT

$37.4B market by 2029. 7.0% annual growth.

A single day of unplanned downtime on a construction site can cost tens of thousands of dollars in lost productivity. That creates pricing power for critical OEM parts — where it exists. Manufacturers without market visibility cannot identify where that power is. Decisions made without data here are not conservative. They are blind.

Source: The Business Research Company, 2025

HVAC & BUILDING SYSTEMS

7.4% annual market growth through 2030.

Regulatory change, electrification, and seasonal demand create multi-layered pricing complexity. Service revenue in HVAC is structurally more profitable than equipment sales — making parts pricing strategically critical. Underpricing erodes service margin; overpricing opens the door to independent suppliers.

Source: FieldEdge HVAC Market Report 2025

PACKAGING & INDUSTRIAL MACHINERY

Hundreds of wear parts per machine. Multiple geographies. One price list.

A single packaging machine may contain hundreds of individually priced wear parts, each with different competitive dynamics. A part priced correctly in the US may be significantly off in Germany or Southeast Asia. Regional pricing governance without market intelligence is not a strategy. It is guesswork.

Source: MARKT-PILOT Global Parts & Service Report 2025

200+ leading manufacturers across agriculture, construction, machine tooling, packaging, and industrial equipment rely on MARKT-PILOT for Pricing Performance. See customer success stories →

05 HOW TO IMPLEMENT: FROM DATA TO DECISION

The starting point is always the same: understanding where you actually stand. MARKT-PILOT's analysis of over 800,000 spare part data points reveals a consistent portfolio distribution:

51.9%
EXCLUSIVE PARTS

No direct competition. Candidates for premium pricing where OEM value is uncontested

22.3%
UNDERPRICED PARTS

Revenue left on the table. Market rates exceed your current list price.

22%/4.1%
OVERPRICED / AT MARKET

Overpriced parts cede volume to competitors. Only 4.1% are correctly priced at market.



Source: MARKT-PILOT Global Parts & Service Report 2025 — analysis of 800,000+ spare part data points

THREE STEPS TO MARKET-BASED PRICING

01 IDENTIFY MARKET OPPORTUNITIES

Upload your parts portfolio. Analyze competitive positioning at SKU level. Establish which parts are exclusive, underpriced, or overpriced versus market.

02 DEVELOP ACTIONABLE INSIGHTS

Define pricing strategy by part segment. Run scenarios. Receive governed recommendations with full rationale. Execute initial pricing actions and track impact.

03 KEEP PULSE OF MARKET DYNAMICS

Monitor market shifts continuously. Proactive alerts on emerging opportunities and risks. Pricing evolves with the market — not 12 months behind it.

CUSTOMER REFERENCE: OKUMA AMERICA

Okuma America — a leading CNC machine manufacturer with $60M+ in spare parts inventory and nearly 3 million SKUs — moved from labor-intensive manual pricing and Excel spreadsheets to systematic, market-driven pricing with MARKT-PILOT. Cost-plus pricing could not cope with tariff pressure, currency swings, and third-party resellers undercutting margins. With real-time market data, Okuma accelerated from quarterly to monthly pricing updates across their entire portfolio.

"Prices in the marketplace are a black box — with real and faux competitors muddying the waters and undercutting margins."
John Orton, Manager Pricing Strategy & Analytics, Okuma America | Full case study →

Also: DIEFFENBACHER — Solving Pricing Complexity for Purchased Parts →



06 MP ONE™ — Unified Pricing Performance Platform

A price is right, only when three things are true at the same time.

Miss one and the static pricing gap opens: margin left on the table, or a customer who felt it.

Current

Would this price still be defensible if the market moved yesterday?

Controlled

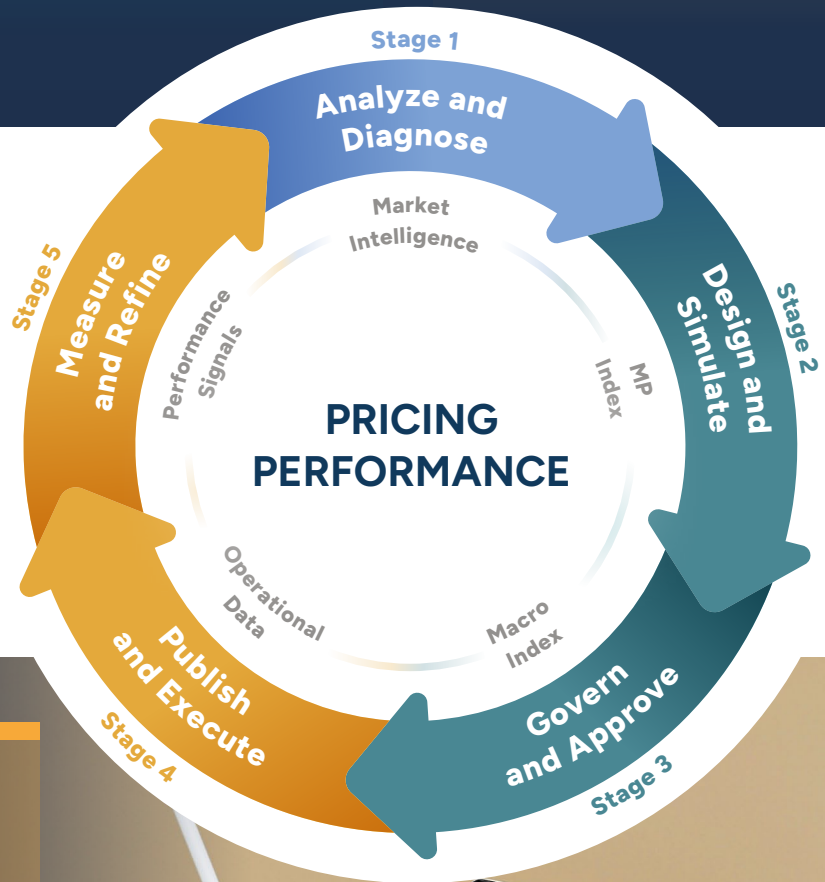
Does this survive the person who set it leaving?

Proven

Can we show the receipt?

One loop. Zero drift.

MP ONE™ runs all three continuously, as one loop instead of one annual project. **That discipline is Pricing Performance.**



4-6%
average revenue lift in the aftermarket

200+
machine manufacturers worldwide

See the loop on your own portfolio.

Click to book a demo

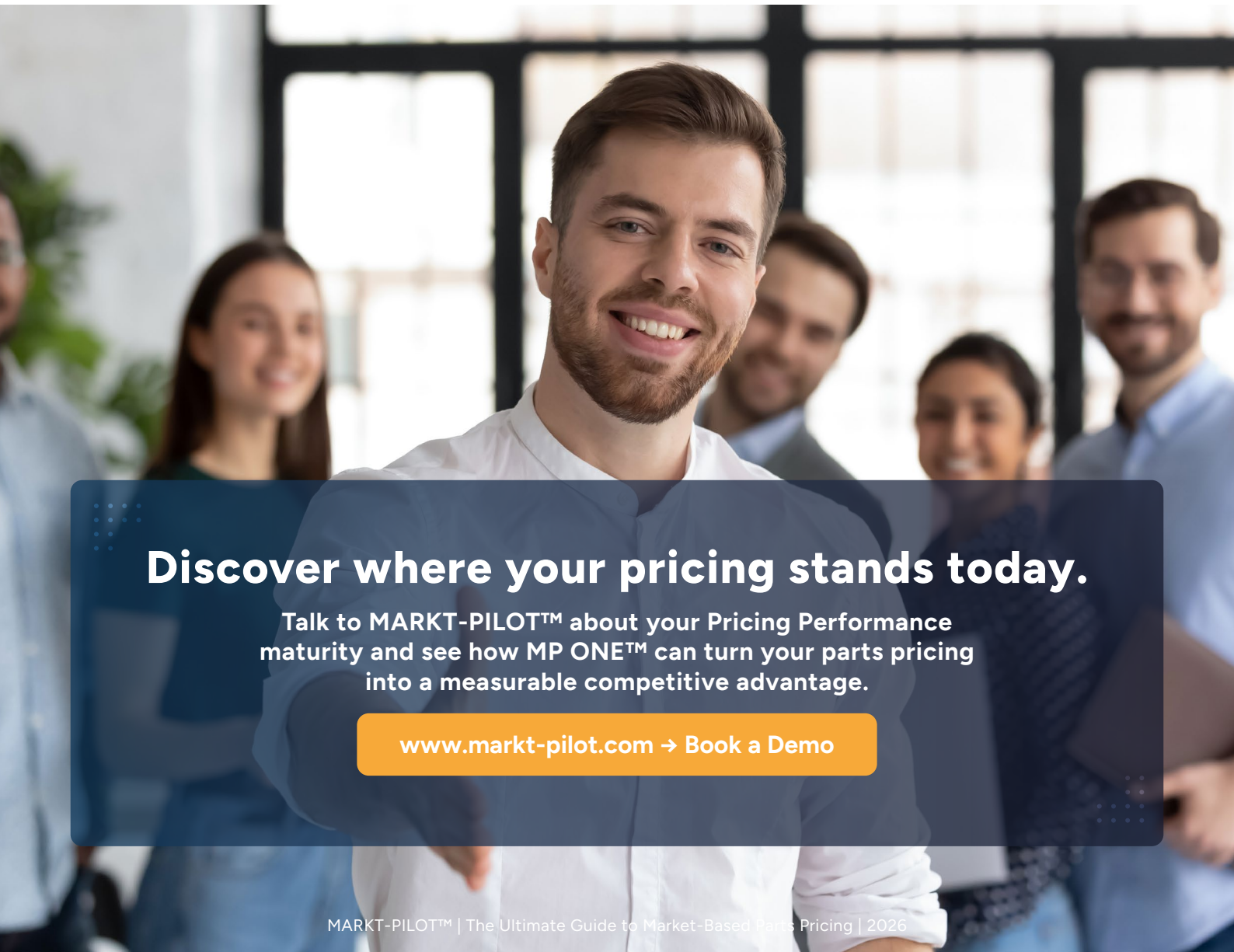
ABOUT MARKT-PILOT™ & NEXT STEPS

MARKT-PILOT™ is the Pricing Performance Company for industrial machine manufacturers.

We unify market intelligence, pricing decisions, and performance measurement in one governed platform — giving manufacturers clarity into their markets, confidence in their decisions, and control over outcomes. That is Pricing Performance. 200+ leading manufacturers across agriculture, construction, machine tooling, packaging, and industrial equipment already rely on MARKT-PILOT.

Know the Market. Win the Moment.

KOENIG & BAUER · KÄRCHER · DIEFFENBACHER · HOLMER · KÖRBER · OKUMA



Discover where your pricing stands today.

Talk to MARKT-PILOT™ about your Pricing Performance maturity and see how MP ONE™ can turn your parts pricing into a measurable competitive advantage.

www.markt-pilot.com → Book a Demo

SOURCES & REFERENCES

[1] MARKT-PILOT. Global Parts & Service Report 2025. Survey of 285 industry professionals. Proprietary platform data from 800,000+ spare part data points (2023–2025). https://www.markt-pilot.com/en/report

[2] VDMA — Verband Deutscher Maschinen- und Anlagenbau. Spare parts revenue and EBIT benchmarks for industrial machine manufacturers. https://www.vdma.org

[3] McKinsey & Company. "The Future of Aftermarket Pricing: Unlocking Value with AI." 2024. https://www.mckinsey.com/industries/automotive-and-assembly/our-insights/the-future-of-aftermarket-pricing-unlocking-value-with-ai

[4] McKinsey & Company. "AI Is Already Rewiring the Aftermarket and Services." May 2026. https://www.mckinsey.com/industries/automotive-and-assembly/our-insights/ai-is-already-rewiring-the-aftermarket-and-services

[5] McKinsey & Company. Pricing Strategy Research — pricing leverage benchmarks. https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/pricing

[6] Gartner. "67% of B2B Buyers Prefer a Rep-Free Experience." March 2026. https://www.gartner.com/en/newsroom/press-releases/2026-03-09-gartner-sales-survey-finds-67-percent-of-b2b-buyers-prefer-a-rep-free-experience

[7] Gartner. "80% of B2B Sales Interactions Occur in Digital Channels." 2025. https://www.swell.is/content/b2b-marketplace-trends-shaping

[8] Gartner / Vendict. B2B Buyer Behavior Research 2025. https://vendict.com/blog/b2b-buyer-behavior-why-verifiable-trust-digital-transparency-are-the-real-dealbreakers

[9] Mixology Digital / G2. "66 Must-Know Stats About B2B Buying." 2025. https://mixology-digital.com/blog/must-know-stats-about-b2b-buying

[10] Experis Pricing Solutions / Vendavo. "2025 Pricing for Profitable Growth Outlook." https://www.nasdaq.com/press-release/2025-pricing-considerations-identified-new-research-experis-pricing-solutions-and

[11] The Business Research Company. "Construction Equipment Aftermarket Market Report 2025." https://www.thebusinessresearchcompany.com/report/construction-equipment-aftermarket-global-market-report

[12] FieldEdge. "HVAC Profit Margins: Understand and Improve Them." 2025. https://fieldedge.com/blog/hvac-profit-margins/

[13] MARKT-PILOT. "Okuma: Journey to Smarter Parts Pricing." PARTS FORUM 2025 keynote recap. February 2026. https://www.markt-pilot.com/en/resources/blog/the-market-moves-okumas-journey-to-smarter-parts-pricing-and-managing-margins

[14] MARKT-PILOT. "DIEFFENBACHER Solves Pricing Complexity for Purchased Parts." Case study. https://www.markt-pilot.com/en/product/case-studies/dieffenbacher

© 2026 MARKT-PILOT™. All rights reserved. | www.markt-pilot.com