

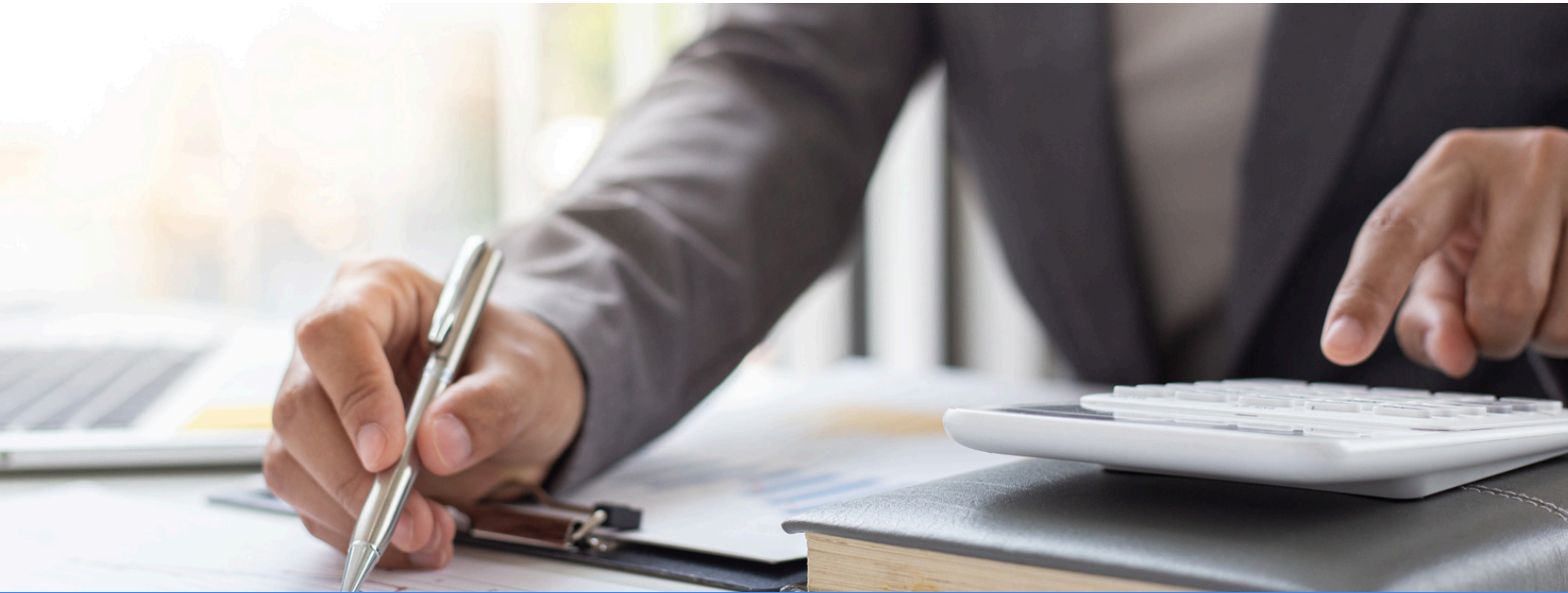


 entytle

2026 AFTERMARKET PRIORITIES

SURVEY REPORT

Message From Our CEO



Over the past decade, we've watched the aftermarket move from a "nice-to-have" profit center to the core engine of value creation for industrial OEMs. Yet this survey makes one thing very clear: even the most capable aftermarket leaders are being asked to deliver more growth, protect more margin, and retain more customers - often without the data, visibility, or executive sponsorship they need to succeed.

I believe the OEMs that will win this decade are the ones that deeply understand their Installed Base—not just who their customers are, but how they behave, buy, and signal risk and opportunity across the lifecycle. This analysis is a small but important step in that direction: it gives aftermarket leaders evidence they can take to the C-suite, and a clearer view of where to invest next to turn Installed Base insight into durable, profitable growth.



VIVEK JOSHI

CEO, Entytle

30 years of experience in
B2B Manufacturing,
Aftermarket and Services

2026 Aftermarket Priority Survey: The Stakes Have Never Been Higher

We surveyed aftermarket leaders from industrial OEMs across North America and Europe to understand their priorities, fears, and strategies for 2026. The results reveal an industry at an inflection point - caught between mounting revenue pressure and the existential need to retain customers, all while fighting for a seat at the executive table.



2026 Priorities

The Pressure Is Real -
and Personal



Impact

The Consequences of
Inaction Are
Compounding



Mitigation

The Path Forward:
Installed Base
Intelligence and Supply
Chain Resilience

The Pressure Is Real - and Personal

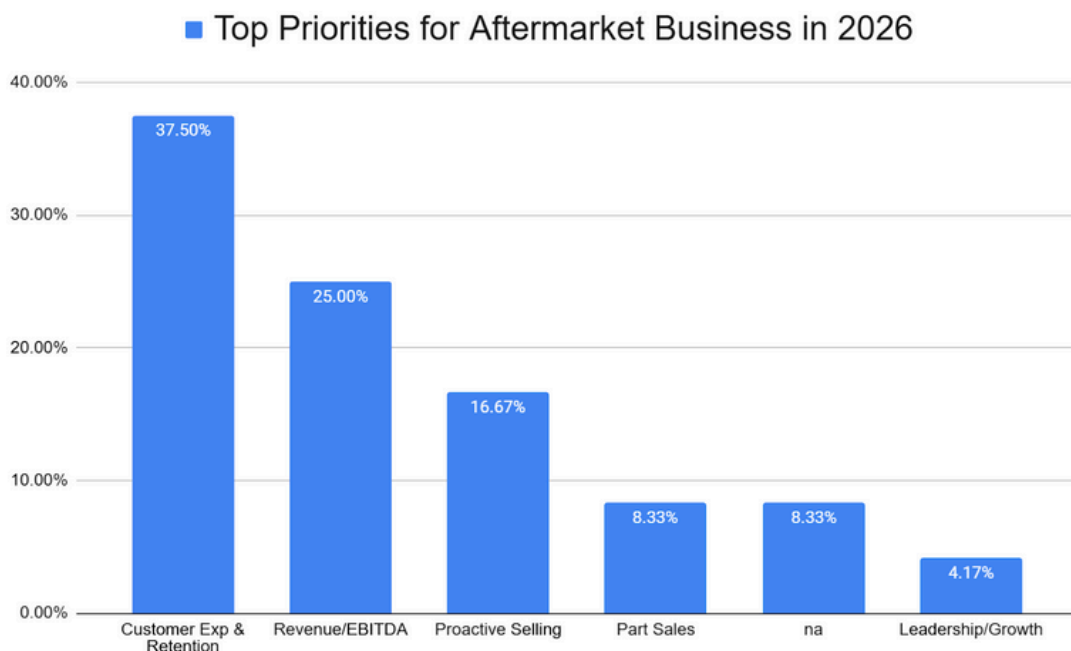
Aftermarket leaders are navigating a dual mandate: drive revenue and EBITDA growth while protecting customer relationships. Our survey data confirms this tension:

37.5% **prioritize customer experience and retention** as their single most pressing issue - focused on "maintaining customer share of wallet," "retaining customers in the light of tariff-driven price increases," and "listening carefully to our biggest customers."

Survey responses reveal customer experience and revenue/EBITDA as the dominant priorities, accounting for 62.5% of all responses

25% center on revenue and EBITDA growth - explicitly calling out "recurring revenue growth and IB value maximization," "EBITDA growth," and "growth of revenue."

17% emphasize proactive selling to shift from reactive order-taking to strategic account development.



Yet many still lack the executive credibility to act decisively. As one respondent put it: "I do not get a seat at the table of leadership." Another noted bluntly that without demonstrable progress on growth and margin, the consequences are clear: "Don't make goals. Don't get bonus. Get replaced."

This is not merely a business challenge - it is a career and credibility risk.

The Consequences of Inaction Are Compounding

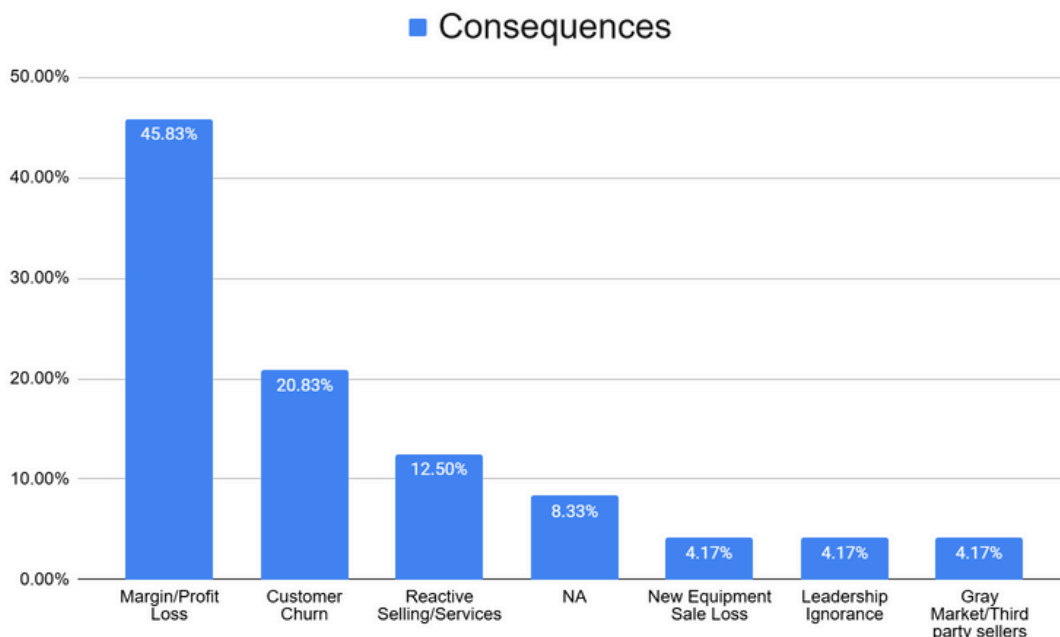
When we asked what happens if these priorities are not addressed, the responses were stark:

45.83% cite **margin and profit loss** as the primary consequence
Half of all respondents cite margin and profit loss as the primary consequence, while nearly a quarter fear customer churn

20.83% **fear customer churn** - "they might leave us to our competitors," "loss of IB," "customer losses, decrease of loyalty, decrease of market share"

12.5% warn of being **trapped in reactive selling** and limited service offerings

Others flag gray market leakage, leadership ignorance, and new equipment sales decline



The message is unambiguous: inaction equals revenue erosion, customer defection, and organizational marginalization.

The Path Forward: Installed Base Intelligence and Supply Chain Resilience

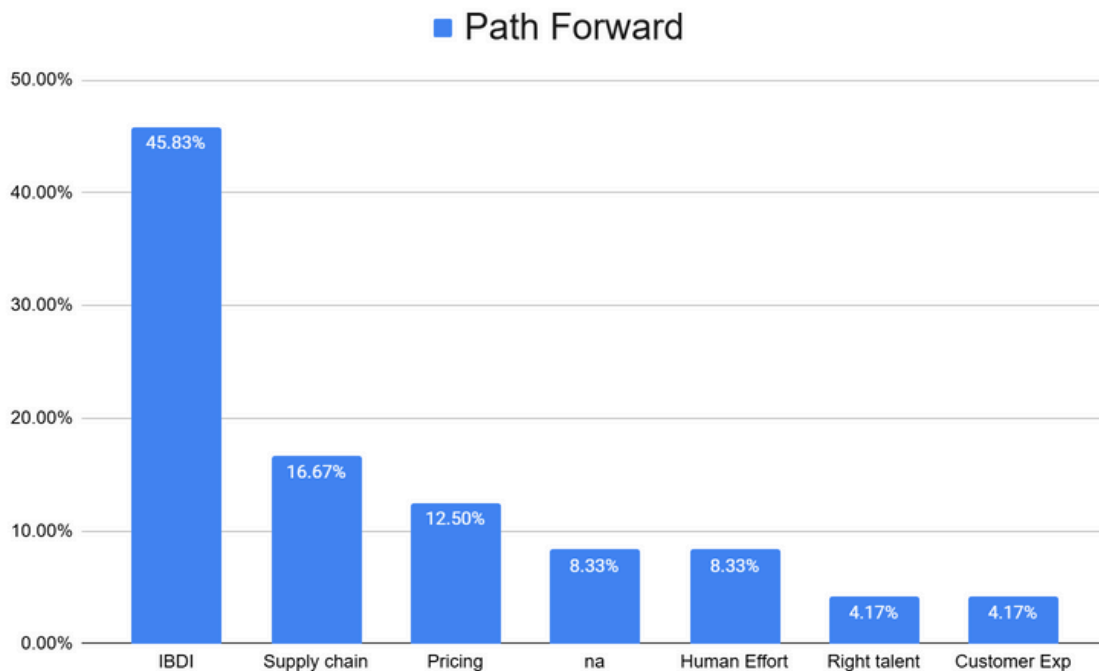
When leaders outlined how they plan to mitigate these risks, two themes dominated:

45.83%

Installed Base Data & Intelligence (IBDI) emerged as the clear priority, accounting for 45.83% of all mitigation strategies. Responses include "better control on the IB," "develop detailed understanding of the operational installed base," "installed base activation, Key Account Management, up-selling of solutions," and "value selling, data-driven service concept, AI." Nearly half of all mitigation strategies center on Installed Base Data & Intelligence (IBDI), with supply chain management emerging as a critical secondary focus

17%

Supply chain management jumped to 17% of responses - the third most cited strategy - because parts availability directly impacts customer satisfaction and retention. Leaders recognize that "steady supply of spare parts," "daily work to secure a better and resilient supply chain," and "striking a balance between location of touch points and cost of transportation" are table stakes for defending wallet share.



The pattern is clear: OEMs are realizing they need to pay attention to their Installed Base to address revenue, retention, and relevance risks simultaneously.

Why Deep Installed Base Understanding Matters Now



Addressing these risks starts with a deeper, more granular understanding of your Installed Base - not just lists of customers and machines, but how they behave, buy, use, and churn over time. OEMs that win in the aftermarket will be those that can see patterns in this behavior: which segments are most at risk, which fleets are under-penetrated, which customers are signaling upcoming demand, and where gray market threats are emerging.

This kind of Installed Base understanding enables commercial, service, and supply chain teams to act in concert instead of in silos - designing offers around actual usage patterns, prioritizing accounts with the highest upside, and aligning inventory and capacity to real demand signals. It turns the aftermarket from reactive order-taking into a proactive growth engine, grounded in evidence rather than assumptions.

Entytle's Installed Base Intelligence Platform is built to deliver exactly this level of behavioral and pattern-level visibility, and its Autonomous Aftermarket capabilities help turn those insights into consistent, scalable action.



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