



double loop

it's all about people and value



A Double Loop & ValueBizbooster Webinar

Tackling Pricing Pressure in the Chemical Industry and B2B Manufacturing Businesses

Survey Results & What We Can Do About Pricing Pressure - Feb 26th, 2025

Dr. Ralf Schmidt & Dr. Steve Laborda

Double Loop & ValueBizbooster

chemvalue-academy.com

1. Welcome & Introduction
2. Survey Results
3. Recommendations
4. Contact & More Information



The Initiators of the Study



Dr. Ralf Schmidt



Dr. Steve Laborda

The Initiators of the Study: Ralf

PhD in Marketing

Master in Business Administration

Founder of Double Loop

Based in Germany

B2B Marketing & Sales Excellence expert with a focus on the chemical industry and more than 30 years of experience in the fields of B2B Marketing, Pricing, Sales Excellence, Sales Enablement & Coaching, Account Management, KAM and Value Selling.

Lead Marketing & Sales Trainer for BASF

Myers Briggs Type Indicator® certified, hands-on and with a down-to-earth mentality.

In his private life: Husband, dad to three kids, Savate-kickboxer, Online Deep House Hobby DJ and cigar aficionado. And you see him regularly in the gym and on hikes in nature.



PhD in chemistry

Founder of ValueBizbooster

French, based in Germany

Overall 15+ years of experience in B2B sales & marketing

Expert in commercial excellence and value-based selling

In his corporate life, he was leading a commercial excellence program focusing on profitable growth and sales enablement for a global 2,5 B€ corporation (chemicals) and led and successfully delivered change management initiatives in 20+ projects in EMEA, AMER and APAC.

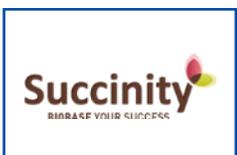
Thought leader and passionate about value-based selling

Author of the book: „Master The Art of Value-based Selling“

In his private life: Married and father to two kids aged 21 and 14. He loves bouldering and cooking.



A Selection of Our Customers



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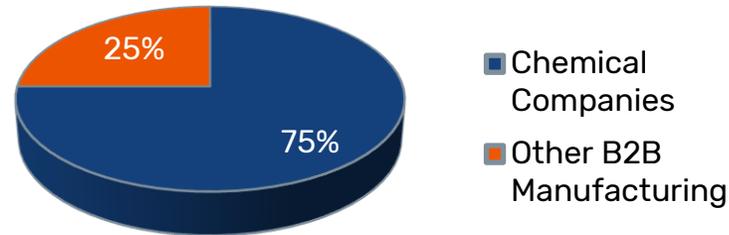


Demographics

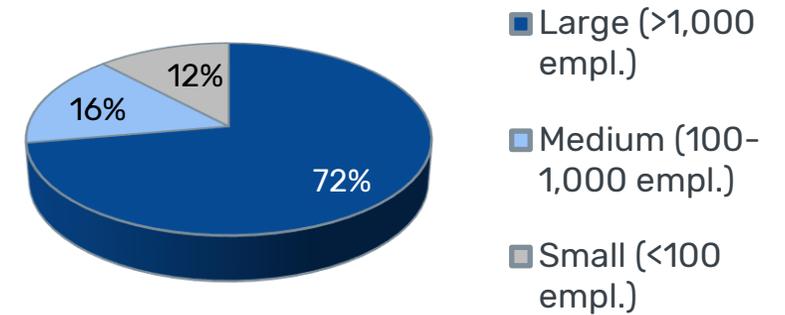
IN TOTAL:
84 participants



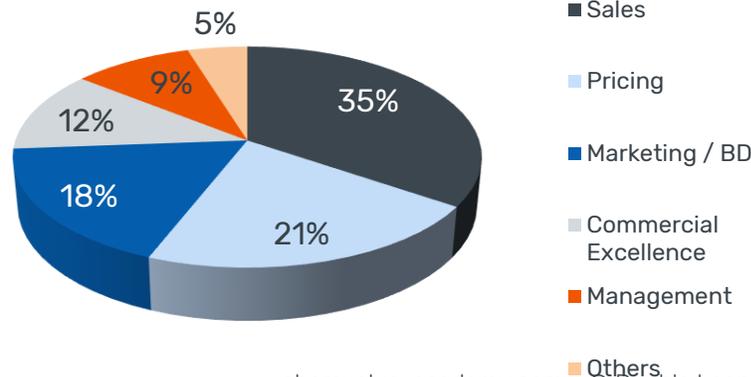
INDUSTRIES



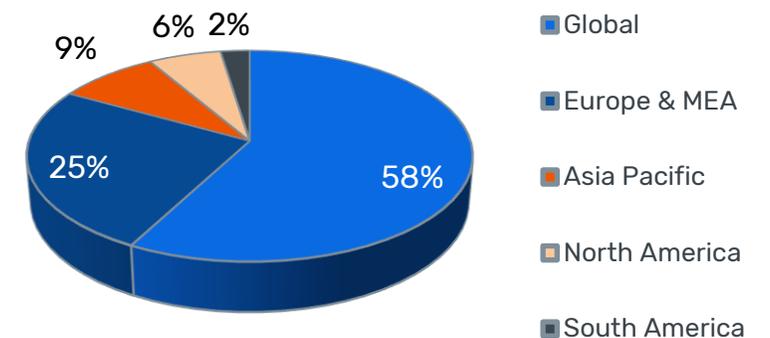
COMPANY SIZE



FUNCTION



REGION





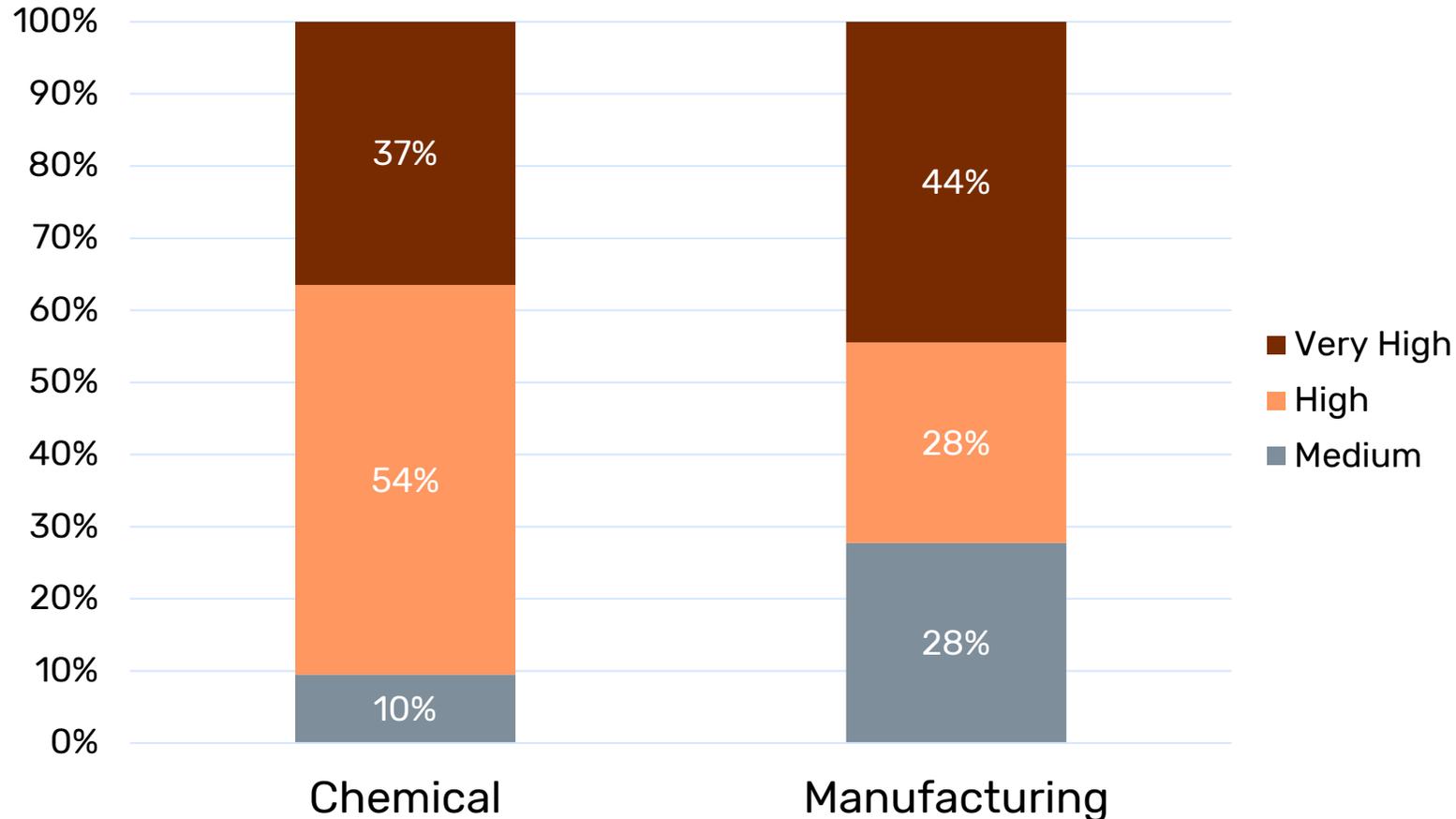
How big is the pricing pressure?



87% of companies are navigating significant pricing pressure, a challenge that has intensified over the past two years.

Source: Double Loop / Valuebizbooster Survey (2025)

How Big Is the Pricing Pressure You Are Experiencing Nowadays?

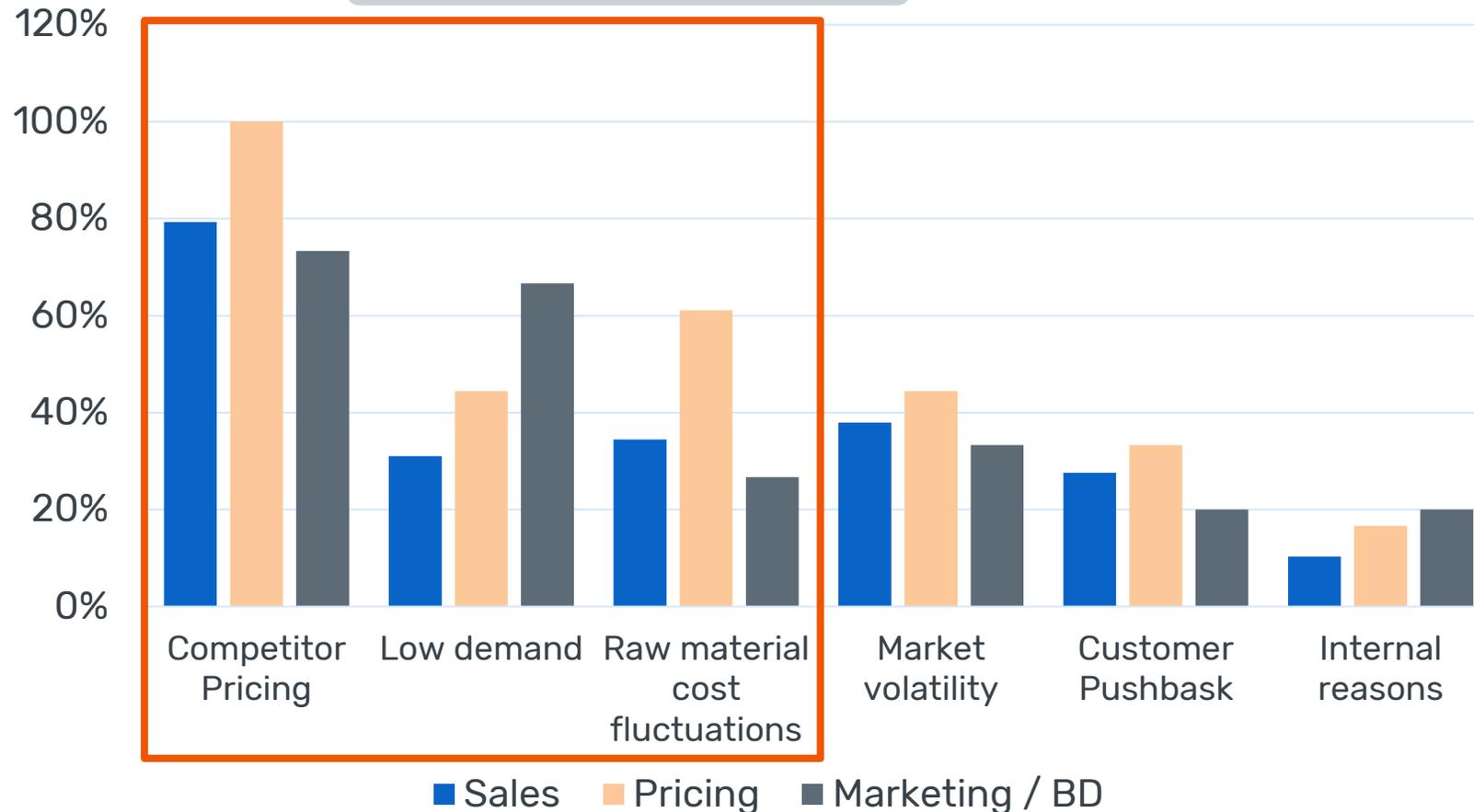


Highlights

- ∞ The chemical industry feels more pricing pressure than other B2B manufacturing.
- ∞ Across industries, 80% of respondents report rising pressure over the last two years.

What Is the Reason for the Pricing Pressure?

AI clustered open-ended responses



💡 Highlights

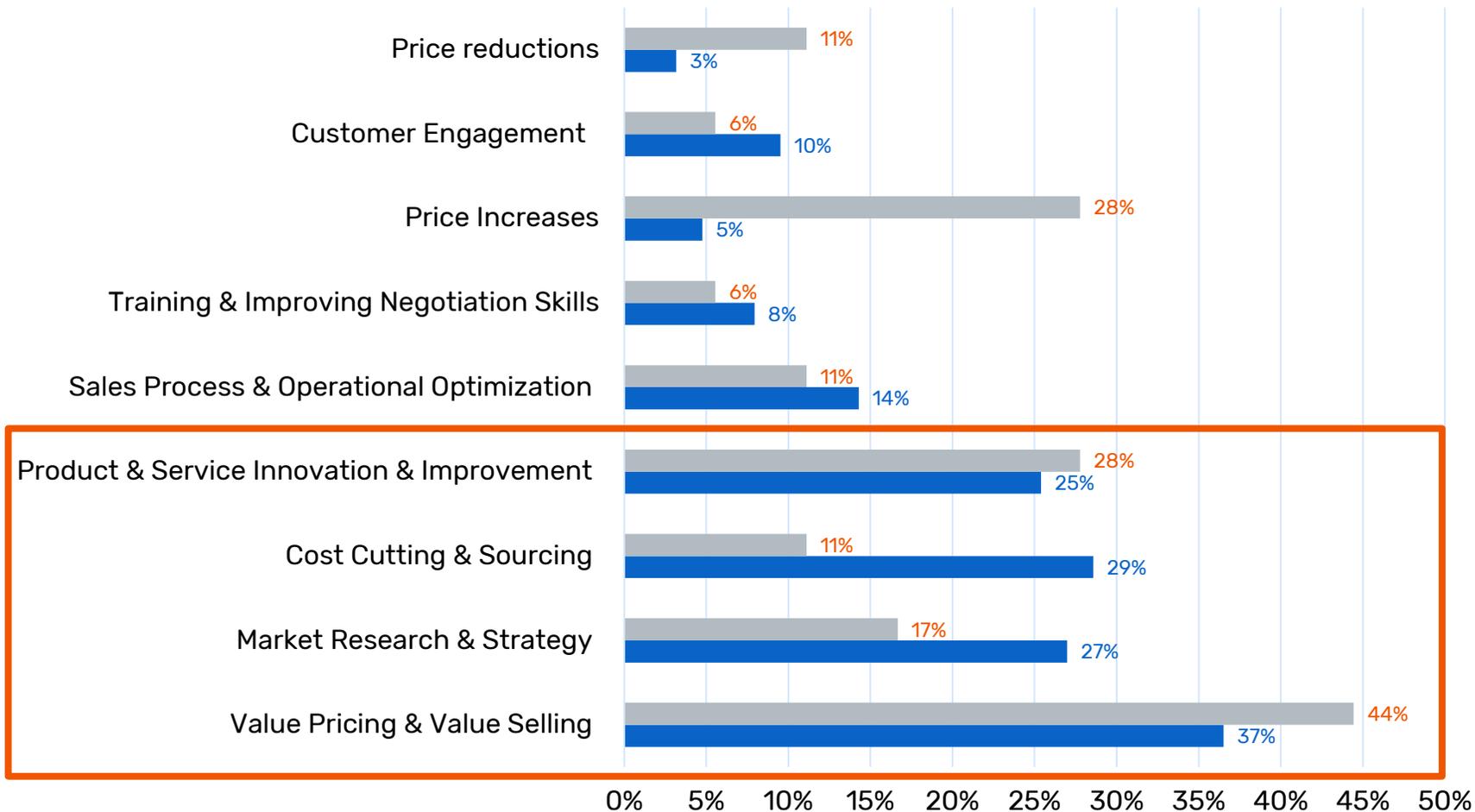
- ∞ There is a **handful of reasons** for pricing pressure.
- ∞ It's always the others: **Most blame their competitors** for causing price pressure.
- ∞ Marketing also sees the **low demand** as another important reason.

What Measures Are You Taking to Cope with The Pricing Pressure?

Measures Taken:

All clustered open-ended responses

■ Other B2B Manuf. ■ Chemicals



Highlights

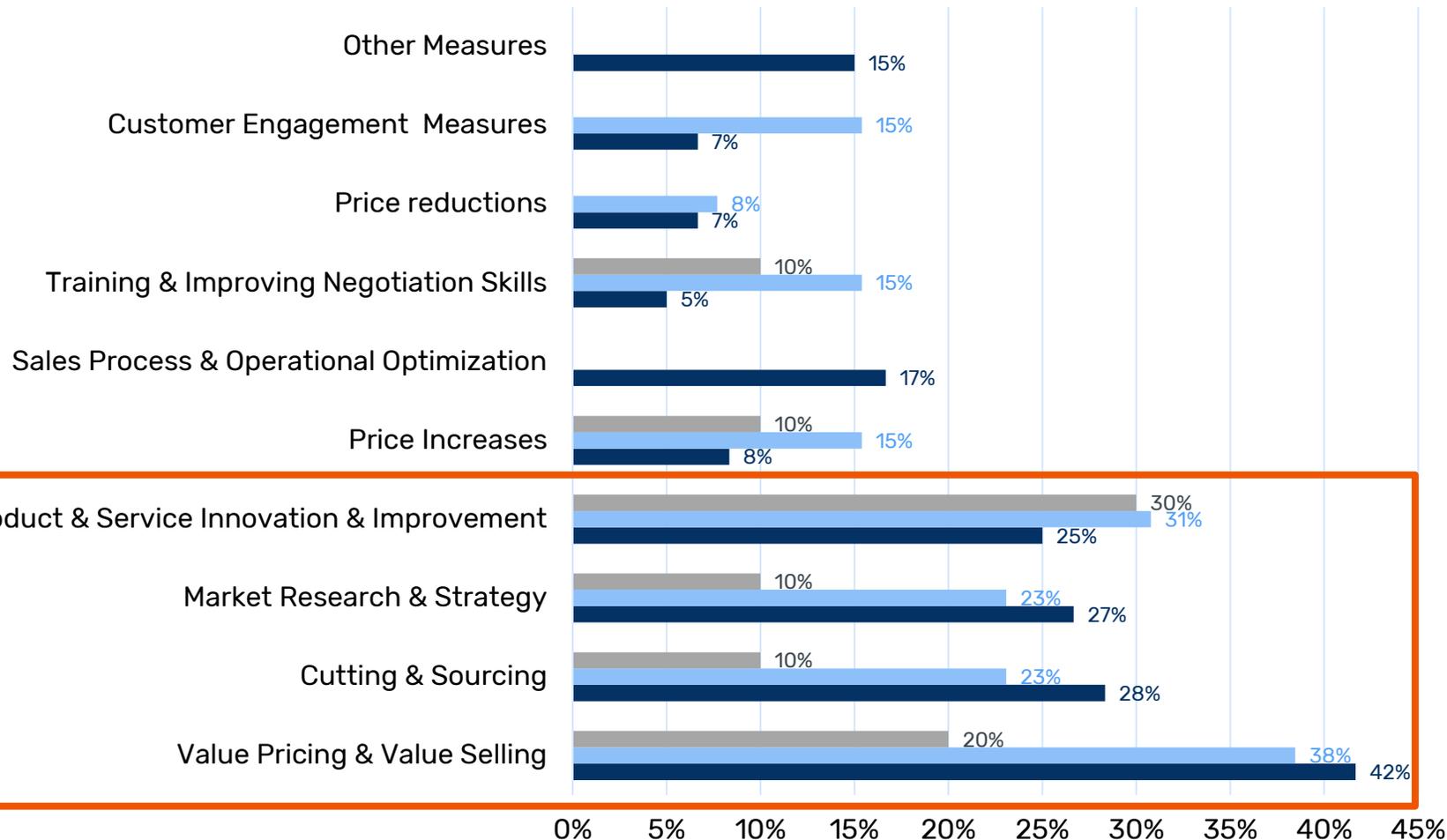
- ∞ Value-driven strategies lead the way
- ∞ Chemical companies also rely on market research, cost cutting and innovation.
- ∞ Other B2B manufacturing companies implement more price increases.
- ∞ Companies see little need to invest into negotiation skills.

What Measures Are You Taking to Cope with The Pricing Pressure?

Measures Taken:

AI clustered open-ended responses

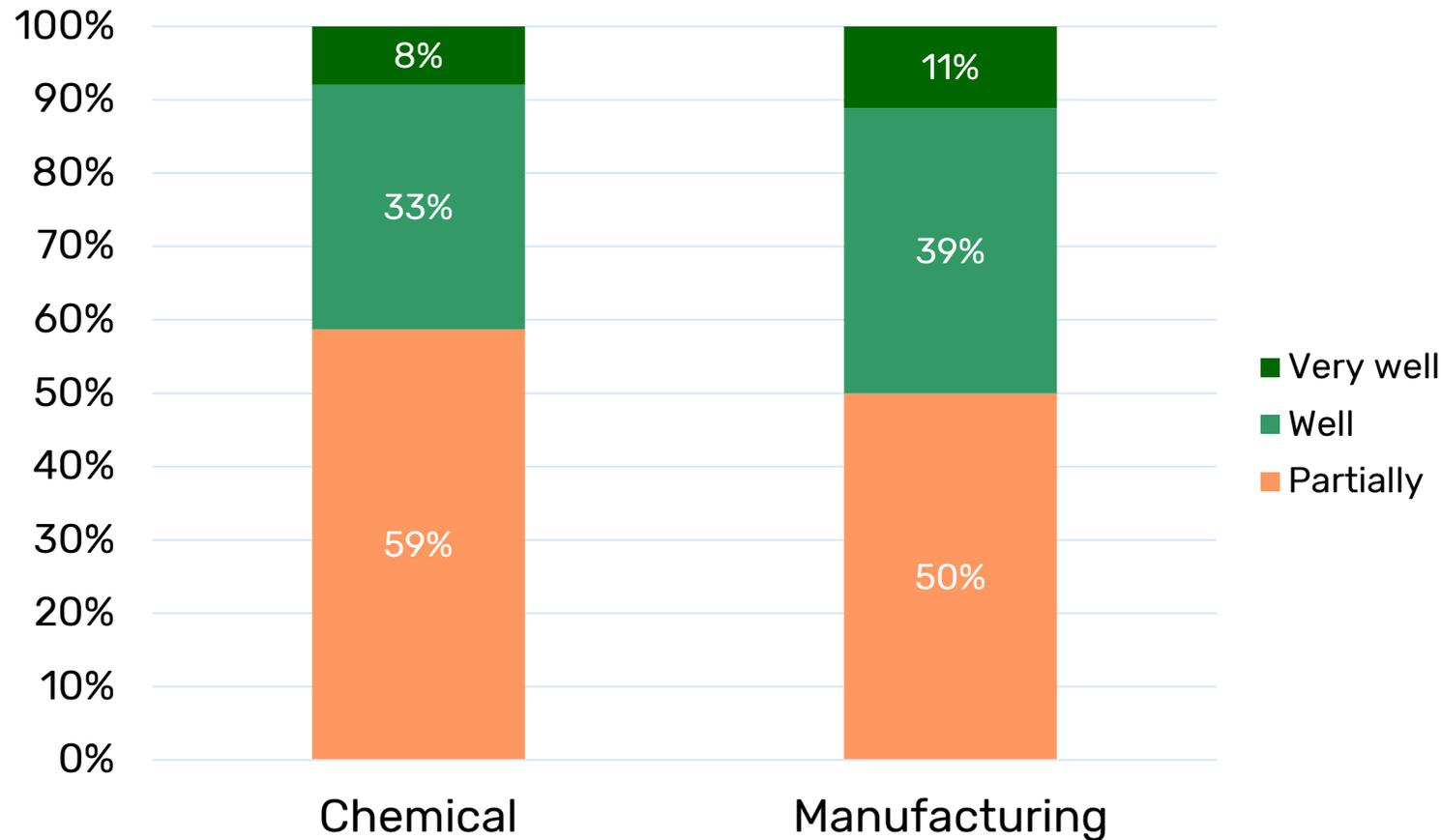
■ Small ■ Medium ■ Large



Highlights

- ∞ Value Pricing / Selling Measures are the top priority for large and medium companies, followed by cost cutting, market research & strategy and innovation, which is also important for small companies.
- ∞ Improving negotiation skills to enhance deal-making effectiveness is not seen as a priority.

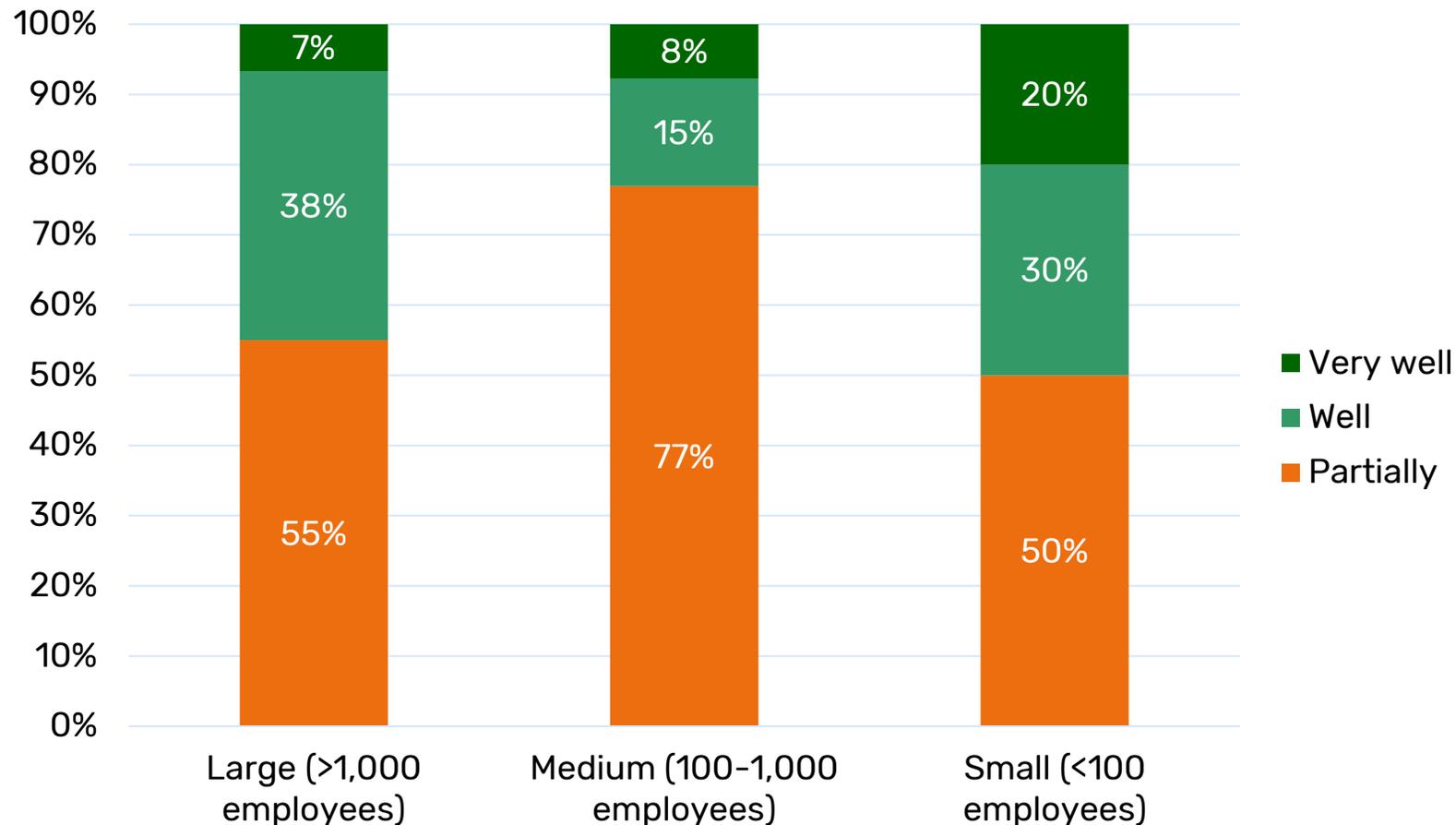
Do You Feel Well Equipped to Deal With the Pricing Pressure? – By Industries



💡 Highlights

- ∞ 50% to 60% of the respondents don't feel well equipped to deal with the pricing pressure!
- ∞ Chemical companies feel less prepared.

Do You Feel Well Equipped to Deal With the Pricing Pressure? – By Company Size

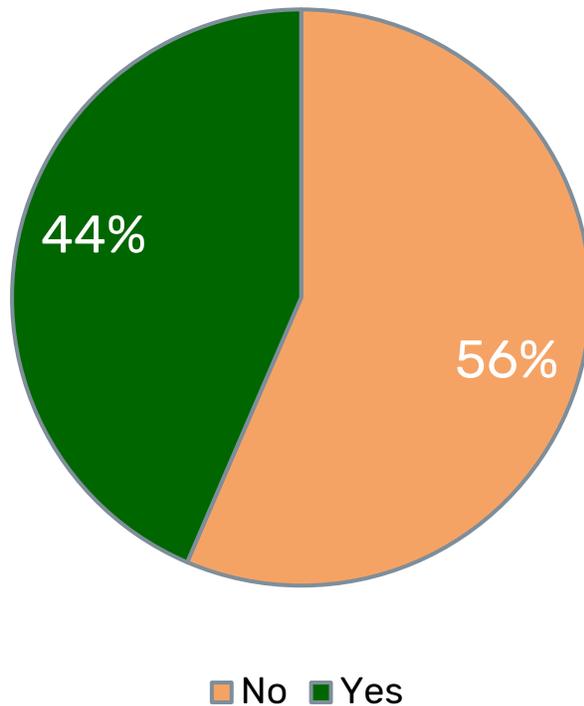


💡 Highlights

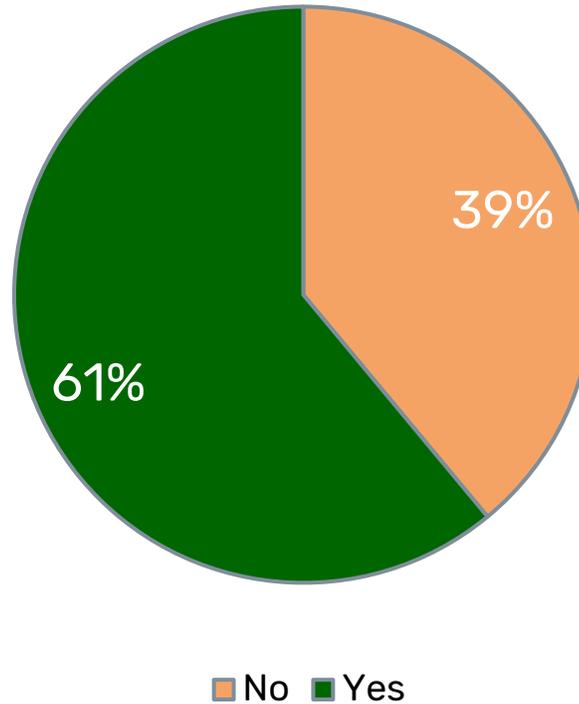
- ∞ Medium-sized companies have a much bigger issue: Only 23% feel well equipped!
- ∞ Small companies feel better prepared: 50 % of the small companies feel well to very well equipped to deal with the pricing pressure

Are Your Value Propositions Strong Enough to Avoid Price Reductions?

Chemical



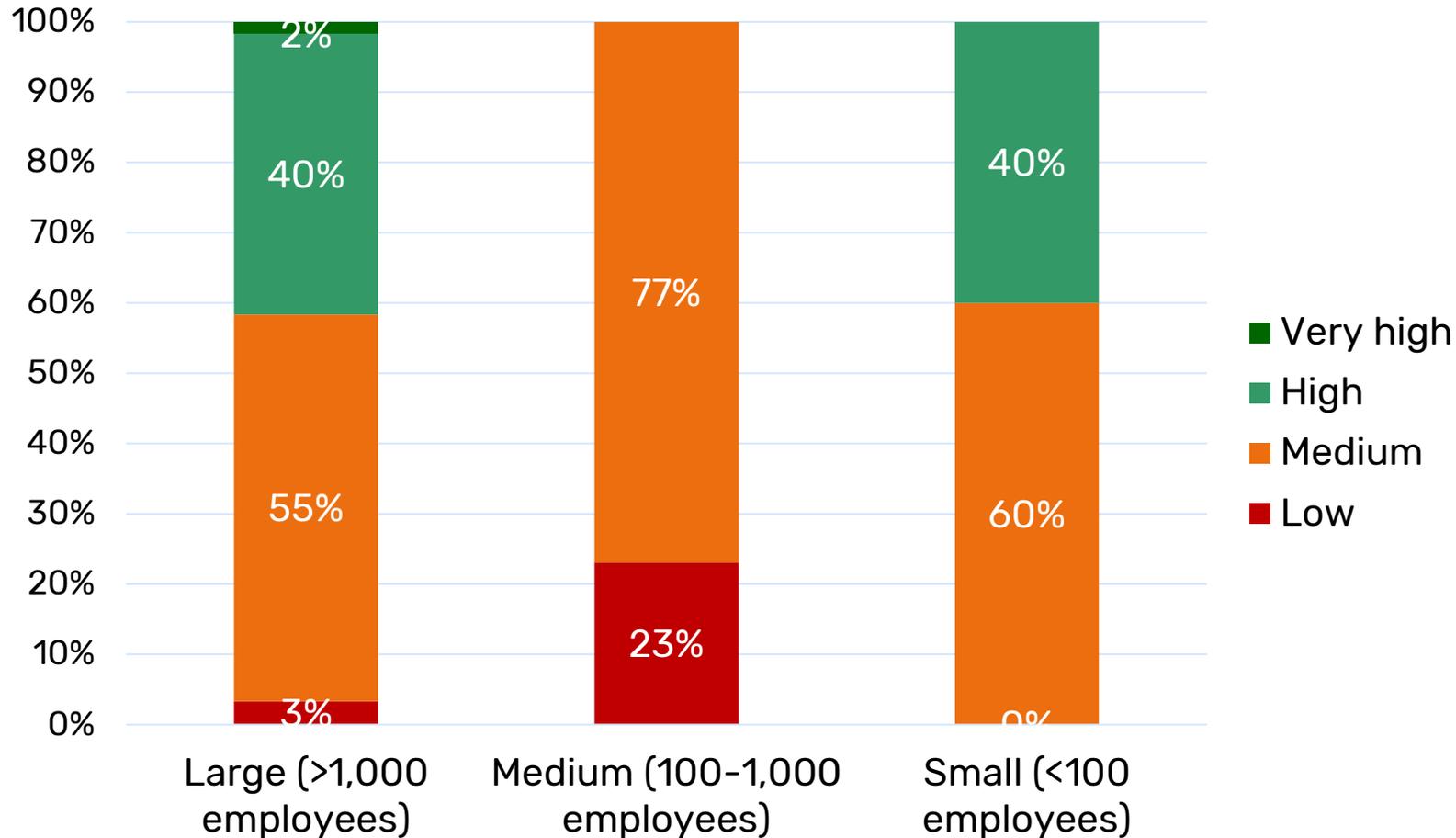
Manufacturing



💡 Highlights

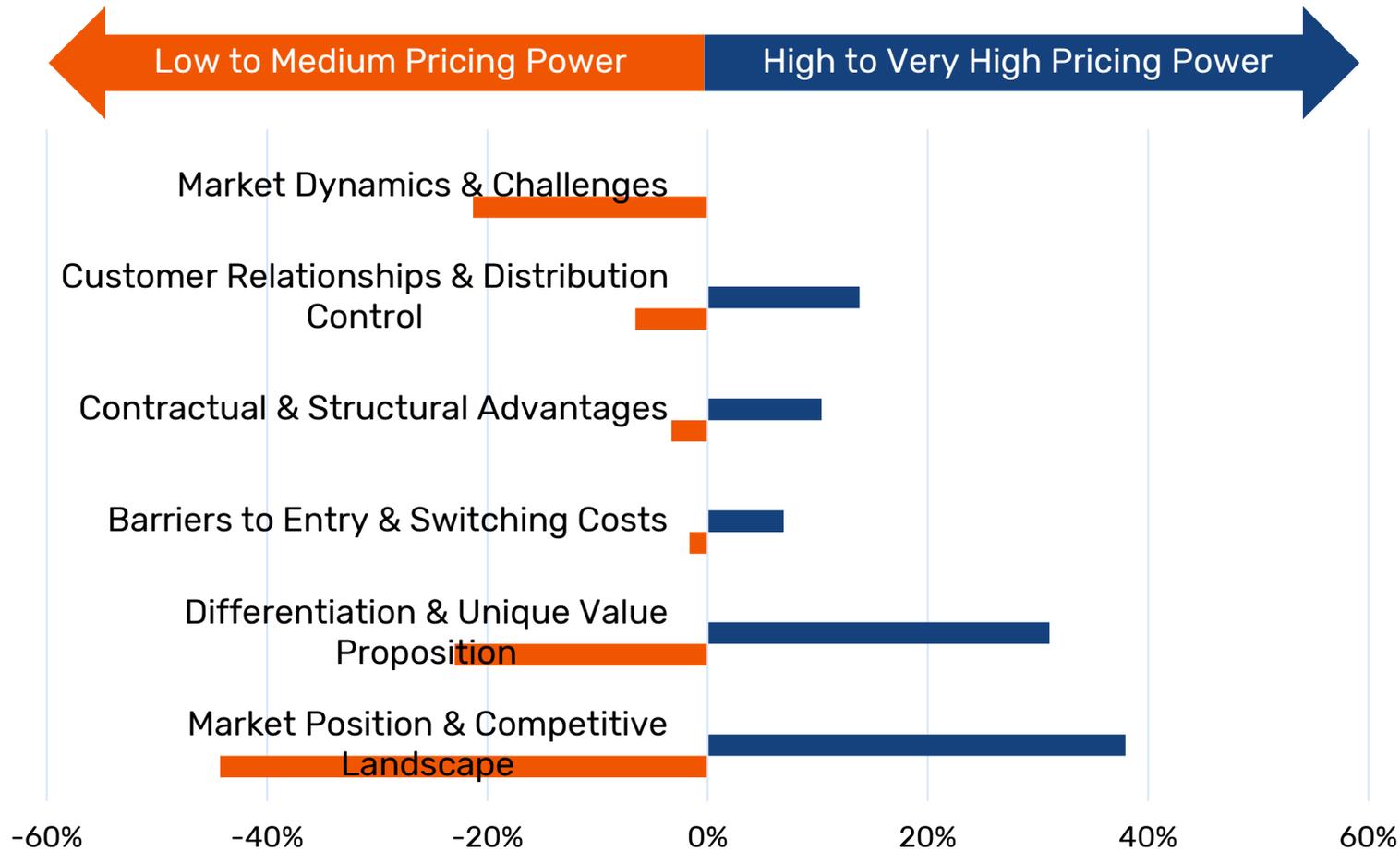
- ∞ Chemical companies seem to have weaker value propositions than other B2B manufacturing companies.
- ∞ This may be the reason why they feel less equipped to deal with pricing pressure.

Does Size Matter for the Pricing Power?



💡 Highlights

- ∞ Appr. 40% believe that they have high pricing power.
- ∞ Medium-sized companies feel a much lower pricing power than other companies.
- ∞ There's significant room for improvement in pricing power.

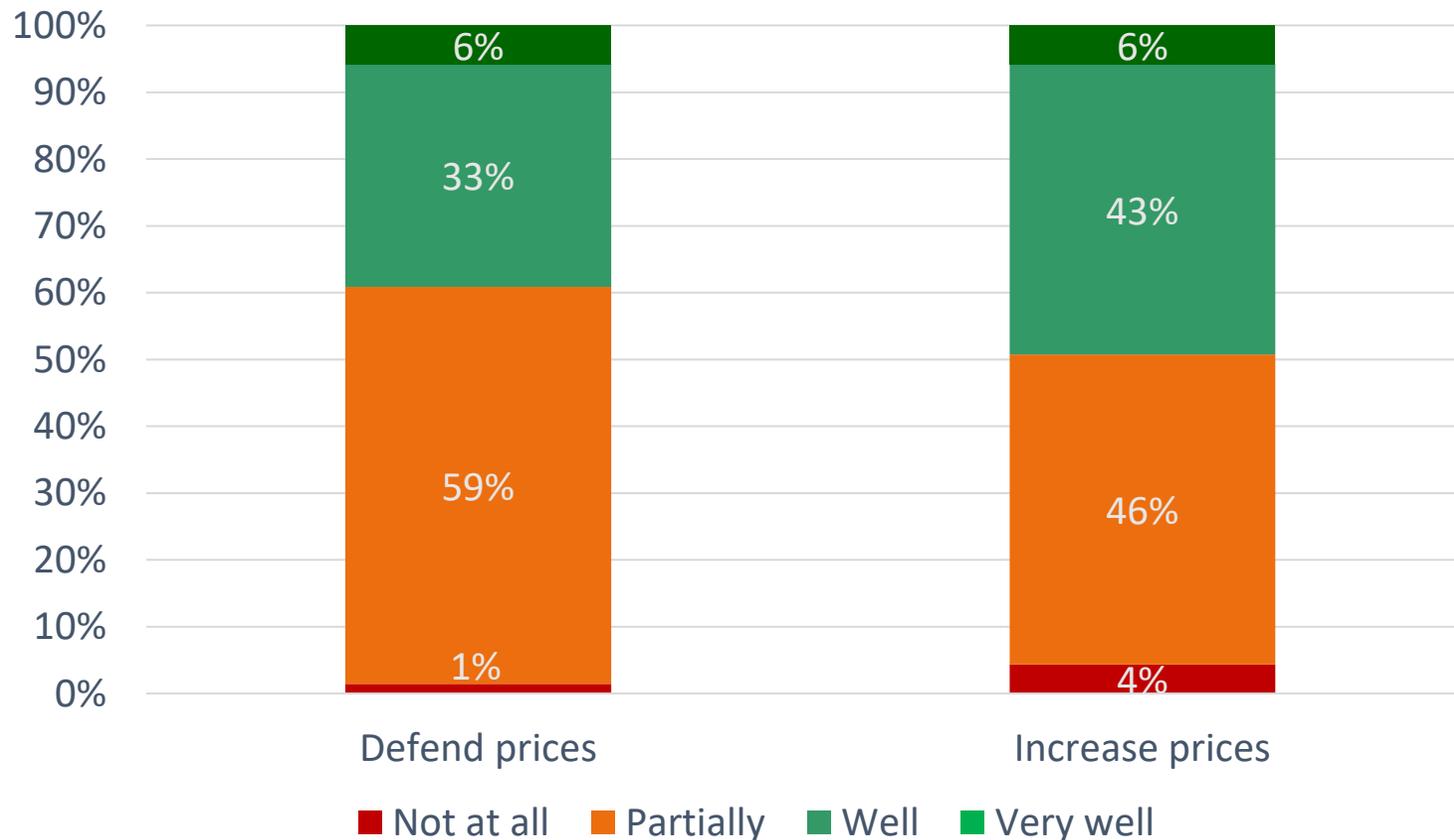


AI clustered open-ended responses

💡 Highlights

- ∞ Market position and the competitive situation and Value Selling & differentiation strategies are the main reasons for having high or low pricing power.
- ∞ Those respondents who felt less pricing power also mentioned market challenges and dynamics as another important reason.

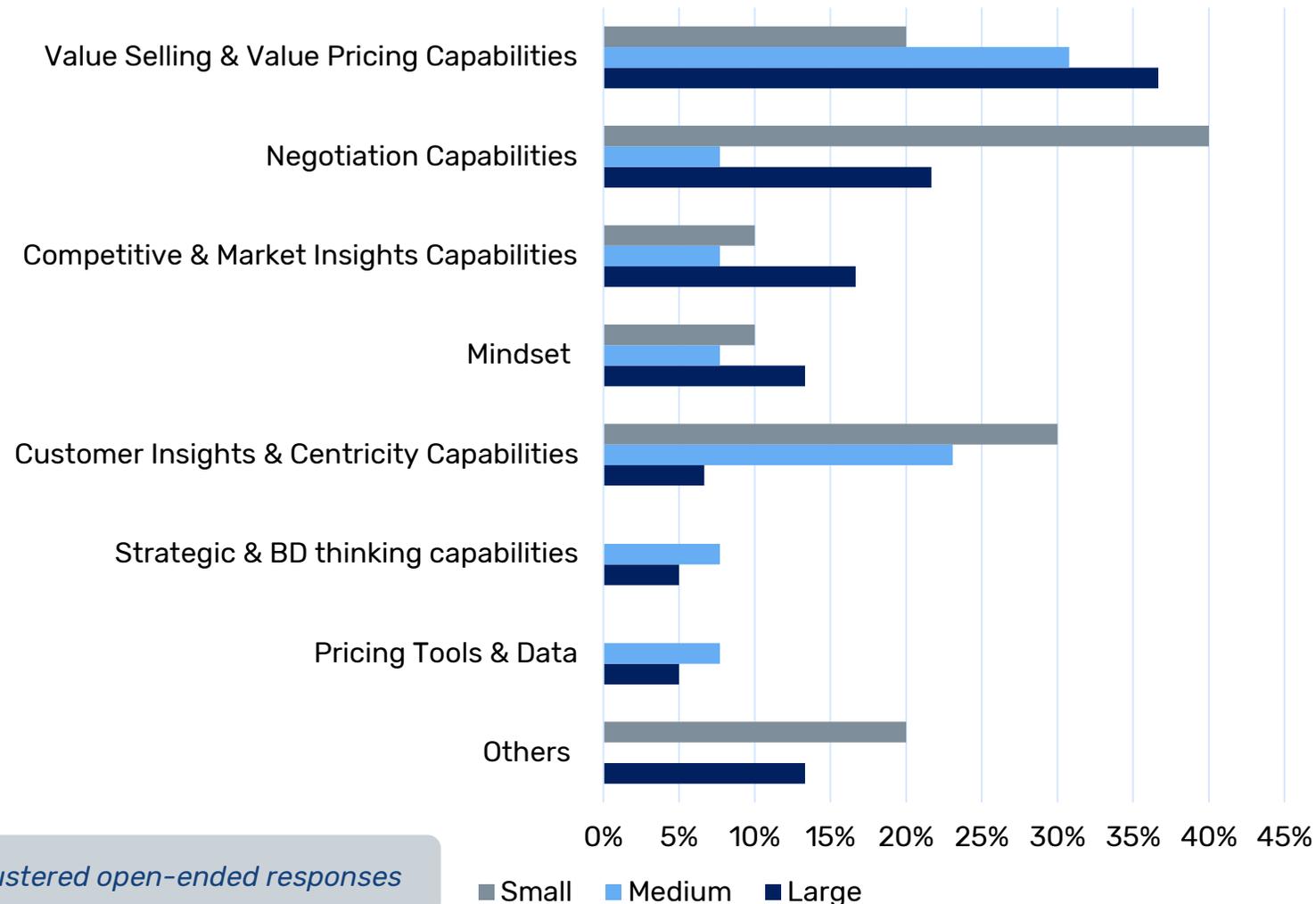
Are Your Sales Teams Well Equipped for Defending Prices Against that Pressure?



💡 Highlights

- ∞ Almost 60% perceive that the sales teams are not well prepared to defend prices when they get under pressure.
- ∞ Sales is slightly better equipped to increase prices than to defend prices.
- ∞ No significant difference between Chemicals and other B2B manufacturing

What Pricing Capabilities or Skills Do Your Teams Need to Develop in the Next 12 Months?



AI clustered open-ended responses

💡 Highlights

- ∞ Medium-sized and large companies understand that they have to develop Value Selling and Value Pricing capabilities!
- ∞ Small companies put more focus on developing their negotiation skills and customer centricity.

Are companies suffering from pricing pressure?

Yes. 87% feel high or very high pricing and increasing pressure.

What are the reasons?

It's always the others: Most cite their competitors as the main reason for price pressure.

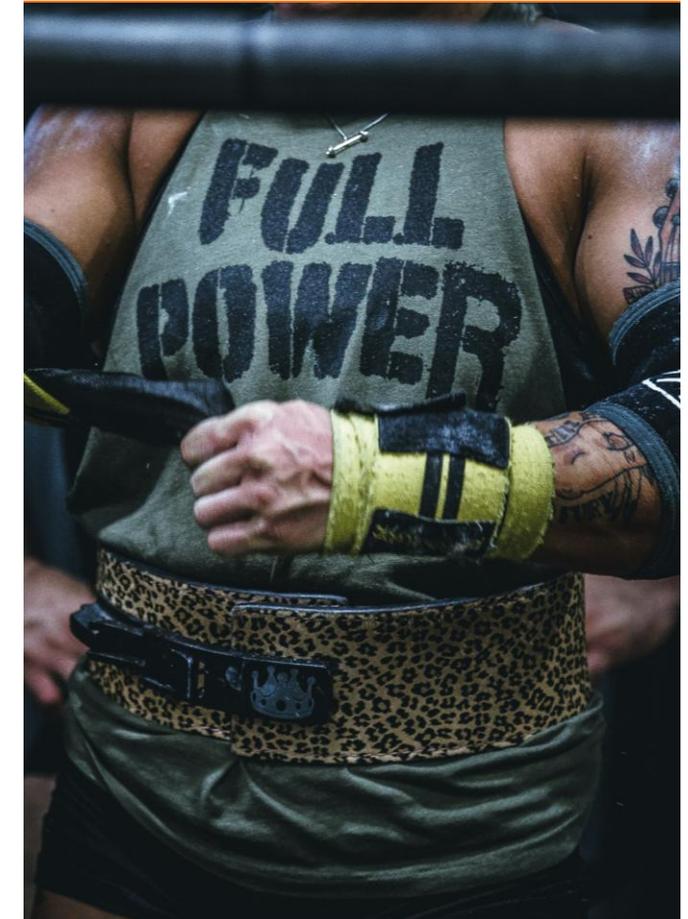
How much pricing power do companies have?

Appr. 40% believe that they have high pricing power. Medium-sized companies seem to have much less pricing power.

Almost 60% don't feel well equipped. Medium-sized companies have a much bigger issue. And chemical companies seem to have weaker value propositions.

What are the main reasons for having or not having pricing power?

The biggest drivers of pricing power are market position, competitor landscape and value proposition.



Summary & Conclusions: Measures

What are companies doing?

Value and differentiation lead the way: Most companies move into the direction of Value Selling and Value Pricing.

What are **chemical companies** doing additionally?

Strategy & market research, cost cutting and innovation – a perfect mix.

What are **other B2B manufacturing companies** doing additionally?

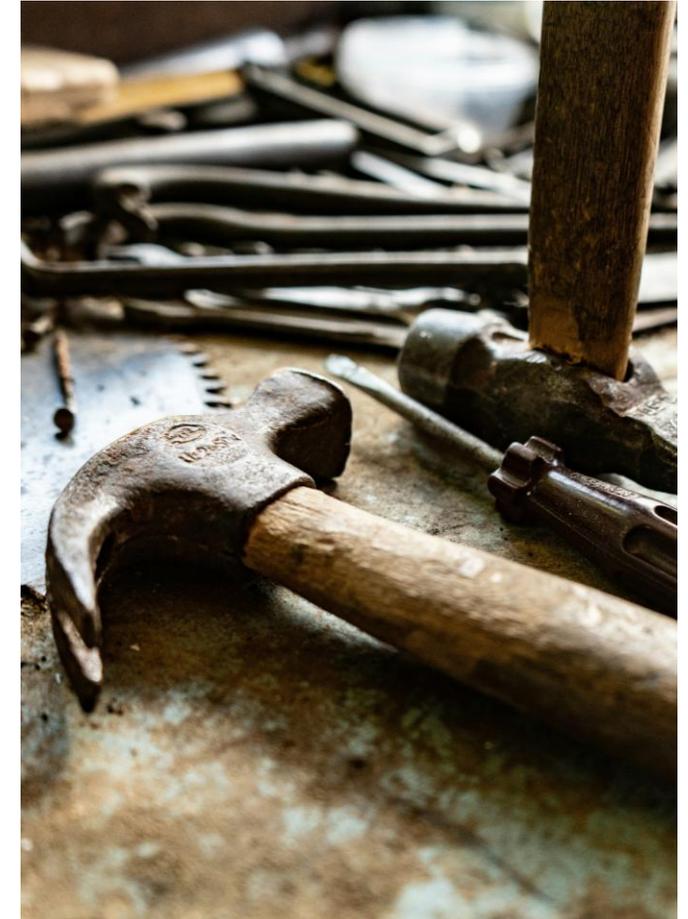
Innovation and price increases and less cost cutting.

And **small and medium-sized** companies?

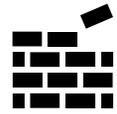
More focus on product & service innovation.

Interesting

Companies see only little need to invest into negotiation skills.



Summary & Conclusions: Skills Your Teams Need to Develop in the Next 12 Months?



Almost 60% perceive that the **sales teams are not well prepared to defend prices** when they get under pricing pressure.



Medium-sized and large companies understand that they have to develop **Value Selling and Value Pricing** capabilities!



Small companies rely more on **developing negotiation skills and customer centricity**.





Summary & Conclusion

ValueBizbooster

Steve Laborda

Pricing pressure is an undeniable challenge. However, the ability to command pricing power can be a game-changer.

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There are 9 measures you can do to increase and use your pricing power ...



Summary: Recommendations

1

Market & competitive & customer intelligence

2

Assess your pricing power

3

Respect your market position

4

Optimize your sourcing

5

Ensure a strict CM orientation

6

Value Selling & Value Pricing

7

Innovation: Product, services, business model

8

Develop long lasting customer relationships & smart contracts

9

Improve your negotiation skills

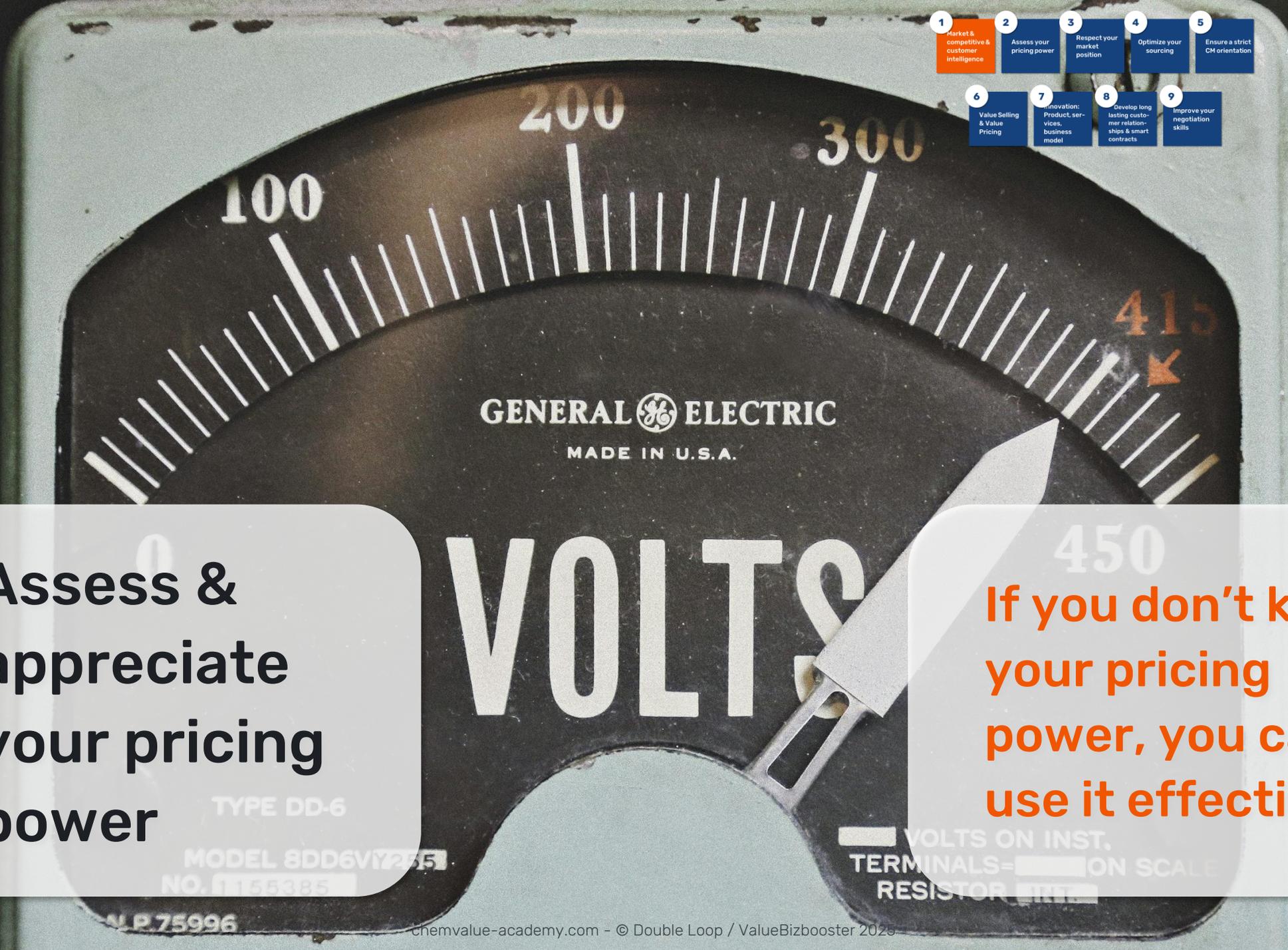


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1

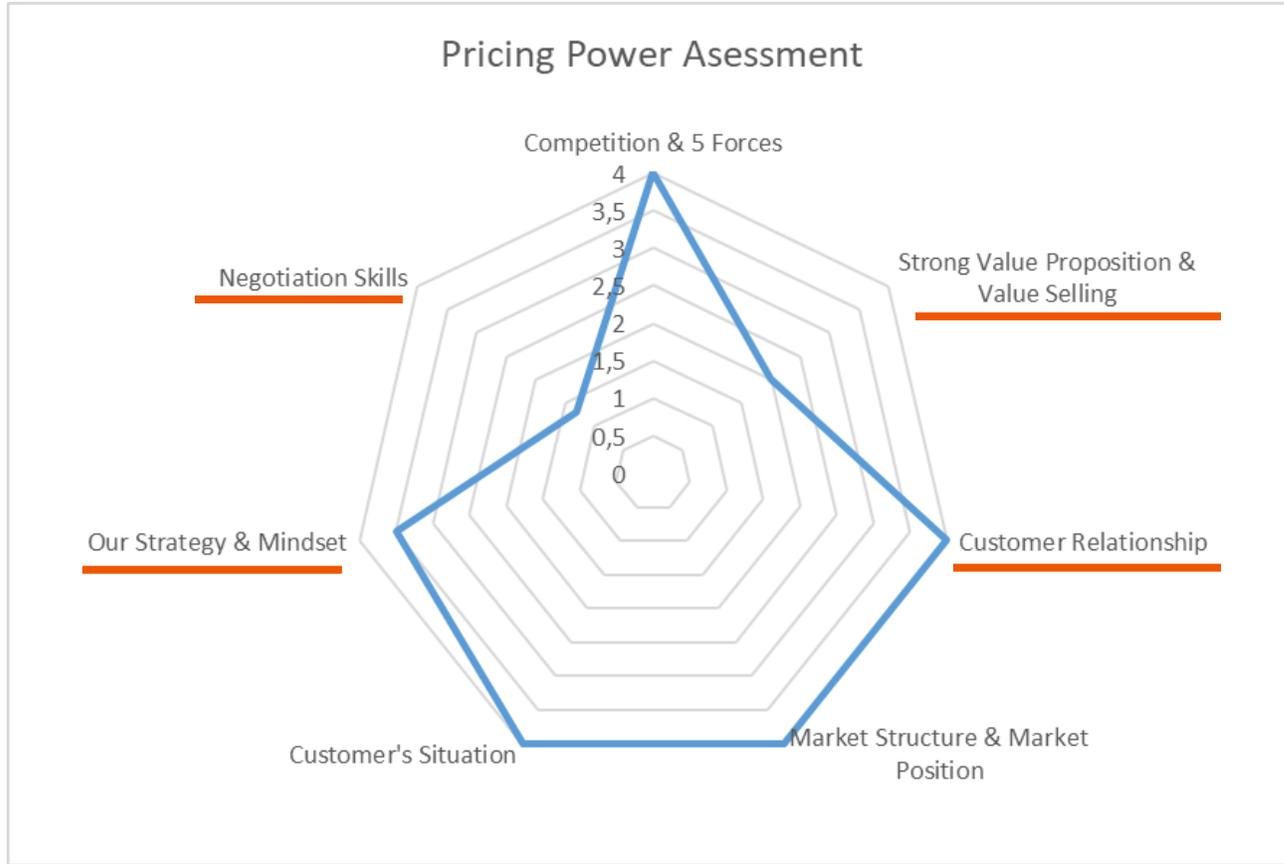
Assess & appreciate your pricing power

If you don't know your pricing power, you can't use it effectively!



Checklist – Pricing Power

- 1 Market & competitive & customer intelligence
- 2 Assess your pricing power
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- 5 Ensure a strict CM orientation
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Competition & 5 Forces	I rather disagree	I fully agree
Value Proposition	I rather disagree	I fully agree
Customer Relationship & Insights	I rather disagree	I fully agree
Market Structure & Market Position	I rather disagree	I fully agree
Customer's Situation	I rather disagree	I fully agree
Strategy & Mindset	I rather disagree	I fully agree
Negotiation Skills	I rather disagree	I fully agree
sales team has outstanding negotiation skills.	<input checked="" type="radio"/>	<input type="radio"/>
All customer-facing functions have a clear focus on value creation and value capture.	<input checked="" type="radio"/>	<input type="radio"/>
the upcoming negotiation we have a great BATNA.	<input type="radio"/>	<input checked="" type="radio"/>

1
2
3
4



Disagreement: Low Pricing Power
Full Agreement: High Pricing Power



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2

Build market & competitive & customer intelligence



3

Play your role in accordance with your market position



- 1 Market & competitive & customer intelligence
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4

Optimize your sourcing





5

Ensure a strict Contribution Margin orientation



“Above all we have to fill our plant, as capacity utilization is key for our profitability.

Therefore, we should be careful with our prices.

Because when prices are too high, we will have underutilization, idle capacities and idle capacity costs.”

This is a fallacy!

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6

Implement **Value Selling & Value Pricing** and increase barriers to entry for your competitors



Value Selling & Value Pricing

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Value Selling is not a sprint. It's a longer journey.

How to Create Added Value for Customers?



What can you do to create value for your customers and to differentiate from competition?



5' summary information





Sources of Value Creation

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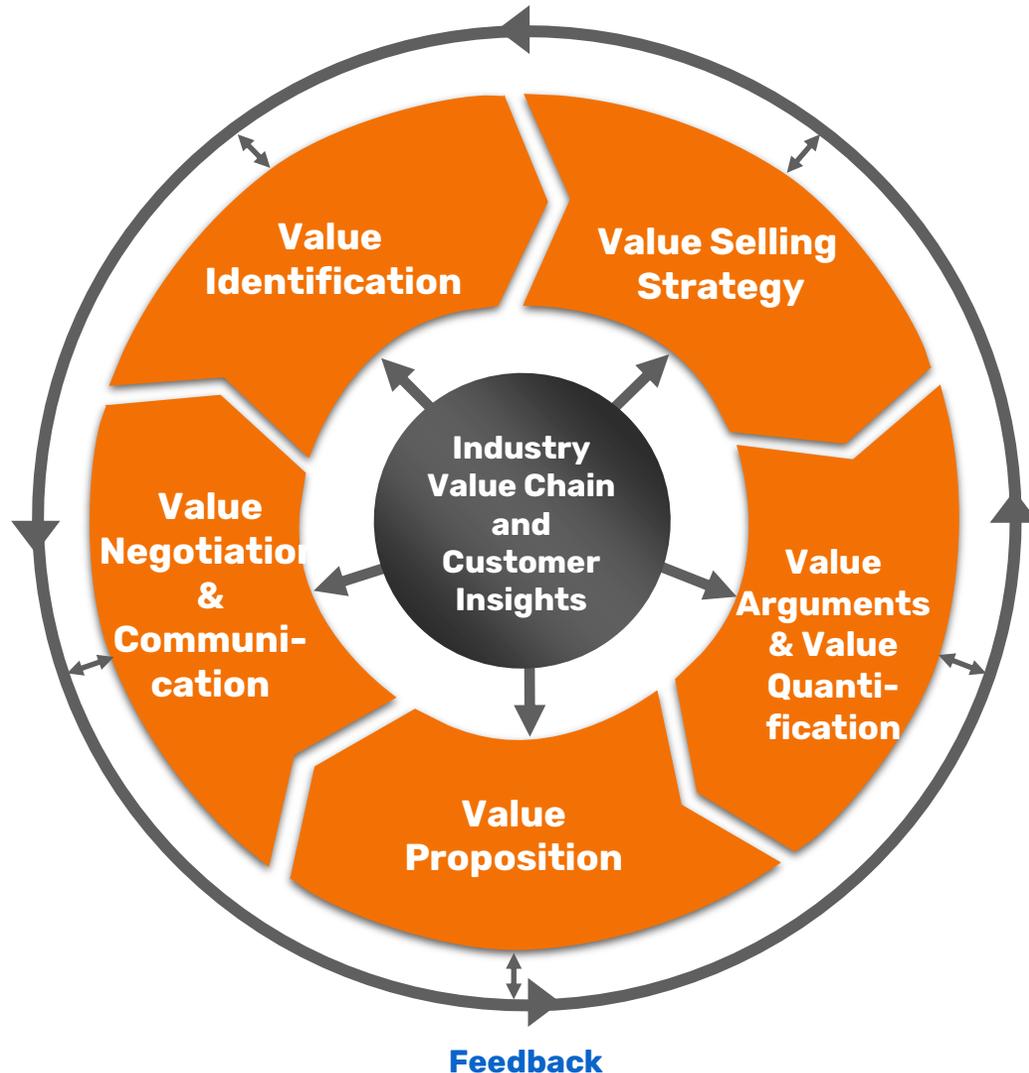
How can we create additional value for our customers?

How can we differentiate from competition?



The Double Loop Value Selling Process

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The DL Value Selling Process / Wheel

Value Identification:

Creating insights: Understanding and appreciating customer needs and willingness to pay along the value chain. Understanding customer's applications and processes as well as the true NBA (Next Best Alternative).

Value Selling Strategy:

Defining Value Selling direction and objectives: Increasing margins or growing volumes or top line? Deciding on price-value-positioning

Value Arguments & Value Quantification:

Defining value argumentation, **quantifying the value for the customer** incl. **Value Cards** and tailoring of value arguments

Value Proposition:

Defining value and differentiation from NBA in a UVP statement

Value Negotiation & Communication:

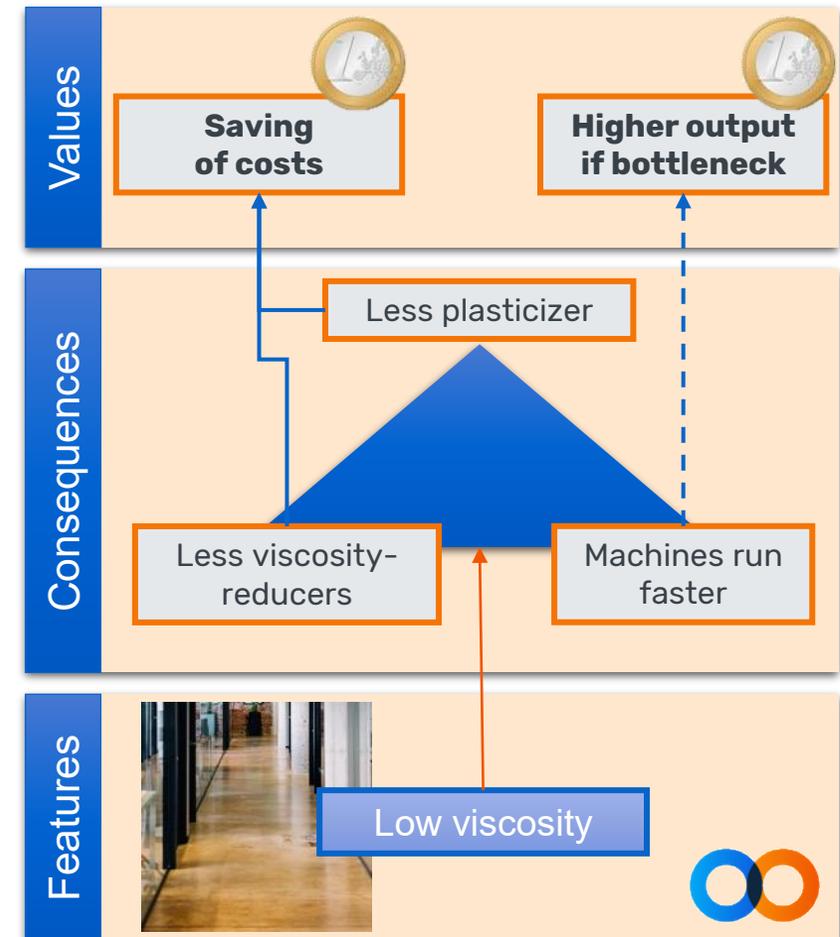
Communicating and negotiating value and price in order to win the deal by selling the price instead of selling by price.

Value Cards:

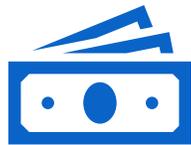
From Technology to Customer Value

- ∞ Translating **technology into real customer value**
- ∞ **Enhancing cross-functional collaboration**
- ∞ **Basis for value quantification** 
- ∞ **Foundation for the entire value communication** across all touchpoints, including selling stories
- ∞ Help to sell the price instead of selling by price

In a Value Card you should compare yourself with a **Next Best Alternative (NBA)**.



This example illustrates one feature of a PVC product in flooring.



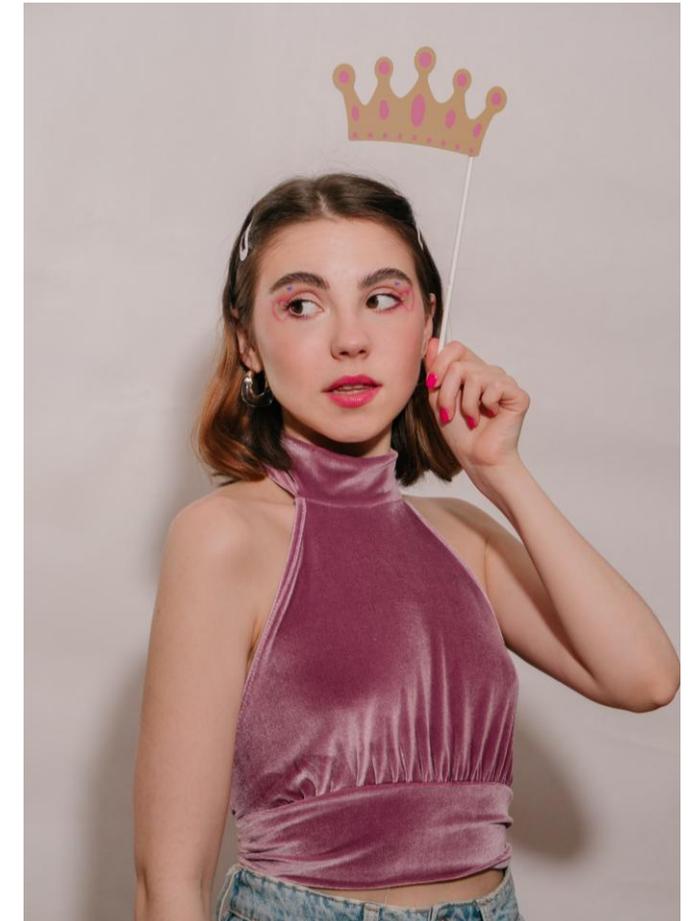
The “coronation” of the Value Pricing process:

Based on application-specific and customized value calculators.

Powerful, if done and applied correctly. Challenging.

Always specific. Never completed.

Never certain. **A journey.**





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7

Develop product and service or business model innovations



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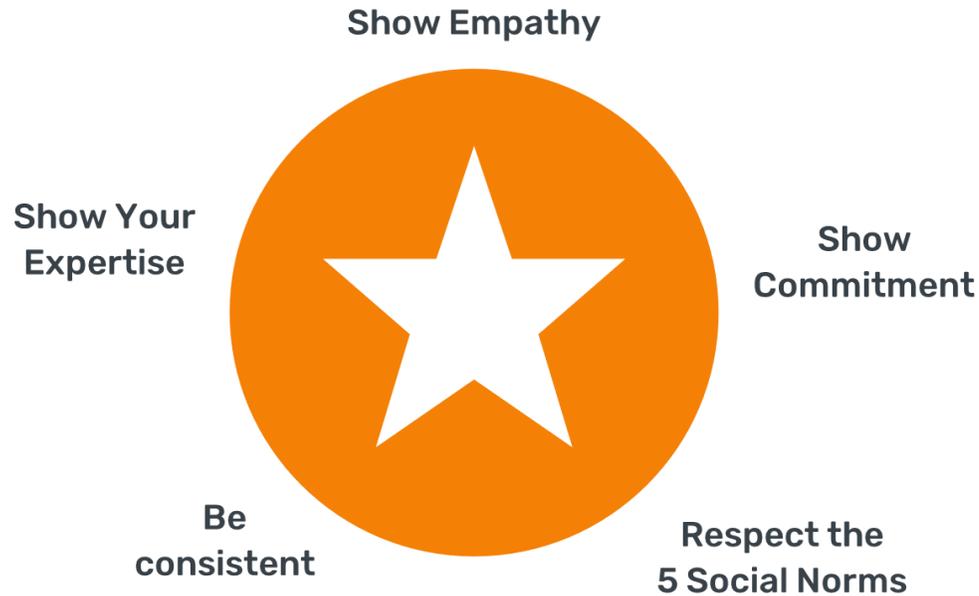
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Develop long lasting customer relationships and smart contracts

And Avoid Unfair Pricing That Jeopardizes Customer Relationship

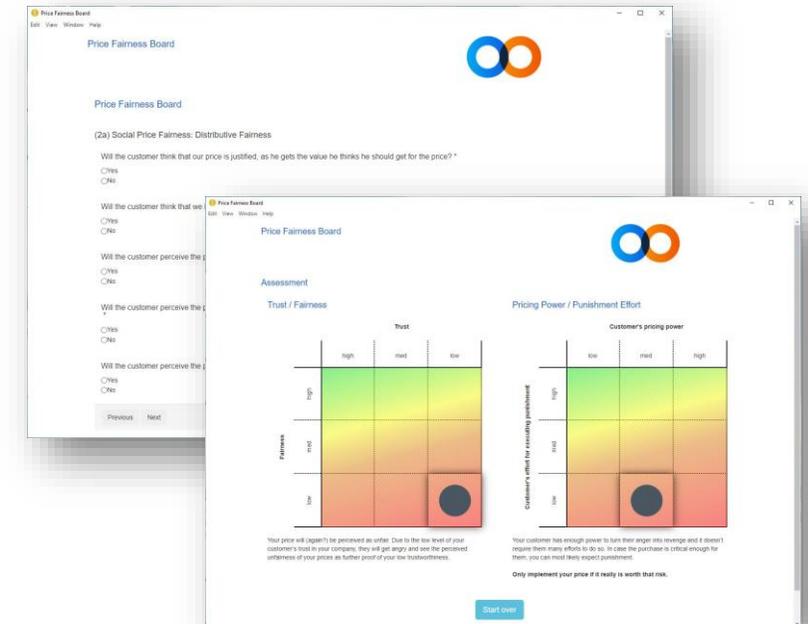
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Building Trust



- 1 Openness
- 2 Honesty
- 3 Tolerance
- 4 Reciprocity
- 5 Fairness

DL Price Fairness Assessment





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ValueBizbooster

Steve Laborda

9

Improve your negotiation skills



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Frequent bias:
Misperception that purchasers are in a more powerful position.



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Learn how to deal with purchaser's tactics and "killer phrases".





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If you have a great BATNA and pricing power, you can turn the tide.



Value Touchdown For Preparing B2B Negotiations

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Customer Situation Analysis & Competition

Strategy, Goal Matching & Agenda

Decision Process Mapping

Stakeholder Mapping

Defining & Tailoring Value Argumentation

BATNA Assessment

Psychological Mapping (MBTI)

Defining Information Needs

Number Crunching & Concessions

Pricing Psychology

Prepare for Mean Negotiation Tactics



Negotiation Choreography



Improving Your Basic & Advanced Negotiation Skills Will Help

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<p>Double Loop Digital Sales Academy</p> <h2>Active Listening</h2> <p>A Basic Communication Skill To Negotiate Successfully</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Asking Questions</h2> <p>A Basic Skill To Successfully Negotiate</p> 	<p>Double Loop Digital Sales Academy</p> <h2>BATNA</h2> <p>Understand Your Negotiation Power</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Closing the Deal</h2> <p>No Deal - No Business</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Harvard Concept Principles</h2> <p>Basic Skills To Successfully Negotiate</p>  
<p>Double Loop Digital Sales Academy</p> <h2>Pricing & Profits</h2> <p>Commercial Acumen, Pricing & Impact Of Sales</p> <p>Make Sure To Capture The Value</p> 	<p>Double Loop Digital Sales Academy</p> <h2>The Purchasers' Perspective</h2> <p>Why professional buyers sometimes make you feel squeezed ...</p> <p>A look behind the curtain</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Remote & Hybrid Selling</h2> <p>The new normal in changing customer journeys.</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Preparing Negotiations</h2> <p>Introduction - Preparing - Negotiating</p> <p>If you don't prepare, prepare to fail.</p>  	
<p>Double Loop Digital Sales Academy</p> <h2>Value Selling</h2> <p>Because if you cannot sell value, you sell by price' ...</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Negotiation Psychology</h2> <p>Because negotiation is psychology!</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Succeeding In Tough Negotiations</h2> <p>How to manage stressful situations</p> 	<p>Double Loop Digital Sales Academy</p> <h2>Selling Sustainability</h2> <p>Specialize your business and capture the value of your sustainability solutions</p>  	



Summary: Recommendations

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Innovation: Product, services, business model

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Develop long lasting customer relationships & smart contracts

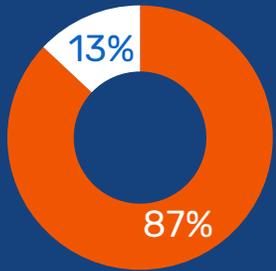
9

Improve your negotiation skills

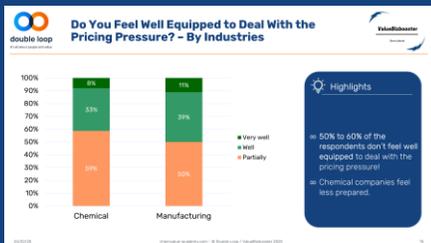


Wrap-up

Pricing Pressure



It's huge and increasing



But many companies don't feel well equipped.

Assess your pricing power

Competition & 5 Forces	I rather disagree	I fully agree
Value Proposition	I rather disagree	I fully agree
Customer Relationship & Insights	I rather disagree	I fully agree
Market Structure & Market Position	I rather disagree	I fully agree
Customer's Situation	I rather disagree	I fully agree
Strategy & Mindset	I rather disagree	I fully agree
Negotiation Skills	I rather disagree	I fully agree

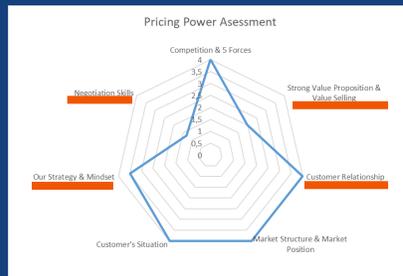
sales team has outstanding negotiation skills.

All customer-facing functions have a clear focus on value creation and value capture.

the upcoming negotiation we have a great BATNA.

1 2 3 4

Disagreement: Low Pricing Power Full Agreement: High Pricing Power



Indirect impact

- Competition
- Market Development
- Customer's Situation

Respect it!

Direct impact

- Market, Competitor & Cust. Insights
- Sourcing
- Strategy & CM Mindset
- **Value Selling & Pricing Innovation**
- Customer Relationship
- **Negotiation Skills**

Work on it!



1. Welcome & Introduction
2. Survey Results
3. Recommendations
4. Contact & More Information



Want to dive deeper into pricing pressure
– or talk to the people behind this study?

Just reach out.



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THANK
YOU



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