NR INDUSTRY INSIGHTS REPORT:

Analysis of prices of brands and online stores

in the category of Do it Yourself (DIY) in France

Abstract

This Netrivals Industry Report includes a sample of products and brands in the category of DIY in France. These products and brands have been used to analyze price changes across sales channels, along with the behaviour and evolution of prices throughout time, and across all brands and online stores included in this study.

This Report offers a comprehensive analysis of over 103.66K products. This high volume of products is due to the fact that Netrivals analyzes all the existing variants for a single product, given that all of them have different EAN codes. That is why, in this study, we have included all the product variants that have been detected via Netrivals' Big Data. Thanks to this, we can ensure that we have a comprehensive view of changes occurring in the categories analyzed, and if those changes have an impact at a variant level. It is worth noting at this point what we understand as a product variant: any variations given for a specific product, such as colors available, something that may affect the price.

The products analyzed belong to 22 different brands and 9 stores of a category that is one of the most popular categories of online sales regarding volume.

This report has been made via BI Netrivals technology and it takes into account some of the most relevant online stores and brands in this category.

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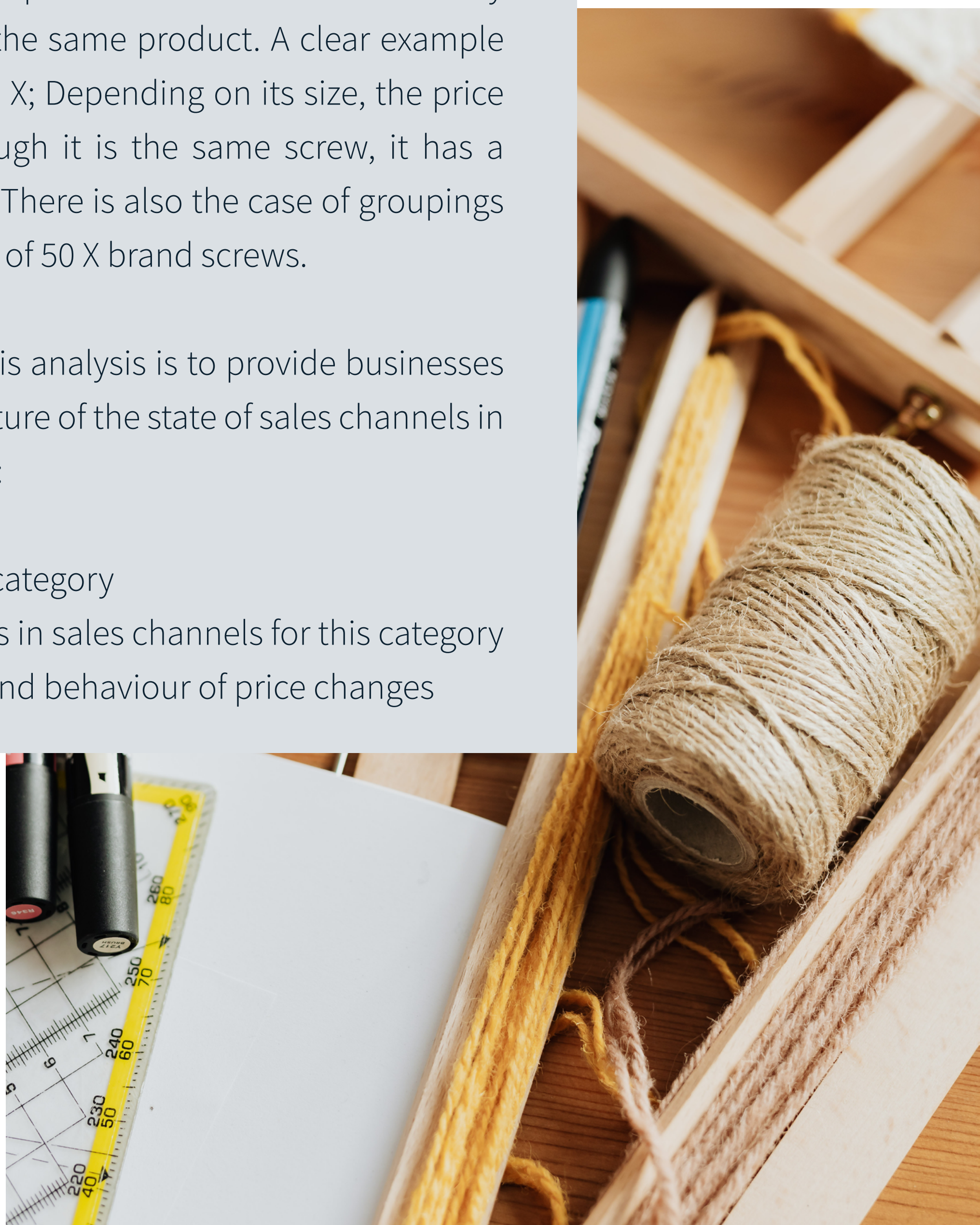
Introduction

Do it Yourself category is one of the most popular ones regarding the number of products. That is why products in this category are sold via a large number of players, both from a purely online approach and also from an omnichannel one.

One of the characteristics of this category is the large number of products and varieties of products that are in it. There may be dozens of varieties of the same product. A clear example is a star screw from brand X; Depending on its size, the price may vary since even though it is the same screw, it has a different production cost. There is also the case of groupings of products, such as a bag of 50 X brand screws.

That is why, the goal of this analysis is to provide businesses with quite an accurate picture of the state of sales channels in this category, by checking:

- Price evolution in this category
- The most active players in sales channels for this category
- Detection of patterns and behaviour of price changes



Key points of the analysis

Products, Brands and Time range of the analysis

The time range for this analysis comprises that period between January of 2020, and November 2020.

In this study we have taken into account a total of **103.66K** products (including variants of products if the latter have been detected by Netrivals). This amount of products have been analyzed across 9 popular online stores in this category. The total number of brands included in this study is 22.

- Legrand
- Abb
- Makita
- Goodhome
- Diall
- Colours
- Hager
- Facom
- Bosch
- Blooma
- Hikoki
- Aric
- Stanley
- Gewiss
- Form
- V33
- Dulux Valentine
- Mac Allister
- Karcher
- Fischen
- Chapuis
- Vynex

Analysis of price changes

In the appendix that can be found at the end of this study, you can access the general number of price changes. Nevertheless, this study will focus more on the analysis of the sales channels in this category. The graph that follows shows the total number of price changes that have been made in a day by each of the stores analyzed. It is worth noting again that the number of products analyzed by Netrivals is different in each of the cases. It all depends on the number of products detected by our algorithms in each of the stores included in this report.

Behaviour of prices at a time level

View of price reductions and increases throughout the week

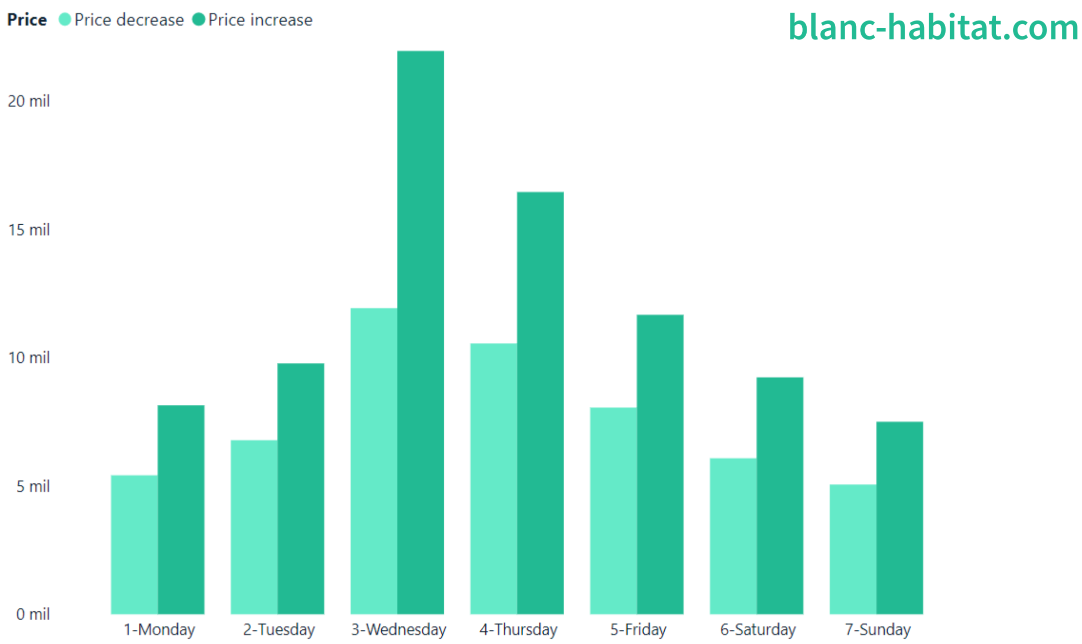


Figure 1: Price changes in blanc-habitat.com throughout the week. Source: Netrivals Big Data

In the graph we can see how Wednesdays and Thursdays are the busiest days in terms of price changes. On Saturday, we can notice though how more price changes are made in comparison to Mondays.

Price increases prevail over price decreases every day of the week, with Wednesday being the busiest day again.

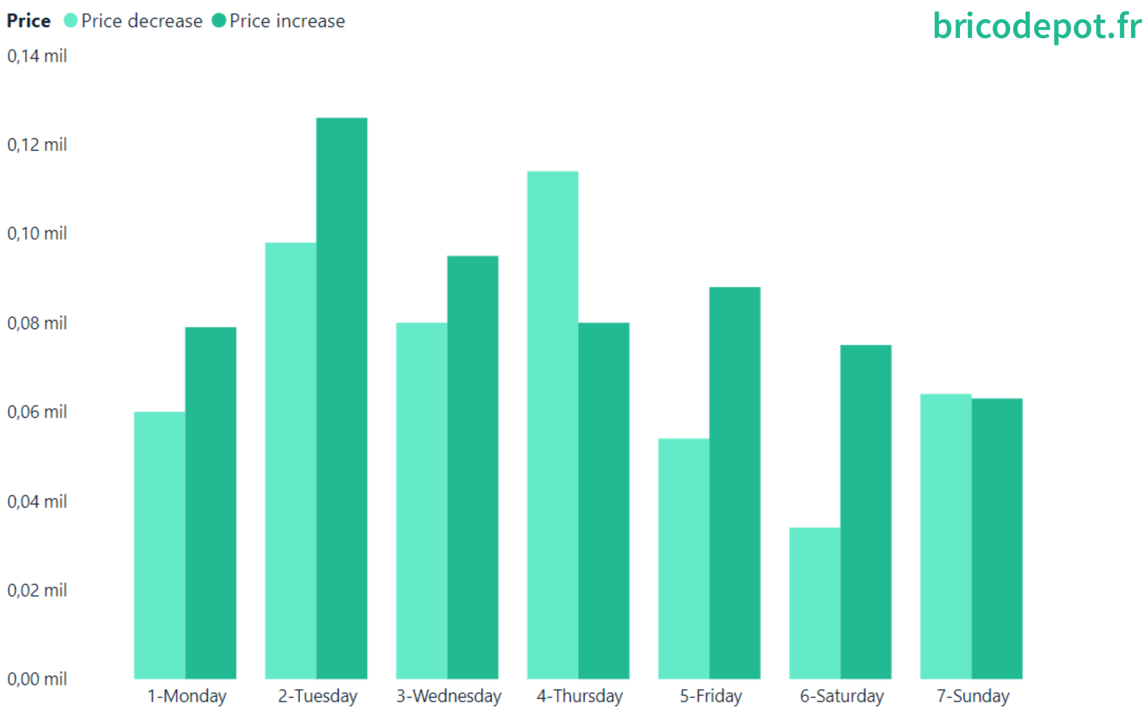


Figure 2: Price changes in bricodepot.fr throughout the week. Source: Netrivals Big Data

The data collected on price activity on bricodepot.fr is in complete contrast to that obtained during the analysis of blanc-habitat.com.

We can see how Tuesdays and Thursdays are the days when the most price changes are made. The weekends show a high level of activity, not far behind the weekdays.

We can easily see how there are days when more price decreases occur in comparison to price increases, such as Thursday or Sunday.

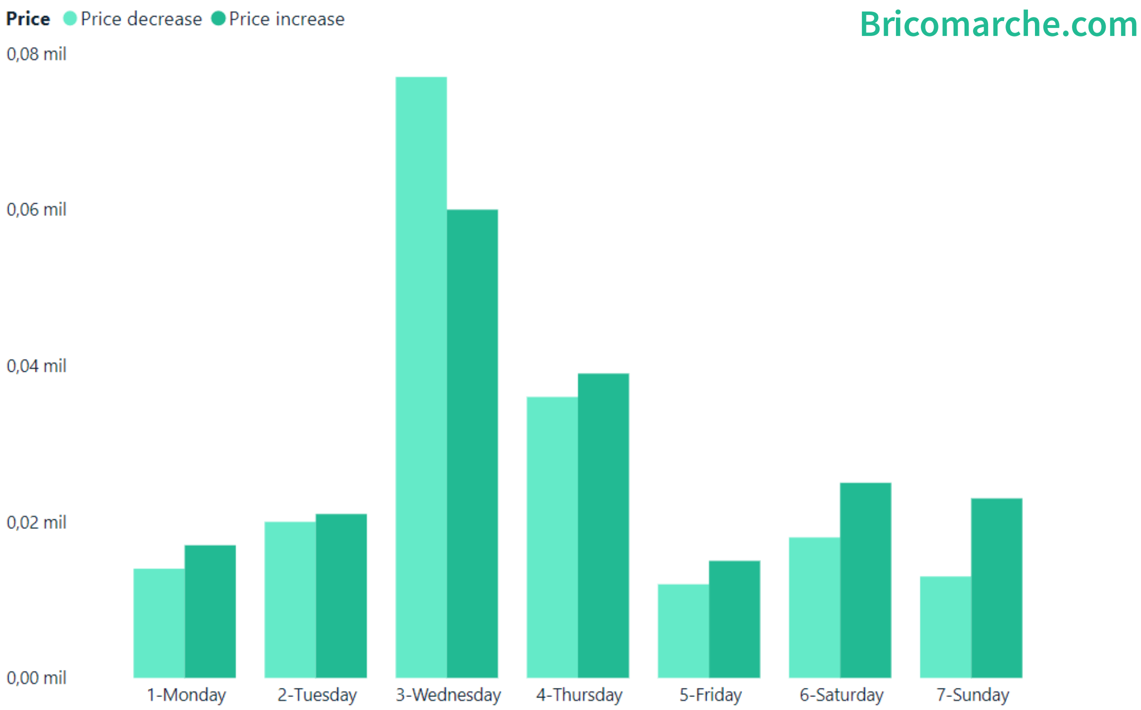


Figure 3: Price changes in bricomarche.com throughout the week. Source: Netrivals Big Data

This case is quite interesting, Bricomarche shows the most sharped graph. We can see how Wednesday is the day that shows the most activity, well above the second day with the most activity.

Weekends show higher activity than Mondays and Fridays.

At a global level, despite showing a large number of price decreases on the busiest day of the week, on all other days the increase in prices predominates over the decrease in prices.

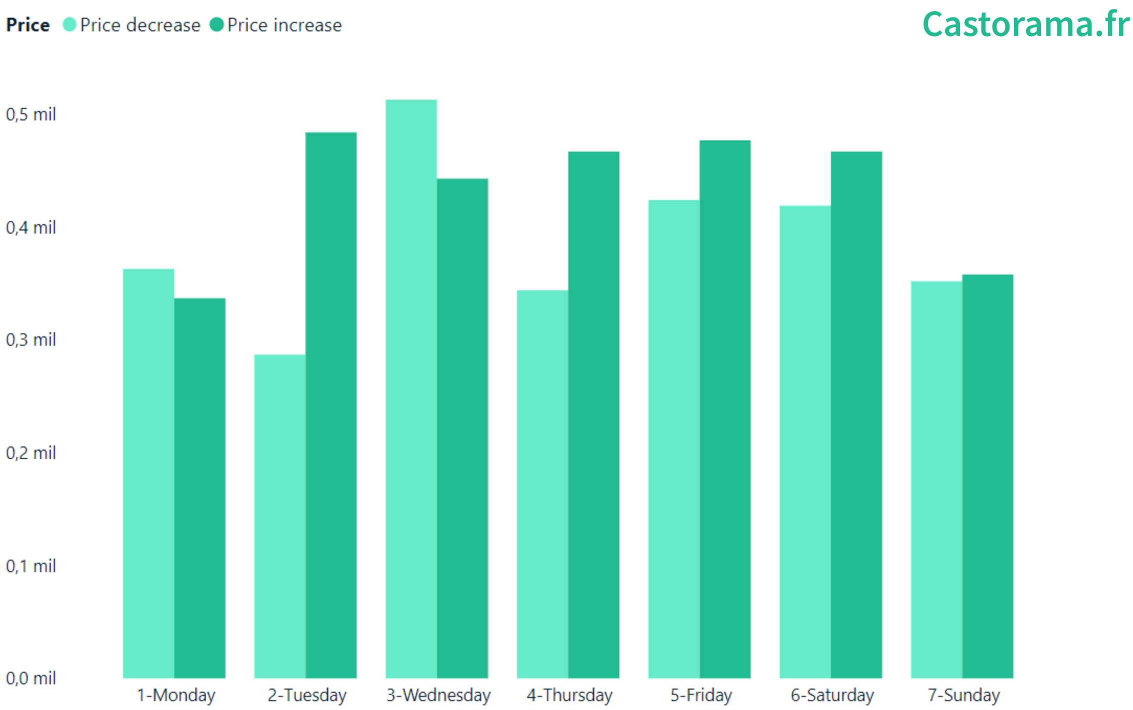


Figure 4: Price changes in castorama.fr throughout the week. Source: Netrivals Big Data

It could be said that the data collected from the study of castorama price changes shows a more equitable distribution than previous stores.

As it is normal, the increase in prices prevails over the decrease during most of the week. Another curious fact is that there is more activity on Saturdays than every day of the week except for Wednesdays.

In this case, again, price increases predominate over decreases.

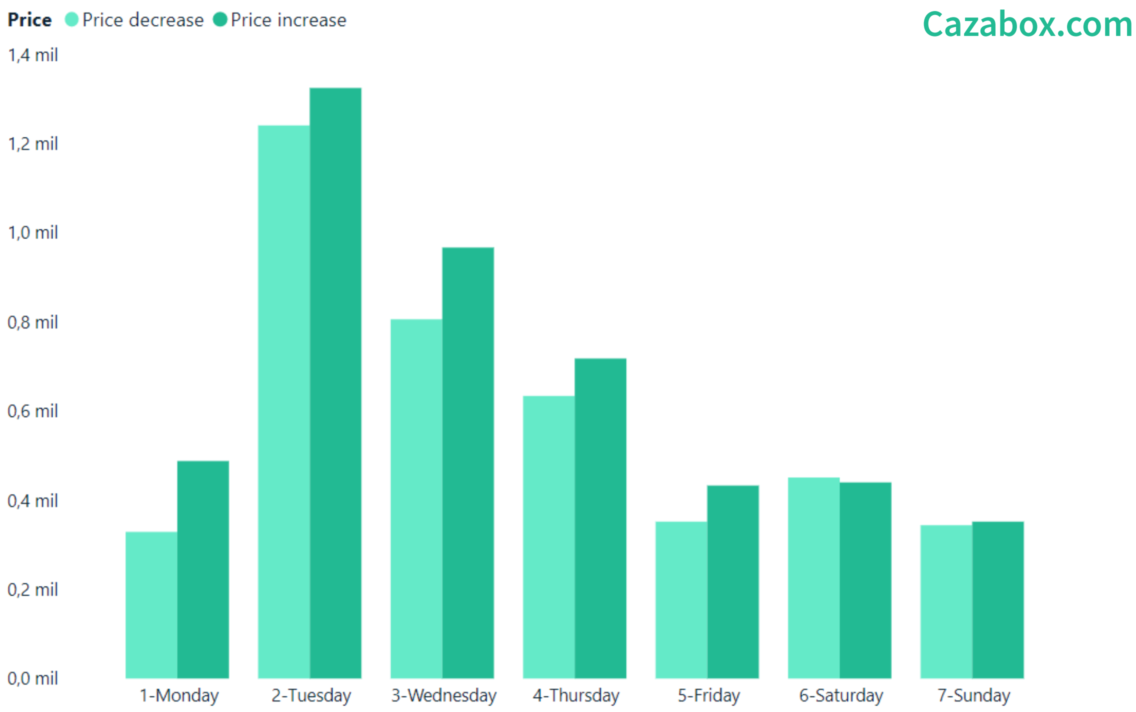


Figure 5: Price changes in cazabox.com throughout the week. Source: Netrivals Big Data

The case of cazabox.com, like Bricomarche, shows us how a large amount of weekly activity is concentrated in just two days. On Tuesday and Wednesday are the days of the week when the majority of price changes occur.

As in the previous cases, the price-increment type of change is always more predominant than the case of price-reduction.

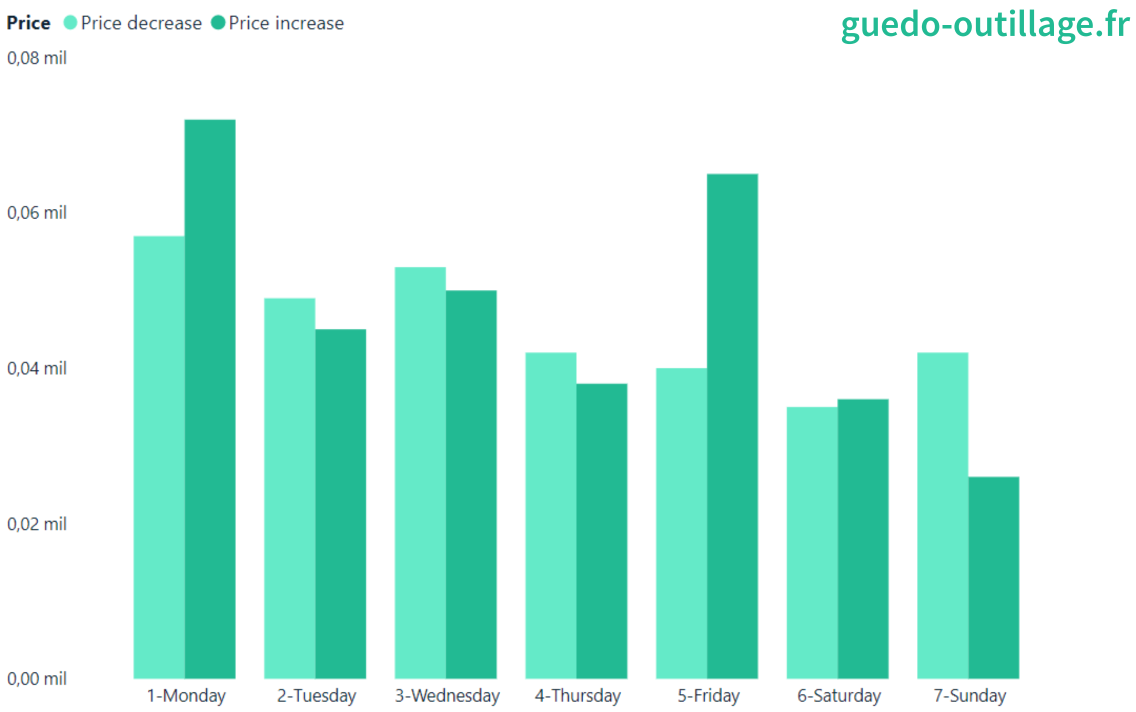


Figure 6: Price changes in guedo-outillage throughout the week. Source: Netrivals Big Data

The most active days in this case are Mondays, Wednesdays and Fridays. Specifically, Mondays and Fridays are the most notable days. Sundays, on the one hand, are remarkable due to the level of price reductions. Fridays, on the other hand, are remarkable for quite the opposite reason, though, since a lot of price increments take place those days. We notice how price reductions are predominant in this company..

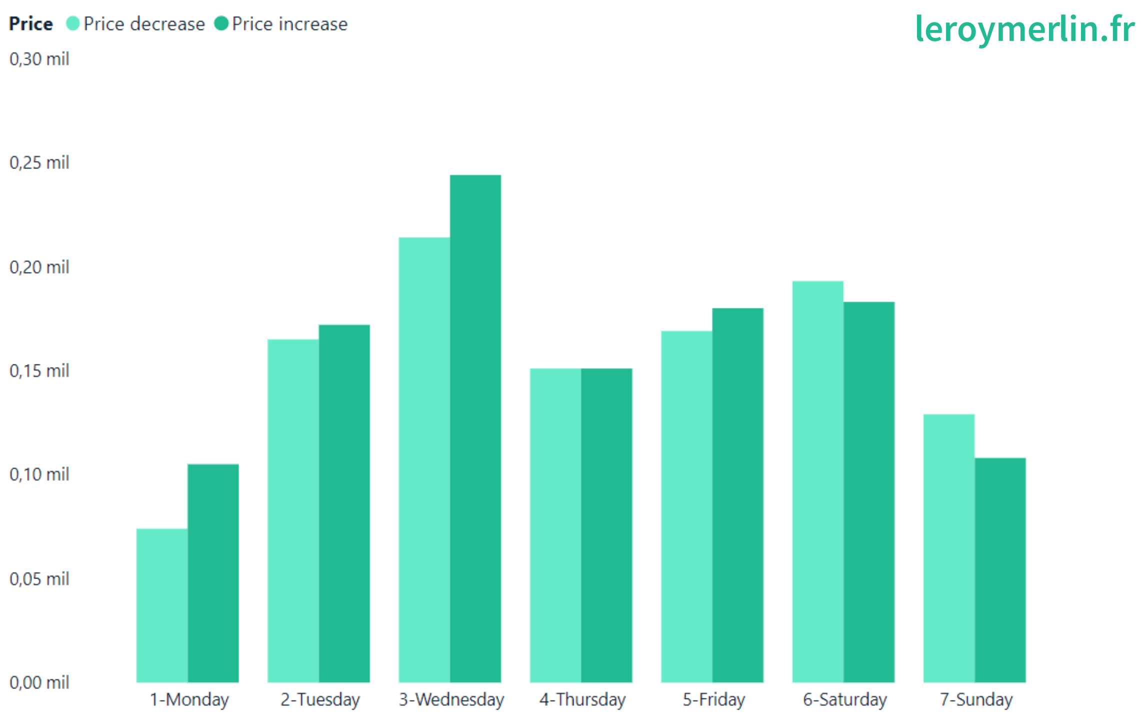


Figure 7: Price changes in leroymerlin.fr throughout the week. Source: Netrivals Big Data

Leroy Merlin is a well-known player in the DIY sector. We see that it has a fairly equitable distribution of price change activity every day of the week.

This online store shows activity above average on the weekend, especially on Saturday. Surprisingly, the day that shows the least activity is Monday, a weekday.

Price increases are quite balanced with price decreases, with days when the increase is more common, such as Wednesdays, and days when the decrease is more common, such as Sundays.

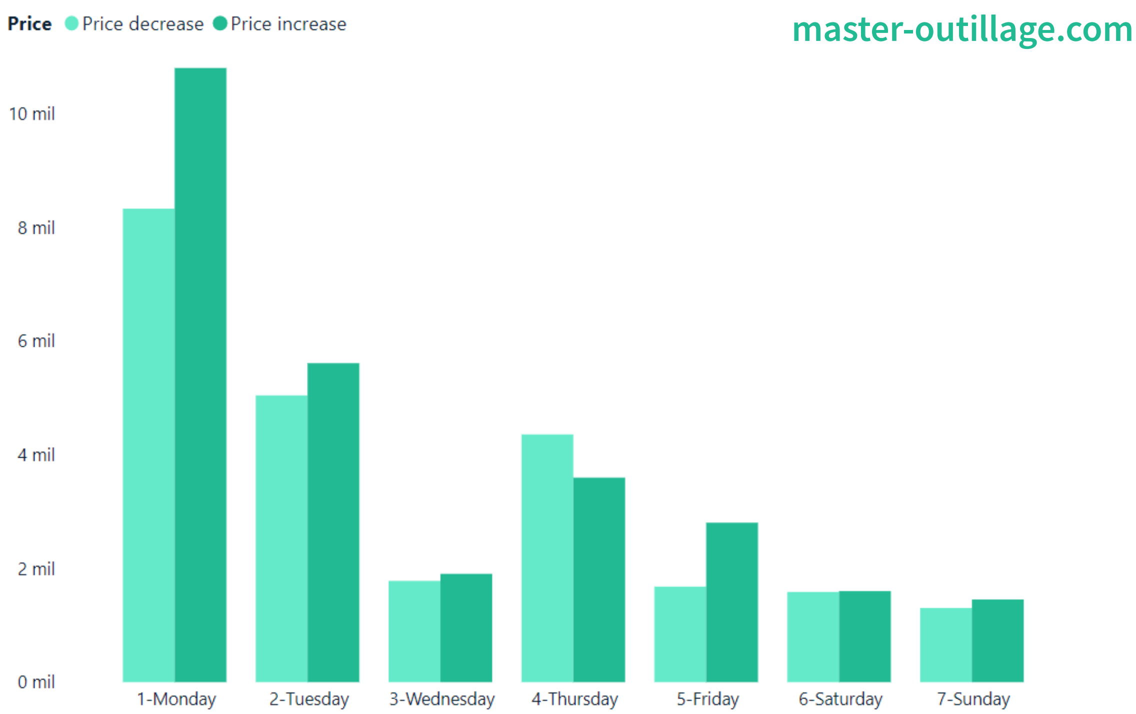


Figure 8: Price changes in master-outillage throughout the week. Source: Netrivals Big Data

With a trend totally opposite to the previous case (Leroy Merlin), we find in this graph that Master-Outillage.com is more active at the beginning of the week than in the middle of the week or during the weekend.

It clearly shows a tendency to increase prices during six of the seven days of the week, with Monday being the one that increases prices the most times.

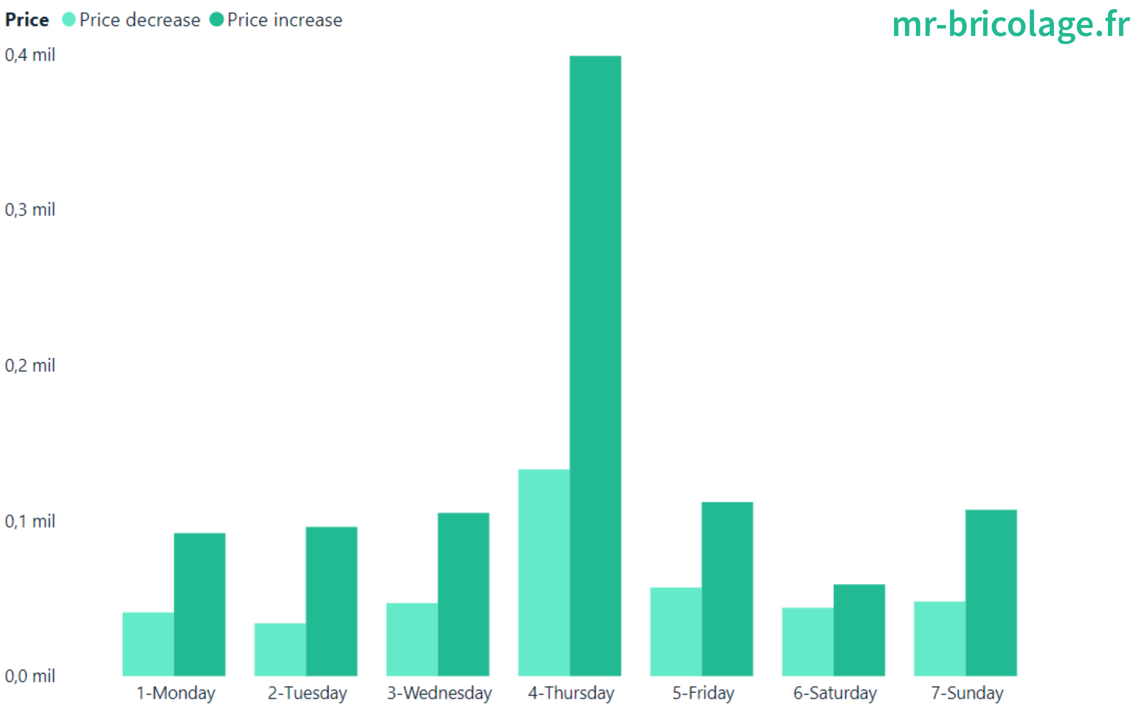


Figure 9: Price changes in mr-bricolage throughout the week. Source: Netrivals Big Data

The price change graph for this store is the steepest of all the graphs we've seen so far. This store concentrates most of its price change activity on Wednesdays, followed well below the other days of the week.

Saturday is the day with the fewest changes.

This store is one of the few that we have analyzed that shows higher price increase activity each and every day of the week.

View of average price changes per online store throughout the week

These graphs show, on average, the changes over prices in percentage terms. This refers to whether such price changes have been made to a greater or smaller degree.

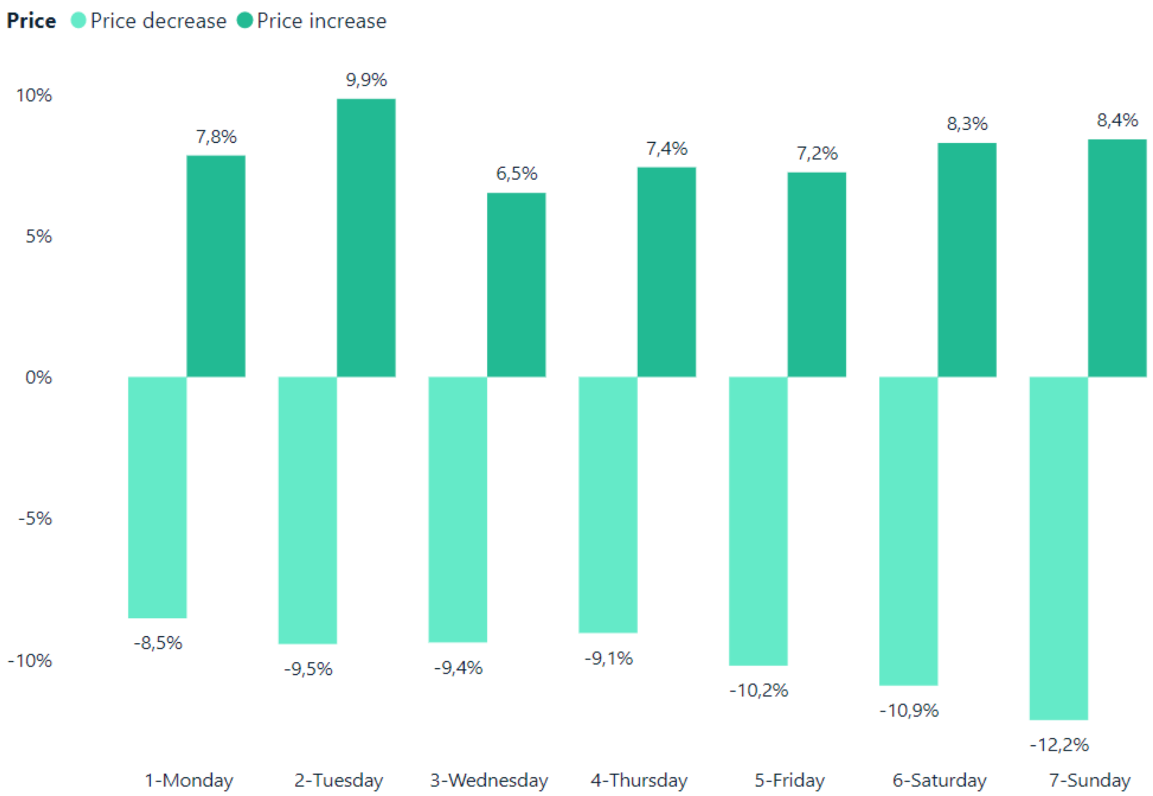


Figure 10: Price change in percentage terms on analyzed online stores throughout the week.
Source: Netrivals Big Data

By analyzing all the stores included in the analysis we can see clearly how price increments are always greater than price reductions in percentage terms. It is true that following the previous analysis of activity per store, we have noticed how price reductions were always predominant. Nevertheless, it is also that even if price increments are less predominant at an activity level, in the case of intensity of such price changes, we can confirm that price increases are always stronger at a percentage level in comparison to price reductions.

For instance, from the graph above we can see how Tuesdays are the days when price increments are the strongest in percentage terms (9,9%). On the other hand, if we have a look at price reductions, we can see how the stronger changes in percentage terms take place on Sundays (12,2%). Nevertheless if we compare those 2 percentages (9,9% vs. 12,2%), we can appreciate how the intensity is higher in cases of increments than in the case of reductions.

We'll now see the case of each one of the stores, separately.

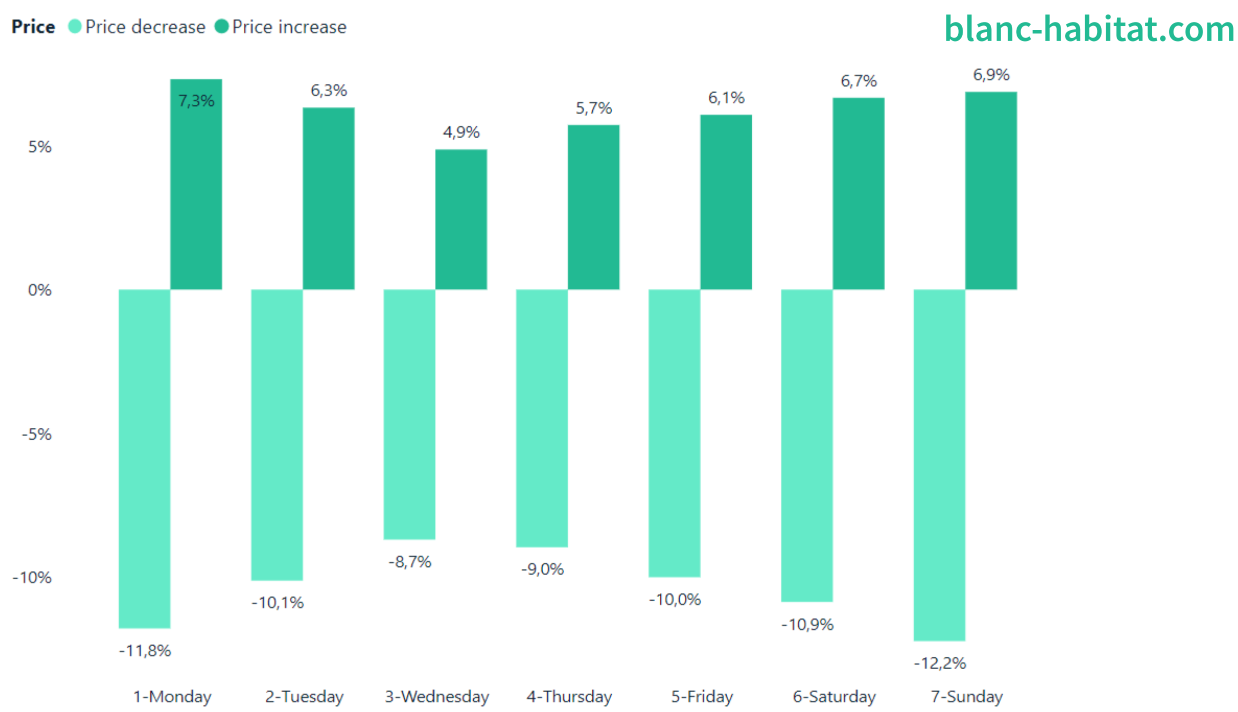


Figure 11: Price change in percentage terms on blanc-habitat throughout the week.
Source: Netrivals Big Data

As for price increases, Sundays and Mondays are the days when price increases on blanc-habitat.com are the greatest. Still, the differences among all the days of the week are not very pronounced.

Speaking of decreasing prices, Sundays and Mondays are the days when prices are lowered the most in this store.

In more general terms, blanc-habitat.com shows reductions that are bigger than the price increases, despite the fact that, as we have seen before, it increases the prices of more products than it reduces prices of products.

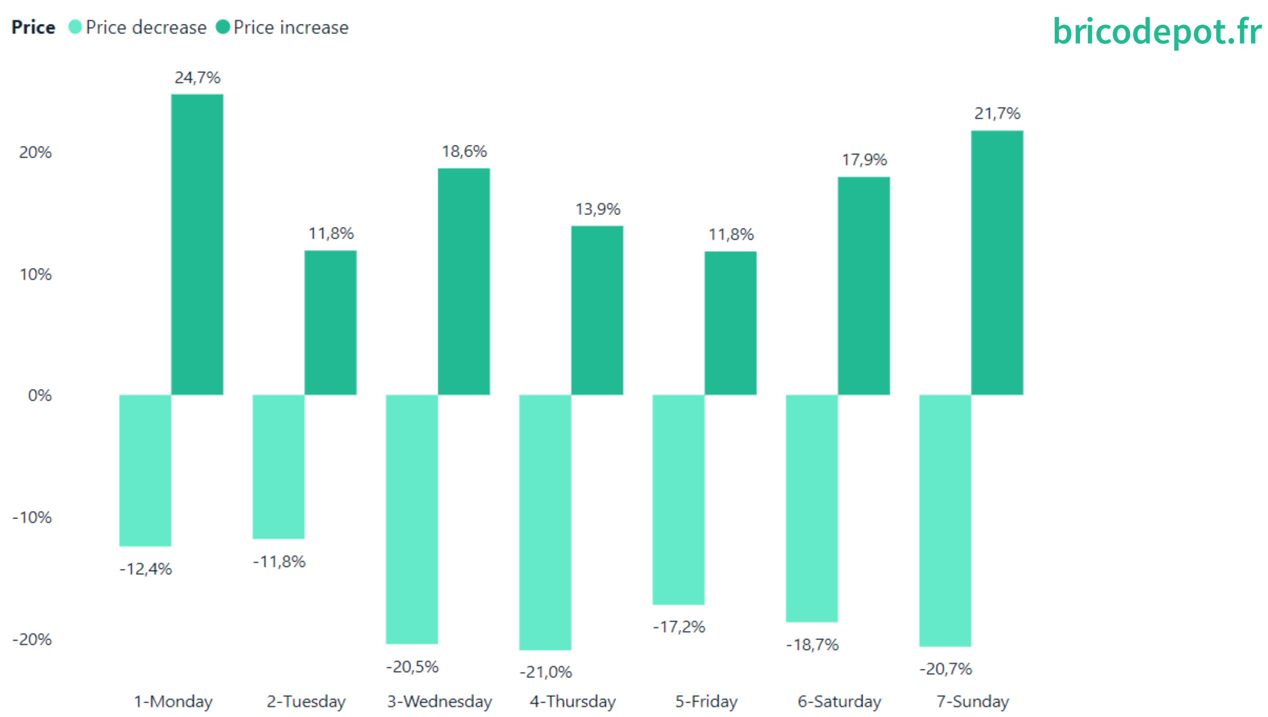


Figure 12: Price change in percentage terms on bricodepot.fr throughout the week.
Source: Netrivals Big Data

Regarding price increases, Sundays and Mondays are the days when price increases on bricodepot.fr are the greatest. The difference in price increases between these two days, and the rest of the week is quite pronounced, especially on Tuesdays and Thursdays.

Speaking of decreasing prices, Wednesday, Thursday and Sunday are the days when prices are lowered the most in this store.

In more general terms, bricodepot.fr shows larger reductions on average than price increments.

Figure 13: Price change in percentage terms on bricomarche.com throughout the week. Source: Netrivals Big Data

Regarding price increases: there are not very pronounced differences among the days of the week. On average, price increases go between 6 and 8%.

Regarding price reductions: discounts are usually higher than price increases, reaching over 9% in more than one day. Except for Saturday, which is fairly balanced.

In general terms, the price increases and decreases are fairly balanced, more than in the previous cases.

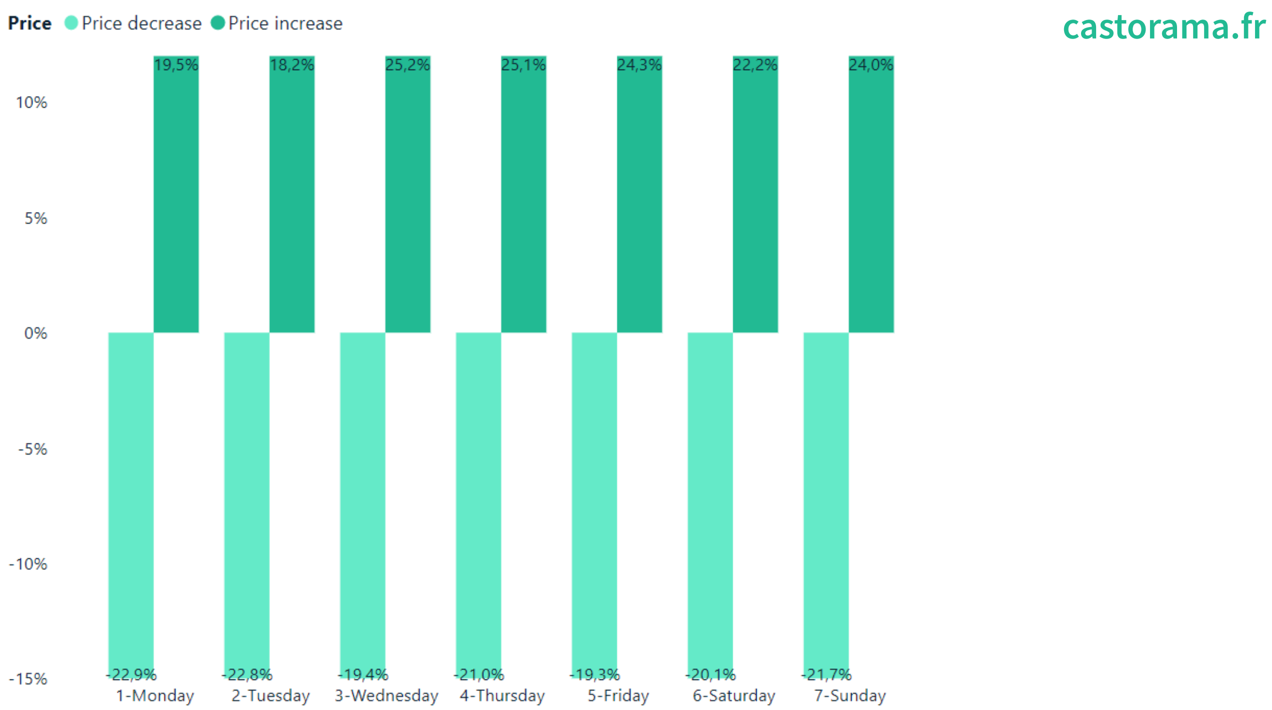


Figure 14: Price change in percentage terms on castorama throughout the week. Source: Netrivals Big Data

Regarding price increases: they show large price increases distributed equally during the week, on Wednesdays and Thursdays it is when prices increase the most, although not much more than on other days.

Regarding price reductions: this store shows reductions that are very similar to the price increases, with few differences among the days of the week.

In general terms, castorama.fr makes more aggressive price reductions than price increases.

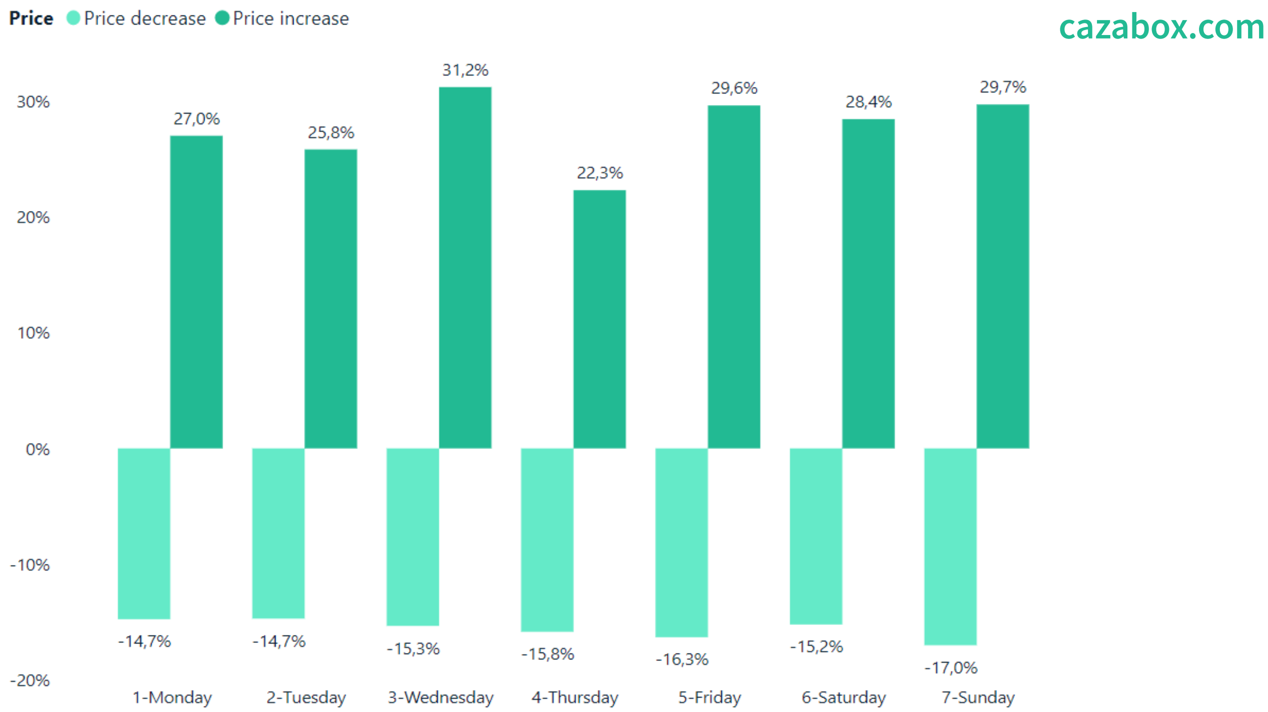


Figure 15: Price change in percentage terms on cazabox throughout the week. Source: Netrivals Big Data

Regarding price increases: this graph shows how this store's most predominant price activity is that of price increments, with days when average prices can go up even 30%.

Regarding price decreases: it shows some more common numbers than not in the case of price increases. On average, reductions go between 14 and 16%.

Generally speaking, the increases are much more significant than the price decreases. On the other hand, and as we have seen in the previous case, there are more increases than reductions in this store.

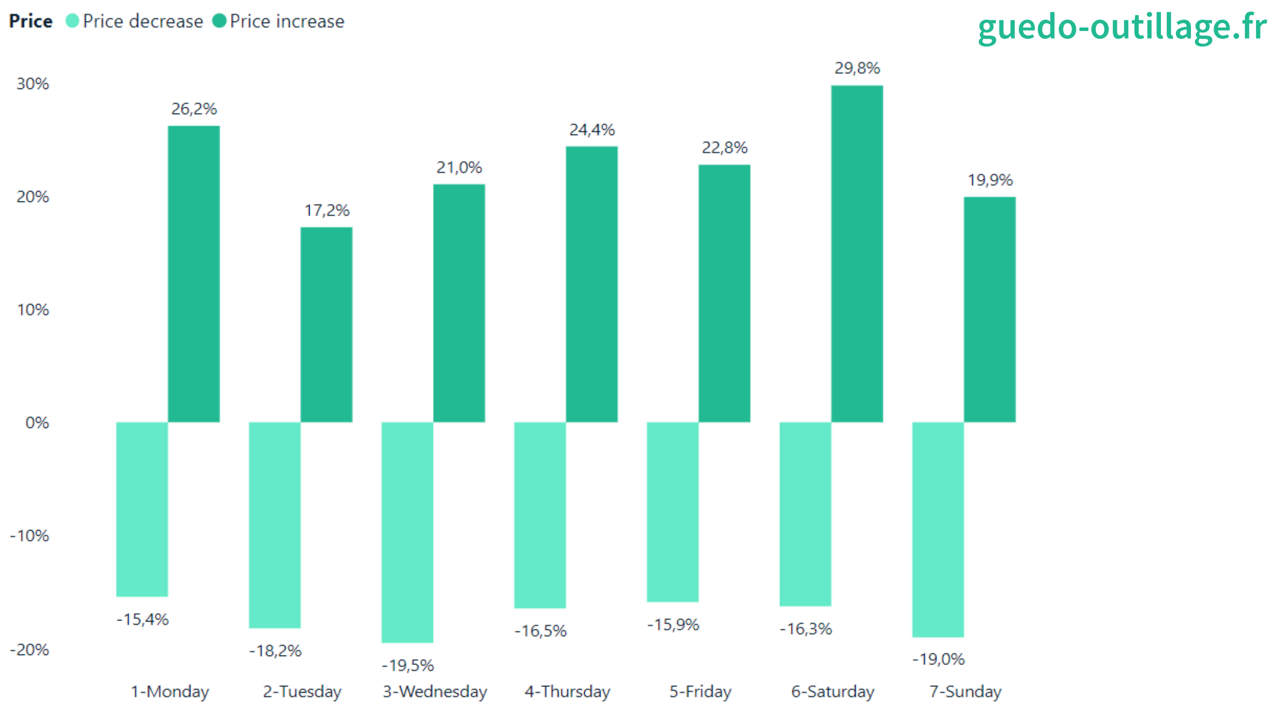


Figure 16: Price change in percentage terms on guedo-outillage.fr throughout the week.
Source: Netrivals Big Data

As for price increases: we see that they are much more notable than the decreases. The average price increase activity fluctuates between 17.2 and 29.8%. Mondays and Saturdays are the days when prices are raised the most.

Regarding price decreases: the graph shows a more stable distribution. The days when prices are lowered the most are Wednesdays and Saturdays.

In general terms, in this case the prices experience more increments than reductions.

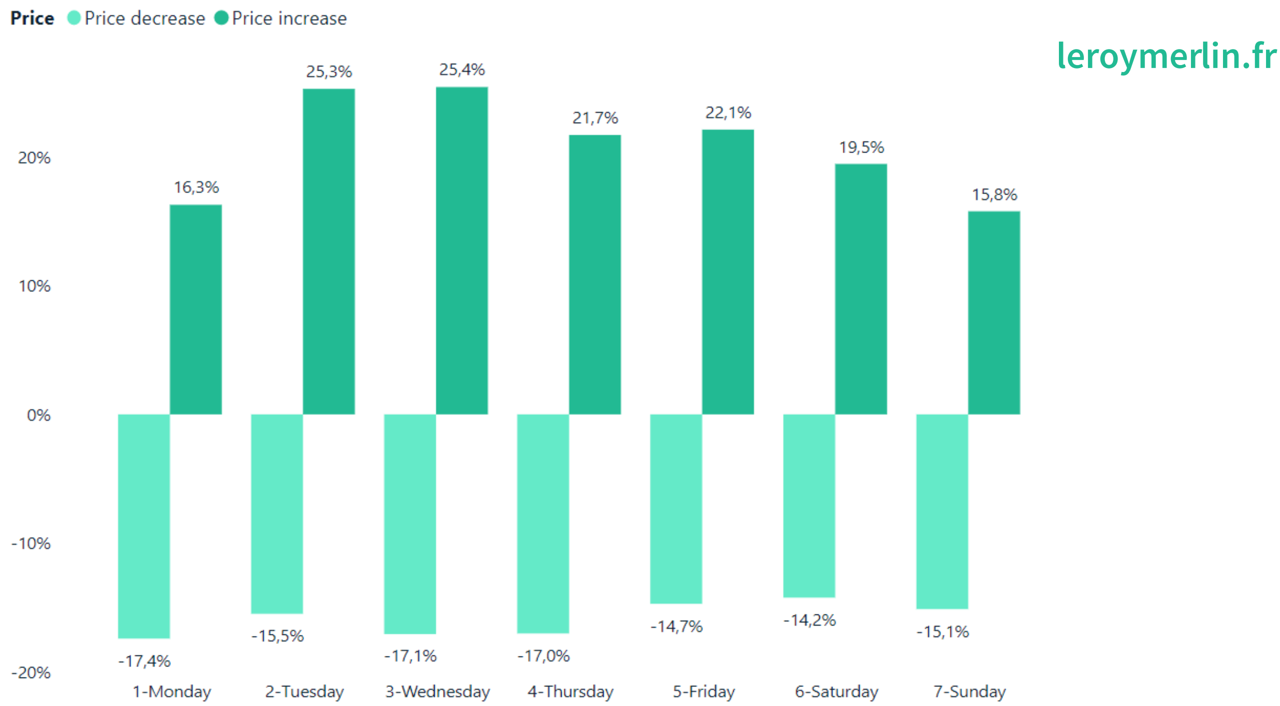


Figure 17: Price change in percentage terms on leroymerlin.fr throughout the week.
Source: Netrivals Big Data

In terms of price increases: this store shows an incredible increase in prices on Tuesdays, Wednesdays and Thursdays, exceeding 22 percentage points. On Mondays and Sundays, as the graph shows, prices are increased much less in comparison.

Regarding price decrease: it is much lower than the average of price increases, being between 15 and 17%.

In general terms, in this case again price increments are more remarkable than reductions.

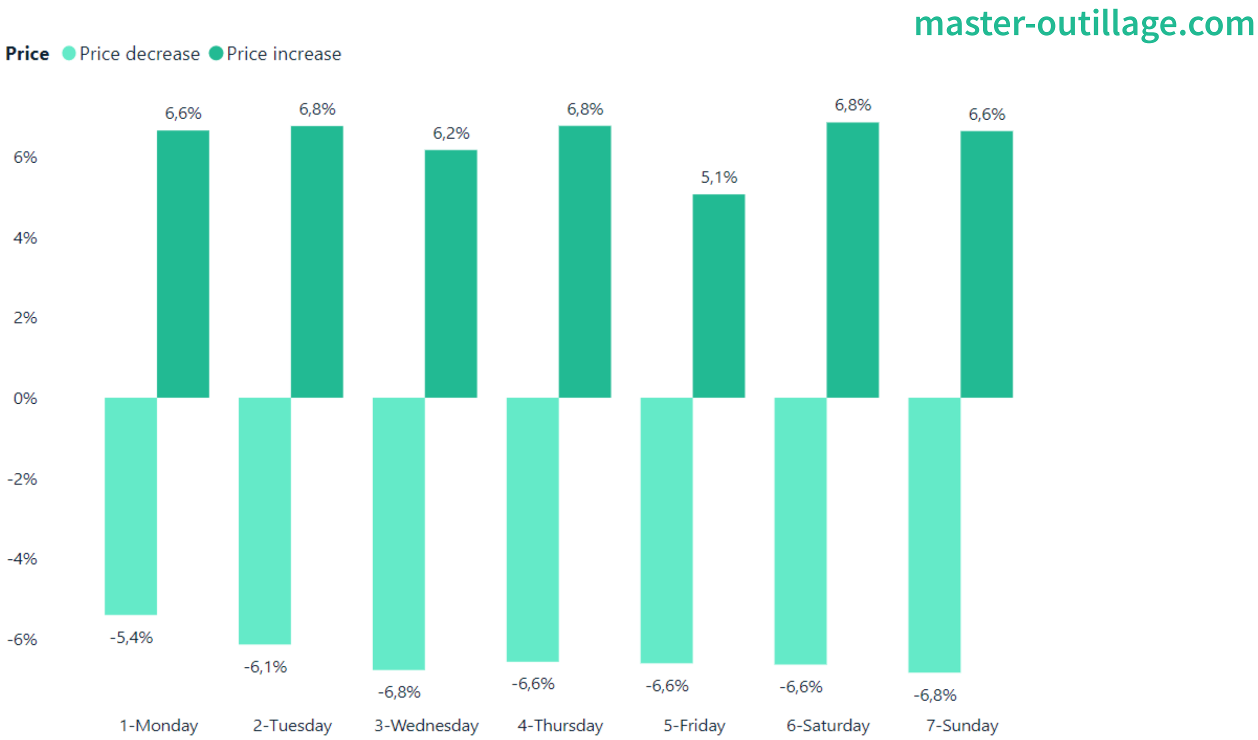


Figure 18: Price change in percentage terms on master-outillage.com throughout the week.
Source: Netrivals Big Data

In general terms, the price changes in master-outillage are much lower than in the cases seen above. It shows much less volatile prices than its competitors.

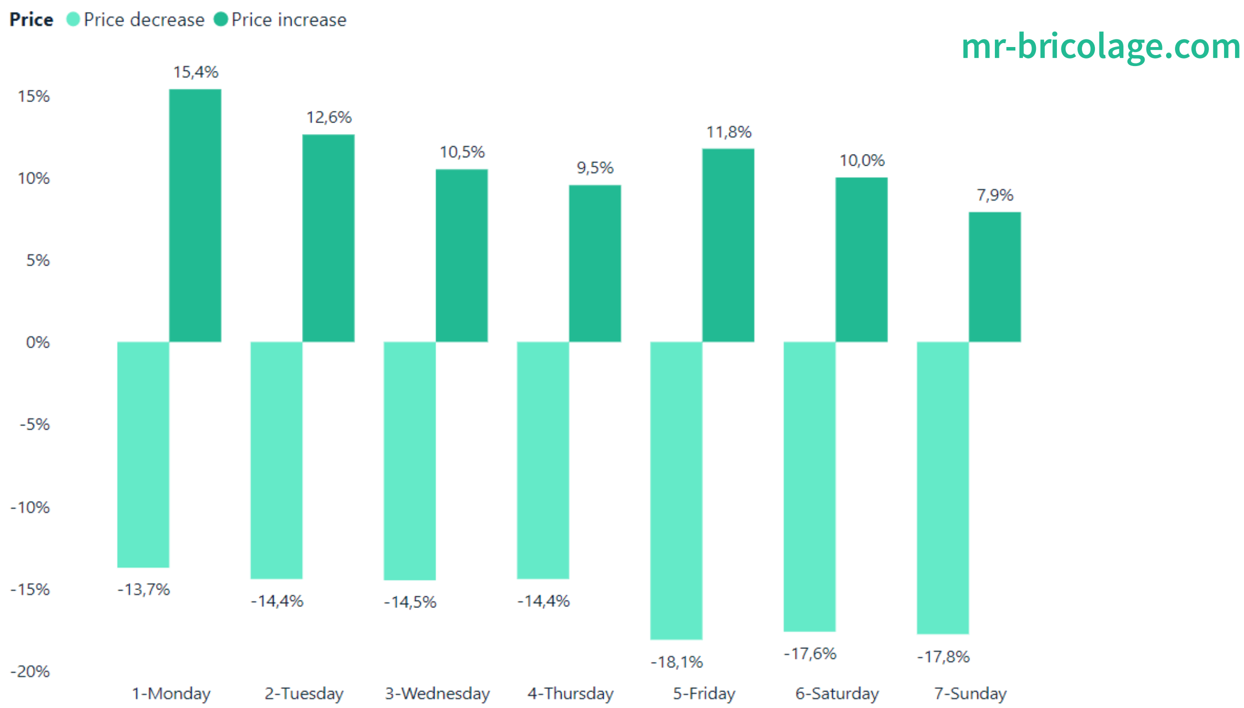


Figure 19: Price change in percentage terms on mr-bricolage.com throughout the week. Source: Netrivals Big Data

Regarding price increases: Mondays and Tuesdays are usually when price increases the most, Thursdays and Sundays are the days with the fewest increments.

Regarding price reduction: unlike its competitors, mr-bricolage.com carries out a more aggressive reduction strategy than its price increments strategy. On average weekends, it reduces them by more than 17.5%.

Generally speaking, their pricing strategy shows a stronger commitment to making big sales on their product catalog.

Prices: magnitude and evolution

It is important to bear in mind that the price evolution discussed below includes the products captured by the Netrivals system until December 2019. Therefore, the price evolution of such products have been analyzed during the 2020 period. This is something relevant to keep in mind when assessing the data below.

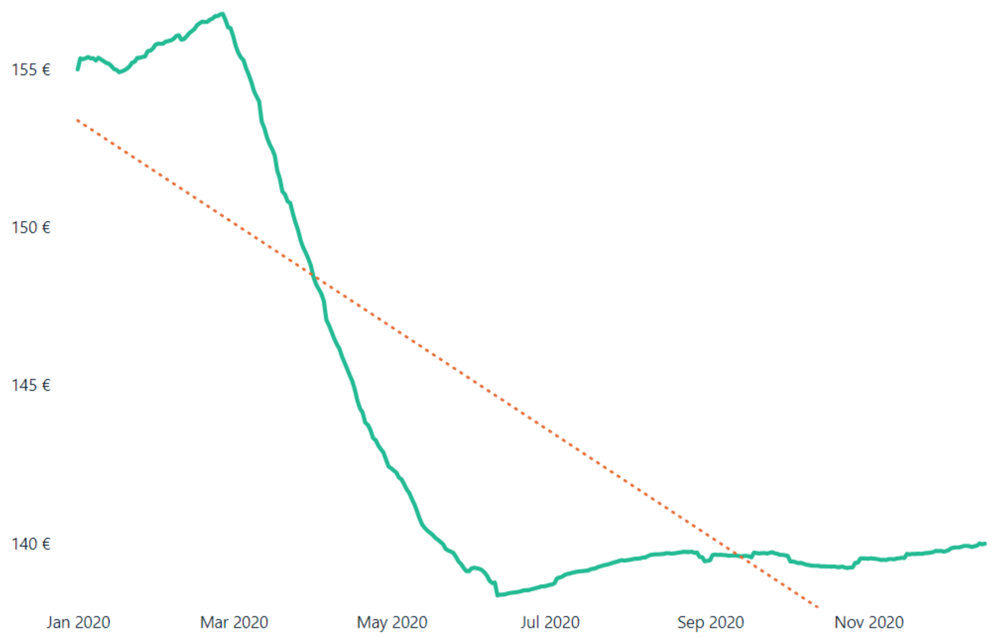


Figure 20: 'Price evolution in retailers and brands analyzed'. Source: Netrivals Big Data

As we can appreciate from the history of prices based on the total amount of retailers and brands analyzed: The starting prices from January 2020 experienced a continuous decrease from March until June 2020, when price points recovered from continuous price reductions.

Although on this graph the line seems to experience a very high drop, in reality we are talking about a price difference of just over twenty euros between the highest point (€ 156.64) and the lowest point (€ 138.35) so far this year.

In the following pages we will analyze this evolution store by store.

Evolution of prices: detailed analysis per store

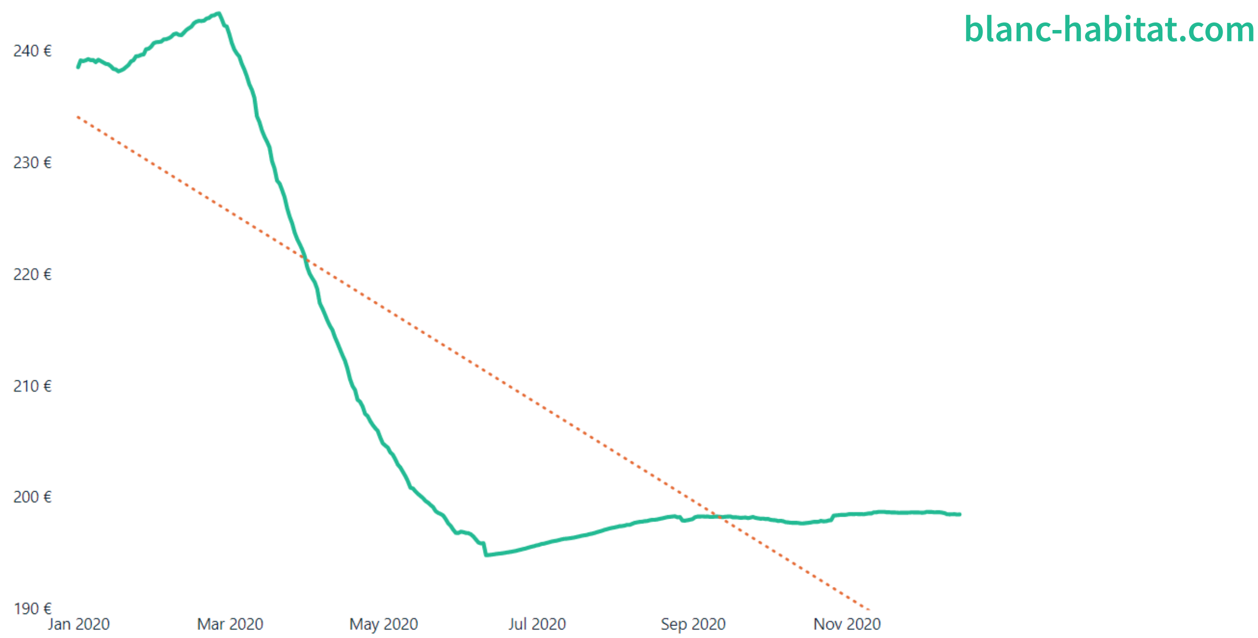


Figure 21: 'Price evolution on blanc-habitat.com'. Source: Netrivals Big Data

Blanc-habitat shows a price trend very similar to the average for the industry and the competitors analyzed in this report.

It increased its average price from February to March. At the beginning of March its average price began to decrease and did not stop until well into the summer, in mid-July, thus reaching its minimum for this year 2020, € 194.81.

We can see that its average price is slightly higher than that of the industry, but we must bear in mind that the study has been carried out based on the products detected for each seller and not on exactly the same products for all sellers.

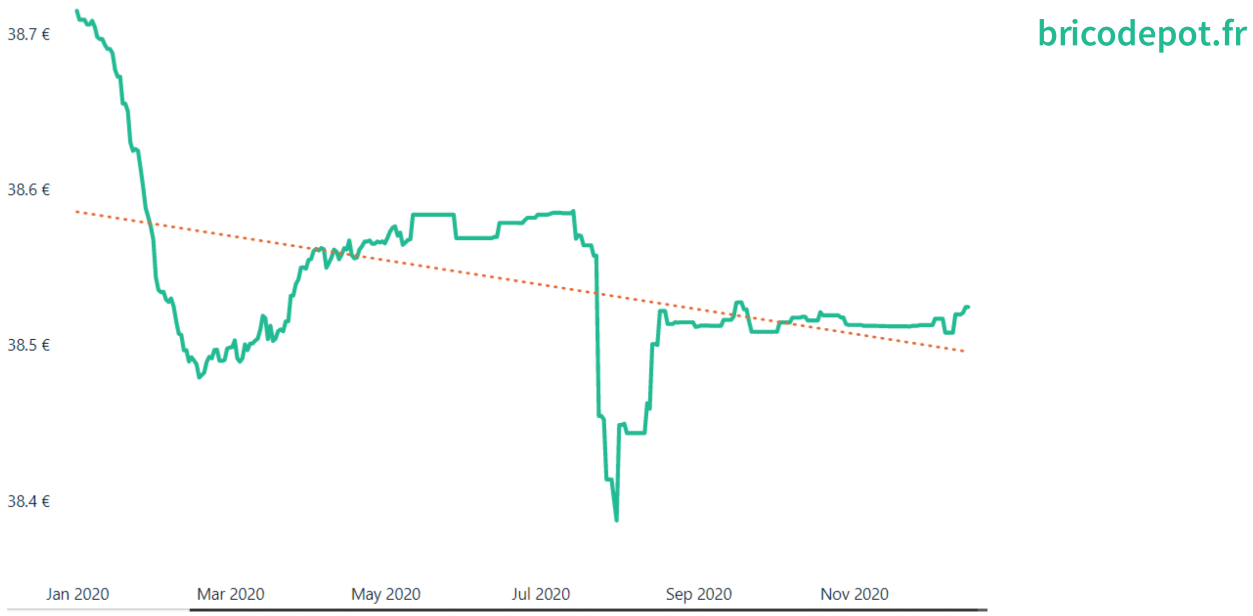


Figure 22: 'Price evolution on bricodepot.fr. Source: Netrivals Big Data

In the case of bricodepot.fr, the analyzed products have an average price much lower than that of their counterparts.

It shows a lot of price changes during this year. It is important to look at the magnitude of these changes since from the highest average price detected to the lowest average price detected there is a difference of no more than € 0.30.

Even so, and given that the sample chosen for the study is significant, the trend in bricodepot.fr's prices during 2020 has been downward.

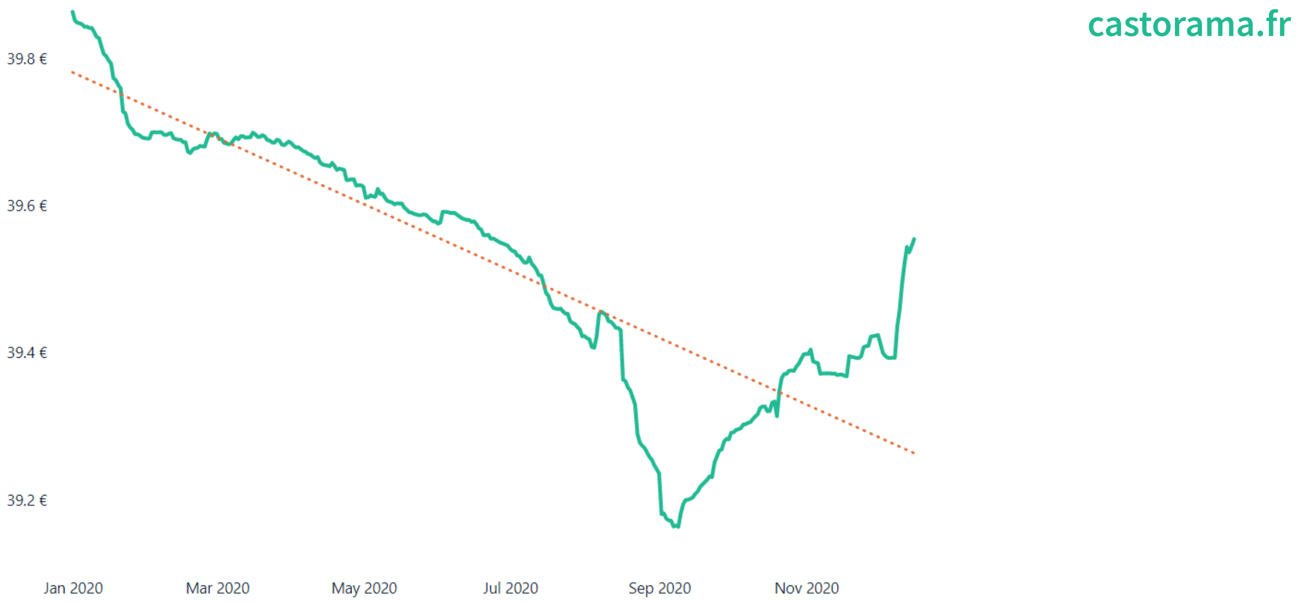


Figure 23: 'Price evolution on castorama.fr. Source: Netrivals Big Data

In this graph we can easily see how the pricing policy of this store has shown a downward trend during the first three quarters of the year and the average price has started to rise since mid-September.

As we have commented previously, we must take into account the magnitude of these changes. The day of the year when its average sale price was the most expensive was January 1 with a price of € 39.86. The day of the year that has been the lowest at a price point level was September 9 at a price of € 39.16.

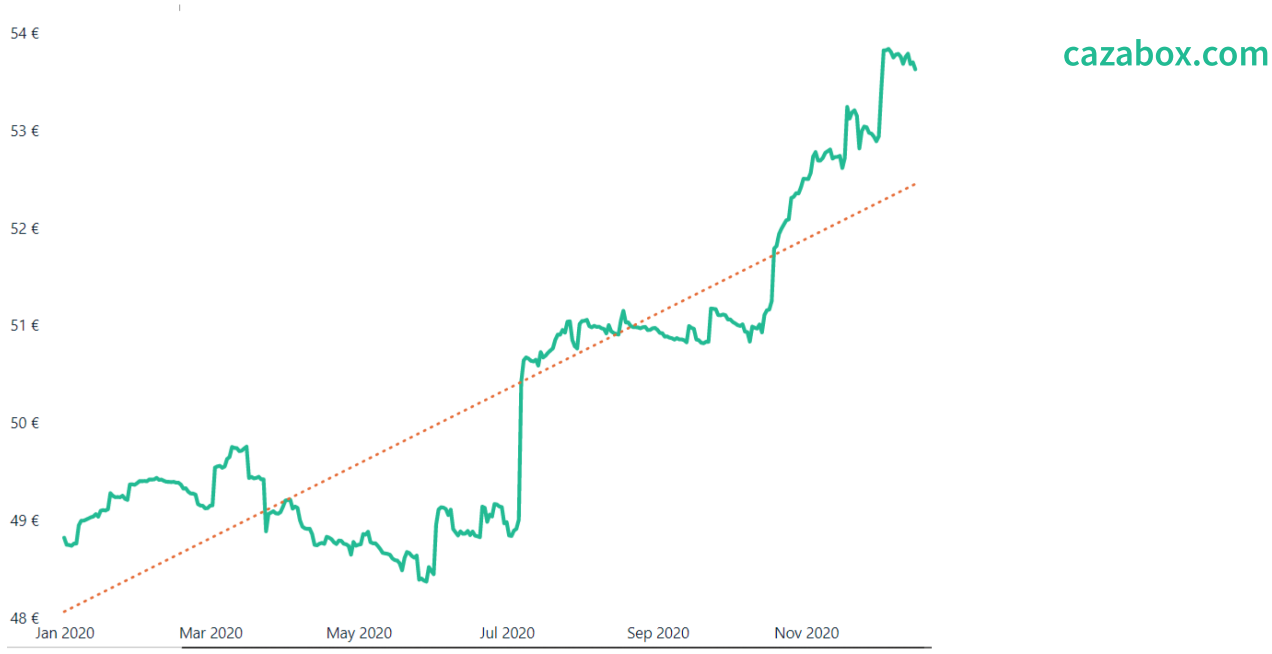


Figure 24: ‘Price evolution on cazabox.com. Source: Netrivals Big Data

The case of Cazabox.com presents a very high contrast with the cases seen previously. The average sale price has followed an upward trend for much of 2020.

We can see how during the first and second quarters of the year there was great price volatility, following a downward trend. In July, the average price increased to stabilize again for a few months until November, which rose again without stopping until the end of the year.

Its minimum price, € 48.38, reached it on Friday, May 29, while its most expensive price reached it on December 4, reaching € 53.82.

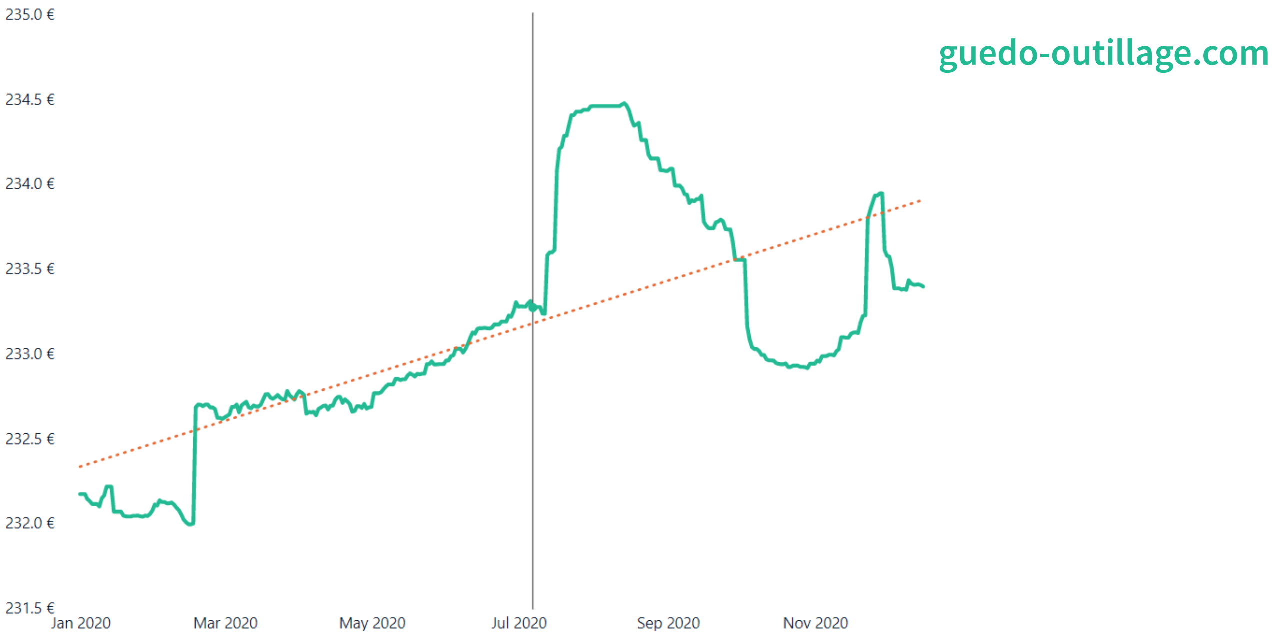


Figure 25: 'Price evolution on guedo-outillage.com. Source: Netrivals Big Data

This is a case like the one we just saw on Cazabox.com, prices show an upward trend during 2020.

During the first two quarters of the year, the average price of its products has been increasing with small increases of the magnitude of € 0.01. At the end of the summer it made a quite remarkable price increase, of about two euros of difference, to continue lowering it until mid-November.

Surprisingly, we can see how the highest prices in the fourth quarter of 2020 occurred the week of Black Friday.

Figure 26: 'Price evolution on leroymerlin.fr. Source: Netrivals Big Data

Before going into more detail with this case, we must note that the average price ranges between € 44.80 and € 46, so all these price changes are at a very low magnitude.

In the graph we can see how there was an increase in the average price during the end of May, shortly after reaching its maximum of € 45.86 on June 5. In the middle of the same month, the price begins to drop without stopping until it reaches the minimum of € 45.00 on October 20, 2020.

As we have seen in the previous case, the average price of this store increases again during the last quarter of the year, with Black Friday being one of the periods in which the average price is not below the annual average.

Figure 27: 'Price evolution on master-outillage.com. Source: Netrivals Big Data

As in the case of Guedo-outillage.fr and Cazabox.com, the price trend during 2020 of Mater-outillage.com has been on the rise.

As usual, at the beginning of the year it shows a decline until mid-March, the month in which prices start to rise regularly until July. From then on they go down again until mid-November, when the price trend line goes up again.

This is the most obvious case of a high pricing strategy for Black Friday. In the case of this store, the maximum average price has reached mid-December, intuiting that it is the strategy for the Christmas campaign.

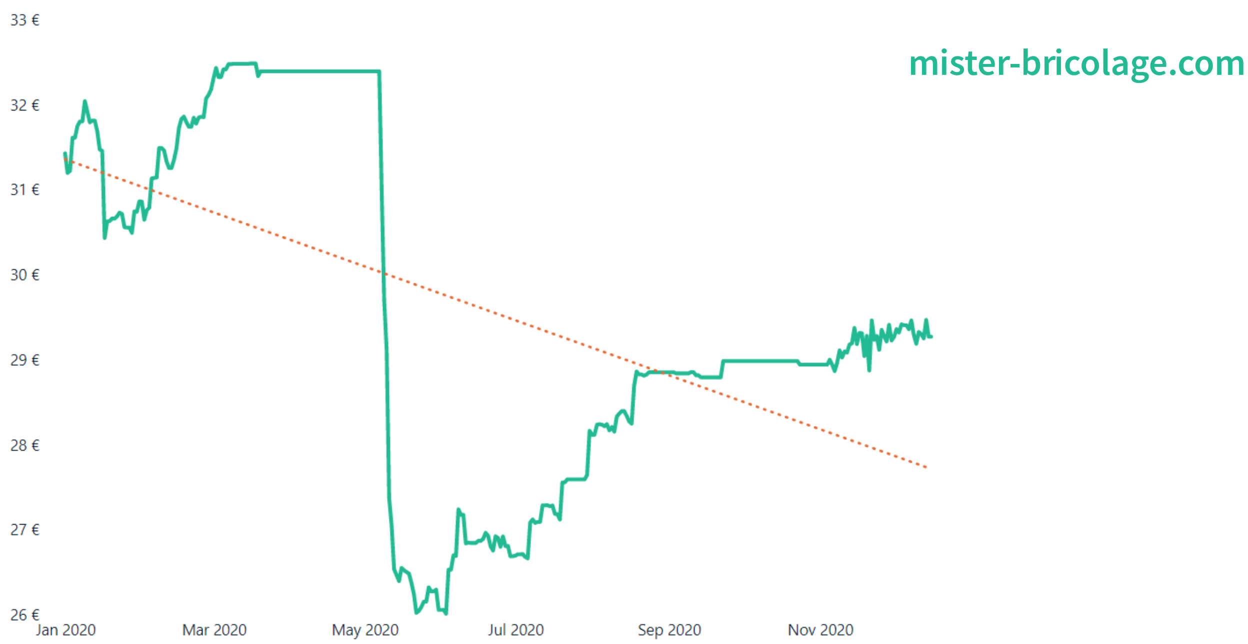


Figure 28: 'Price evolution on master-outillage.com. Source: Netrivals Big Data

This graph shows an unusual trend. So far we have seen how stores increased prices during the month of January and then reduced it. In this case, during the month of January it makes an increase of less than one euro and then drops by almost € 1.50. Right afterwards it begins to rise gradually until it reaches the limit of € 32.39, which it maintains for a few months and then drastically reduces it in a few days.

During the third quarter of the year, it makes small increases and then stabilizes it at the end of the year between € 29 and € 30.

Takeaways

From the data we've been assessing throughout this Industry Report we can conclude the following:

- Price increases are more common than price decreases. Even so, price increases are always more remarkable in percentage terms.
- It is common to make price changes during weekends, especially on Saturdays.
- At the beginning of the year there is a general decrease in prices in almost all stores, just after the end of the Christmas season.
- The Black Friday week is not the time when prices are the lowest in any of the cases studied in this report.

Additional Resources

Combine the information collected by Netrivals with data related to any of your business areas or departments (Sales, Finance, CRM and Data Science), and increase the quality and quantity of data metrics you get from your Business Intelligence tool.

Go one step further and make the most of your KPIs by adding data from other actors in the market, and generate dashboards with your own look and feel. Learn more on: https://www.netrivals.com/business-intelligence/

Appendix

The next table contains the number of price changes in products analyzed per each of the brands and stores included in the analysis.

Brand	blanc-habitat.com	Total
legrand	74209	**74209**
makita	23427	**23427**
hager	19666	**19666**
aric	14818	**14818**
hikoki (hitachi)	4572	**4572**
abb	2019	**2019**
fischer	1330	**1330**
gewiss	1179	**1179**
facom	1037	**1037**
stanley	482	**482**
bosch	61	**61**
chapuis	24	**24**
Total	**142824**	**142824**

Figure 29 : Number of price changes per brand on blanc-habitat.com. Source: Netrivals Big Data

Brand	bricodepot.fr	Total
legrand	425	**425**
diall	176	**176**
goodhome	149	**149**
colours	114	**114**
form	92	**92**
dulux valentine	77	**77**
blooma	67	**67**
mac allister	26	**26**
karcher	20	**20**
bosch	18	**18**
stanley	17	**17**
fischer	4	**4**
facom	1	**1**
Total	**1186**	**1186**

Figure 30 : Number of price changes per brand on bricodepot.fr. Source: Netrivals Big Data

Brand	bricomarche.com	Total
legrand	200	**200**
stanley	92	**92**
karcher	38	**38**
bosch	36	**36**
facom	15	**15**
fischer	12	**12**
Total	**393**	**393**

Figure 31 : Number of price changes per brand on bricomarche.com. Source: Netrivals Big Data

Brand	castorama.fr	Total
colours	2133	**2133**
blooma	1060	**1060**
dulux valentine	828	**828**
goodhome	505	**505**
diall	496	**496**
legrand	496	**496**
bosch	325	**325**
form	215	**215**
karcher	108	**108**
v33	101	**101**
mac allister	100	**100**
chapuis	97	**97**
facom	24	**24**
aric	8	**8**
stanley	7	**7**
fischer	3	**3**
Total	**6506**	**6506**

Figure 32 : Number of price changes per brand on castorama.fr. Source: Netrivals Big Data

Brand	cazabox.com	Total
legrand	4762	**4762**
facom	1370	**1370**
fischer	1250	**1250**
stanley	656	**656**
gewiss	537	**537**
makita	293	**293**
aric	192	**192**
chapuis	76	**76**
bosch	68	**68**
hager	17	**17**
Total	**9221**	**9221**

Figure 33 : Number of price changes per brand on cazabox.com. Source: Netrivals Big Data

Brand	guedo-outillage.fr	Total
bosch	456	**456**
hikoki (hitachi)	130	**130**
makita	120	**120**
stanley	19	**19**
facom	5	**5**
fischer	4	**4**
karcher	3	**3**
Total	**737**	**737**

Figure 34 : Number of price changes per brand on guedo-outillage.fr. Source: Netrivals Big Data

Brand	leroymerlin.fr	Total
legrand	651	**651**
bosch	542	**542**
makita	281	**281**
karcher	210	**210**
v33	208	**208**
stanley	179	**179**
facom	100	**100**
dulux valentine	77	**77**
abb	50	**50**
fischer	10	**10**
aric	3	**3**
Total	**2311**	**2311**

Figure 35 : Number of price changes per brand on leroymerlin.fr. Source: Netrivals Big Data

Brand	master-outillage.com	Total
facom	48961	**48961**
bosch	18158	**18158**
stanley	7020	**7020**
makita	6679	**6679**
karcher	3098	**3098**
Total	**83916**	**83916**

Figure 36 : Number of price changes per brand on master-outillage.com. Source: Netrivals Big Data

Brand	mr-bricolage.fr	Total
v33	287	**287**
chapuis	248	**248**
legrand	245	**245**
stanley	190	**190**
dulux valentine	188	**188**
bosch	58	**58**
karcher	54	**54**
facom	47	**47**
fischer	33	**33**
vynex	9	**9**
abb	1	**1**
Total	**1360**	**1360**

Figure 37 : Number of price changes per brand on mr-bricolage.fr. Source: Netrivals Big Data

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