



A Prime View: Amazon's CPG Share Growth

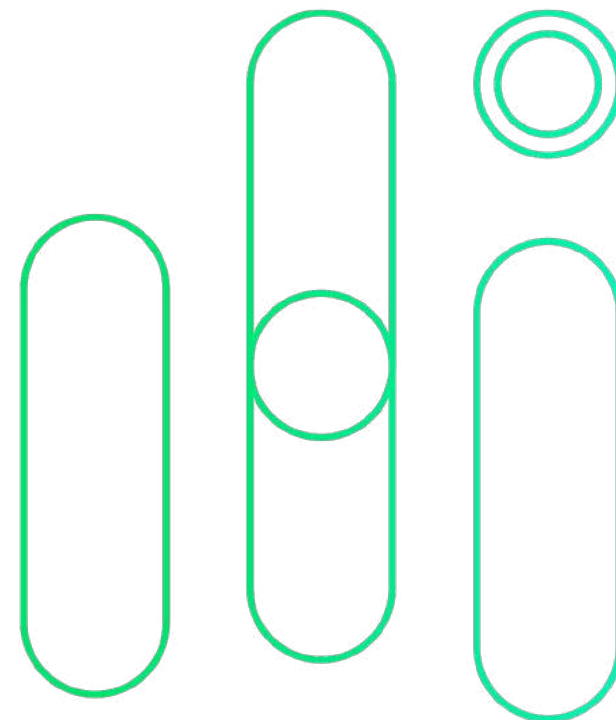
May 2021



Methodology

Amazon's CPG Share Growth

- **Source:** Numerator TruView
Built off the 1M+ household Numerator Measurement Panel, delivering omnichannel market share measurement with consumer context
- **Timeframe:** 04/01/2018 – 03/31/2021
Yearly and monthly views, with daily breakouts for Prime Days 2018, 2019, and 2020
- **Scope:** Total Omnichannel market views, in-store and online.
Additional breakouts for Amazon, Walmart, Target and Costco, plus their associated .com's
- **Sectors:** Grocery, Household, Health & Beauty, Pet and Baby



Amazon CPG Share

- Amazon's share of CPG sales has grown from **2.4% in 2018 to 3.9%** (1.6x) in 2021
- Amazon holds roughly **one-fifth of market share** for Health & Beauty and Baby sectors

Prime Day Impacts

- Amazon sees a **4-5x boost** in CPG share on Prime Day
- This share is primarily **sourced from smaller retailers**. Other major .com's experience a boost as well
- The increase **extends beyond Prime Day** and affects the month as a whole

View Across Generations

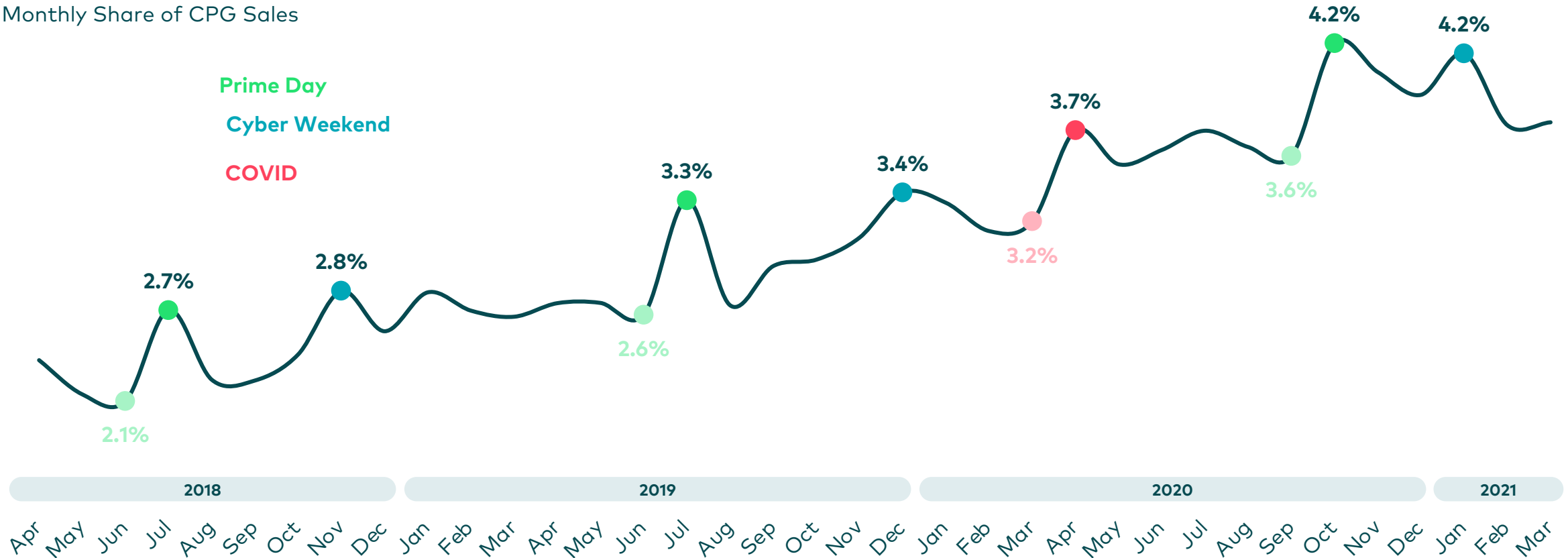
- Amazon has grown share across **all generations** of consumers except Gen Z
- Millennials show the biggest share boosts on Prime Day, and have **overtaken Gen Z** for top share on Amazon

Amazon's share of CPG dollars has grown roughly 1.6x in the past 3 years.

The e-tailer's CPG market share fluctuates month-to-month, with distinct boosts each year around Prime Day. These Prime Day increases give Amazon a roughly 0.6 share point increase the month of Prime Day vs. the month prior.

Amazon's CPG Market Share

Monthly Share of CPG Sales



Source: Numerator TruView 04/01/2018 – 03/31/2021, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

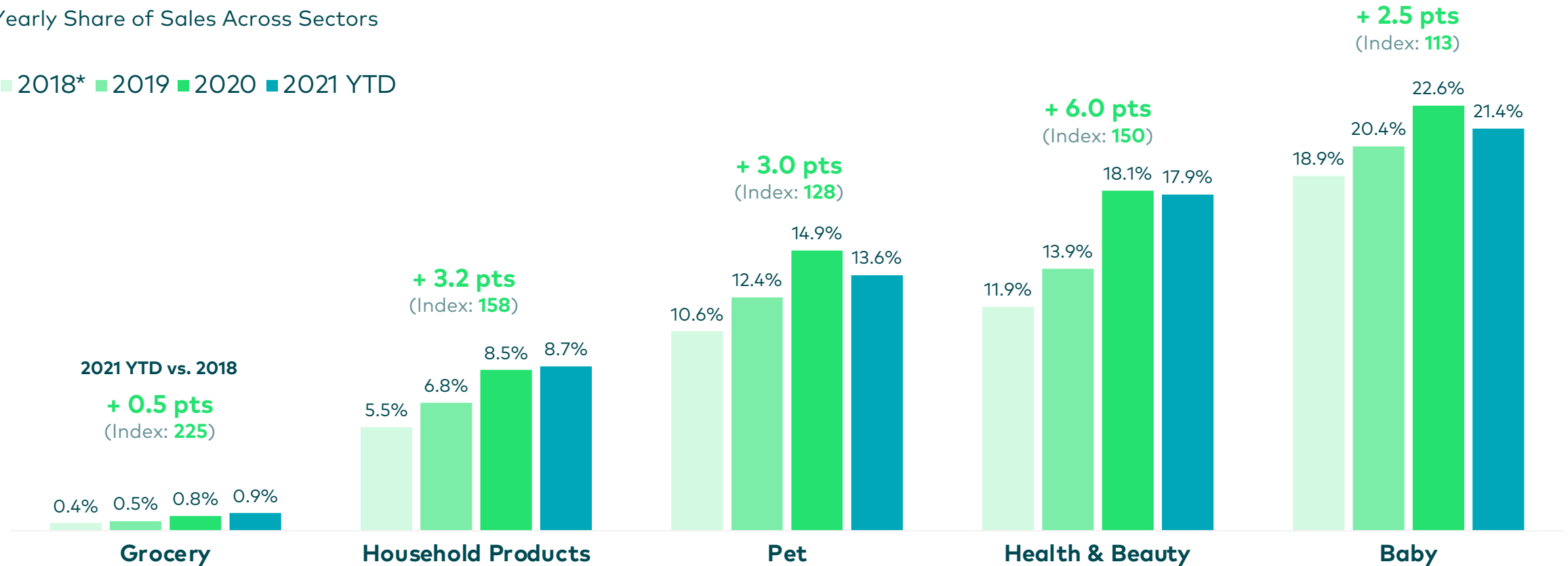
Amazon holds one-fifth of market share in Health & Beauty and Baby.

Both sectors have grown in the past three years, particularly since COVID, with Health & Beauty increasing 1.5x. Alternatively, while Amazon's grocery business has seen tremendous growth, the retailer still holds less than 1% market share for the sector.

Amazon's CPG Market Share x Sector

Yearly Share of Sales Across Sectors

■ 2018* ■ 2019 ■ 2020 ■ 2021 YTD



Source: Numerator TruView 04/01/2018 – 03/31/2021, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

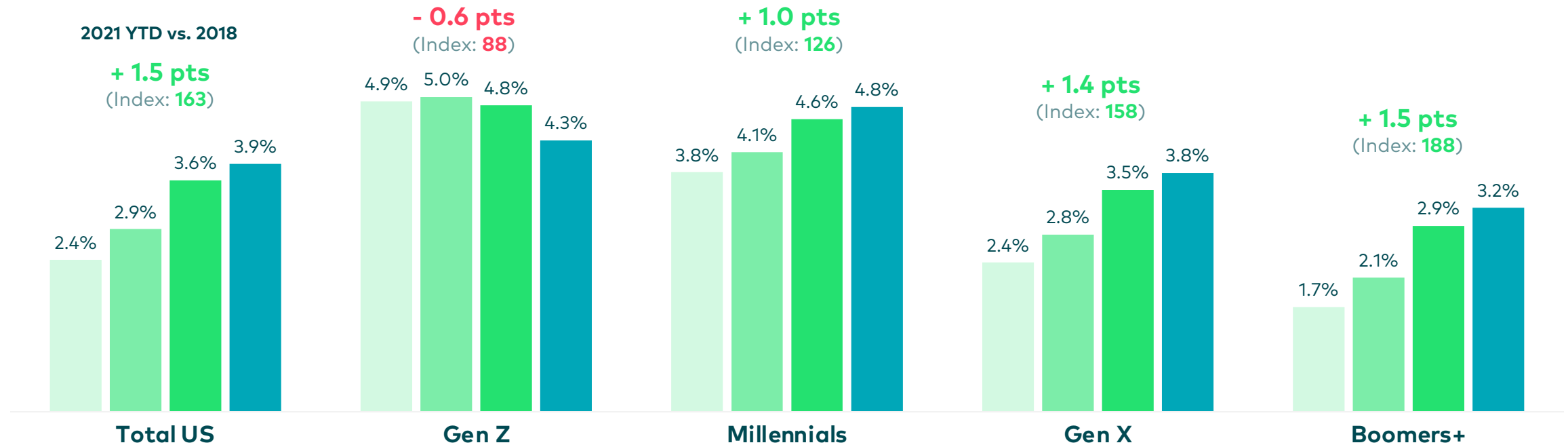
Amazon's CPG share has grown across all generations except Gen Z.

While Amazon has seen significant share growth with Gen X and Boomer+ shoppers, they've seen a declining share among Gen Z shoppers. 2021 to-date, Millennials hold highest share at Amazon, a space previously held by Gen Z.

Amazon's CPG Market Share x Generation

Yearly Share of Sales Across Sectors

■ 2018* ■ 2019 ■ 2020 ■ 2021 YTD



Source: Numerator TruView 04/01/2018 – 03/31/2021, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

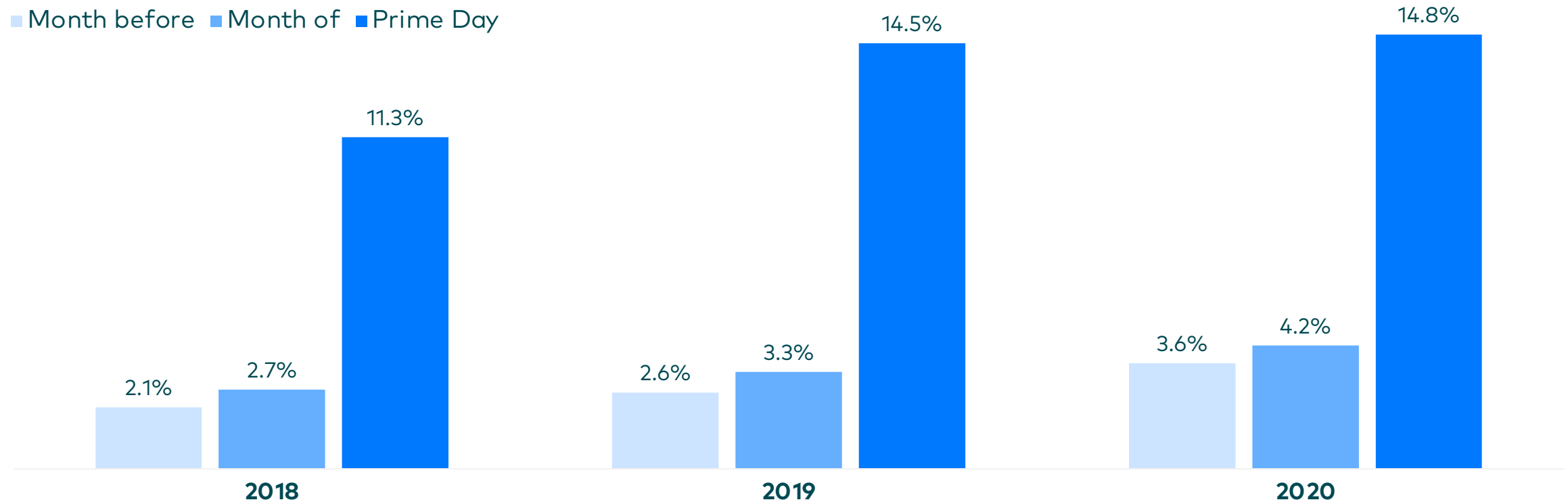
Amazon's CPG share skyrockets 4-5x on Prime Day every year.

While the entire month containing Prime Day sees a modest share boost vs. the month prior, Amazon's day-of share on Prime Day is 4-5x higher than its usual range. Day-of share grew from 11.3% on Prime Day 2018 to 14.5% in 2019 and 14.8% in 2020.

Amazon's CPG Market Share x Sector

Yearly Share of Sales Across Sectors

■ Month before ■ Month of ■ Prime Day



Source: Numerator TruView 04/01/2018 – 03/31/2021, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)
Prime Day 2018: 7/16/18 – 7/17/18 | Prime Day 2019: 7/15/19 – 7/16/19 | Prime Day 2020: 10/13/20 – 10/14/20

This Prime Day share boost is primarily pulled from smaller retailers.

Major retailers see share decreases at their in-store locations, while their online outlets experience slight share boosts, as consumers browse the web for additional deals. The largest share decline comes from smaller retailers and varies by category.

CPG Share Change on Prime Day

Share change on Prime Day vs. Month Prior, shown in percentage points

	Online				In-Store				Online + In-Store
	Amazon.com	Walmart.com	Target.com	Costco.com	Walmart	Target	Costco	Kroger	All Other
Prime Day 2018	+9.2 pts	+0.1 pts	+0.2 pts	--	-0.4 pts	-0.1 pts	-0.1 pts	-0.7 pts	-8.3 pts
Prime Day 2019	+11.9 pts	--	--	--	-1.1 pts	-0.1 pts	-0.2 pts	-0.6 pts	-9.7 pts
Prime Day 2020	+11.2 pts	+0.1 pts	+0.2 pts	+0.1 pts	-1.0 pts	-0.4 pts	-0.8 pts	-0.4 pts	-8.9 pts

...and this shift affects the entire month of Prime Day, not just day-of.

Amazon's share the month of Prime Day grows 0.5 – 0.6 percentage points, and other major online retailer see slight increases as well. Walmart was also able to capture in-store share increases in October 2020, despite losing share on Prime Day itself.

CPG Share Change Month of Prime Day

Share change month of Prime Day vs. Month Prior, shown in percentage points

	Online				In-Store				Online + In-Store
	Amazon.com	Walmart.com	Target.com	Costco.com	Walmart	Target	Costco	Kroger	All Other
July 2018	+0.5 pts	--	+0.2 pts	--	-0.1 pts	+0.1 pts	--	-0.1 pts	-0.6 pts
July 2019	+0.7 pts	--	--	--	--	--	-0.1 pts	-0.1 pts	-0.5 pts
October 2020	+0.7 pts	+0.1 pts	+0.2 pts	--	+0.6 pts	--	-0.1 pts	+0.1 pts	-1.6 pts

Source: Numerator TruView 04/01/2018 – 03/31/2021, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)
July 2018 vs. June 2018, July 2019 vs. June 2019, October 2020 vs. September 2020

Amazon pulls significant share in the Baby sector from Target & Walmart.

Amazon's Prime Day share increases come from different retailers based on sector. While Grocery sees minimal impact, Health & Beauty and Household products see more dramatic increases and pull share most heavily from Costco.

2020 CPG Share Change Month of Prime Day x Sector

Share change month of Prime Day vs. Month Prior, shown in percentage points

	Online				In-Store				Online + In-Store
	Amazon.com	Walmart.com	Target.com	Costco.com	Walmart	Target	Costco	Kroger	All Other
Baby	+3.0 pts	+0.4 pts	-1.2 pts	+0.2 pts	-1.2 pts	-1.2 pts	+1.2 pts	+0.2 pts	-1.4 pts
Health & Beauty	+2.8 pts	+0.2 pts	+0.1 pts	-0.1 pts	+0.3 pts	-0.3 pts	-1.5 pts	+0.1 pts	-1.6 pts
Household	+2.5 pts	+0.3 pts	+0.1 pts	-0.1 pts	+0.2 pts	-0.4 pts	-1.3 pts	+0.1 pts	-1.4 pts
Pet	+0.9 pts	--	--	--	-0.8 pts	-0.4 pts	+0.4 pts	--	-0.1 pts
Grocery	+0.1 pts	--	--	--	+0.7 pts	+0.1 pts	+0.1 pts	+0.1 pts	-1.1 pts

Additional retailers included in "All Other"

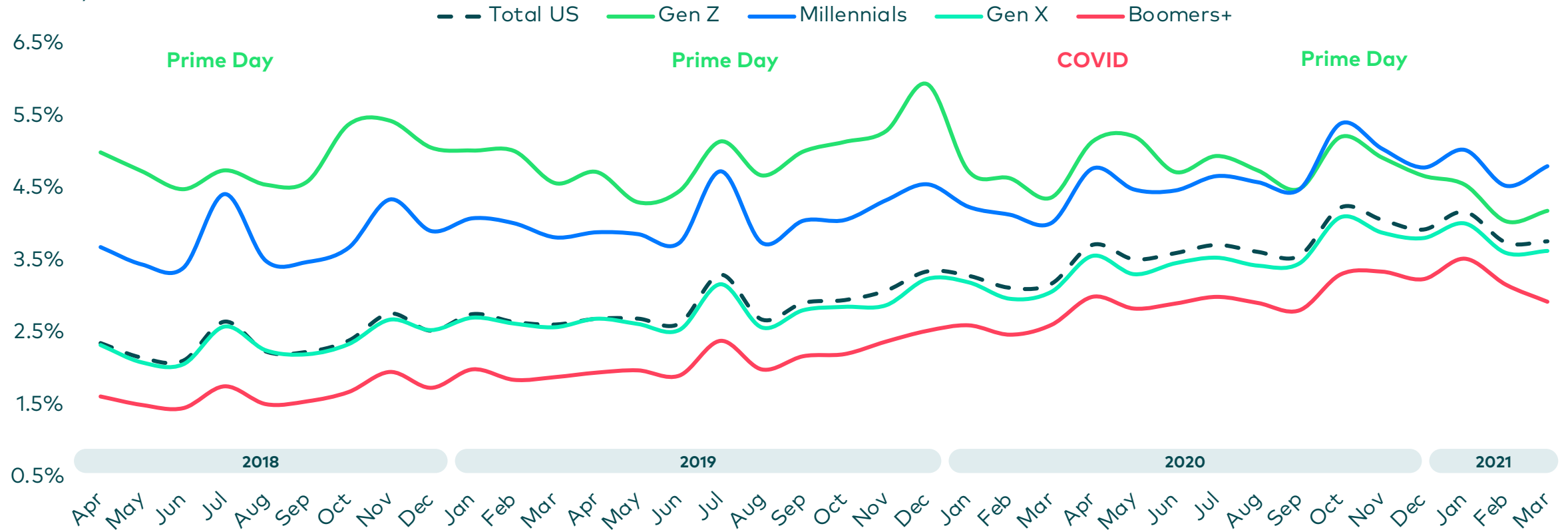
Pet: Chewy.com +2.0 pts, Petco.com -0.1, Petco -0.8 || Beauty: Sephora +0.1, Sephora.com -0.1, Ulta.com -0.3, Ulta -0.4

Millennials typically show the largest Amazon share boost on Prime Day.

All generations see a boost in Amazon share surrounding Prime Day, but Millennials most significantly so. October 2020 was the first time Amazon's Millennial share exceeded that of Gen Z consumers, and Millennials have held the highest share since.

Amazon's CPG Market Share

Monthly Share of CPG Sales



Source: Numerator TruView 04/01/2018 – 03/31/2021, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

Want to Know More?

Contact us at hello@numerator.com

