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# A Prime View: Amazon's CPG Share Growth

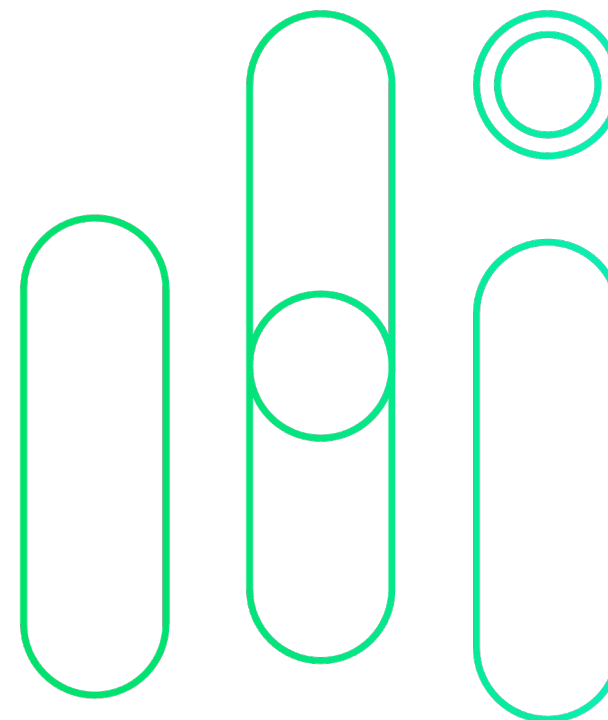
June 2022 Update

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# 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:** 01/01/2019 – 06/12/2022  
Yearly and monthly views, with daily breakouts for Prime Days 2019, 2020, and 2021
- **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 **3.2% in January 2019 to 4.7%** (1.5x) in January 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

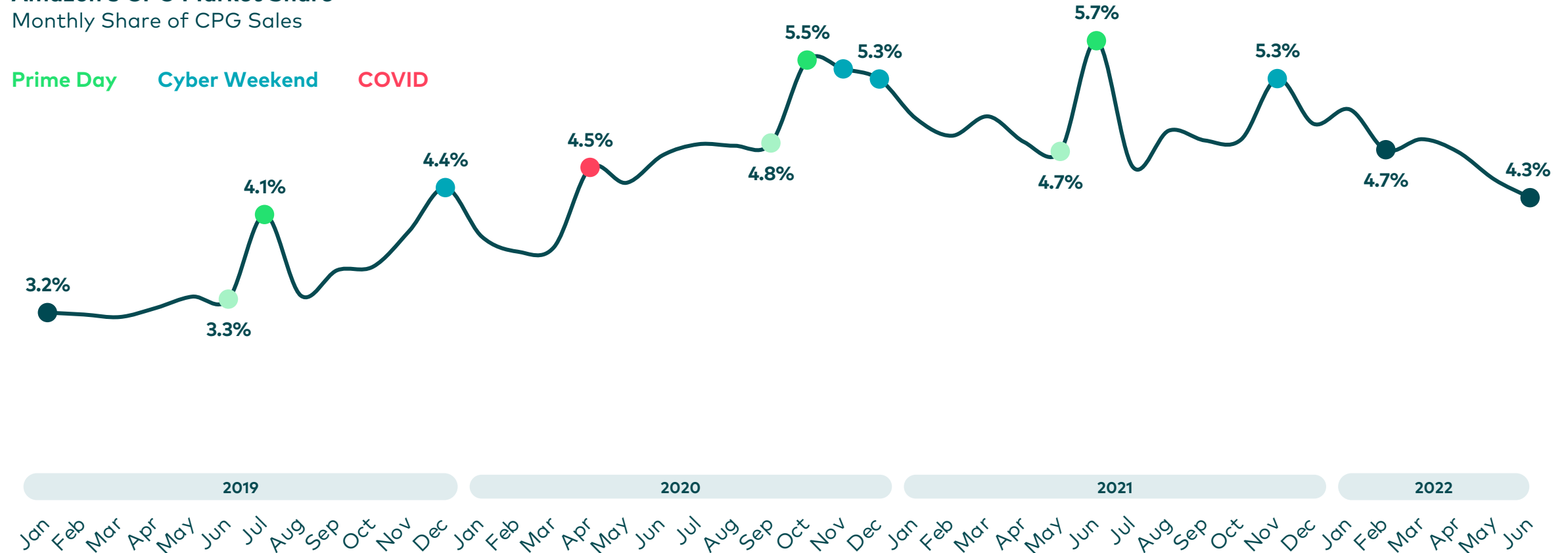
- Amazon has grown share across **all generations** of consumers except Gen Z
- Despite the slight decline in 2022, Amazon still holds the **largest share among Gen Z** consumers compared to other generations
- **Millennials & Gen Z** show the biggest share boosts on Prime Day.

# Amazon's share of CPG dollars has grown roughly 1.5x 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 1 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 01/01/2019-06/12/2022, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

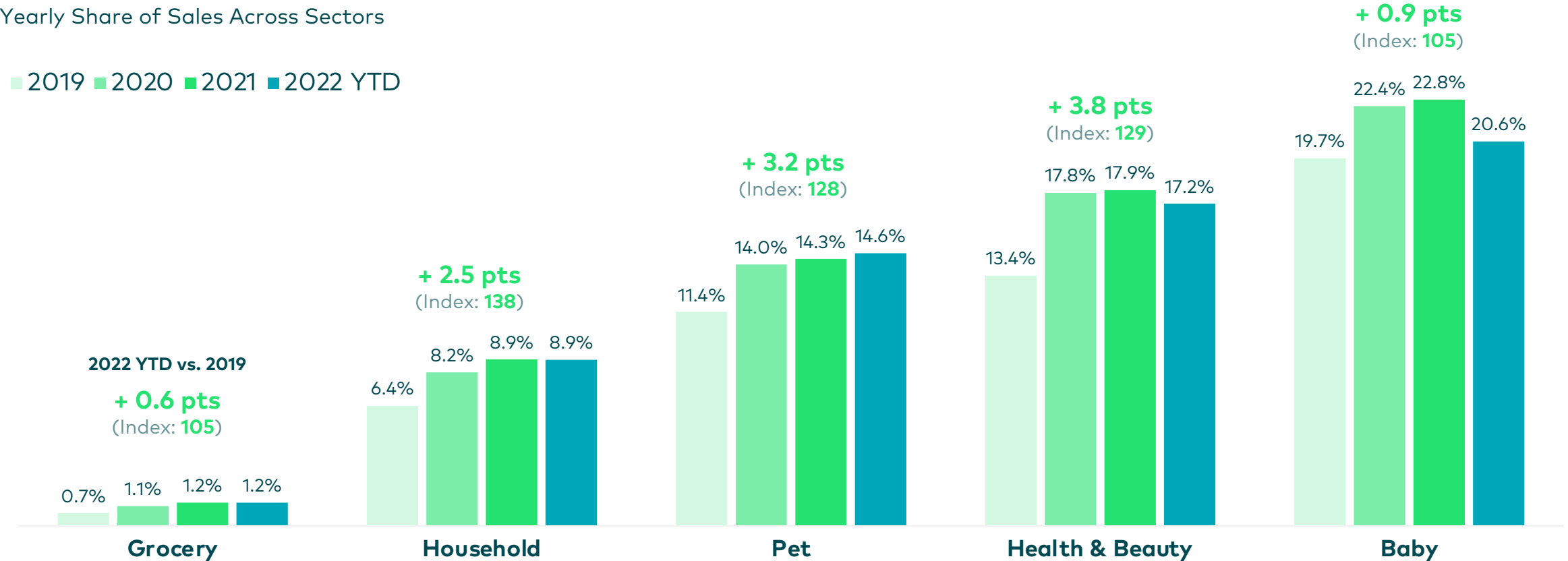
# Amazon holds one-fifth of market share in Health & Beauty and Baby.

Both sectors have grown in the past three years, though have seen a slight decline in 2021 YTD. Alternatively, while Amazon's grocery business has seen tremendous growth, the retailer still holds only 1% market share for the sector.

## Amazon's CPG Market Share x Sector

Yearly Share of Sales Across Sectors

■ 2019 ■ 2020 ■ 2021 ■ 2022 YTD



Source: Numerator TruView 01/01/2019-06/12/2022, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

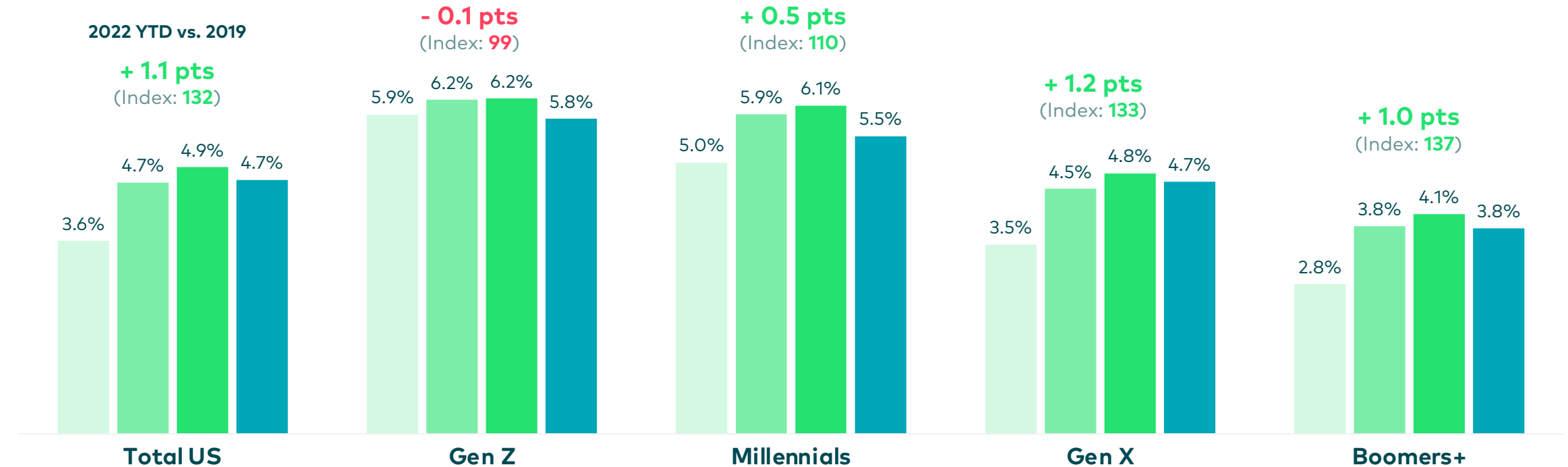
# Amazon's CPG share has grown across all generations except Gen Z.

While Amazon has seen significant share growth with Gen X and Boomer+ shoppers, they've seen a declining share among Gen Z shoppers. Despite this slight decline in 2022 YTD, Amazon still holds the largest share among these Gen Z consumers.

## Amazon's CPG Market Share x Generation

Yearly Share of Sales Across Sectors

■ 2019 ■ 2020 ■ 2021 ■ 2022 YTD



Source: Numerator TruView 01/01/2019-06/12/2022, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

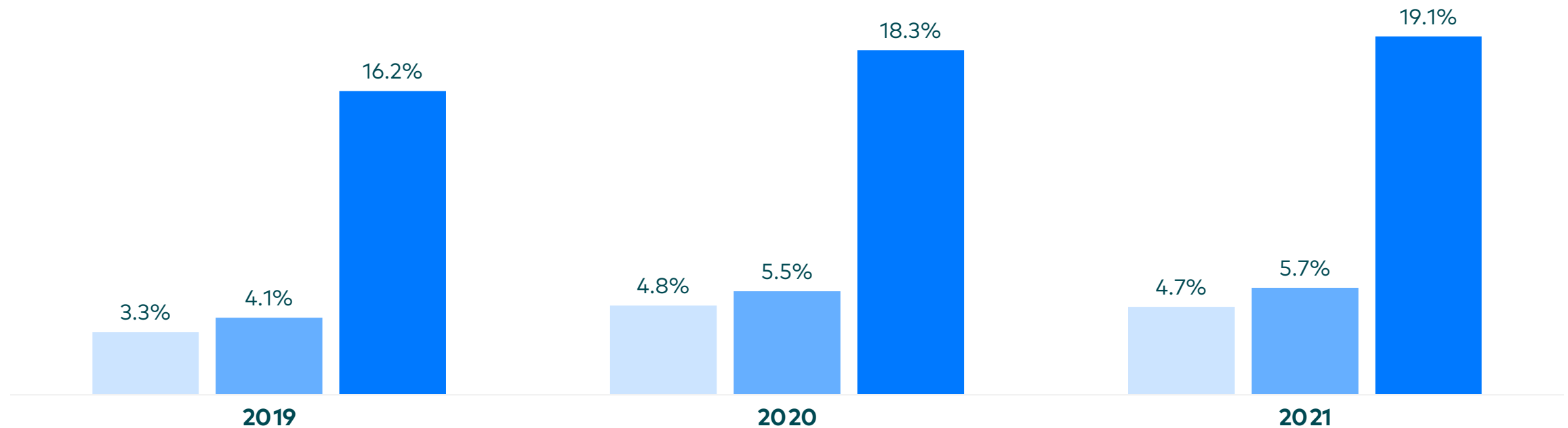
# Amazon's CPG share skyrockets 4-5x on Prime Day every year.

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 16.2% on Prime Day 2019 to 18.3% in 2020 and 19.1% in 2021.

## Amazon's CPG Market Share x Sector

Yearly Share of Sales Across Sectors

■ Month before ■ Month of ■ Prime Day



Source: Numerator TruView, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)  
Prime Day 2019: 7/15/19 – 7/16/19 | Prime Day 2020: 10/13/20 – 10/14/20 | Prime Day 2021: 6/21/21 – 6/22/21

# 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 2019 | +12.8 pts  | -0.3 pts    | --         | --         | -2.0 pts | -0.2 pts | -0.8 pts | -1.1 pts | -8.5 pts          |
| Prime Day 2020 | +13.6 pts  | +0.1 pts    | +0.4 pts   | +0.1 pts   | -1.9 pts | -0.6 pts | -1.2 pts | -1.0 pts | -9.4 pts          |
| Prime Day 2021 | +14.4 pts  | -0.1 pts    | +0.8 pts   | --         | -2.1 pts | --       | -1.2 pts | -1.4 pts | -10.5 pts         |



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

Amazon's share the month of Prime Day grows 0.8 – 1.0 percentage points. Walmart was able to capture in-store and online share increases in October 2020, despite losing share on Prime Day itself, while Target in-store saw slight increases as well.

### CPG Share Change Month of Prime Day

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

|                 | Online     |             |            |            | In-Store |          |          |          | Online +<br>In-Store |
|-----------------|------------|-------------|------------|------------|----------|----------|----------|----------|----------------------|
|                 | Amazon.com | Walmart.com | Target.com | Costco.com | Walmart  | Target   | Costco   | Kroger   | All Other            |
| July<br>2019    | +0.8 pts   | -0.1 pts    | --         | --         | -0.1 pts | +0.1 pts | -0.2 pts | -0.2 pts | -0.3 pts             |
| October<br>2020 | +0.8 pts   | +0.2 pts    | --         | --         | +0.6 pts | --       | -0.1 pts | +0.2 pts | -1.6 pts             |
| June<br>2021    | +1.0 pts   | --          | --         | --         | -0.2 pts | +0.1 pts | +0.2 pts | -0.2 pts | -1.0 pts             |

Source: Numerator TruView, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)  
July 2019 vs. June 2019, October 2020 vs. September 2020, June 2021 vs. June 2020

# Amazon pulls significant Baby & Household sector share from 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 Walmart.

## 2021 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            | +3.7 pts   | -0.2 pts    | --         | -0.4 pts   | -1.7 pts | +0.6 pts | +0.3 pts | -0.1 pts | -2.2 pts          |
| Health & Beauty | +2.0 pts   | -0.1 pts    | --         | --         | -0.8 pts | -0.1 pts | +0.5 pts | -0.1 pts | -1.3 pts          |
| Household       | +3.8 pts   | --          | --         | --         | -1.4 pts | +0.3 pts | -0.1 pts | -0.1 pts | -2.5 pts          |
| Pet             | +1.9 pts   | +0.1 pts    | --         | --         | -0.3 pts | +0.1 pts | +0.3 pts | -0.1 pts | -1.9 pts          |
| Grocery         | +0.2 pts   | +0.1 pts    | --         | --         | --       | +0.1 pts | +0.1 pts | -0.2 pts | -0.3 pts          |

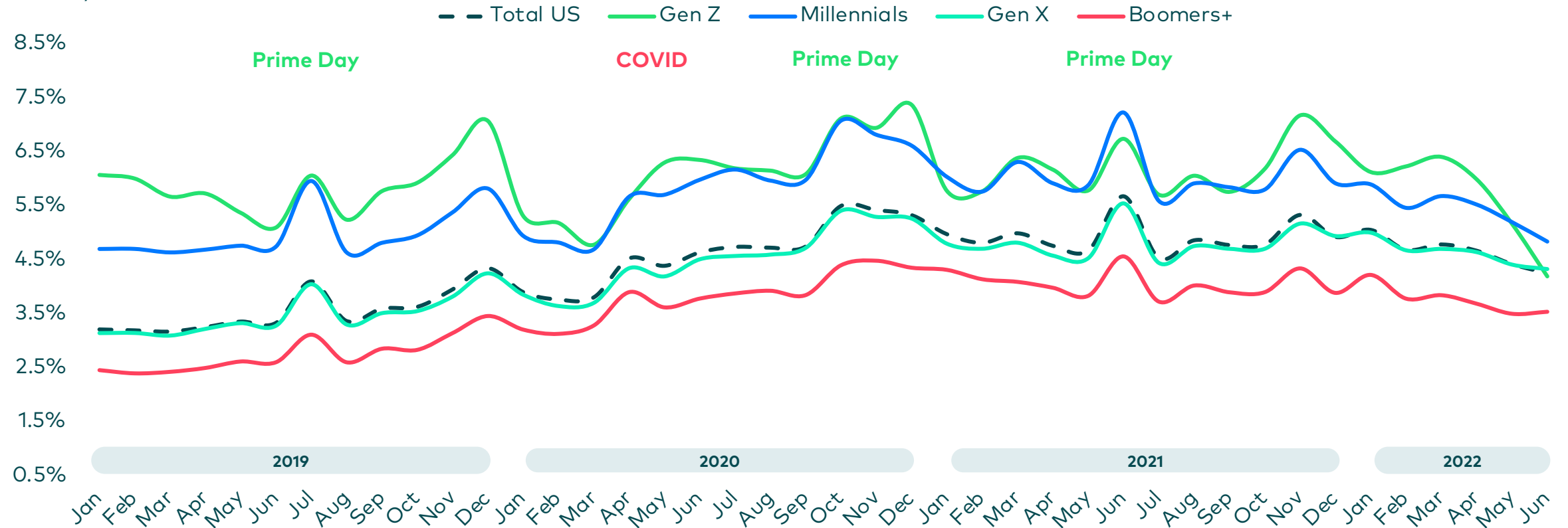
Source: Numerator TruView June 2021 vs. June 2020, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

# Younger generations show the largest Amazon share boost on Prime Day.

All generations see a boost in Amazon share surrounding Prime Day, but Millennials & Gen Z most significantly so. Early indications in May & June 2022 show declining share among Gen Z, dropping below both Millennials and Gen X consumers.

## Amazon's CPG Market Share

Monthly Share of CPG Sales



Source: Numerator TruView 01/01/2019-06/12/2022, CPG Sectors (Grocery, Health & Beauty, Household, Baby & Pet)

Want to know more?

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