

Amazon Subscribe & Save loses share across CPG categories

Article



US Amazon Subscribe & Save Penetration, by Consumer Packaged Goods (CPG) Category, 2023 & 2024*

% of total category purchases

	2023	2024*
Dog food and treats	19.3%	17.1%
Face care	18.1%	15.0%
Pet health and wellness	13.1%	11.1%
Coffee	12.3%	10.0%
Letter vitamins	11.1%	9.7%
Cat food and treats	11.1%	9.5%
Laundry detergent	11.1%	9.5%
Hair, skin, and nail vitamins	9.6%	8.3%
Probiotics	9.7%	8.2%
Herbal supplements	-	7.8%
Shampoo and conditioner	10.0%	-

Note: read as 19.3% of dog food and treat purchases on Amazon in 2023 were made via Amazon Subscribe & Save; *Jan 1-June 26, 2024

Source: Numerator, June 26, 2024

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Key stat: [Amazon's](#) Subscribe & Save program lost share across nine of the top 10 consumer packaged goods (CPG) categories between 2023 and 2024, according to June data from Numerator.

Beyond the chart:

- Consumers continue to be cautious about how they're spending money, which may mean putting their subscriptions on pause and researching the best deals.
- Amazon's US sales of health, personal care, and beauty products and pet products (both of which make up the majority of the top 10 CPG Subscribe & Save categories) will continue to grow by double digits both this year and next, per our forecast.
- Health, personal care, and beauty will be the fastest-growing category we track on Amazon in the US this year, growing 14.8% to reach \$51.55 billion, or 10.5% of Amazon's total US ecommerce sales (up from 7.5% in 2021).
- Amazon's US ecommerce sales of pet products will reach \$11.78 billion this year, 2.4% of Amazon's total ecommerce sales in the US, per our forecast. But sales growth is slowing from a high of 38.3% in 2021 to 11.3% in 2024.

Use this chart:

- Highlight categories where Amazon shoppers may be open to shopping elsewhere.

- Suggest focusing resources on high-engagement categories to maximize return on investment and strengthen brand loyalty among existing subscribers.
- Illustrate shifting consumer trends and emphasize the importance of adapting marketing strategies to align accordingly.

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Note: Data was provided to EMARKETER by Numerator.