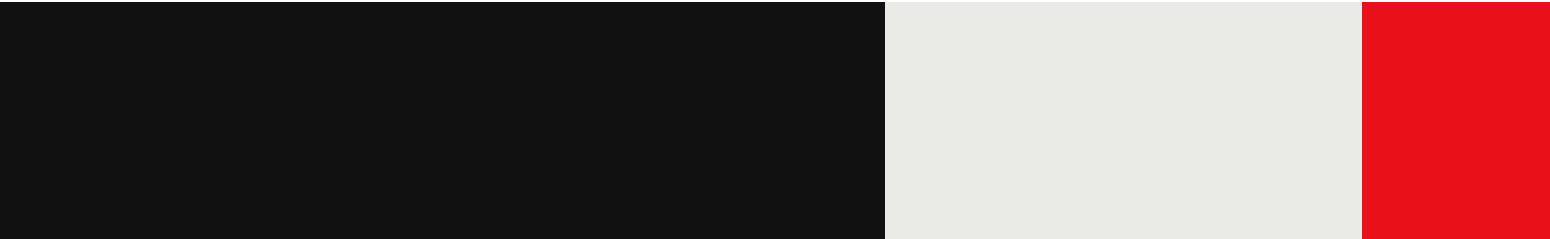



How Amazon Fresh stacks up among the leading digital grocery players

Article



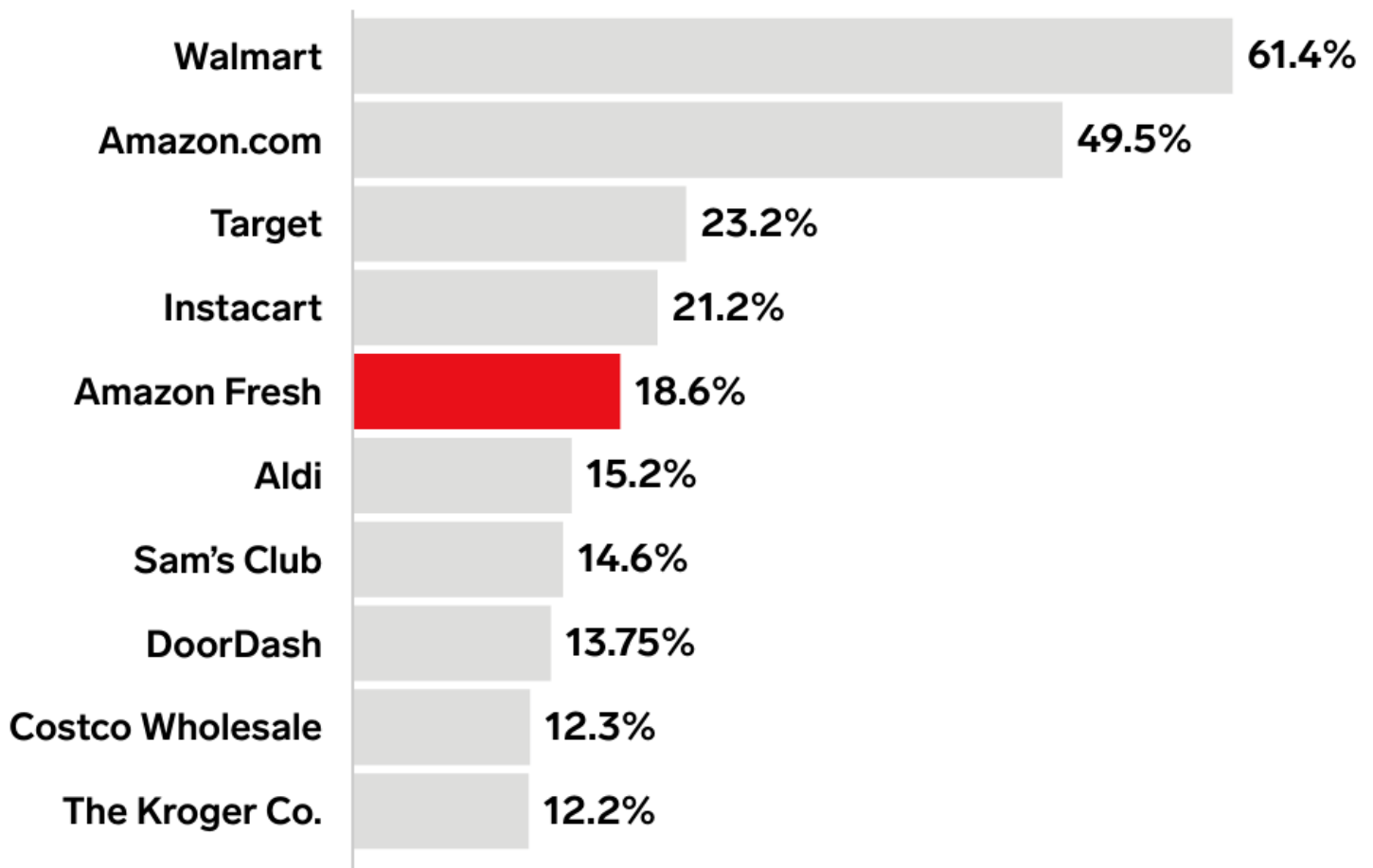
Less than 19% of US digital grocery buyers used Amazon Fresh within the past year. Nearly all of them have also shopped on other digital grocery platforms.

Walmart and the core Amazon site command the largest audiences.

- Amazon Fresh has a smaller audience than the leading players, but it still sits within the top five. Its share of recent digital grocery buyers is similar to Instacart's and larger than those of leading US grocery chains like Costco Wholesale and The Kroger Co.

Less Than 20% of Digital Grocery Buyers Have Placed an Order From Amazon Fresh

% US digital grocery buyers, May 2023



Note: Respondents were asked, "In the past 12 months, which of the following grocery-ordering websites or apps have you used to place an order?; this is the website or app that you initially accessed to place the order."

Source: Insider Intelligence | eMarketer, July 2023

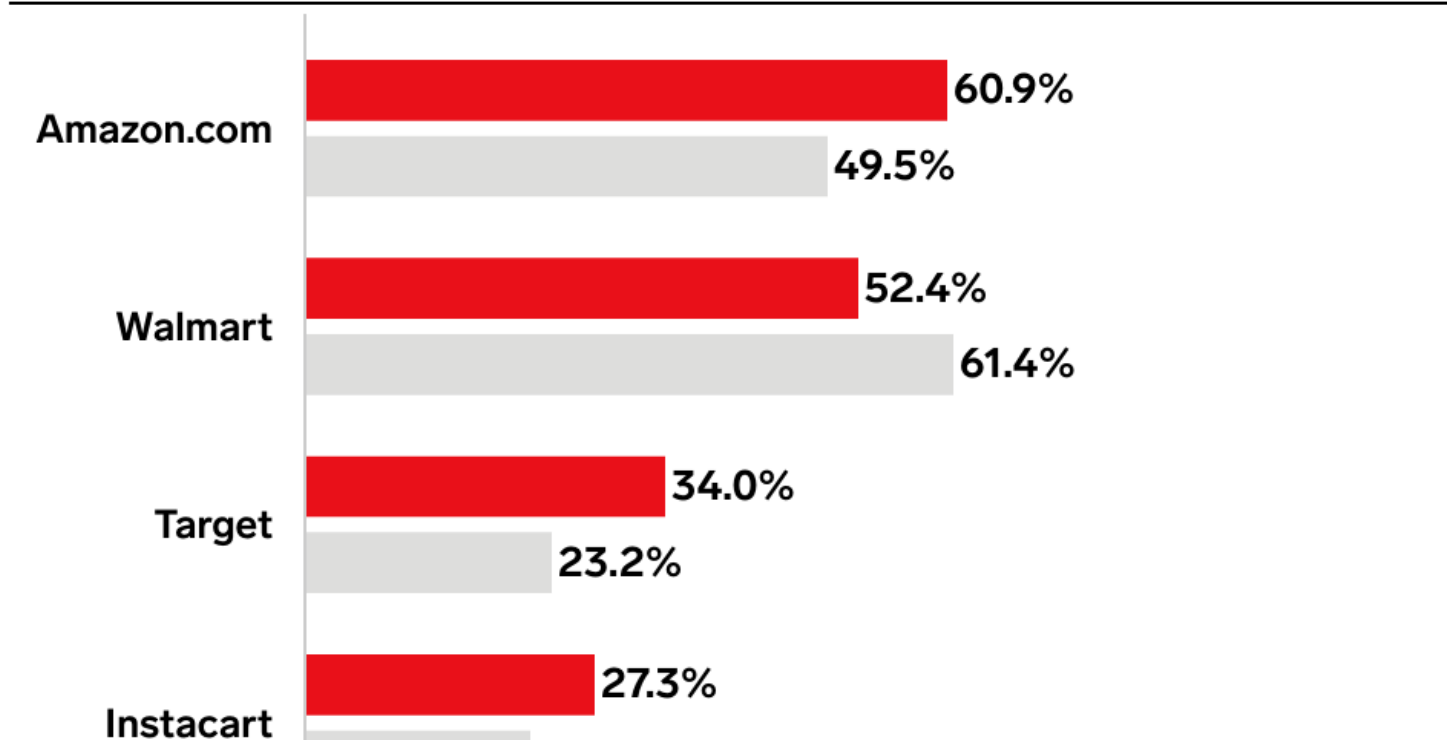
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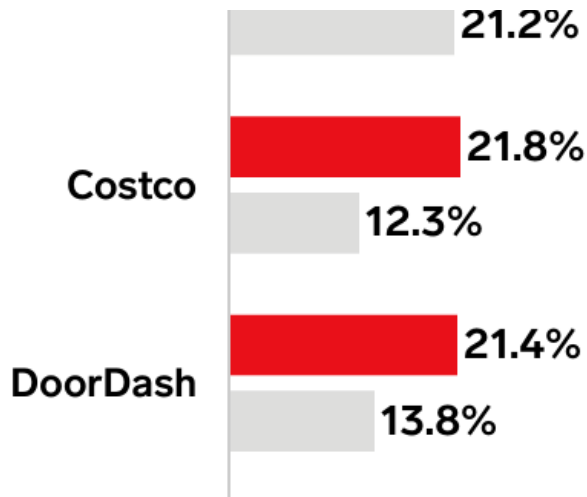
Insider Intelligence | eMarketer

- **Amazon Fresh also has a larger online audience than Whole Foods Market.** The most popular method of ordering grocery products from Amazon is via the core Amazon site, using ship-to-home fulfillment. But among the pure-play grocery channels, Amazon Fresh is more popular than Whole Foods. The latter Amazon-owned grocery brand only received online orders from 7.3% of US digital grocery buyers in the last year.
- **Less than 3% of Amazon Fresh shoppers were exclusive to the platform.** This isn't out of the ordinary. Most US digital grocery shoppers (79.9%) bought from more than one platform in the last year. But Amazon Fresh did have a lower percentage of exclusive shoppers compared with industry leader Walmart, where 14.5% of digital grocery customers were exclusive.
- **Amazon Fresh customers were more likely than all digital grocery shoppers to also buy groceries on Amazon's core site.** Additionally, more than half have also shopped at Walmart — a slightly lower rate than for all digital shoppers.

Amazon Fresh Customers Overindex on Other Grocery Platforms Except Walmart

% US digital grocery buyers using each platform, May 2023





Amazon Fresh customers **All digital grocery buyers**

Note: Respondents were asked, "In the past 12 months, which of the following grocery-ordering websites or apps have you used to place an order?; this is the website or app that you initially accessed to place the order."

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Report by Blake Droesch Sep 15, 2023

Digital Grocery Platforms Survey 2023

