

NIQ Perspectives

November 25th, 2025

Here’s what industry experts are saying:

“Amazon’s first 100 days of offering perishables through its core online model have delivered impressive growth. The retailer complemented this launch with a new, lower-priced private food brand and a site feature enabling customers to add items to existing orders. These moves position Amazon to capture underpenetrated grocery categories and strengthen its ecosystem by gaining share in the fast-growing U.S. online grocery market.”



Jack O’Leary
Director,
eCom Insights,
NielsenIQ

“We are most excited about ... the ability to provide perishable groceries with same-day deliveries. ... Many of our customers are buying from us multiple times a week and ... are buying things like shampoo or detergent or paper cups or water, where the ability to add milk and eggs and yogurt and other perishables to their order and have it live in the same shop in cart and then show up a few hours later is very compelling. We started with a few markets about a year ago, and we were really taken aback at the adoption—not just the number of people that started buying perishables from us very quickly, but how often they came back downstream to buy perishables and groceries from us in the future.”

Andrew Jassy
President & CEO, Amazon
Q3 2025 Earnings Call



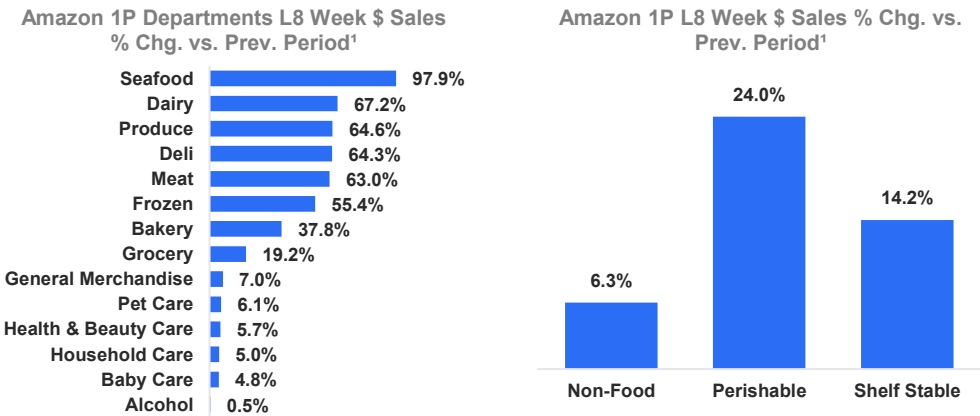
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Amazon’s Grocery Push Delivers Strong Growth

Implications for the industry

Amazon’s Strongest Recent Gains Coming from Grocery

100 days after enabling Prime members to add perishables to their Amazon.com orders, the retailer has seen significant grocery growth. Initially available in 1,000 cities, the program is expected to reach 2,300 by year-end. Key departments—seafood, dairy, produce, deli, and meat—grew more than 60% over the last eight weeks versus the prior period. Overall, perishables rose 24% compared to 6.3% for non-food. This initiative is also creating a halo effect on shelf-stable items, with shoppers increasingly viewing Amazon as a full grocery destination, driving 14.2% growth in those categories.



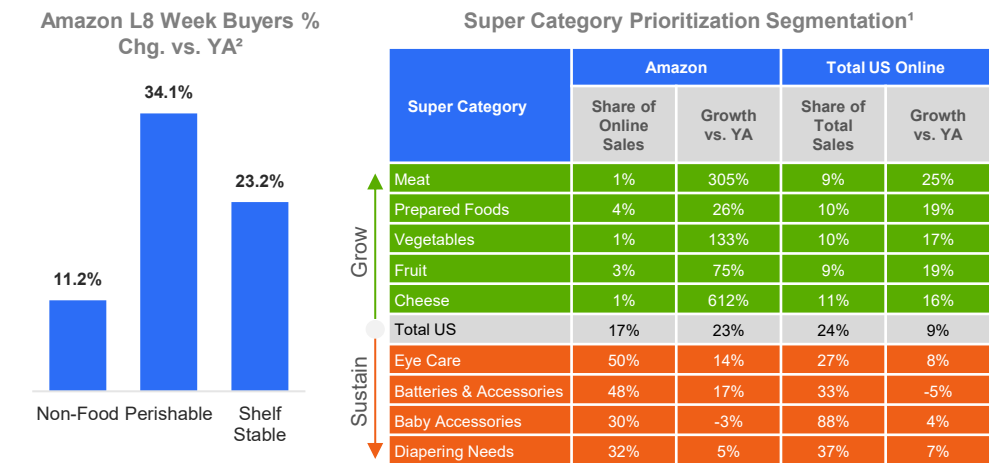
Price Leadership as a Growth Lever

Amazon has made significant investments to strengthen the price position of its perishable assortment, aiming to attract more grocery shoppers. Many key categories have seen average unit prices fall by more than 40% year-over-year on Amazon, with items such as cheese, lunch meat, and sour cream now priced below national averages. This initiative goes beyond convenience; Amazon is signaling value to consumers as a core part of its grocery expansion.

Select Relevant Super Categories, Amazon 1P vs. xAOC Avg. Unit Price, Today vs. YA ¹								
Super Category	Amazon Today	Amazon YA	xAOC Today	xAOC YA	Amazon % Chg.	xAOC % Chg.	Amazon vs. xAOC Today	Amazon vs. xAOC YA
Eggs	\$6.38	\$44.17	\$4.75	\$5.14	-86%	-8%	34%	760%
Yogurt	\$3.28	\$12.05	\$2.86	\$2.71	-73%	5%	15%	344%
Cheese	\$3.09	\$8.25	\$4.29	\$4.34	-63%	-1%	-28%	90%
Vegetables	\$2.92	\$7.09	\$2.17	\$2.17	-59%	0%	35%	227%
Fruit	\$4.80	\$11.35	\$2.13	\$2.17	-58%	-2%	125%	424%
Milk Products	\$9.49	\$17.03	\$3.59	\$3.57	-44%	1%	165%	377%
Lunchmeat	\$4.76	\$8.04	\$6.36	\$6.14	-41%	4%	-25%	31%
Sour Cream Products	\$2.15	\$3.52	\$2.77	\$2.74	-39%	1%	-22%	29%
Fresh Meat	\$7.75	\$10.57	\$5.67	\$5.16	-27%	10%	37%	105%
Yogurt	\$3.28	\$12.05	\$2.86	\$2.71	-73%	5%	15%	344%
Amazon Avg. Unit Price Currently Less Than xAOC								

Amazon Targets Underpenetrated Categories to Capture New Missions

Amazon’s perishables initiative is successfully attracting new shoppers. Over the last eight weeks, the number of buyers of perishable items grew 34% year-over-year—far outpacing non-food buyer growth of 11%. Amazon is prioritizing these categories because they remain underpenetrated online, offer high growth potential, and represent areas where Amazon’s share is still low. This is now a core strategic focus for the retailer.



Sources: ¹NielsenIQ Retail Measurement | US NIQ Total Store Inc Fresh - 444 - Weekly (Synd), L8 Weeks ending 11/8/2025, ²NielsenIQ Panel On Demand Omnishopper | US Exp Osh - Syndicated - SYND CTG ONLY CPS OMNI 444, L8 Weeks ending 11/1/2025