

NIQ Perspective

Prime Day Arrives Earlier: Preparing for a Different Competitive Environment

Here’s what industry experts are saying:

With Prime Day 2026 set to run from June 23rd to June 26th, Amazon moves the event into Q2 and captures demand earlier in the year. The timing reduces the opportunity for competing retailers to front run promotions, while brands face a shorter preparation window and a new planning cycle compared to the typical July timing.



Jack O’Leary
Director, eCom Thought Leadership, NielsenIQ

For brands...

Prime Day requires earlier planning, disciplined pricing, and sustained media support across the full event. Promotions should be applied thoughtfully across the portfolio, considering competitive promotions across channels. Brands should also ensure digital shelf readiness, with content, availability, and visibility optimized to capture demand during key shopping moments.

For retailers...

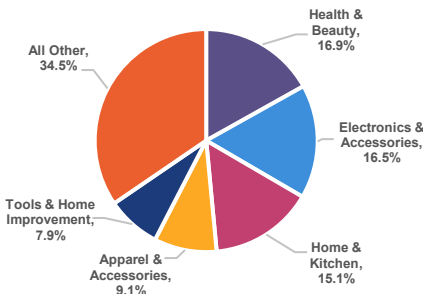
Retailers that can adjust quickly to an earlier Prime Day have an opportunity to capture elevated eCommerce demand during an otherwise typical week in June. This requires a clear plan for which categories to compete in, how to align pricing and promotions, and how to position their assortment to win share. Strong execution can help reinforce retailer omni value propositions and build shopper consideration as a long term eCom alternative beyond the event.

Implications for the Industry

HBC, Electronics, Home, and Apparel drive Prime Day performance

Expect similar category performance during the 2026 event. This year, brands in these categories and beyond will be working to ensure products are surfaced within the “Alexa For Shopping” AI interface, which is expected to play a larger role in helping shoppers evaluate attributes, ingredients, use cases, and overall value of their purchases.

Prime Day 2025 Sales Share By Category¹



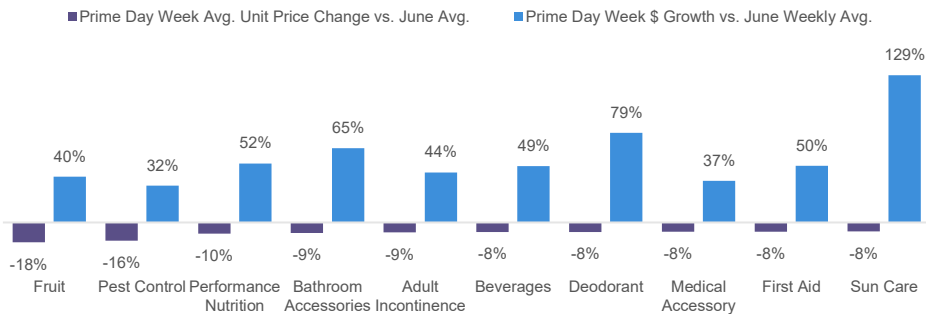
Prime Day 2025 Top Selling Item Types¹

- Headphones & Microphones
- Vacuums
- Tablets
- Supplements & Vitamins Combination Packs
- Televisions
- Wearable Devices
- Laptops & Netbooks
- Cell Phone Accessories
- Home Security & Surveillance
- Women's Tops & Tees

In CPG, Prime Day discounts drive strong growth but do not consistently correlate with top-performing outcomes

For large CPG super categories, average unit price declined by as much as 18% during Prime Day 2025. However, deeper discounts did not always result in stronger sales growth. Categories like Sun Care saw Prime Day sales more than double June weekly averages with only modest price reductions, while Pest Control delivered more moderate growth despite deeper discounts. Discount depth alone does not drive performance.

Prime Day 2025 CPG Super Category Price Discounts vs Sales Performance²



Amazon typically prices above retailer peers but remains below DTC, and faces increased pricing competition during Prime Day

Across several key categories, Amazon typically prices above Brick and Mortar and Pure Play generalists online, while remaining below DTC. Prime Day drives intensified pricing competition, which can widen gaps in some categories while narrowing them in others. For example, in Health and Beauty, Amazon prices moved closer to Brick and Mortar peers during Prime Day 2025, shifting from roughly 75 percent above in June to 35 percent above during the event.

Amazon Price Premium/Discount vs. Competition (%)¹
June 2025 and Prime Day 2025 Avg. Unit Price Comparison

Category	Brick & Mortar Generalists		Pure Player Generalists		Direct To Consumer	
	June	Prime Day	June	Prime Day	June	Prime Day
Health & Beauty	75%	35%	2%	5%	-20%	-25%
Electronics & Accessories	-68%	-42%	-25%	35%	-86%	-85%
Home & Kitchen	26%	31%	33%	51%	-73%	-80%
Apparel & Accessories	-25%	-42%	-13%	-9%	-11%	-9%
Grocery & Food	282%	283%	122%	127%	-11%	-4%
Baby Products	40%	14%	62%	83%	-54%	-45%

Source: ¹NIQ Digital Purchases, ²NIQ RMS US Total Store Inc Fresh – 444 – Weekly (Synd). All departments except General Merch, Bulk Bin, Floral, and Tobacco, Super Categories with >\$10 million in 1P June Amazon sales considered

The Takeaway

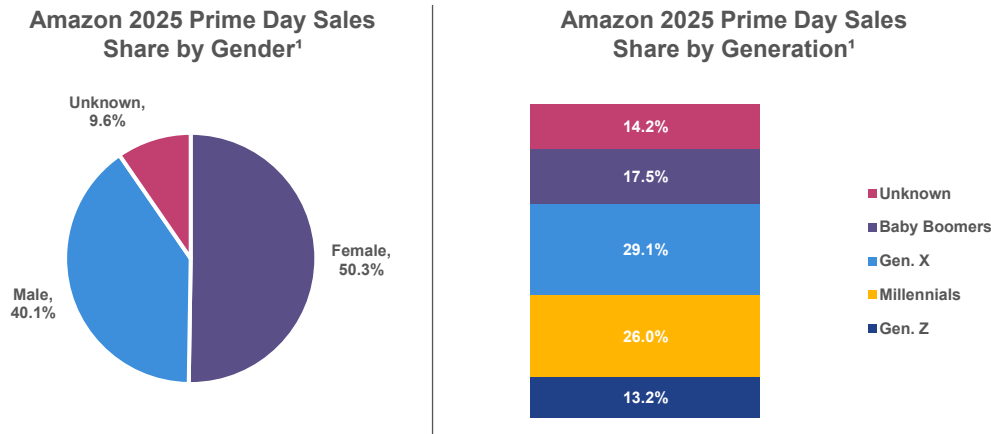
- Earlier timing compresses planning: June 23 to 26 timing requires faster preparation and execution
- Discounting is not a standalone lever: The deepest price declines did not consistently translate to the strongest growth
- Competition extends beyond Amazon: Cross-channel coordination is required as retailers run parallel promotions

Your Next Move

- Plan Prime Day as a portfolio strategy, not a full-catalog event, focusing discounts on high-impact SKUs
- Measure both 1P and 3P sales for your categories on Amazon to build the full picture of Prime Day performance
- Pace media budgets across all event days to maintain visibility during peak traffic windows
- Align pricing and promotions across channels to remain competitive with parallel retailer events
- For retailers, capitalize on elevated eCommerce demand by aligning promotions, pricing, and assortment to compete directly with Prime Day and reinforce long term shopper consideration

Women, Gen X, and Millennials Lead Prime Day Shoppers

While growing in influence, Gen Z continues to represent a smaller share of Prime Day sales, trailing older generations. Gen X and Millennials are expected to remain the dominant shoppers, combining for 45.1% of total event sales in 2025.



Afternoon and evening hours drive the highest sales volume

2025 marked the first four-day Prime Day, requiring brands to manage media budgets more carefully across the full event. Demand started strong, with Day 1 accounting for 30.2% of total sales. Peak activity occurred in the evenings, with 6pm to 10pm representing 24.6% of total event sales and the highest sales volume on a per hour basis

Prime Day 2025 Sales Share of Total Event by Time of Day ¹						
Time	Day 1	Day 2	Day 3	Day 4	Total	Per Hour
Overnight (12am-8am)	5.0%	4.7%	3.9%	3.9%	17.5%	0.5%
Morning/Midday (8am-2pm)	9.0%	6.7%	6.2%	6.6%	28.5%	1.2%
Afternoon (2pm-6pm)	6.2%	4.9%	4.5%	4.9%	20.6%	1.3%
Evening (6pm-10pm)	7.4%	5.6%	5.1%	6.5%	24.6%	1.5%
Late Evening (10pm-12am)	2.6%	2.0%	1.9%	2.5%	8.9%	1.1%
Total	30.2%	23.8%	21.6%	24.4%	-	-

Prime Day drives stronger 1P participation, with 3P share declining and varying by category

Amazon has long been a majority 3P platform in terms of total transaction value. While many 3P sellers perform well during Prime Day, the event tends to shift share toward more established 1P operators. This varies by category, with Vitamins and Supplements seeing 77% of sales from 3P sellers, compared to just 22% in Pet Food.

