The Amazon Marketplace Report 2026

ECDB

What This Report Covers

Amazon is the single largest retailer on earth. Five chapters size it against the field, open up its business model and shoppers, detail what it sells, map its footprint, and set it against the challengers.

Sources: ECDB

The World's Largest Retailer

Amazon is not a channel among many; it is the single largest retailer on earth by GMV. For most brands it is less a choice than a baseline, the default place their category is bought and sold.

TOTAL GMV	BUYERS	FREQUENCY	RANK
$847 bn	**754 m**	**19.5 x**	**#1**
Total GMV in 2025, the largest of any retailer worldwide.	Buyers worldwide in a single year.	Orders per buyer each year, the highest of any major marketplace.	By GMV in the world, and in most Western markets.

SO WHAT

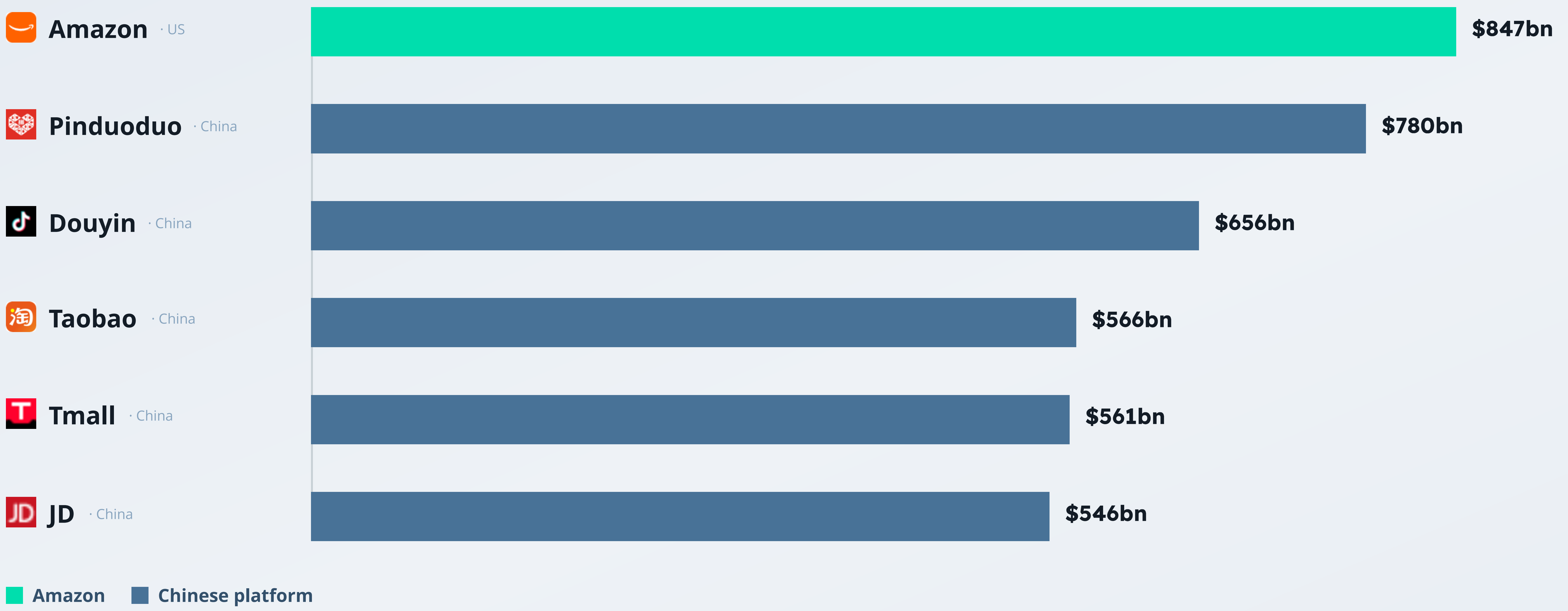
When one retailer is this far ahead by GMV and this deep into shopper habit, it is the baseline every brand's e-commerce plan is measured against. The real questions are **how Amazon works, where it is beatable, and who is now coming for it.**

Notes: Retailer GMV = third-party GMV + first-party net sales + first-party VAT. Amazon is the largest retailer worldwide by this measure.

Sources: ECDB

Amazon in the Global Field

Amazon is the largest retailer in the world by GMV, but only just. Five Chinese platforms sit right behind it, a reminder that scale at Amazon's level is no longer uniquely Western.



Notes: Retailer GMV incl. third-party sellers. Taobao and Tmall are both Alibaba.

Sources: ECDB

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Habit at Population Size

Amazon's scale is built on habit at population size: three quarters of a billion buyers, each returning again and again.

SO WHAT

Amazon's moat is not any single purchase; it is **frequency** . A buyer who returns twenty times a year has little reason to shop elsewhere, and that habit, at 754 million people, is what competitors are up against.

The Reach

Amazon's global buyer base and shopping behavior, 2025

754 m

buyers worldwide bought from Amazon in 2025

19.5 ×

orders per buyer each year, the highest of any major marketplace

$57

average order value, small baskets, bought often

#1

largest online retailer on earth by GMV

Notes: Buyers, purchase frequency and average order value are ECDB modeled estimates for 2025.

Sources: ECDB

Two Thirds Is Other People's Goods

Amazon's GMV is not mostly Amazon's own sales. Two thirds is third-party sellers; its own first-party business is the other third, once counted on the same gross basis as the marketplace.

HOW AMAZON'S $847 BN GMV SPLITS · 2025

3P · 66%
$558 bn · third-party sellers

1P · 34%
$289 bn · net sales $265 bn + VAT $24 bn

First-party 34% combines net sales (31%, $265 bn) and VAT (3%, $24 bn) into one gross figure, so it compares like-for-like with third-party GMV.

Why VAT is added to 1P

Third-party GMV is a gross number, the full price shoppers pay, VAT included. To compare like with like, we add VAT to Amazon's first-party net sales so both sides are gross. Without it, the 1P business would look artificially smaller than the marketplace beside it.

SO WHAT

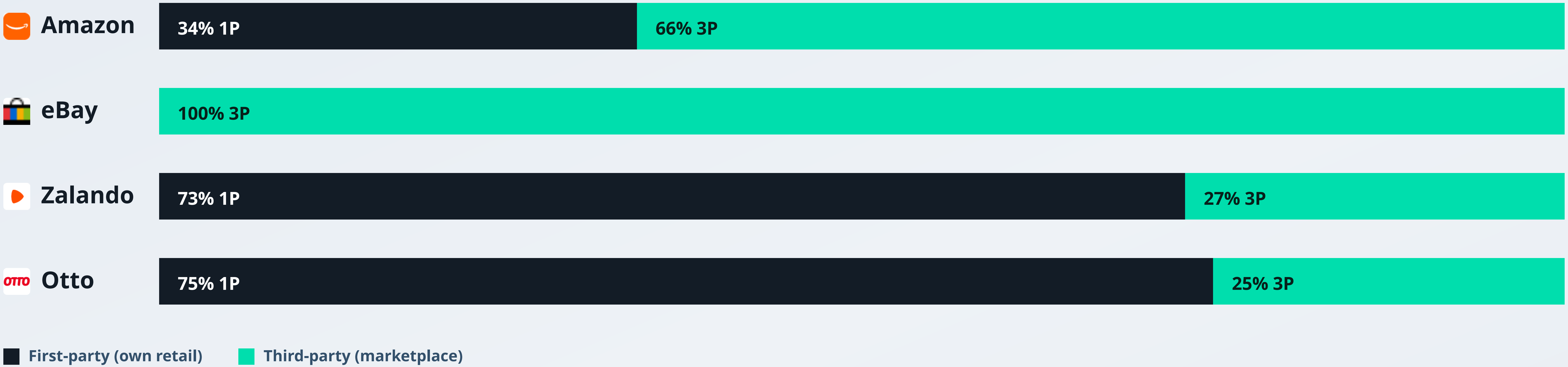
Amazon's power is as a **platform, not a shop** . Two thirds of what sells on Amazon belongs to third-party sellers, which is why brands can reach that demand directly, and why Amazon earns from fees and ads as much as from its own margin.

Notes: Retailer GMV = third-party GMV + first-party net sales + first-party VAT, per ECDB definition. VAT is added to 1P for gross comparability with 3P GMV.
Sources: ECDB

Two Models, Side by Side

The marketplaces a brand might use are not built the same way. Amazon and eBay are platforms for other sellers; Zalando and Otto mostly sell their own goods.

SHARE OF GMV: FIRST-PARTY VS THIRD-PARTY · 2025



SO WHAT

Model decides strategy. On Amazon and eBay a brand lists as a third-party seller in an open marketplace; on Zalando and Otto it sells to a retailer that resells. Same word, "marketplace", two very different routes to the shopper.

Notes: First party = own net sales plus VAT; third party = seller GMV. Shares of each retailer's total GMV.

Sources: ECDB

Amazon Wins on Frequency, Not Basket

Amazon does not win by selling expensive baskets. Its order value is among the lowest of the field; it wins because its shoppers come back far more often.

Retailer	Avg order value	Orders / buyer / year	Model
Amazon	$58	**19.5×**	High frequency
eBay	$57	8.7×	Mid frequency
Zalando	$78	4.7×	Considered
Otto	**$192**	2.7×	Big ticket

SO WHAT

Otto sells baskets three times Amazon's size, but an Otto shopper buys under three times a year while an Amazon shopper buys twenty. **Amazon has turned buying into a reflex** , that habit, not price, is the hardest thing for a rival to copy.

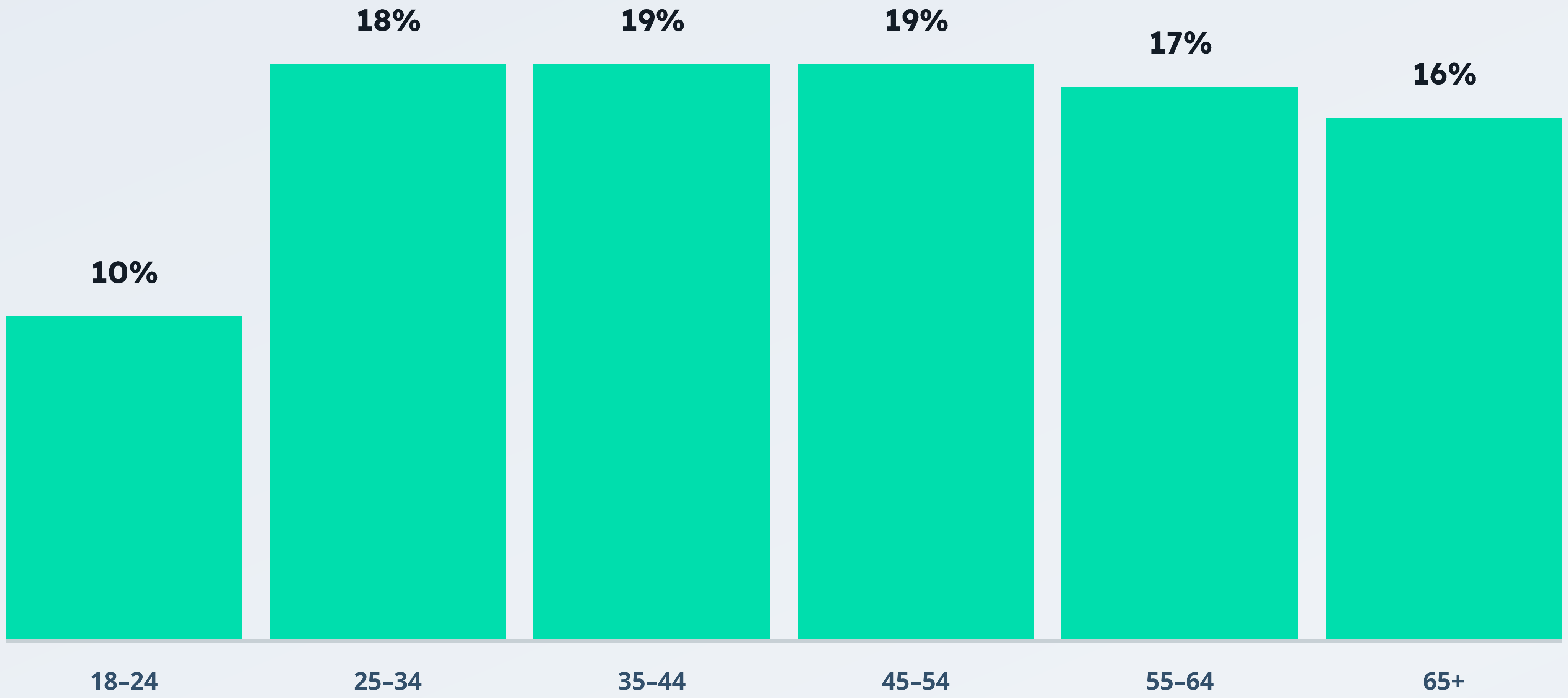
Notes: Average order value (gross) and purchase frequency, ECDB modeled estimates for 2025.

Sources: ECDB

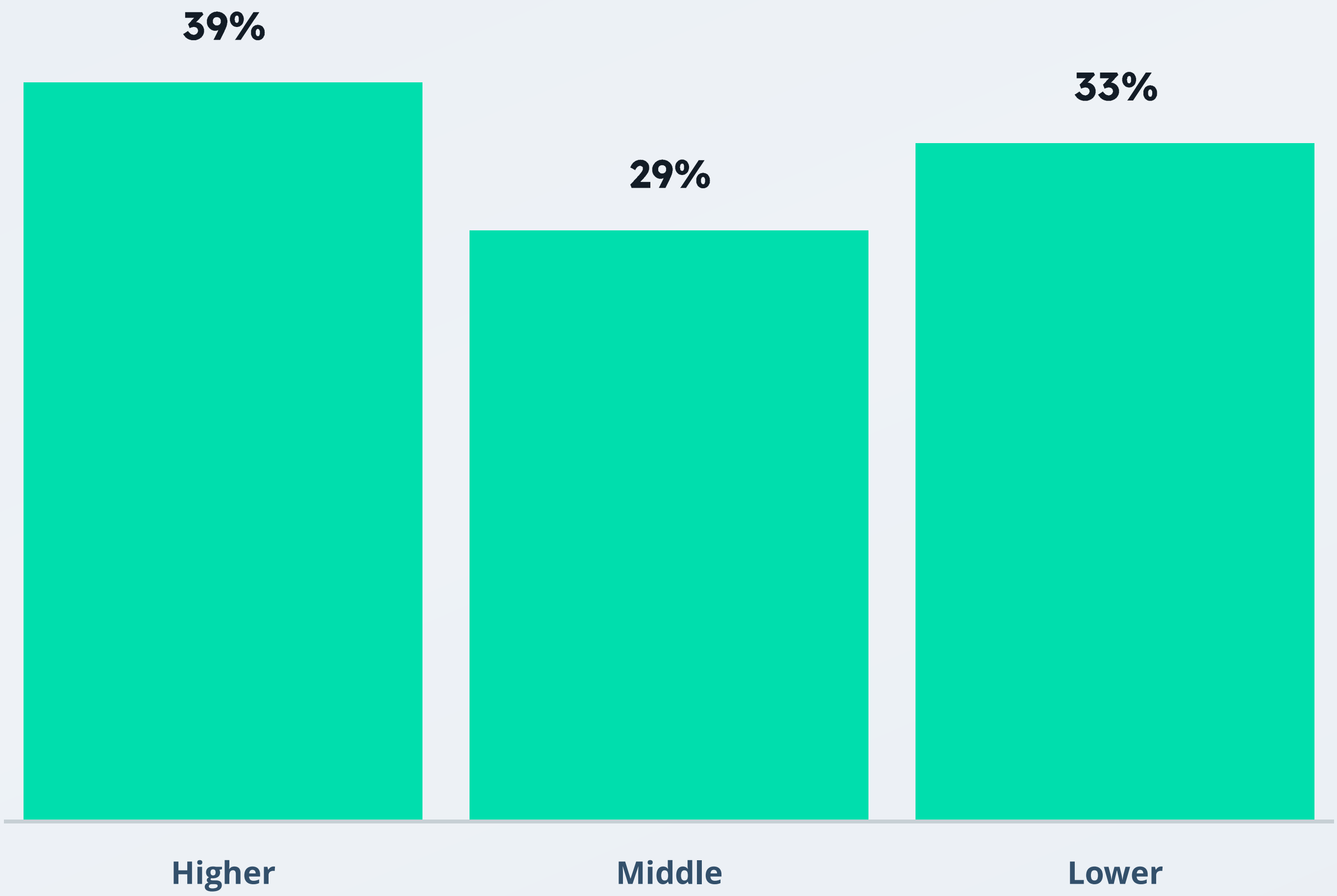
Who Shops Amazon.com

Amazon's biggest store is as close to everyone as e-commerce gets. Its buyers spread evenly across every age band and income level.

BUYERS BY AGE



BUYERS BY INCOME



SO WHAT

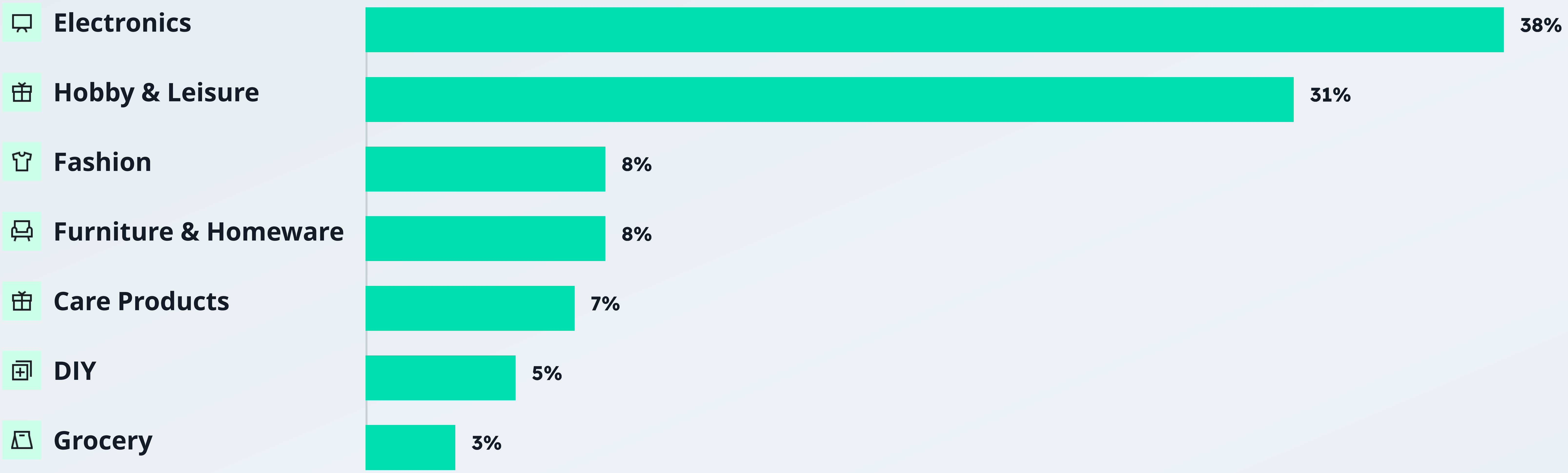
There is no core Amazon demographic; there is everyone. That universality is a strength for mass brands and a warning for niche ones: on Amazon you are not reaching a segment, **you are in a crowd of every shopper at once.**

Notes: amazon.com buyer shares by age band and income tercile, 2025. Age bands sum across all buyers.

Sources: ECDB

What Amazon Sells

Amazon's GMV is concentrated in electronics, media and hobby. Fashion, beauty and grocery are a much smaller share of its mix, which is exactly where specialists compete.



SO WHAT

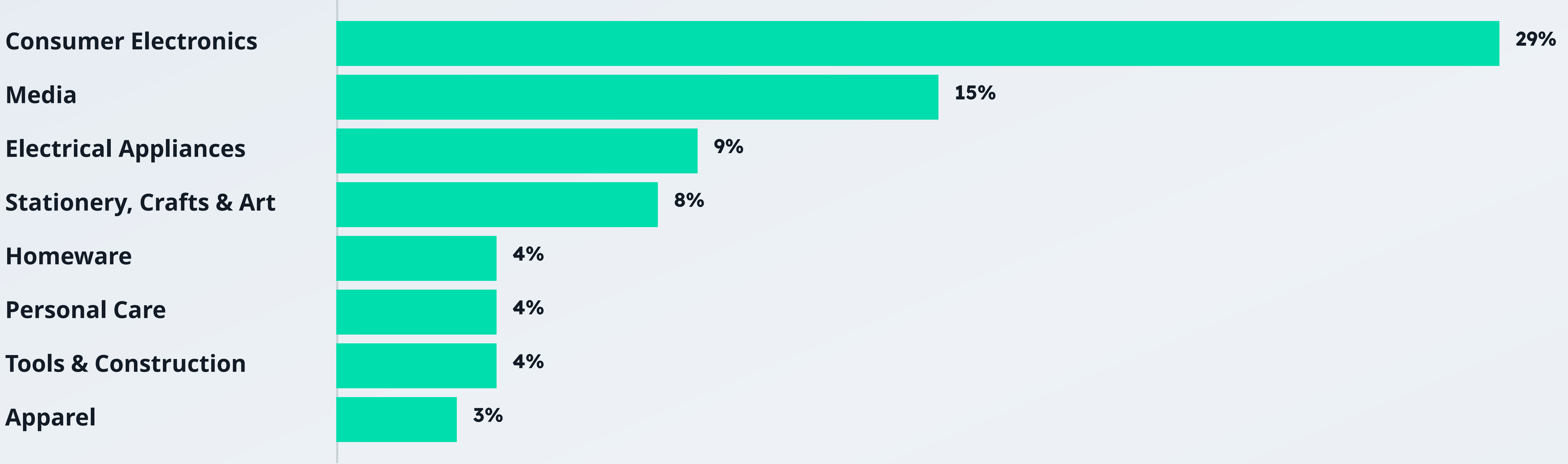
Electronics and media are Amazon's heartland, nearly 70% of GMV together. Fashion, beauty and grocery are under a fifth combined. **Amazon is dominant, but not equally everywhere** , and the gaps are where a specialist can still win.

Notes: Category shares of Amazon's global GMV. Media sits inside Hobby & Leisure.

Sources: ECDB

The Detail Beneath the Headline

One level down, the picture sharpens. Amazon's single largest subcategory is consumer electronics, followed by media. No subcategory outside electronics and media reaches a tenth of GMV.



SO WHAT

Amazon's dominance is really an electronics and media dominance, consumer electronics alone is nearly a third of everything it sells. For a brand outside those aisles, **the field is more open than the headline suggests.**

Notes: Level 2 subcategory shares of Amazon's global GMV, 2025. Top eight shown.

Sources: ECDB

Where Challengers Hold Ground

The categories that are small in Amazon's mix are the ones where focused players keep winning. Amazon is a generalist; specialists own the experience in fashion, beauty and grocery.

Category	Share of Amazon's mix	Where shoppers also go
Fashion	8%	Zalando, About You and pure-play fashion, on fit, curation and returns
Care & beauty	7%	Douglas, dm and beauty specialists, on range and advice
Grocery	3%	Grocers and quick commerce, on freshness and delivery
Furniture	8%	Home specialists and D2C brands, on showrooming and service

SO WHAT

Amazon's weakness is not size, it is **fit** . In categories that need curation, advice or freshness, specialists still win the shopper. A brand in fashion, beauty or grocery has a real reason to build beyond Amazon.

Notes: Category shares are of Amazon's own GMV mix. Named retailers are illustrative category leaders, not a ranking.

Sources: ECDB

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Where Amazon's Revenue Comes From

In absolute terms, Amazon is a US business first. Half of its GMV is American; the UK, Germany and Japan are the next tier.

Notes: Amazon GMV attributed to each country, incl. third-party sellers.

Sources: ECDB

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Half of Amazon Is America

For all its global reach, Amazon is a US business first. Just over half of its entire GMV comes from a single country, and the next three markets are a distant tier.

SHARE OF AMAZON'S TOTAL GMV BY COUNTRY · 2025

United States · 51%

Rest of world · 49%

broken down below ↓

↑ **INSIDE THAT 49%** · THE NEXT-LARGEST MARKETS, SHARE OF AMAZON GMV

UK	Germany	Japan	Canada
9.6%	**7.8%**	**7.1%**	**4.4%**

SO WHAT

Amazon's fortunes are tied to America. That US base is its greatest strength and its clearest concentration risk, and it means Amazon's grip is **far lighter in most of the world** than its global scale suggests.

Notes: Each country's share of Amazon's total GMV (GMV to GMV, incl. third-party sellers). Not a share of any market.

Sources: ECDB

Identify Where Growth Is Actually Happening

- Assess any retailer or market before you commit to a strategic direction
- Spot where momentum is building so you can focus on where it counts
- Brief your stakeholders backed by structured market intelligence

Discover More

Amazon and the Western Field

Among the Western marketplaces a brand might use, Amazon is in a category of one. The rest are either far smaller or focused on a single vertical.

Western marketplace	2025 GMV	Model	Focus
Amazon	**US$ 847 bn**	Hybrid, mostly 3P	Generalist, everything
eBay	US$ 77 bn	Pure marketplace	Generalist, resale and long tail
Zalando	US$ 16 bn	Mostly 1P retail	Fashion specialist, Europe
Otto	US$ 8.9 bn	Mostly 1P retail	Generalist, Germany
Kaufland	US$ 2.3 bn	Marketplace	Generalist, Germany and CEE

SO WHAT

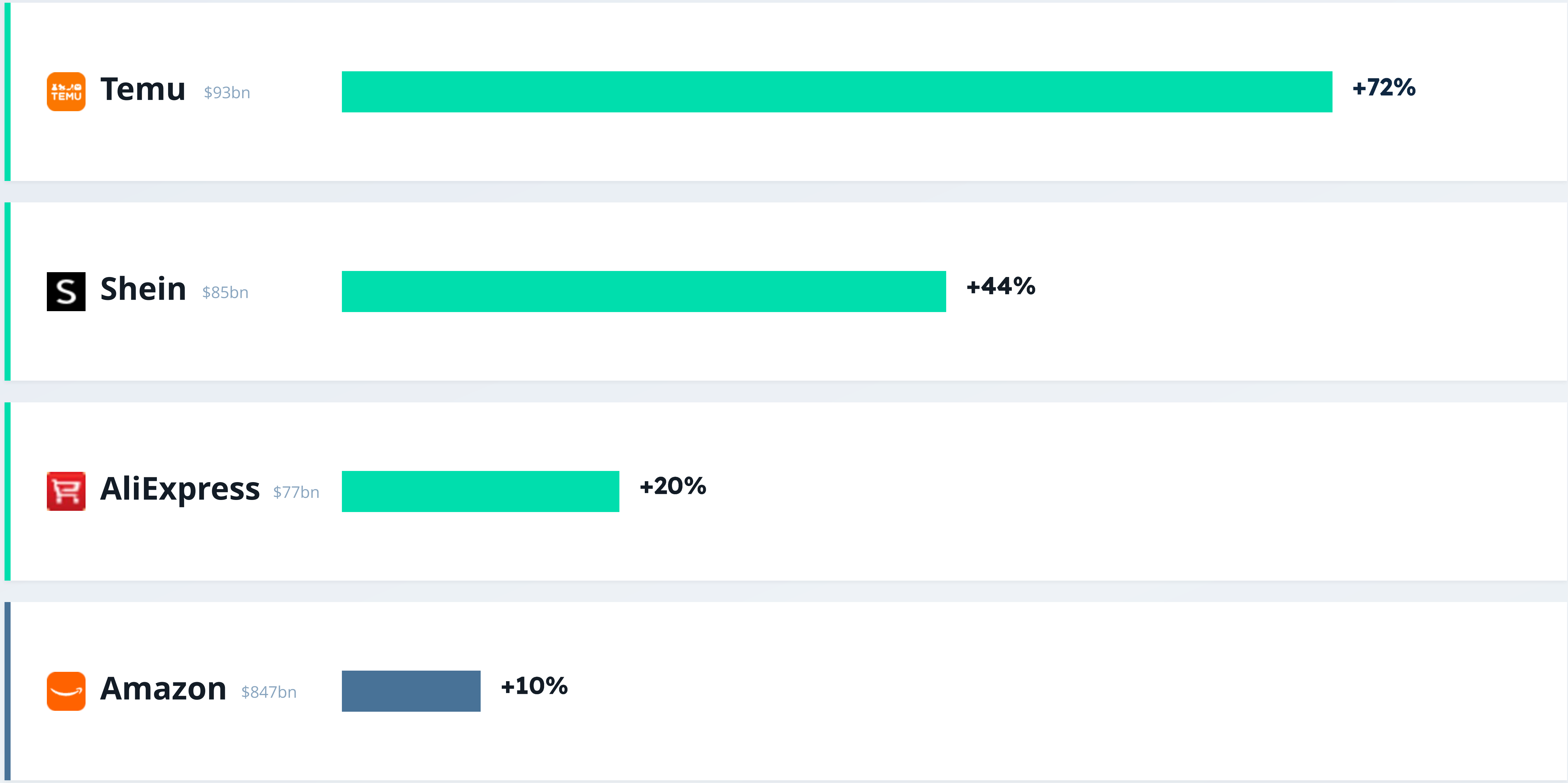
In the West there is no second Amazon, it is roughly 11× eBay and 50× Zalando. The real alternative here is not another marketplace, it is **focus**: a vertical specialist, or a brand's own direct channel.

Notes: Western marketplaces only. GMV incl. third-party sellers where hosted. Asian platforms at Amazon's scale are shown separately.

Sources: ECDB

The Attack from Asia

GMV growth, 2025 (year on year), challengers grow several times faster than Amazon



Growing Where Amazon Is Strongest

The real pressure on Amazon is not a Western marketplace; but Chinese cross-border. Temu, Shein and AliExpress are growing **several times faster than Amazon** , inside Amazon's own markets.

Each is already near eBay's size, with Temu shipping **$22.5 bn into the US** alone.

NOW WHAT

They attack Amazon where it is strongest, on price and selection. Watch them as the **primary competitive threat** , not the Western field.

Notes: GMV and year-on-year growth, 2025. Temu, Shein and AliExpress are Chinese cross-border retailers shipping into Western markets.

Sources: ECDB

Sell on Amazon, or Build Your Own

For a brand, Amazon is a choice with a clear trade-off: the fastest reach, and the least control. The answer is usually both, with eyes open.

Sell on Amazon

The largest pool of online demand, in some markets half of it, with built-in trust, logistics and a buyer who returns twenty times a year.

But: fees, thin customer data, price pressure, and little brand control. You rent the audience.

Build your own store

Full margin, first-party data, and control of the brand and the experience.

But: reach is yours to earn, against a marketplace that already owns the customer and the habit.

NOW WHAT

Use Amazon for reach where its share is highest, but do not let it own the customer. **Build the direct channel in parallel** for margin, data and brand, especially in categories where Amazon is a generalist and you are the specialist.

Sources: ECDB

What It Means for a Brand

Five things to carry out of this report

01	**Amazon is the baseline**	The largest retailer on earth by GMV and deep into shopper habit. The reference point, not an option.
02	**It is a marketplace first**	Two thirds of Amazon's GMV is third-party sellers. Brands can reach that demand directly.
03	**Its moat is frequency**	A 754m-strong base that buys twenty times a year. Habit, not price, is what you compete with.
04	**Attack where it is a generalist**	Fashion, beauty and grocery are small in Amazon's mix. Specialists still win the shopper.
05	**Watch Asia, not the West**	Temu, Shein and AliExpress grow several times faster than Amazon, inside its own markets.

Sources: ECDB

The ECDB Platform Behind This Report

Every figure here comes from ECDB, modeled data on tens of thousands of retailers and markets. The full toolset, mapped to the work in this report:

CORE INTELLIGENCE

- **Profiles**
- **Analyze & Compare**
- **Rankings**
- **Competition**
- **AI Assistant**

ADD-ON TOOLS

- **Category Explorer**
- **Amazon Analytics**
- **Lead Finder**

Sources: ECDB

METHODOLOGY

How the Data Is Built

ECDB combines several independent sources, with **real transaction data at the core** , into one consistent and comparable view, modeled and cross-validated by analysts.

That is what makes the figures defensible across every market, retailer and category.

Where the Numbers Come From

Transaction signals at the core, cross-validated and modeled into comparable intelligence

01

Real Transaction Core

Built on real transaction signals, the strongest evidence of what was actually bought.

02

Multiple Independent Sources

Several independent inputs combined, so no single blind spot drives the result.

03

Analyst Modeled

Analysts apply proprietary models and AI to turn raw inputs into structured intelligence.

04

Consistent & Comparable

Cross-validated, so figures hold up and compare cleanly across markets.

Read the Full Methodology

See the full coverage, sources and how every figure is modeled.

Learn More

Sources: ECDB