

Amazon 1Q25 Recap: Key Takeaways Including Tariff Analysis

By Russ Dieringer // May 1, 2025 // Briefings, Forecasts, Research

TL;DR: Retail growth rates come down, but Amazon appears well-positioned to navigate tariff uncertainty; market share inside Amazon up for grabs as tariffs are expected to have an uneven impact across brands and sellers.

5 minute read

Amazon reported its 1Q25 results this evening, shedding light on tariffs along with an updated outlook for its business.

Tariff Impact on Amazon

We analyzed Amazon's performance and commentary to understand (1) what type of overall consumer impact are tariffs having or will have, (2) whether Amazon is uniquely impacted by tariffs versus retail peers, and (3) how market share inside Amazon's platform might be impacted.

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