

Amazon 2Q25 Recap: Key Takeaways for Consumer Brands

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TL;DR: Amazon's accelerating growth across 1P, ads, and essentials demands a recalibration of brand forecasts, promotional strategies, and budget allocations. A +8.4% GMV forecast for 2025 suggests a conservative outlook on the account risks underperformance.

5 minute read

Amazon delivered another very strong quarter in 2Q25, reinforcing its position as the most strategically important growth platform for consumer brands. With global GMV growth of +11% and advertising accelerating +22% year-over-year, Amazon continues to outpace both retail and retail media peers, even as broader macroeconomic and tariff concerns persist.

What stands out this quarter is Amazon's ability to grow at scale across regions and business models: 1P growth outpaced 3P for the first time in over five years, driven by momentum in low ASP everyday essentials. Brands that leaned into Amazon's calls for expanded 1P selection are now seeing the return.

Advertising growth was particularly notable. Brands are allocating an even higher percentage of GMV to ads, responding to improved returns and expanded offsite reach. Meanwhile, fulfillment efficiencies and margin improvements suggest Amazon is better positioned than ever to reinvest for growth.

This report breaks down the quarter's results and highlights the strategic implications for brands heading into the back half of the year. From demand trends to ad efficiency benchmarks, we outline what brand leaders need to know and act on following Amazon's latest earnings.

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