

What Recent Benchmarking on Walmart and Amazon Tells Us About the Consumer and Retail Winners

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Last week Walmart <u>reported</u> strong 4Q and full year 2023 growth noting its commitment to EDLP and omnichannel excellence have driven transaction growth and share gains.

We recently checked in with brands to see how performance is trending for them in 1Q.

This data combined with comparables for Amazon help illustrate the relative strength of these two retailers, in part due to their positioning with the consumer around price and value, along with the convenience of eCommerce.

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