



## WHERE ARE THEY NOW & WHAT'S ON THE HORIZON?



Over the past several years there has been significant growth in the popularity and adoption of eCommerce that was accelerated due to Covid-19. Consumers were driven to online retail platforms and the omnichannel model of shopping driving the growth of online grocery delivery services. As lockdowns ended and the world opened back up, the question that remained was would the growth of eCommerce shopping and, specifically, grocery delivery to the home continue.

Did consumers stop using grocery delivery services? Was the need to touch and feel a product a driver that drove a decline in eCommerce and grocery delivery? Or was product quality through delivery strong enough to remove that fear and continue to allow delivery services to grow even as the world opened back up? Based on what we see from looking at Instacart, usage is not only continuing but also thriving. Consumers appreciate the convenience and time-savings associated with grocery delivery. This report investigates the growth of Instacart over the past two years and the trends in the market that indicate its potential long-term success.

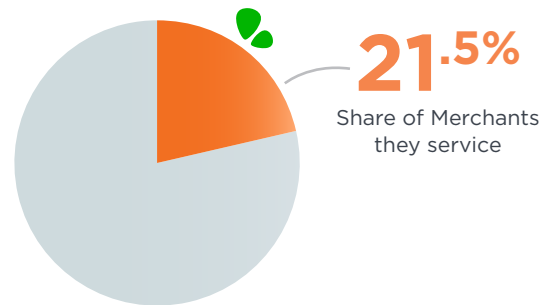


# CONTINUED GROWTH IN eCOMMERCE AND INSTACART



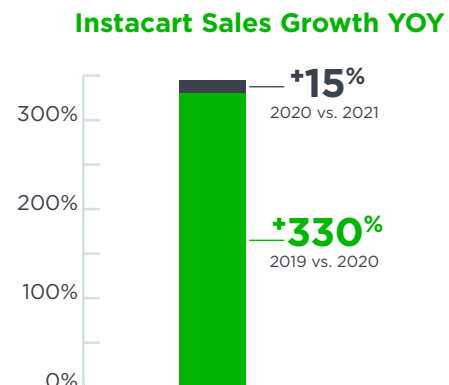
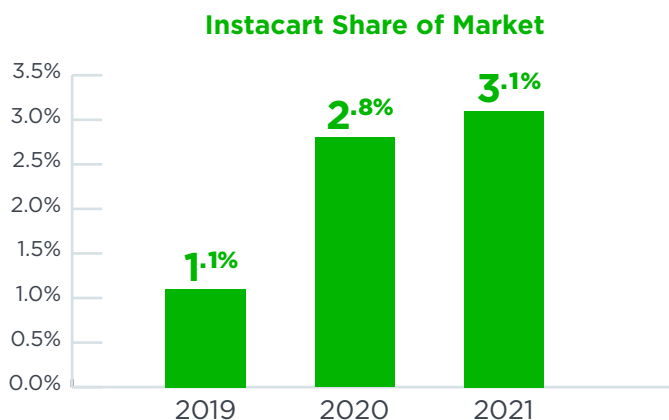
Numbers show that consumers have not only become accustomed to shopping online but also to having those purchases delivered directly to their doorsteps. Grocery delivery has shifted from a nice perk that was associated with high fees to a convenience that is worth the cost of use. This shift in behavior is seen clearly in the growth of Instacart's share of eCommerce.

As of full year 2021, **Instacart has 3% share of the total eCommerce universe**. When limiting the universe to just the merchants Instacart services, **their share is 21.5%**. While that may seem small, over the past 2 years, Instacart has realized nearly **400% sales growth**, tripling its share over the same period.



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January 2019 through December 2021

Instacart's growth on top of already high growth outpaced the rest of the market, resulting in increase in share.



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# GROCERY DELIVERY CEMENTS ITSELF

Retailers have established many choices for consumer delivery. Pickup, curbside, locker, scheduled, same-day, and instant delivery are just a few. The goal of establishing these choices is to provide convenience for consumers. They have embraced these choices and there has been significant continued growth in the delivery space over the last two years.

From 2019 to 2021 sales in **eCommerce fulfilled by Delivery have grown 77%**, with an **increase from 2020 to 2021 of 10.8%**.



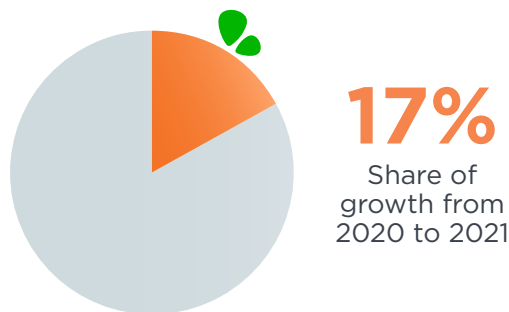
**eCommerce fulfilled  
by delivery grew:**

**+59.8%**  
from 2019 to 2020

**+10.8%**  
from 2020 to 2021

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Despite new entrants in this space and retailers expanding their own store provided delivery, Instacart continues to be a market leader, **propelling 17% of the growth from 2020 to 2021**. This is extremely high for a merchant with 3% share of total eCommerce as of full-year 2021.



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## TOP SELLERS

### Who are the retailers that are driving purchases through Instacart?

Over the past two years, certain retailers have capitalized on the increased importance of powering orders through Instacart. Even retailers that have invested in their own delivery programs use Instacart to reach more of their consumer base. With more than 500 retailers available for delivery through Instacart, consumers have their choice of where to get their grocery orders filled. According to our data sets the **Top 5 retailers account for over 50% of Instacart sales.**

#### TOP 5 INSTACART SELLERS



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The largest gains in share over the past two years were seen at Publix, Costco, Aldi, Food Lion, Shoprite, Meijer, and Walmart, who together have added over 10% percentage points of share within the Instacart universe.

**The top gainers grew +3.4pp, +1.4pp, and +1.3pp respectively.**

#### LARGEST SHARE INCREASES



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# TOP CATEGORIES

## Growth Shifts to the Center Aisle

Instacart is one of the top merchants in the online grocery space and a key growth driver for the grocery category online. As the dominant tier on Instacart, **Grocery represents 82% of dollar sales** flowing through the merchant in 2021 alone.

Larger growth in Grocery in 2021 has come more from sales on center-store groceries and less on perishables and nonfoods like baby and health care.

These shifts in sales appear to indicate categories that customers prefer to shop for in-store. Shelf-stable beverages and foods are driving increased sales while sales for perishable items and household items are declining.

The outlier to these findings is meat.



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The double-digit growth on top of triple digit growth in 2020 seen in beverages including **Carbonated Drinks of 37%**, **Juice of 28%** and **Tea of 31%**; **Confectionery of 19%**, **Health Bars of 56%** and **Protein of 80%** are examples of this shift. In comparison we have seen growth slow in the fresh areas where Dairy only had a growth of 5% in 2021 compared to 305% in 2020, Infant Diapers lost 17.45% vs a growth of 290.67% and Allergy & Cold dropped 64% compared to 138% growth in 2021.

## How this shift in online shopping behavior has affected sales overall

With growth occurring in the center store rather than perishables and household items we have also seen a drop in the sales value of the baskets shopped through Instacart. Total grocery has **dropped on average from \$57 in 2019 to \$36 in 2021**. This drop occurs across all categories.

Average  
Total Grocery  
Basket Size dropped  
**-14%**  
from 2019 to 2021



Average  
Health & Beauty  
Basket Size dropped  
**-20.9%**  
from 2019 to 2021

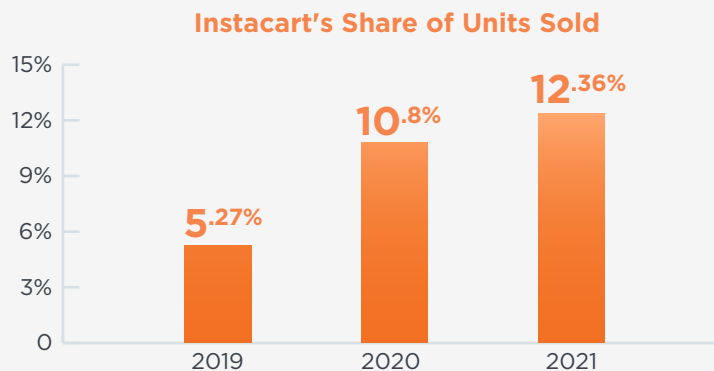


Average  
Household Essentials  
Basket Size dropped  
**-17.2%**  
from 2019 to 2021



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While the basket sizes are decreasing Instacart's share of dollars spent is increasing. We see Instacart's share of units sold increasing at a higher rate. The growth in units sold and overall dollars shows that their customer base continues to expand.



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Overall, Instacart and grocery delivery continue to grow and flourish even as the pandemic lockdowns end and shoppers have the ability to return to the stores.

### How can we help you stay ahead of shifting, online consumer trends?

The statistics in this Instacart Spotlight were generated by the 1010data eCommerce Suite, which offers access to our timely data updates across the broadest category coverage in the marketplace. Companies leverage our data intelligence solutions to better understand digital shopping behaviors and monitor brand performance within today's online consumer journey from the path-to-purchase and beyond.

Contact [info@1010data.com](mailto:info@1010data.com) for more information.

#### eCommerce Data

Although 1010data utilizes multiple panels that track millions of panelists, 1010data is projecting up to the total U.S. population. Panel-based projections are not intended to perfectly correlate to actual sales on an absolute dollar sales basis. The strength of 1010data's eCommerce data lies in share performance and trends over time.

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