



Economic Impact Report

2025

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When you order on Instacart, your focus is likely on the fresh fruit, pantry staples, and everyday essentials that show up at your door, seemingly like magic. But you may not realize the powerful economic impact you're part of every time you tap "place order." From the grocer restocking their shelves and the shopper earning on their own schedule to the local brand reaching new customers, every order placed has a positive ripple effect in communities across the U.S. and Canada. Each delivery represents a small but meaningful part of something much bigger: the shared grocery economy we're helping build together.

Instacart began as a way to bring same-day delivery to millions of households. Now, it's evolved into a dynamic ecosystem that connects and supports everyone in the grocery industry — from the local store to the kitchen table.

We measure our success not just by how many orders we deliver, but by the real-world impact we create for people, businesses, and communities. Our marketplace is built on four interconnected pillars — **retailers, shoppers, customers, and CPG brands** — and we're proud to help each of them grow and succeed together.

- For **retailers**, we provide the tools and technology to thrive in an increasingly omnichannel world, helping grocers of every size reach new customers, grow their revenue, and create jobs in their communities.
- For **shoppers**, we offer flexible earning opportunities that empower hundreds of thousands of people to earn for themselves and their families on their own terms.
- For **customers**, we deliver time back, savings at checkout, and access to fresh, nutritious food — including for those living in underserved areas..
- For **CPG brands**, we open doors to new customers and provide the insights and tools to help them scale, compete, and grow.

Each of these groups represents a vital side of our marketplace, and when connected through our technology they form a powerful cycle of economic growth and opportunity. The numbers in this report — from jobs created and hours saved to revenue gains and family savings — reflect the tangible, positive impact Instacart helps generate across North America.

And most importantly, behind every statistic are people: a young worker getting their first job in the bakery of a neighborhood grocery store, a shopper earning additional income to care for their family, a family who counts on Instacart because their health doesn't allow them to shop in store, and a food startup founder reaching new households for the first time. Their stories are why we do what we do.

As we look to the future, our mission remains clear: to create a world where everyone has access to the food they love and more time to enjoy it together. As we pursue that mission, we'll work tirelessly to continue powering economic opportunity in communities and driving growth across every side of our marketplace. We're proud of the impact Instacart has made so far — and even more excited for what's ahead.

Dani Dudeck

Chief Corporate Affairs Officer
Instacart

Introduction

For more than a decade, Instacart has helped transform how people shop for groceries. Today, we're proud to power a unique, interconnected ecosystem — one that fuels growth for retailers, creates flexible earning opportunities for hundreds of thousands of shoppers, expands reach and sales for food producers and CPG brands, and makes fresh food more affordable and accessible for families across the U.S. and Canada.

By connecting **retailers, customers, shoppers, and CPG brands**, Instacart is strengthening communities across industries. And by leveraging technology, we've become much more than an online ordering platform — we are an engine for **economic growth, earnings opportunity, local job creation, and household savings**. This report highlights Instacart's economic impact across the four sides of our marketplace — and it outlines how our platform continues to deliver exceptional value to each of these critical stakeholders.¹

Our impact is tangible:

- For **grocers**, we've helped add more than **237,000 grocery jobs** and **\$22.5 billion in revenue** since Instacart's founding in 2012, with **small business jobs** representing nearly one in every three of those.²
- For **customers**, we've powered more than **1.5 billion orders**³, saving families over **1 billion hours**⁴ and more than **\$3 billion**⁵ through deals, discounts, and loyalty programs.
- For **shoppers**, we provide **approximately 600,000**⁶ **individuals** with flexible earning opportunities, and they've earned over **\$24 billion**⁷ **in income** to help support themselves and their families.
- For **brands**, we've become a leading retail media platform, helping **7,500+**⁸ **CPG brands** reach new customers, increase their sales, and scale new products — with **Black- and women-owned businesses** seeing particular growth.⁹

And across our marketplace, **small businesses are central to our story**. From independent grocers and local retailers to emerging brands and small business customers, Instacart is helping entrepreneurs compete, grow, and thrive.

Instacart's story is not just about scale — it's about **impact**. We've expanded affordability with new savings tools, broadened access to nutritious food through **SNAP EBT acceptance with retailers in all 50 states**, and strengthened our partnerships with community organizations to help families across North America access the food they need.

As we look towards 2026 and beyond, Instacart is committed to continuing this momentum: **helping the grocery industry thrive, empowering shoppers, driving growth for food and CPG brands, saving families money and time, and ensuring that fresh, affordable food is within reach for everyone.**

1. Data in the report are based on Instacart's geographic reach in both the U.S. and Canada unless otherwise specified.
2. Industry data based on 2025 NERA Economic Consulting study.
3. As of Q3 2025, number of orders (pick-up or delivery) since Instacart's entry into the market through September 30, 2025.
4. As of Q3 2025. Based on both delivery and pick-up orders since Instacart's entry into the market.
5. As of Q3 2025. Based on savings data on marketplace orders from Q1 2023 through Q3 2025.
6. As of Q2 2025. Based on shoppers who completed at least one order during the month ended June 30, 2025.
7. As of Q2 2025. Based on earnings since Instacart's entry into the market, inclusive of tips.
8. As of Q2 2025.
9. As of Q2 2025.

INSTACART'S ECONOMIC IMPACT ON

Retailers

Instacart helps brick-and-mortar grocers and other retailers thrive in an omnichannel world, supporting revenue growth, job creation, and expanded reach.¹⁰ Our platform enables retailers with the technology and solutions they need to compete and serves as a lifeline for small grocers who are the backbone of their local communities. Beyond direct business impact, this growth also contributes to the broader economy: increased sales, earnings, and new business activity generate tax revenues that support local governments and community services.



10. Results discussed associated with Instacart's impact on grocery revenue and job creation are industry data based on [2025 NERA Economic Consulting study](#).



100,000 retail stores

Instacart partners with more than 1,800 national, regional and local grocery and other retail banners to deliver from nearly 100,000 stores across the U.S. and Canada.¹¹

237,000 grocery jobs

Instacart has helped U.S. grocers create over 237,000 grocery jobs since 2012 — from managers to cashiers, bakers to deli workers.



\$22.5 billion in increased revenue

Since our launch in 2012, we've helped brick-and-mortar grocers in the U.S. increase their revenue by \$22.5 billion.

“Instacart allows us a platform to focus on our business while also servicing a number of different people that can't get into our store — whether that's a nursing home, assisted living, different schools, or the YMCA.”

JEREMY GERIS

Co-Owner & Store Director, Elden's Fresh Foods, Alexandria, MN

11. As of December 31, 2024.

Small business spotlight: Supporting small grocers

We're proud to champion small and medium-sized grocers in the communities they serve. Nearly three in every ten grocery jobs Instacart has helped create in the U.S. have been at small grocers (those with fewer than 50 employees), fueling local growth where it matters most.¹² This is more than double the average job growth at small businesses across the grocery industry. By bringing their businesses online, Instacart helps small grocers reach new customers, increase sales, and compete in today's digital marketplace.

68,000
small business jobs

Of the 237,000 jobs we've helped grocers create, 29% of them were at small businesses — **double the industry average**.¹³

\$7 billion in revenue
growth for small grocers

Instacart has helped small grocers increase their revenue by \$7 billion by helping them bring their businesses online, reach new customers, and increase their sales.



“Our partnership with Instacart has been instrumental in taking our business to the next level. It has allowed us to extend our reach far beyond our brick-and-mortar store locations and tap into a broader customer base. This has led to increased sales and a stronger market presence.”

JOHN ORTON

VP of Marketing, Yoke's Fresh Market, Spokane, WA

“Our partnership with Instacart has not only enabled us to reach a wider customer base but has also helped level the playing field with larger retailers. Despite lacking the same level of infrastructure as these larger companies, our collaboration with Instacart has given us a competitive edge, allowing us to better compete in the market by leveraging their technology. The convenience and reliability of Instacart's fulfillment solutions have been instrumental in helping us succeed.”

WILL DURAN

Co-Owner, Food Garden Market, Brooklyn, NY

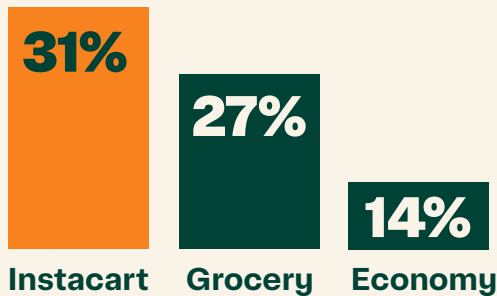


12. Industry data based on 2025 NERA Economic Consulting study.

13. Instacart helps create grocery jobs at small businesses at roughly twice the rate seen across the industry. Based on NERA Economic Consulting study showing that 28.7% of jobs created by Instacart accrued to businesses with 49 or fewer employees — even though businesses with 49 or fewer employees make up only 13.6% of all U.S. grocery jobs and 28.1% of all U.S. jobs.

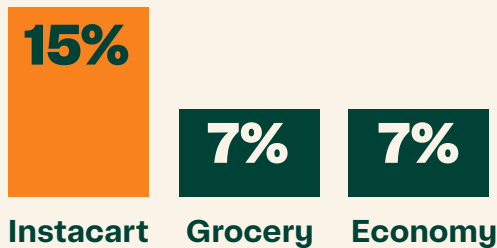
Helping grocers create more jobs

Instacart is proud to help grocers create jobs that open doors for people from a range of backgrounds — from young workers just entering the labor force and seniors seeking supplemental income to individuals pursuing higher education and those building careers without a four-year degree.¹⁴ These groups, which research shows often face greater barriers to employment, are finding meaningful opportunities through the grocery jobs Instacart helps power.



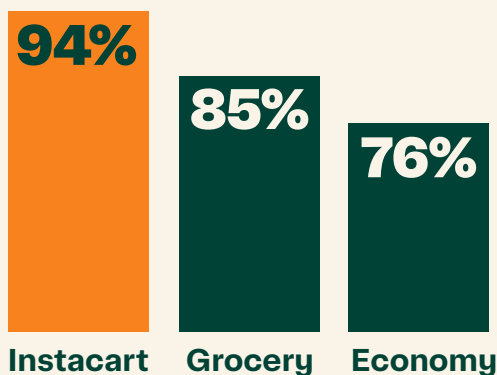
31% Young Workers

Nearly one in three grocery jobs supported by Instacart go to workers under the age of 25 — compared to just 27% across the grocery industry overall and only 14% across the broader economy. This means Instacart is helping create more pathways for young people to gain early work experience and build lasting careers.



15% Seniors

15% of the grocery jobs Instacart helps create are filled by workers over the age of 65 — more than double the share in both the grocery industry and the overall economy. Instacart is helping provide seniors with work that supports financial stability and continued community engagement.



94% Without a Four-Year College Degree

The vast majority of grocery jobs Instacart supports — 94% — go to workers with a high school diploma, GED, or associate’s degree. That’s significantly higher than the grocery industry average (85%) and the broader economy (76%), showing how Instacart is helping create accessible, entry-level opportunities for workers without a four-year degree.



“Partnering with Instacart has 100% improved our business... We’ve reached customers that we generally haven’t reached before.”

LIZETTE GOMEZ

Marketing Director, Vallarta Supermarkets, Santa Clarita, CA

14. Industry data based on 2025 NERA Economic Consulting study.

Customers

Instacart helps more than **25 million¹⁵ families and individuals** across the U.S. and Canada access the food they love from the retailers they trust. This includes households in food deserts and other hard-to-reach areas, as well as individuals facing transportation barriers or health-related mobility challenges. By making grocery shopping more accessible, Instacart is helping ensure that nutritious food is within reach for nearly everyone.



25 million
customers

More than 25 million people place orders on Instacart per year.



1.5 billion
orders

Since launch, Instacart has powered more than 1.5 billion orders.¹⁶



30 billion
items ordered

Customers have ordered more than 30 billion items through the Instacart platform.¹⁷

Making healthy choices easier for customers

Instacart is helping families bring more fresh, nutritious food to the table. Customers are filling their carts with fruits and vegetables alongside everyday staples like milk and eggs.

More than 1 in 4 food items sold are fresh produce

28% of items sold on Instacart are **fresh fruits and vegetables.**¹⁸

Top 3 purchased items

On the Instacart platform, the top three most-purchased items are **bananas, milk, and eggs.**¹⁹



“Healthy food is very important to me and my family. Instacart delivers quality food. It’s easy.”

LINDA T

Instacart Customer, Washington, D.C.

15. Unique marketplace orderers in the trailing 365 days in the U.S. and Canada. For the period July 1, 2023 to June 30, 2024.

16. As of Q3 2025, number of orders (pick-up or delivery) from inception through September 30, 2025.

17. As of Q3 2025, number of items since Instacart entry into the market through the month ended September 30, 2025.

18. As of June 30, 2025. Based on total food items in cart as of June 2025.

19. As of June 30, 2025.

Everyday Savings

Instacart is committed to making everyday essentials more affordable for millions of households. By combining access to the widest range of retailers with innovative tools that surface the best deals, we help customers stretch their budgets without compromising on quality or convenience. Every coupon clicked, every price comparison, and every discount adds up — turning Instacart into one of the most powerful household savings tools in grocery today.



\$3 billion in savings

From January 2023 through June 2025, customers saved more than \$3 billion through deals, discounts, and loyalty programs by ordering on Instacart.²⁰ That's the same as:

- 721 million gallons of milk²¹
- A week of groceries for 8.6 million families²²
- 1.6 billion pounds of bread²³

More than 1 billion hours saved

Instacart customers have saved more than 1 billion hours by using the platform.²⁴ That's equal to approximately:

- 2.2 billion trips to the playground.²⁵
- 137 million 8-hour workdays — or the equivalent of adding decades of productivity back into people's lives.²⁶
- A week of family dinners for every household in North America.²⁷

More than \$5 per order saved

On average, customers save more than \$5 on grocery and household items on every Instacart order.²⁸

20. Based on savings on orders placed between January 2023 through June 2025 in the U.S. and Canada. Item level savings refers to discounts and savings tied to an item which is applied to the full item price amount or typical price shown to a user on the Instacart app. See methodology for more details.
21. The number of gallons of milk is based on an average gallon of milk of \$4.162 as of July 2025, according to Bureau of Labor Statistics.
22. Estimate based on an average grocery family spend of \$347.25 per week for a family of four using the [USDA Thrifty Food Plan: U.S. Average, August 2025](#) that includes one adult male, one adult female and two older children (ages 9 to 11) spending approximately \$1,389 monthly. This estimation is based on a moderate monthly food budget, with the full range starting at \$1,100 on a more price-conscious plan and up to \$1,675 on a more liberal budget.
23. Based on Bureau of Labor Statistics average price of bread per pound of \$1.84 in August 2025.
24. As of Q2, 2025.
25. Assuming 30 minutes of play time.
26. Based on converting total hours saved into equivalent 8-hour workdays.
27. Based on approximately 148.5 million households in North America — including 132 million in the U.S. (U.S. Census Bureau) and 16.5 million in Canada (Statistics Canada, [Table 17-10-0159-01](#)) — a total of 1.1 billion hours saved is equivalent to about 7.4 hours per household, or roughly one week's worth of dinners assuming one dinner is equivalent to one hour.
28. As of Q3 2025, based on order data from January 2023 to September 2025.

How we drive savings



Retail Selection

We partner with a wide range of retailers — including bulk and discount stores — giving consumers the flexibility to shop where they find the best value and expanding their access to stores where they may not otherwise be able to shop.



In-Store Pricing

Many of our 1,800 retail partners offer the same pricing online as they do in-store — also known as price parity — along with loyalty savings and deal perks that help customers stretch their budgets. Price parity retailers have grown 10 percentage points faster than non-parity retailers, on average; and, customers that shop at price parity retailers are more likely to become recurring customers.²⁹



Promotions & Discounts

Our dedicated Deals Tab surfaces active discounts and coupons, making it easy for customers to save more — while also creating opportunities for emerging brands to reach customers within their price point.



Product Variety

Through deep catalog integrations, Instacart offers thousands of products from each store, including private label options that provide affordable alternatives without sacrificing quality — for a total of 17 million unique items.³⁰ This is important as over 70% of our customers have at least one dietary preference.³¹



Savings on Caper Carts

Caper Carts are Instacart's AI-powered smart shopping carts that transform the in-store experience by allowing customers to scan items as they shop, view personalized recommendations, and access deals in real time. In September 2025, we introduced new savings features — including EBT SNAP eligibility tracking, digital coupons, Cart Cash rewards, and on-cart loyalty sign-up — turning Caper Carts into powerful budgeting tools that help customers maximize benefits and stay on budget.³²

On average, customers using Caper Carts save **nearly \$3 every time they shop**, with more than 50% of users clipping at least one coupon directly through their cart.³³

29. As of Q2 2025 based on internal company retailer and customer data.

30. Q4 2024 Shareholder Letter.

31. Q1 2025 Shareholder Letter.

32. Company press release September 25, 2025.

33. As of Q2 2025 based on internal company retailer and customer data.



Expanding access for customers

Instacart is helping break down barriers to food access by reaching communities that have historically been underserved. From urban neighborhoods to rural towns, and from families relying on SNAP benefits to those living in food deserts, we're working to ensure that everyone has a reliable way to shop for the groceries they need. Today, we reach:



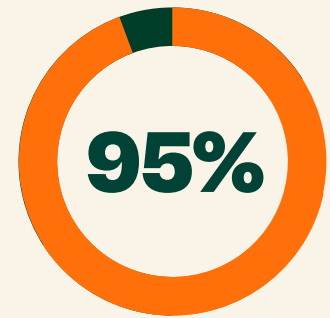
Instacart reaches 98% of all households in the U.S.

Nearly every household in America can access fresh groceries and everyday essentials via Instacart.³⁴



Instacart reaches 98% of households that are enrolled in SNAP

More than 98% of households enrolled in SNAP can access delivery on Instacart.³⁵



Instacart reaches 95% of households in low access areas³⁶

Instacart now reaches more than 95% of households in low income, low access areas in the U.S. — sometimes known as food deserts.

“I am a senior citizen and am unable to get groceries. If it were not for Instacart I have no idea what I would do. I rely on them going shopping for me and helping with my budget by shopping at more competitively priced markets and stores.”

MAIRE G

Instacart Customer, New York, NY

34. As of March 31, 2024.

35. As of August 2024.

36. As of Q2 2025.

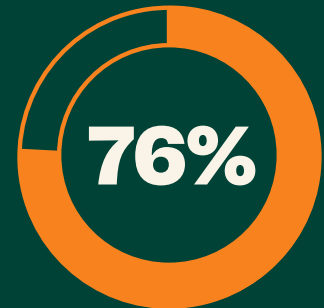
Who are our customers?

More than 25 million³⁷ customers rely on Instacart each year to bring them the groceries and essentials they need — from busy families managing their weekly shop to small businesses stocking up on supplies. For many, Instacart has become more than a convenience; it's a service they consider essential.

- **Customers³⁸ include those who are prioritizing and seeking healthy options first, busy achievers balancing work and family life, convenience seekers, and hobby cooks.**

- The leading customer segments include those seeking healthy options (33%) and busy individuals and families (29%).
- 68% of customers consider Instacart essential.

- **Customers differ geographically across suburban communities (47%), urban communities (36%), and rural communities (17%).**



76% identify as female



29% have children in the home

“For me, Instacart is so much more than grocery shopping. Five years ago, I got sick with a chronic illness...overnight my life, my body, my capacity drastically changed. Instacart is absolutely an essential service.”

JESS

Instacart Customer, Washington, D.C.

37. Unique marketplace orderers in the trailing 365 days in the U.S. and Canada. For the period July 1, 2023 to June 30, 2024.

38. As of Q1 2025, based on an internal survey of customer satisfaction, see Methodology section for more details.

Small business spotlight: Empowering small business customers

While you may typically think of Instacart orders dropping on a family’s doorstep, many of Instacart’s customers are actually small- and medium-sized (SMB) businesses. From restaurants to daycares, fitness centers to nursing homes, SMBs across North America rely on Instacart to keep their shelves stocked and operations running smoothly.

That’s why we created Instacart Business — a platform designed to empower business customers with better purchasing tools, greater visibility into team spend, and simplified operations. The majority of Instacart Business users are small businesses, many of whom highlight how the platform makes it easier to manage expenses. Recently, Instacart Business also launched invoicing for SMBs, giving small teams an even simpler way to track and control costs.

- Instacart Business customers have placed orders in all **50 states and 10 Canadian provinces**.³⁹
- More than **1 million businesses** have placed orders on Instacart Business in the last year.⁴⁰
- The top three types of businesses using Instacart Business are food service and beverage, office and professional services, and community and non-profit organizations.⁴¹



“We always said we would put technology at the core of our business to help us work smarter, so one day we decided to give the Instacart app a try, and the first time we used it, we were just like, ‘Wow!’ It just saves us so much time, and as a business owner, time is money. Especially as we started to expand, there was just no way we could be making multiple store runs for multiple locations all day long. Honestly, there’s really no way we could have expanded without using Instacart.”

KHARI AND SHAWN PARKER

Owners, Connie’s Chicken & Waffles, Baltimore, MD

“Instacart is a staple in my preschool programming; it’s a convenient, personalized shopping experience that gives us better options for the children we serve. We’ve tried to use other vendors, but we had less control over the quality of fresh foods, which really matters when you’re serving kids.”

DR. TAMAR ANDREWS

*Director Emeritus Of Early Childhood Education & Engagement,
Temple Isaiah Preschool, Culver City, CA*



39. As of Q2 2025.

40. As of Q1 2025.

41. Business type is determined based on self-reported data provided by the business and an internal segmentation of business categories.

Impact on Communities

Community Carts are a charitable giving feature on Instacart that have enabled individuals and organizations to create and contribute to grocery orders for food banks, nonprofits, and schools. By directing essential items where they're needed most — from disaster relief to everyday food insecurity — Community Carts give donors a simple, transparent way to make a meaningful impact. Each cart reflects the specific needs of local organizations, ensuring contributions are both relevant and effective.

Through donations, partnerships, and innovative tools like Community Carts, Instacart is helping families across the country put nutritious food on the table and strengthening the communities we serve.



14 million meals donated

Since 2018, Instacart has donated nearly 14 million meals through Feeding America to help families across the U.S.



300 partner organizations

We have partnered with more than 300 organizations⁴² nationwide to power Community Carts and expand local food access.



360,000 items donated

Since launch, more than 360,000⁴³ grocery items have been donated through Community Carts, from food for over 300 food banks to school supplies for families impacted by the 2025 Los Angeles, California fires.



10 million servings of produce delivered

Since launching our partnership with Partnership for a Healthier America, we've provided 10 million servings of fruits and vegetables to families in need across the U.S.

42. As of November 5, 2025.

43. Based on items ordered between January 1, 2021 and November 5, 2025.

Shoppers

Instacart shoppers are essential members of our community. By choosing when, where, and how often they shop, these independent workers turn grocery shopping into a flexible source of income. For many, it's a way to supplement other jobs, balance family responsibilities, or simply create more financial breathing room — all while helping neighbors in their communities access the food and essentials they need.



600,000 shoppers

Approximately 600,000⁴⁴ individuals shop on Instacart across North America.

\$24 billion in earnings

Since our company was founded, Instacart shoppers have earned more than \$24 billion⁴⁵ on the platform.

“I started shopping as a way to earn extra income and am thankful to remain an independent contractor so that I can earn outside of my full time job. Shopping allows me to plan and budget.”

TONYA S

San Francisco Bay Area, CA



“The most satisfying thing about shopping with Instacart is helping people get the food, medicine, and other things that they need. It doesn't feel like work. It just feels like I'm helping people in my community.”

MICHAEL D

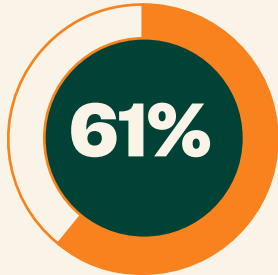
Instacart Shopper, Queens, NY

44. As of Q2 2025. Based on shoppers who completed at least one order during the month ended June 30, 2025.

45. As of Q2 2025.

Who are shoppers?

Shoppers are students, parents, retirees, and caregivers who choose Instacart for the flexibility to earn on their own terms.

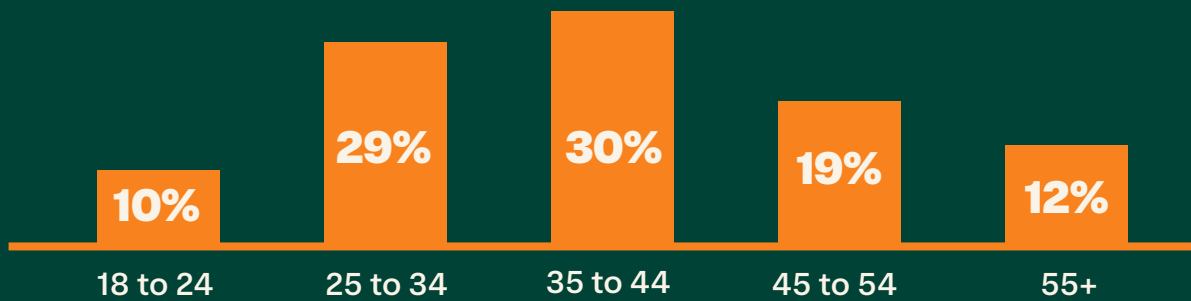


61% identify as women⁴⁶



50% are parents of children under age 18⁴⁷

Shoppers fall across a range of ages:



Nearly 80% of shoppers are likely to continue working with Instacart in 6 months.⁴⁸

“Shopping with Instacart gives me the flexibility to earn on my own time while taking care of my aging parents and my sister, who lives with disabilities. I can start and stop working anytime, depending on when they need me.”

SHAMIKA N
Queens, NY

46. Based on Q1 2025 internal survey of shoppers, see Methodology section for more details.

47. Based on Q1 2025 internal survey of shoppers, see Methodology section for more details.

48. Based on Q1 2025 internal survey of shoppers, see Methodology section for more details.

Why shoppers shop

Instacart shoppers are independent contractors who choose when, where and how long to work. They consistently tell us that the freedom and flexibility that come with being an independent contractor are the top reasons they shop with Instacart. For many, this work supplements another job, helps balance family responsibilities, bridges career transitions or business launches, or simply provides income that adapts to their lifestyle.



On average, shoppers choose to work **less than 10 hours per week**⁴⁹ on Instacart.



70% have multiple income streams⁵⁰, with most looking to Instacart for supplemental earnings.



75% of shoppers⁵¹ say they choose to work with Instacart specifically because of the real-time flexibility it provides.



“I was a teacher for 30 years, but now that I’m retired, being able to make my own schedule is so important to me. When I wake up, I know I’m in charge of my day. I help my almost 90 year-old mother, and have two grandchildren I want to spend time with. Shopping with Instacart gives me the flexibility to spend quality time with my family while still being able to earn extra money.”

CARYN D
Instacart Shopper, Maryland



49. Average hours per week and time spent shopping for the quarter ended June 30, 2025. Based on shoppers in the U.S. and Canada.

50. Based on a July 2025 national survey of shoppers, see Methodology section for more details.

51. Based on a July 2025 national survey of shoppers, see Methodology section for more details.

CPG Brands

Instacart provides a powerful retail media platform that helps food and consumer packaged goods (CPG) brands of every size — from fresh produce companies and emerging food startups to beloved household CPG brands — connect with new customers, drive sales, and grow their businesses.

Our suite of groundbreaking advertising products, tools, and insights makes it easy for brands to reach the right customers at the right time, measure real impact, and grow their businesses.

7,500 brand partners

Instacart partners with more than 7,500 brands⁵², helping them expand their reach and connect with new customers.

25% average sales lift

Brands that advertise on Instacart see a 25% boost in sales on average⁵³ — translating into measurable growth and higher revenue.

680 Black and women-owned emerging brands supported

Instacart has supported more than 680 Black and women-owned emerging brands⁵⁴, providing tools and visibility to help them scale in a competitive market.



Produce Ads Go Digital

Instacart was the first e-commerce platform to launch an online advertising capability for fresh, weighted produce items. This innovation levels the playing field for produce brands — making everything from fresh citrus to sweet potatoes just as discoverable as packaged goods across the Instacart Marketplace.

52. As of Q2 2025.

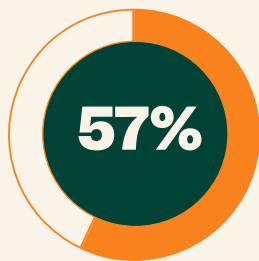
53. Based on internal tests run across all brand partners during the quarter ended September 30, 2025 using an updated methodology with a 28-day lookback period.

54. Based on the average of internal tests run across all brand partners during the last four quarters ended September 30, 2025 using an updated methodology with a 28-day lookback period. There can be no assurance that the outcomes for these tests can be maintained or replicated due to a variety of factors, some of which may not be within Instacart's control or cannot be anticipated.

Small business spotlight: Fueling emerging brands

Instacart is not only a place to shop for trusted favorites — it’s also where customers discover what’s new. For small and emerging brands in particular, Instacart helps level the playing field, giving them access to the same tools as industry leaders and helping them break into — and thrive in — a competitive marketplace.

Our platform makes it easier for small and emerging brands to have their products gain notice, be tried for the first time, and build lasting loyalty. While customers use Instacart for routine shopping, they also use the platform to discover new choices for their grocery purchases.⁵⁵



57% of customers have discovered a new brand or product on Instacart.



29% of customers use Instacart specifically to seek out new brands.



“Advertising on Instacart helps us drive trial and stay top of mind at the digital shelf. It allows us to reach high-intent shoppers right when they’re filling their carts – and that’s priceless for creating real conversion opportunities.”

ANOUCK GOTLIB
CEO, Belgian Boys

“Instacart has been a great partner for us. It’s been a great journey so far and in fact, with strategy, the right support, and fast execution, we became the #1 broth brand. I truly believe Instacart helps to drive trial and velocity in-store, giving brands the possibility to tap into a different audience.”

NICCOLO GLOAZZO
Senior Director of Media and Omnichannel, Kettle & Fire



55. As of Q1 2025, based on an internal survey of customer satisfaction. See Methodology section for more details.

Looking Ahead

Instacart is proud to play a role in powering the grocery and food industries and strengthening the communities we serve. From creating hundreds of thousands of grocery store jobs and increasing sales for food brands big and small, to helping families save time and money and unlocking billions in earnings for shoppers, the Instacart platform continues to deliver measurable impact across every corner of the marketplace.

Importantly, this economic impact is also community impact: local business growth and local job creation are vital to the health of the neighborhoods we serve, and they form the foundation of thriving, resilient communities. On top of that, the broader ripple effects of this growth — including the tax revenues generated by increased commerce, earnings, and new business activity — also help governments and policy leaders strengthen the communities they represent.

Looking ahead, we know the grocery industry will continue to evolve, and Instacart is committed to leading that transformation alongside our partners. Through these efforts, we remain steadfast in our mission: to create a world where everyone has access to the food they love and more time to enjoy it together — ensuring that Instacart is not only a driver of today's grocery economy, but also a partner in shaping its future.

Press inquiries: press@instacart.com



Methodology & Data Sources

To describe and quantify Instacart’s economic impact on all sides of the marketplace, Instacart leveraged various methods, including commissioned independent research by NERA Economic Consulting; analysis of internal sales, ads, and shopper data; shopper and consumer surveys; and retailer, shopper, and customer testimonials. Details are provided for each section of the report: grocers, shoppers, customers, and consumer packaged goods (CPG) companies.

Instacart’s Economic Impact on Grocers. This section of the report includes data from a commissioned independent research study conducted by Dr. Robert Kulick of NERA Economic Consulting. Dr. Kulick utilized regression analysis to estimate employment impacts through Q4 2024 using three measures of Instacart adoption – Instacart deliveries in a metropolitan statistical area (MSA), Gross Merchandise Value (GMV) in an MSA, and stores served by Instacart in an MSA. In an earlier estimation of Instacart’s impact on the grocery industry by Dr. Kulick, revenue impacts were proxied using payroll data available from Census Quarterly Workforce Indicators (QWI). However, QWI discontinued providing the payroll data necessary to estimate revenue effects. Thus, to estimate revenue impacts, the employment impacts estimated based on the regression analysis were combined with the BEA’s Regional Input-Output Modeling System (RIMS II) multipliers resulting in the estimated revenue impact discussed in this report. Dr. Kulick also utilized similar modeling, with some modifications, to estimate Instacart’s impact on small and medium size businesses (businesses with less than 250 employees). Full study details can be found on the [NERA Economic Consulting website](#).

Instacart’s Economic Impact on Shoppers. This section of the report includes analysis of internal shopper data and two shopper surveys. The number of shoppers on the platform is based on shoppers who completed at least one order during the month that ended June 30, 2025. Average hours worked is based on the average hours shopped for the quarter that ended June 30, 2025. Selected shopper demographic results are based on an internal 15-minute shopper survey fielded from February 20, 2025, to March 3, 2025 (n=3,321). The survey data have been weighted to ensure representativeness among shoppers.

As part of our continued effort to develop an even greater understanding of the shopper community, Instacart completed an additional national survey of shoppers from across the U.S. We surveyed 1,800 shoppers from July 17, 2025 to July 27, 2025 (margin of error: +2.3) to better understand what motivates them to shop with Instacart and what aspects of the experience they value most. The survey data have been weighted to ensure representativeness among shoppers.

Instacart’s Economic Impact on Customers. This section of the report includes analysis of sales data and a comparison of Instacart’s coverage to external data on low income and low access areas (commonly referred to as food deserts). Q1 2025 Customer Sentiment Satisfaction survey of 1,939 customers in the U.S. and Canada who completed a 15 minute survey fielded February 28, 2025 to March 14, 2025. Percent of households reached is an Instacart estimate as of June 2025 based on the number of EBT SNAP households in areas serviced by EBT SNAP-enabled retailers on Instacart; EBT SNAP retailer banners and locations are for the quarter that ended June 30, 2025. The percent of households reached in food deserts is an Instacart estimate as of June 2025 based on the number of people living in food deserts per USDA Food Desert Research Atlas (2019) that are serviced by retailers on Instacart. Regarding customer savings, the main sources of item level savings are: discounts/savings passed back to Instacart through a retailer’s catalog, which includes savings exclusively available to retailer loyalty members; and, discounts/savings provided by a CPG. The savings calculation accounts for retailers who offer the same as in-store prices as well as retailers where prices on Instacart are higher than in-store prices. Note, savings are based on orders with at least one grocer item and savings are reported in USD.

Instacart’s Economic Impact on CPG Brands. This section of the report relies on internal sales and advertising data.

This report contains estimates and other statistical data made by independent parties and by Instacart relating to our impact on customers, shoppers, retailers, and other partners. This data involves a number of assumptions and limitations, and therefore such estimates should not be given undue weight. All third party names and logos appearing in this presentation are trademarks of their respective owners, and our use hereof does not imply an endorsement by the owners of these trademarks or logos.



