5W AI VISIBILITY INDEX

THE PRIVATE LABEL AI ADVANTAGE — PART 2 OF 5

AMAZON & E-COMMERCE EDITION

The Private Label *AI Advantage*

Amazon & E-Commerce — why Amazon's own brands are the one private-label portfolio AI does not favor.

Published
May 2026

Brands modeled
25

Answer engines
ChatGPT · Claude · Perplexity · Gemini · Google AI Overviews

Research by
5W AI Communications

45 vs 29
CITATION SHARE — NATIONAL BRANDS VS AMAZON'S OWN BRANDS

1.6×
NATIONAL BRANDS CITED MORE OFTEN THAN AMAZON'S OWN BRANDS

2/12
AMAZON-OWNED BRANDS THAT REACHED THE TOP TIER

64
CONSUMER-INTENT PROMPTS TESTED ACROSS FIVE ANSWER ENGINES

01

Executive Summary

Amazon owns the store. It does not own the answer.

Across the grocery aisle, private label wins AI-generated recommendations decisively. On Amazon — the largest store in the world, with the most sophisticated private-label operation in retail — the pattern breaks. 5W modeled the Citation Share of 25 brands sold on Amazon: 12 of Amazon's own brands against 13 national brands with strong on-platform presence. **National brands earned an average Citation Share of 45. Amazon's own brands earned 29.**

This is the inverse of the grocery finding, and it is the most important result in the franchise. It proves the advantage was never "private label wins." It was always **architecture wins** — and Amazon's own-brand portfolio, for all its scale, did not build the architecture.

Only two Amazon-owned brands reached the top tier: Amazon Basics, and 365 by Whole Foods Market. Everything else — Solimo, Mama Bear, Presto!, Happy Belly — sits in the bottom half, out-cited by national brands most shoppers could not name a marketing campaign for.

On Amazon, the assets that used to guarantee dominance no longer do.

THE LEGACY MODEL	THE ANSWER-ENGINE MODEL
Marketplace dominance	Retrieval authority
Search-result placement	Recommendation frequency
Buy Box ownership	Trust density
Lowest price	Community discussion
House-brand proliferation	Coherent brand identity

02 The Headline Finding

The grocery study's store-brand winners — Kirkland, Trader Joe's, 365 — share three traits: a cult-grade retailer halo, dense organic community discussion, and constant editorial coverage. Amazon's own brands have the scale of those winners and almost none of the other three.

Amazon de-emphasized its private-label program after regulatory scrutiny, streamlining from roughly 100 house brands to fewer than 20. The survivors are deliberately generic — Solimo, Presto!, Mama Bear — names engineered to be unobtrusive, not memorable. An unobtrusive brand is, by definition, a weak retrieval anchor. When an answer engine handles "best phone charger" or "best paper towels," it synthesizes reviews and roundups — and that content discusses Anker and Bounty, not their Amazon-owned equivalents.

> ***Shelf dominance no longer guarantees answer dominance. Distribution is not discovery.***
>
> THE AMAZON INVERSION, IN ONE LINE

The two exceptions confirm the rule. **Amazon Basics** works because it is the one Amazon brand with a clear, coherent identity — "reliable, cheap, fine." **365** works because it did not come from Amazon's playbook at all; it inherited the Whole Foods halo wholesale. Both have what the rest of the portfolio lacks: a retrieval anchor.

03 Methodology

Franchise-standard. 25 brands sold on Amazon — 12 Amazon-owned, 13 national — scored across five answer engines on 64 consumer-intent prompts spanning six e-commerce sub-categories. Prompts mirror real shopper language, with no brand names seeded.

Citation Share is a directional visibility model measuring how frequently brands, retailers, and experts appear across AI-generated answers inside ChatGPT, Claude, Gemini, Perplexity, and Google AI Overviews. Scores are indexed 0–100, estimated from current answer-engine behavior and the structure and density of the open-web content each brand can be surfaced from. It is a model of the retrieval landscape — not a logged-query count, which is unstable and easily gamed.

Example prompts tested

ELECTRONICS & ACCESSORIES *"Best budget phone charger on Amazon"*	HOME & KITCHEN *"Best value kitchen storage containers"*
APPAREL & BASICS *"Best affordable wardrobe basics"*	HOUSEHOLD CONSUMABLES *"Best paper towels to buy online"*
BABY & FAMILY *"Best affordable baby wipes"*	COMPARISON

“Amazon Basics vs name brand — which is better”

04 The Citation Share Index

Modeled Citation Share across all five answer engines. Click any column header to sort.

RANK ▲	BRAND ↕	TIER ↕	CITATION SHARE ↕
01	Anker	NATIONAL	66
02	Amazon Basics	AMAZON BRAND	64
03	OXO	NATIONAL	58
04	365 by Whole Foods Market	AMAZON BRAND	57
05	Logitech	NATIONAL	56
06	Ninja	NATIONAL	53
07	Carhartt	NATIONAL	49
08	Levi’s	NATIONAL	46
09	Sony	NATIONAL	44
10	Rubbermaid	NATIONAL	42
11	Hanes	NATIONAL	39
12	Amazon Essentials	AMAZON BRAND	38
13	Tide	NATIONAL	37

RANK ▲	BRAND ↕	TIER ↕	CITATION SHARE ↕
14	Bounty	NATIONAL	35
15	Energizer	NATIONAL	33
16	Duracell	NATIONAL	31
17	Amazon Aware	AMAZON BRAND	30
18	Amazon Saver	AMAZON BRAND	28
19	Solimo	AMAZON BRAND	24
20	Happy Belly	AMAZON BRAND	23
21	Mama Bear	AMAZON BRAND	21
22	Presto!	AMAZON BRAND	19
23	Wickedly Prime	AMAZON BRAND	17
24	Pinzon	AMAZON BRAND	15
25	Amazon Collection	AMAZON BRAND	14
	TIER AVERAGES		OWN 29 · NAT 45

FIGURE 1. Tier averages: Amazon own brands 29 · national brands 45 — the franchise inverted. Bar length scaled to score.

Two Amazon-owned brands in the top eight; ten in the bottom thirteen. On the platform Amazon controls end to end, its own brands are out-recommended by the brands it merely hosts.

05 Platform by Platform

The inversion holds on all five engines, and is widest where community content weighs most.

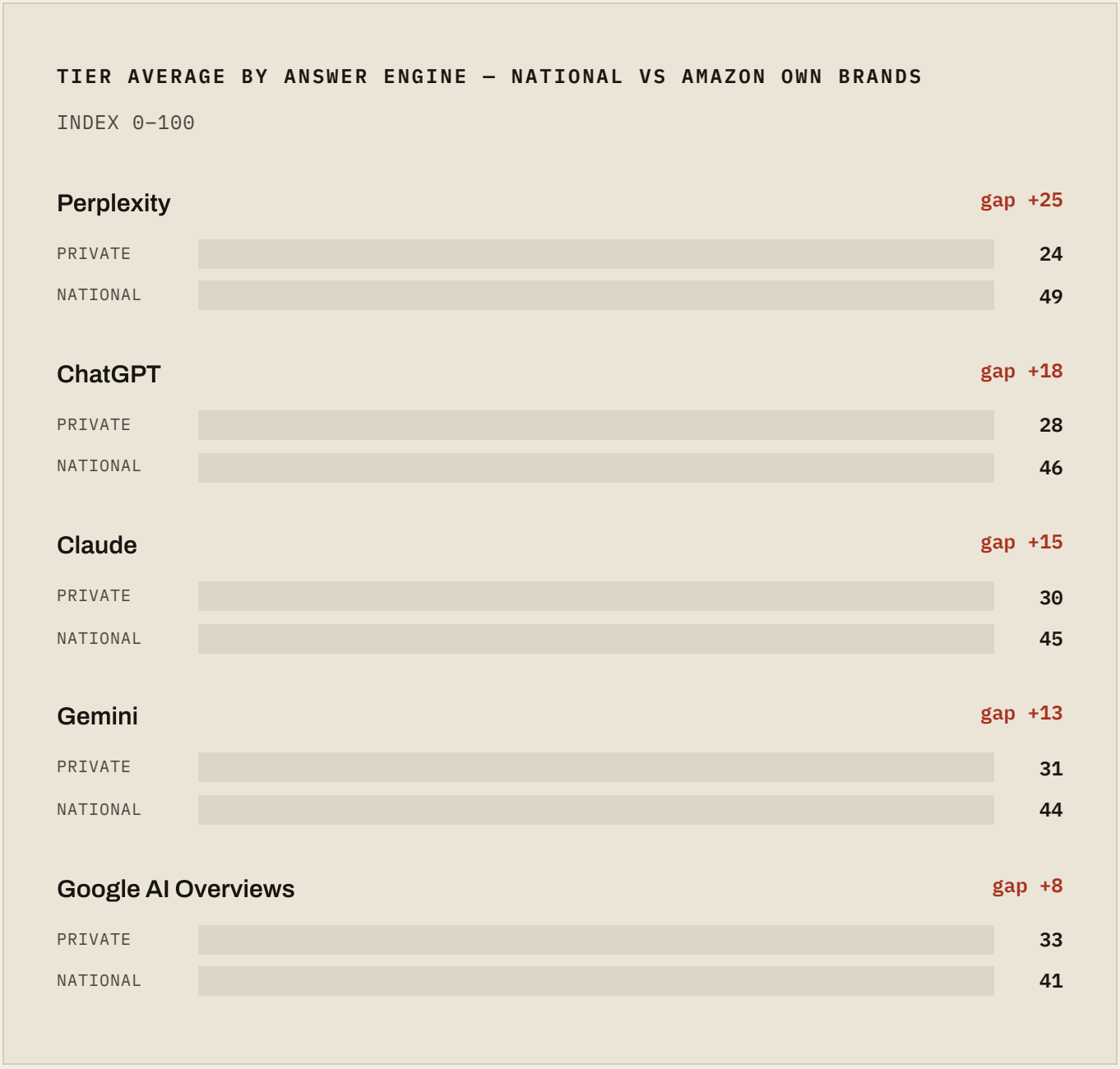


FIGURE 2. Tier average by answer engine. The wider the community-content reliance, the wider the gap.

Perplexity punishes Amazon's own brands hardest — its Reddit-heavy synthesis surfaces independent recommendations, and independent reviewers rarely champion Solimo. **ChatGPT, Claude, and Gemini** show the same gap, slightly narrower. **Google AI Overviews** is the only engine where Amazon's own brands partly recover — it retrieves

Amazon's own product pages and their large first-party review counts. Even there, national brands lead.

06 Sub-Category Analysis

Amazon's own brands are competitive in exactly one sub-category and absent in the rest.

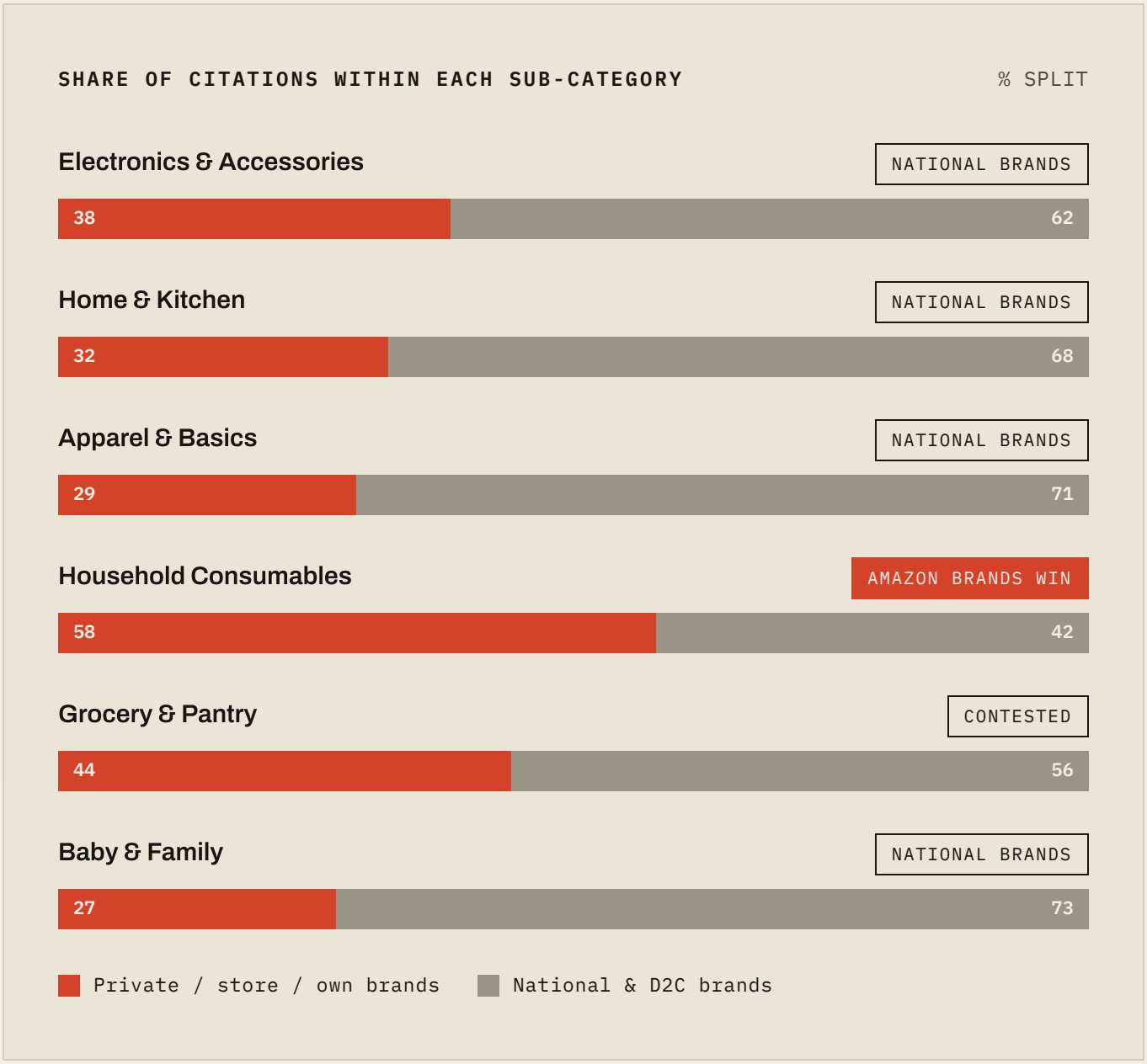


FIGURE 3. Where the advantage holds — and where it does not.

Household consumables — batteries, cables, storage — are the one sub-category where Amazon Basics genuinely wins; the value-and-reliability story is clear enough to surface. Everywhere else, national brands or the lone halo exception, 365, lead. The “Amazon Basics vs name brand” prompt itself resolves toward “name brand for anything that matters” — a verdict the open web has already written.

07 Why AI Recommends These Brands

Answer engines recommend a brand when the open web gives them reason to. For most of Amazon’s own brands, it does not. The six retrieval inputs, scored against the portfolio:

01

Reddit & community density

Near-empty. Communities discuss Amazon the marketplace constantly — deals, returns — but almost never Amazon the brand.

02

Editorial coverage

Minimal. No publication runs “best Solimo finds.” The evergreen format that lifts store brands does not exist here.

03

Review ecosystems

Strong for Amazon Basics, thin for the rest. First-party reviews exist but carry less retrieval weight than independent ones.

04

Expert & professional mentions

Sparse. Tech and home reviewers benchmark Anker and OXO, not Amazon’s house equivalents.

05

Explainer & comparison coverage

Works against Amazon: “Amazon Basics vs brand” explainers usually conclude in the

06

Retailer authority / halo

Absent. Shoppers trust Amazon’s logistics, not its manufacturing. There is no curator halo to inherit.

national brand's favor.

Five of the six inputs run against Amazon's own brands. Amazon Basics scores because it clears one bar national brands also clear — a coherent identity and real review volume. The rest of the portfolio clears none. Recommendation frequency is earned, and Amazon never built the engine that earns it.

Which sources shape the answer

The recommendation a buyer reads is assembled from a specific set of grounding sources — and on Amazon, those sources favor the brands Amazon does not own.

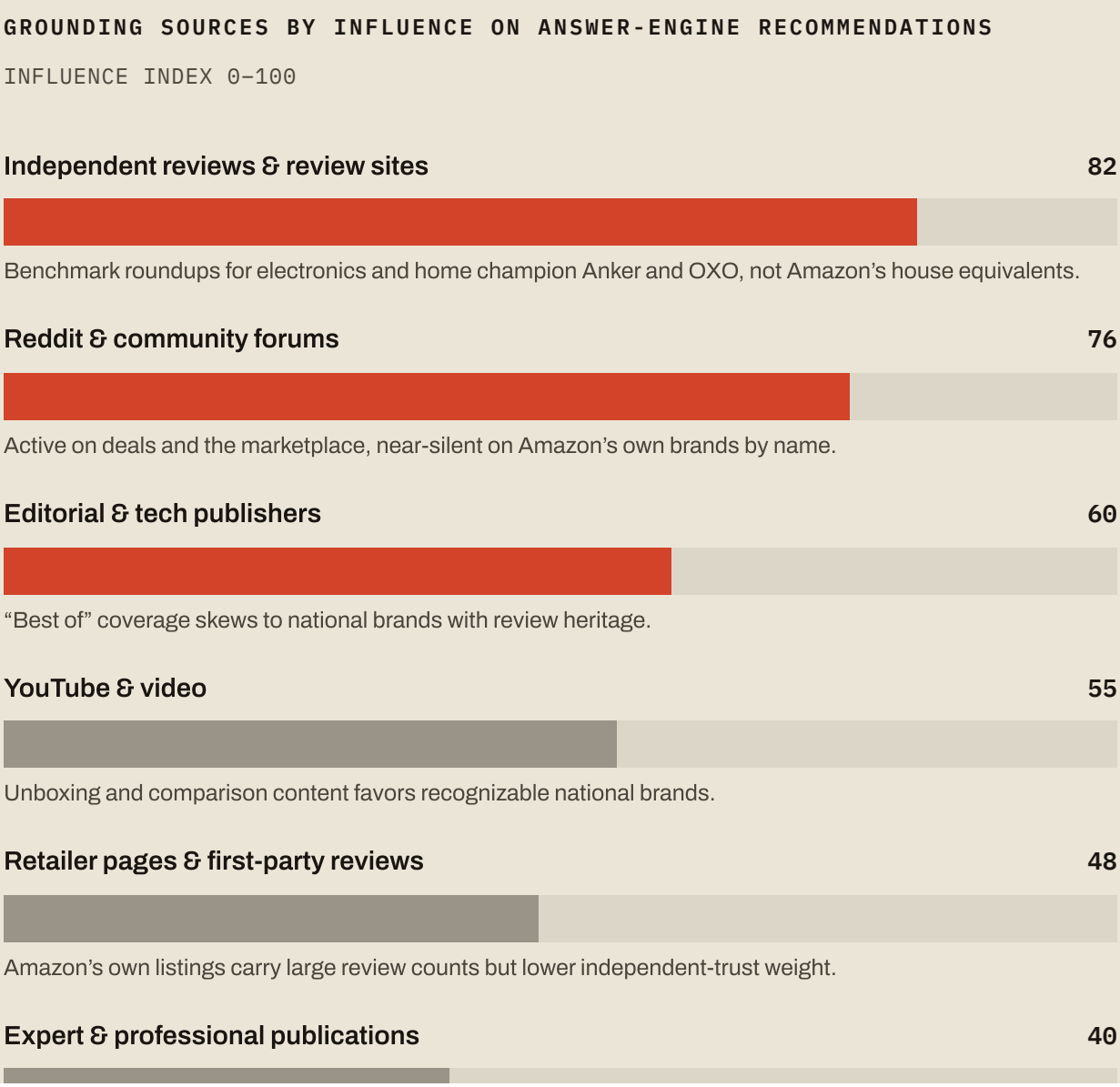


FIGURE 4. The source types conversational retrieval leans on most when recommending brands in this category — the grounding layer beneath every answer.

08 Who's Losing — and Why

The losers here are Amazon's own brands — an unusual finding, and the point of the study. Solimo, Presto!, Pinzon, Mama Bear, Wickedly Prime: competent products, invisible brands. They are not cited because the open web barely discusses them by name.

The winners instead are national brands with genuine review density and enthusiast communities — **Anker, OXO, Logitech, Ninja, Carhartt**. On Amazon, these brands behave the way store brands behave in grocery: dense reviews, clear identity, strong word-of-mouth. The platform inverts the franchise because it inverts the architecture.

09 The Structural Explanation

The grocery study isolated four things answer engines reward: simplicity, trust density, content recency, value clarity. Amazon's own brands have two — they are simple and clearly value-positioned. They lack the other two: trust density (the halo) and the volume and recency of community and editorial content.

Two out of four is not an architecture match. It is a partial one — and a partial match loses. This is the cleanest possible proof that the private label AI advantage is conditional, not automatic.

> *AI systems reward trust density, not just scale. Amazon has the scale. It did not build the trust.*
>
> THE STRUCTURAL READ

Legacy advantage vs AI-era advantage

The shift is not cosmetic. It is a change in which assets generate visibility.

LEGACY ADVANTAGE	AI-ERA ADVANTAGE
Shelf placement	Retrieval authority
Advertising spend	Recommendation frequency
Brand recognition	Trust density
Retail distribution	Community discussion
Search-engine ranking	Answer-layer visibility

10 The Missing Halo

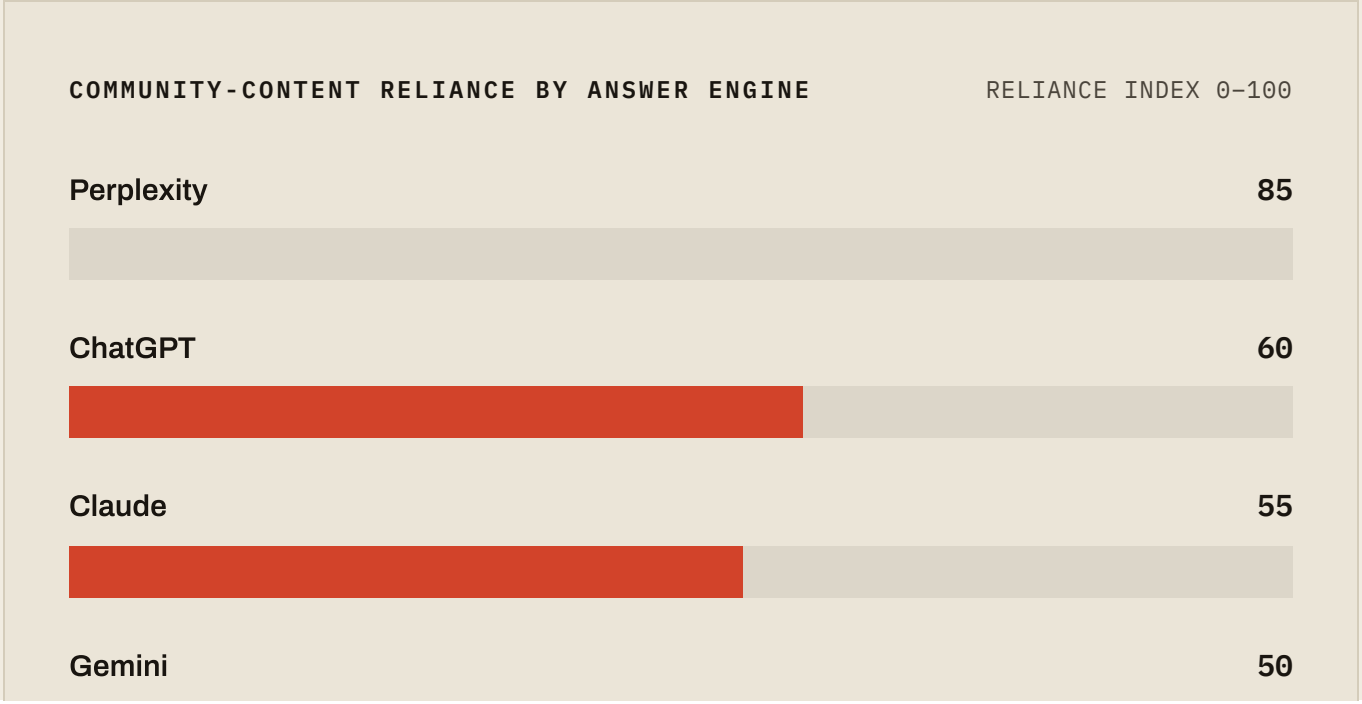
The Retailer Halo Effect — Defined By Its Absence

A halo requires the shopper to trust the retailer as a curator of quality. Amazon earns trust as a logistics engine, not a curator. Answer engines can only inherit a halo the retailer actually built.

Costco earns a curator's halo. Whole Foods earns one — which is why 365 is the portfolio's #2. Amazon earns trust as a selection-and-delivery engine, fast and vast, but not as a judge of quality. Answer engines reinforce the trust that exists; they cannot manufacture one that does not. For every retailer building a private brand, the lesson is blunt: a store brand inherits the halo you have, not the one you wish you had.

11 The Community Factor

The community layer that lifts grocery store brands is, for Amazon's own brands, near-empty. National brands like Anker have built genuine enthusiast followings; Amazon's house brands have not. On Amazon, the community-content advantage belongs to the national brand — and it is the single clearest driver of the inversion.



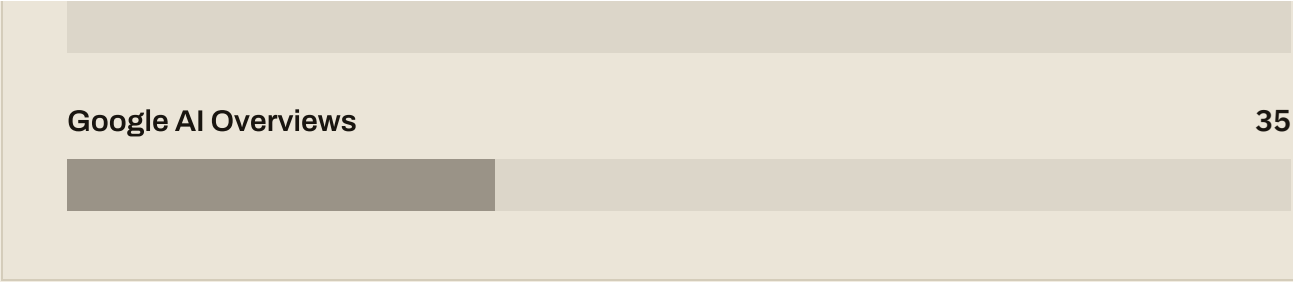


FIGURE 5. The systems that lean hardest on community and review content are the ones that move citation share the most.

> *On Amazon, the brand with the retrieval anchor is usually the one Amazon does not own.*
>
> THE COMMUNITY GAP

12 Winners

Anker

Citation Share 66 · #1

The model national brand for the AI era: dense reviews, a real enthusiast community, one clear claim — reliable charging.

Amazon Basics

Citation Share 64 · #2

The lone Amazon own brand with a true retrieval anchor. “Reliable and cheap” is a signal an engine can surface confidently.

365 by Whole Foods Market

Citation Share 57 · #4

Proof the halo is the variable — the only Amazon-owned brand that inherited a curator's reputation, and it scores like a grocery winner.

13 Losers

Pinzon

Citation Share 15 · #24

Competent product, invisible brand. No halo, no community, a name engineered for anonymity.

Wickedly Prime

Citation Share 17 · #23

A Prime-only food brand with no independent footprint. The open web does not discuss it by name.

Presto! & Mama Bear

Citation Share 19 / 21

Orphans of Amazon's strategic retreat from private label — de-marketed, generic, unretrievable.

Common thread: every bottom-tier brand is an Amazon own brand with scale and no flywheel. Ownership without trust density, community, and editorial coverage produces shelf presence and answer absence.

14 The Commercial Stakes

For Amazon, this is a strategic question, not a crisis — private label was never the core of the model. For every *other* retailer, it is a warning: launching a store brand does not create AI visibility. Target's Good & Gather reached citation parity with century-old national brands

in under a decade because Target built it a halo and a story. Amazon's brands have far more scale than Good & Gather and far less Citation Share. **Scale is not the asset. The flywheel is.**

15 The GEO Playbook

For a private-label owner whose brands look more like Solimo than like Kirkland, the path is a rebuild, not a price cut.

1. **Give the brand one coherent, memorable identity.** Anonymity is a liability in the answer layer. A brand an engine cannot describe is a brand it cannot recommend.
2. **Build the halo, not just the logistics.** Associate the brand with a curatorial reputation — quality judgment — not only fast delivery.
3. **Seed and support genuine community discussion.** The cheapest, fastest-compounding visibility asset is the one Amazon's own brands most lack.
4. **Earn independent editorial coverage.** Reviews and roundups on sources answer engines trust — not first-party product pages.
5. **Measure Citation Share on a fixed cadence.** The gap is invisible until it is tracked. Distribution metrics will not show it.

The principle underneath all five: **build the infrastructure before the crisis — not during it.**

16 Limitations & Outlook

Limitations. Directional model, May 2026 snapshot. The brand set is 25 of the most relevant Amazon-sold brands, not the full catalog. Amazon's own-brand strategy is in flux; a renewed private-label push with better-defined brands could shift these scores.

Outlook. Absent that push, the gap holds — Amazon's logistics dominance does not translate into answer-engine dominance for its own labels. The Amazon study is the franchise's control case: it shows what private label looks like without the architecture.

Glossary

Citation Share

The modeled frequency with which a brand appears across AI-generated answers for a defined set of buyer questions. Indexed 0–100; the answer-engine equivalent of share of voice.

Answer-Layer Visibility

A brand's presence inside the AI-generated answer a buyer reads before reaching a shelf or a search result — the competitive surface that now precedes market share.

Retrieval Authority

The strength and consistency of the open-web signal an answer engine draws on when deciding which brands to surface for a query.

Trust Density

The concentration of credible, independent signals — reviews, community discussion, expert mentions, verification — attached to a brand. Answer engines reward it heavily.

Recommendation Frequency

How often a brand is actively recommended, not merely mentioned, across answer engines for category-defining prompts.

Retailer Halo Effect

The transfer of a retailer's reputation onto its private brand. Answer engines reinforce that inherited trust signal, citing the brand as though the retailer's credibility were its own.

PART OF A SERIES

This is Part 2 of The Private Label AI Advantage — a five-part series within the 5W AI Visibility Index, measuring how answer engines cite store brands against national brands across grocery, e-commerce, pet, pharmacy, and supplements. Each study tests one question: which brands AI recommends, and why.

5W AI Communications

About 5W

5W is the AI Communications Firm, building brand authority across the platforms where decisions now happen — ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews — alongside earned media, digital, and influencer channels. 5W combines public relations, digital marketing, Generative Engine Optimization (GEO), and proprietary AI visibility research to help clients measure and grow their presence in AI-driven buyer research. Founded in 2003, 5W is recognized as a Top U.S. PR Agency by O'Dwyer's, named Agency of the Year in the American Business Awards®, honored as a 2026 Top Place to Work in Communications by Ragan, and named to Digiday's WorkLife Employer of the Year list. Learn more at 5wpr.com.

Sources & Data

Amazon brand portfolio — Amazon "Our Brands" disclosures and public reporting, 2024–2026 · Private-label consumer-trust data — industry surveys, 2025 · National-brand on-platform performance — marketplace and review data · Private-label market context — Circana & PLMA.

5W AI Visibility Index — Amazon & E-Commerce Edition · AI discovery and recommendation intelligence by 5W AI Communications · May 2026 · Citation Share figures are directional models, not logged-query counts.