Amazon's Trickle-Down Monopoly

Third Party Sellers and the Transformation of Small Business

by Moira Weigel

DATA& SOCIETY

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Executive Summary

Amazon's Trickle-Down Monopoly recounts a history of third-party (3P) sellers who have played a key role in building up Amazon's retail business—and thus, Amazon as a whole—over the last two decades. By assembling and analyzing the direct accounts of dozens of small-to-midsized 3P sellers, both in the United States and abroad, this report describes the conditions of their surprisingly secretive work. Numerous researchers have documented how Amazon (mis)treats employees and contractors in their fulfillment and logistics divisions, as well as Amazon's expansion of its private surveillance. I explore another key piece: the ambivalent realities of building a "small business" under the conditions that Amazon has created and controls.

The pages that follow identify three overlapping periods of marketplace expansion, referred to by the shorthand monikers 3P sellers themselves used in interviews: "The Old Days," "The Wild West," and "The Jungle." I argue that the colonial imagery of these terms indicates something crucial about the position of 3P sellers, who treat Amazon simultaneously as a territory-to-be-claimed and as the distant state backing expansion into new territories—whether bargain bins in middle America or the factories of China's Guangdong Province.

Throughout the report, I show that the distinctions between these three time periods have been created by Amazon's continual introduction of new services, regulations, and competitive behaviors—always constraining and sometimes eliminating the businesses of those 3P sellers who have long been responsible for most of their product sales. So, too, do I show that these continual changes produce new business models. The result is that Amazon has not hurt or helped small businesses so much as *transformed* them, turning older forms of commerce into something more akin to day trading.

I propose that we think of this system, and the aspirations that draw sellers to it, as Amazon's **trickle-down monopoly**. By platformizing such a huge swath of retail, Amazon has enrolled countless 3P sellers in expanding the company's influence. But it has also projected their own logics of monopoly onto these small-to-midsized scale sellers, who stockpile inventory in their own homes, sell at losses to try to corner niche markets, and diligently guard all information about their businesses. Amazon has certainly rendered these businesses highly vulnerable to its own changing interests and imperatives.

Given the long-standing economic and ideological supports for "small business" in the United States and beyond, and the changes that Amazon continues to enact for 3P sellers, the question remains: just how much time, value, resources, subsidies, profits, and loyalty does this transformation allow Amazon to claim as their own?

Introduction

For María, shopping days start at Target. There is always a Starbucks at Target, and the bathrooms have changing tables, which mattered when she was starting out. Back then, her daughter was just two months old. Shopping days started at 5:00 a.m. That was the time María set her alarm for. It gave her about an hour to get organized before the baby woke up. Then another hour to feed the baby, get her dressed, and get them both out the door, into the car, and to a Target—there were three or four nearby—by the time doors opened at 7:00 a.m. When she arrived, María would ease her daughter into the carrier, head to Starbucks, and get a coffee first thing. Some days, she drank more than one. Some days, when María had not slept and knew she would drink too much coffee, she brought bottles of formula so she would not give her breastfed baby caffeine jitters.

María has never done well with routine. That was why she left health care. That, and the sadness. She does not like bearing bad news. So, when she heard on a podcast that she could stay with her daughter and make money shopping, she knew that she could make this work. María was always an excellent student. She likes reading. She likes research. In the Target Starbucks, as she sipped her coffee, she flipped through her binder. It was big, full of pen-on-paper notes that she had organized the day or night before, with labels like: *Restrictions, Items to Look For, Items to Avoid, ROI* [Return on Investment]. As she read, she gathered energy for what she was about to do: go through the entire Target, aisle by aisle, scanning items with her cell phone to figure out which she could buy and—maybe—resell for a profit on Amazon.

As María's day begins, Ai's should be winding down, but it never seems to. As she discovered when she moved to Shenzhen, China, people in Shenzhen tend to work late. When I send her a WeChat message at 10:00 or 11:00 p.m. her time, Ai texts me right back. She wants to show me products that she thinks would sell well on Amazon. Portable hibachi grills. Face rollers. School bags that look like SpongeBob SquarePants. The cross-border e-commerce company where Ai works maintains more brands and seller accounts than Ai herself can keep track of—or wants to tell me about, anyhow. "A lot, really a lot," is all she will say. Ai is one of a dozen men and women in their twenties and thirties who work for this company. She splits her time between sourcing and human resources. She mostly works from her phone. Her office is a large, open-plan room with high ceilings, with long fluorescent bulbs suspended from them. There is thin, wall-to-wall carpeting— gray-on-gray squares, like a monochrome chessboard. Rows of computers sit on top of tables with black legs and blond wood, or imitation wood, tops; I can't tell from the pictures. Large, brightly colored posters on the wall offer motivation. *Fenxiang*—"share"—one of them exhorts onlookers. Above the text is an androgynous face in silhouette, rays of rainbow light emanating from its head. Another sign, in English lower case, reads "team."

There, all day long, Ai's colleagues pull dozens of kinds of data, such as search volume on keywords, pay-per-click rates on Amazon ads, sales ranks across different product categories. Ai's job is to pursue their leads, identify manufacturers who make things that her colleagues say will sell well, then negotiate with them. Last year—her first at the company—the team sold more than 1 billion renminbi (RMB), or around US$160 million, worth of these products to the United States. Ai sends me a picture of their Q4 celebration. They are standing together, in two rows, wearing Santa hats and giving a thumbs-up. The others are all in sneakers, but Ai is wearing silver ballet flats with a square bow, crossing her legs in fourth position. I wonder: did she used to dance? I ask what has been selling. She sends a screenshot of a spreadsheet with columns for "photo" (图片), "keywords" (关键词), "page sample display" (页面显示样), "display page" (显示页面), and one word in English: "tactical." The top three rows are:

> *tactical boots*
>
> *pistol bag for handguns and ammo*
>
> *throwing axes tomahawks*

"This kind of thing," she texts me, "is very hot in America."

María and Ai both do and do not have much in common. Both are young, or young-ish, single women. Both have migrated. María, who was born in Mexico, now lives in North Carolina. Ai, who was born in the countryside, now lives in Shenzhen. María and Ai are not their real names. Although we have spoken for hours, and traded texts and videos, I have never met either of them in person. This was normal, in their world, even before the pandemic. Ai talks to dozens of manufacturers every day. María only ever met her Amazon mentor, Kim, through Facebook, even though she worked with her for several years. Their worlds seem full of quick, fragile connections. When Kim, who lives in Missouri and is not really called Kim, either, suddenly quit selling on Amazon, María found out through Facebook. María had been planning to partner with Kim to create a Spanish-language course about reselling on Amazon, and to use Kim's 50,000-member Facebook group to promote it. The two women have not spoken since.

María and Ai do have this in common: they are both third-party (3P) Amazon sellers.

In commerce, the term *first party* refers to the entity that transfers title or ownership of a good. The customer, who receives the title, is the second party to the transaction. The term *3P* refers to suppliers of goods who are not directly controlled by the entity that sells them. The case of Amazon can be confusing because customers buy both first- and third-party goods there—shopping both *from* and *through* the platform. In the first case, a first party, or vendor, sells goods directly to Amazon. Amazon then sells these goods to its customers, just as any brick-and-mortar retailer would. However, in the second case—in which the customer buys something *through*, but not *from*, Amazon—the 3P merchant never sells it to Amazon at all. In legal parlance, they "transfer title" directly to the customer, using Amazon as an intermediary. Amazon's interface does not make it easy to tell whether you are buying from Amazon or from a 3P seller. The fact that most 3P merchants pay Amazon to warehouse and deliver their goods in Amazon trucks, using Amazon-branded boxes, adds to the confusion. A customer must be unusually attentive to even notice the difference.

In many ways, 3P sellers is a group too large and too dispersed to generalize about. Their exact numbers are difficult to ascertain. However, respected industry analysts estimate that, in 2021, there were more than 6 million unique sellers active on Amazon and that nearly 2,000 new sellers opened accounts every day (Kaziukėnas 2021). This population includes resellers like María and Kim; María's mentor and a self-described "couponing queen," who has resold millions of dollars' worth of vitamins, bras, and flip-flops in a single year through Amazon; as well as employees like Ai at private labeling companies. It includes longtime wholesalers, former US Marines, stay-at-home moms, and retirees-turned-inventors. It includes veterans of the sourcing industries in Hong Kong, Guangdong, and Tianjin. It includes friends of friends in Germany or Italy, who will help you get a business address in the European Union so you can take advantage of Amazon's offer to pay your first year of value-added tax consultant fees. All 3P sellers have two things in common, however. They have played, and continue to play, a crucial role in driving Amazon's growth. And to Amazon customers, they remain mostly invisible.

In many ways, 3P sellers is a group too large and too dispersed to generalize about.

This report tells the story of a group of these hidden intermediaries who have played key roles in making Amazon one of the most powerful corporations in the world. It may sound strange to call 3P sellers "hidden," because their existence is not a secret. On the contrary. Over the past several years, 3P sellers have become a focal point of both critics and defenders of Amazon, in the United States and beyond. Numerous figures in a growing global antitrust movement have pointed to 3P sellers as the primary victims of Amazon's monopoly power (Khan 2017; Nadler and Cicilline 2020). The fees they pay are Amazon's single biggest source of revenue (Mitchell 2021). And yet, researchers have shown repeatedly that they get their products copied by Amazon-owned labels (Kalra and Stecklow 2021). Third parties can sell good volume, earn good reviews, pay for ads, and still not show up in Amazon's search results (Jeffries and Yin 2021).

At the same time, Amazon regularly invokes the existence of 3P sellers to defend itself against critics. In July 2020, when Jeff Bezos was called before the US House of Representatives to defend Amazon against charges of anticompetitive behavior, his opening remarks emphasized the close relationship between 3P sellers and the company (Amazon Staff 2020). "It's … important to understand that Amazon's success depends overwhelmingly on the success of the thousands of small and medium-sized businesses that also sell their products in Amazon's stores," Bezos said. He continued:

> These small and medium-sized third-party businesses now add significantly more product selection to Amazon's stores than Amazon's own retail operation. Third-party sales now account for approximately 60% of physical product sales on Amazon, and those sales are growing faster than Amazon's own retail sales … There are now 1.7 million small and medium-sized businesses around the world selling in Amazon's stores. More than 200,000 entrepreneurs worldwide surpassed $100,000 in sales in our stores in 2019.

Bezos went on to speak about two mothers who had managed to build successful businesses on the platform, while also caring for their children. In addition to calling back to the story of his own mother, who had him as a teenager—and with which he opened—these anecdotes appealed to what Bezos described as a distinctly American enthusiasm for entrepreneurship. "Unlike many other countries around the world, this great nation we live in supports and does not stigmatize entrepreneurial risk-taking," he continued. Time and again, this has been Amazon's strategy when confronted with the accusations of monopoly. Amazon insists that, far from being "too big," they are in fact the allies of small businesses against big-box stores such as Walmart and Target. On the most recent Prime Day, in July 2022, the Amazon.com home page prominently featured a button that read "Shop Small Business." If you clicked through, six of the eight photos featured showed Black women, suggesting that this was the primary population of small business owners whom Amazon serves.

Amazon champions and critics alike have focused on the question of whether the company helps or hurts small businesses. Small businesses occupy an almost-sacred place in the political imaginaries of the United States—one that historians have traced back to Thomas Jefferson's celebration of "yeoman farmers" and that was cemented in the battles that independent grocers fought against chain stores after World War I (Levinson 2012; Lichtenstein 2010). Over the course of the twentieth century, political constituencies who agree on little else all embraced "small business" and "entrepreneurship" as means to remedy many kinds of structural inequalities—from the industrialization of farms to the segregation of cities—and problems from the lack of affordable childcare to structural unemployment caused by globalization and automation. But Bezos's appeal to the patriotism of his audience was misleading. In 2020, around 40% of the businesses selling to United States customers through Amazon.com were based in China, while 54% were in the United States. Moreover, 49% of the top 10,000 largest sellers on Amazon.com were in China (Kaziukėnas 2020). If Amazon has benefited from being headquartered in a country that "does not stigmatize entrepreneurial risk-taking," it has also profited from Chinese support for entrepreneurship. The company remains deeply and directly entangled with the Chinese economy and state.

Still, as I would discover once I began speaking to sellers, there was some truth to what Bezos had said. In spring 2021, I happened to interview one of the two mothers he had named in the House of Representatives hearing. Lisa brought up her "claim to fame" casually, recounting how she had answered an open call from Amazon Communications for sellers to submit their stories, but had not known they chose hers until Bezos dropped her name on live TV. "My phone and Facebook were blowing up!" I must have done a poor job hiding my skepticism of Bezos's rhetoric, because her tone became insistent. "My strong opinion is this: I strongly believe that our business wouldn't be at the level that it is today without Amazon." A mother of four, Lisa has built a company that employs 100 people in her town of 15,000, including her own husband. "I'm being truthful," she continued. "I don't want to sound like I'm *for* Amazon. But they have helped us grow to the point where we never would be this successful without them." Who was I—some professor—to challenge her on that? And, setting aside the cynicism of Amazon's appeal to American exceptionalism, if Chinese manufacturers could use Amazon to capture more of the value of the goods they made, why shouldn't they?

I began this research in order to test the premise that Bezos put before the House of Representatives—that Amazon's growth is good for the small and midsized enterprises (SMEs) that sell through it. I decided that the best way to find out was by asking the sellers what they thought. This turned out to be more challenging that I had expected. 3P sellers appear constantly in debates about Amazon and antitrust. But, although we hear *about* them often from both Amazon and its critics, it has remained unusual for anyone outside their community to hear *from* them. There are good reasons for this. Industry research shows that most sellers on Amazon do most of their business through Amazon. They fear angering the company by speaking critically, or drawing the attention of competitors by speaking about success. Moreover, since Amazon connects them directly to millions of customers, they have relatively little to gain from the kind of outside attention that researchers or reporters could bring. Some also feel chagrined by the occasional media coverage that sellers have received. "Look. I trust you because I trust ___," said one of the first people I spoke to—a reseller like María. (He named the close mutual friend who had introduced us.). "But if you're looking to write one of those stories about shopping for a living, I have zero interest."

For these reasons, the population that stands to be most affected by policy debates about Amazon usually remains outside the policy conversation. The fact that Amazon's market power so directly affects sellers is not the only reason to listen to them, however. I chose to focus on this population because its members hold deep expertise about what Amazon is and how it interacts with the rest of the world. In the past, I have published interviews with a wide range of employees and contractors at major tech firms (Tarnoff and Weigel 2020), including one Amazon engineer (Anonymous 2020). During this project, I spoke with numerous current and former Amazonians. But, unlike employees who work within the bounds of one firm or engineers who focus on one narrow project at a time, 3P sellers must navigate the entire web of globally dispersed, constantly shifting systems that Amazon comprises. This position gives them special insights.

Amazon is *transforming* small businesses. Its dominance of online search and global logistics has given rise to a new kind of small business optimized for Amazon.

As soon as I began speaking with 3P sellers, I realized that I had been working under false assumptions. I had expected that I would be interviewing people with pre-existing businesses who used Amazon to "get online." But over dozens of interviews with merchants and consultants based in North America, China, Hong Kong, and Singapore, almost every successful Amazon business that I heard about was Amazon-native. With few exceptions, the sellers I met who had invented or designed a product in some other context struggled to compete there and to protect their brands. If the obvious question is whether Amazon helps or hurts small businesses, the evidence I have gathered shows that Amazon is doing both and neither. Amazon helps and hurts small businesses—often the same ones, at the same time. In fact, Amazon is *transforming* small businesses. Its dominance of online search and global logistics has given rise to a new kind of small business optimized for Amazon. So we must reframe the question. What is Amazon changing small businesses *from*? What is it changing them into? And what consequences does this transformation have?

The first contribution of this report is to provide empirical answers to these questions. By drawing on hundreds of hours of interviews, conversations, and observations, I establish a *typology* and *chronology* of Amazon sellers. Journalists have described this population anecdotally, and scholars and policymakers have described it in abstract terms.[1] My research identifies three specific types of Amazon-native merchants. There are "arbitrageurs," like María and Kim, who buy products in order to resell them through Amazon. There are brand owners like Sherri, who develop and trademark or patent new products to sell through Amazon. And there are global sellers like Ai, who use Amazon's services in order to develop or brand products for sale in foreign markets. While these categories are permeable, my interviews show that Amazon policies have encouraged the rise and fall of these business models over three corresponding time periods: pre-2010, 2010–2016, and 2016 to the present. I further demonstrate that each era has presented distinct opportunities to sellers, as well as possibilities for harm and abuse.

My goal is not just to add texture to existing descriptions of Amazon, however. By centering 3P sellers, I aim to contribute to conceptualizations of platform power more broadly. Specifically, I will argue that the case of Amazon's Marketplace highlights how platforms enroll third-party businesses—not just consumers—in achieving their objectives.

One striking feature of my interview data is how many sellers casually used colonial metaphors both to describe and to periodize their experiences on Amazon. The marketplace, they told me, used to be "The Wild West." It has now become The Jungle. At first, I did not make much of these phrases. After all, the "electronic frontier" and The Wild West have long been Silicon Valley clichés (Turner 2006), and The Jungle echoed Amazon's own branding. Over time, however, I began to recognize that these phrases pointed to an important emic frame—and to a key contradiction embedded within it. On the one hand, my interviewees were suggesting that Amazon's marketplace itself was a frontier. These analogies cast the speaker as a conquistador, homesteader, or 49er, racing competitors from around the world to claim their piece of the terrain that Amazon had made it possible to seize from brick-and-mortar retailers. Yet, if sellers were imagining Amazon as a territory, they frequently spoke of its state-like authority, too. Amazon created programs that sent aspiring sellers all over the world—to struggling Big Lots stores in Missouri, sourcing fairs in New Delhi, and factories in Guangdong—to claim ever more resources for the company. In this respect, my interviewees seemed to imagine Amazon not only as the ground that they were trying to claim but also as the distant crown or state on behalf of which they claimed it.

This apparent contradiction between imagining Amazon-as-land and Amazon-as-crown did not reflect inconsistency, however. Rather, it captured the ambivalence of the sellers' positions. Seizing the "Amazon opportunity," as some of my interviewees called it, meant accepting Amazon's strict discipline—and accepting that the policies, metrics, and algorithms that Amazon uses to govern seller behavior would sometimes abruptly shift for reasons that had little or nothing to do with them. Critics of Amazon's monopoly have often emphasized the ways that the firm *eliminates* competition. But this is only part of the story. This report highlights how Amazon's scale also elicits new kinds of small businesses, calling them into being and enrolling them in achieving its aims—enacting or extending its managerial logics. To the seller, Amazon holds forth the possibility of a *trickle-down monopoly*. To claim a piece of the terrain that Amazon is (and that it is opening), they must become its *agents*. It is by eliciting and constraining the agency of small business owners, rather than simply eliminating them, that Amazon has gained its power over global retail. In the process, countless small businesses across the world have made themselves in Amazon's image. ■

1 The Wall Street Journal has run investigative features on product safety (Dearing 2020) and the abuse of 3P seller data(Mattioli 2020), as well as challenges that the proliferation of sellers in China pose for Amazon search (Mims 2014). Journalists Annie Palmer (2021) and Spencer Soper (2022) also regularly cover the subject, as does Louise Matsakis (2022). However, such stories rarely quote active sellers..

Platform Mom and Pops

Compared with other major tech firms, Amazon has received relatively little attention from qualitative scholars. Amazon's 3P sellers have received almost none.[2] So much of what follows will focus on recounting information that interviewees shared with me and on reconstructing the common history that runs through them as a crucial complement to existing Amazon scholarship. Even as I was conducting this research, groundbreaking books on Amazon warehouse workers (Delfanti 2021) and Amazon branding (West 2022), as well as the impact of Amazon algorithms on literary genre (McGurl 2021) appeared. In addition, business journalist Brad Stone, whose book *The Everything Store* (2013) had offered the most comprehensive reporting available on Amazon's leadership since the 1990s, published a follow-up—*Amazon Unbound* (2021). And ProPublica reporter, Alec MacGillis, published *Fulfillment* (2021), an account of how Amazon's business and lobbying practices have magnified regional inequalities across the United States.[3]

Over the past decade, a rich body of scholarship has examined how search and social media platforms surveil their users, undermining privacy and even free will (Zuboff 2015; 2019) and enclosing (J. E. Cohen 2019) or colonizing (Couldry and Mejias 2019) previously noncommodified aspects of private life and social relations. Another growing subfield has focused on how platforms facilitate outsourcing and "risk shift."[4] Researchers have demonstrated that "lean platforms" (Srnicek 2016) like Uber make it possible to "taskify" and algorithmically assign work (Casilli and

2 Legal scholars (Khan 2017; Rahman 2018; T. Wu 2018), concerned civil society actors (Mitchell 2021), and policymakers (Nadler and Cicilline 2020) have investigated the ways that Amazon can abuse its power over third-party merchants. But to the extent that their articles and reports incorporate qualitative evidence, they rely on anecdotes from previously published journalism. Quantitative researchers have devoted more sustained attention to third-party-sellers, publishing studies that document Amazon' s misleading sellers by prioritizing their own white label products in search results (Dash, Kiefer, and Paul 2021; Jeffries and Yin 2021) and misstating how algorithmic pricing software works (Le 2017). This quantitative research provides invaluable evidence of specific harms. It does not, however, illuminate the situation or agency of third-party sellers, nor the central role that their work and fees pay in upholding Amazon' s business model.

3 MacGillis echoes earlier accounts that described Amazon' s place in the landscape of contemporary work, like Jessica Bruder' s *Nomadland* (2017) or Heike Geissler's *Seasonal Associate* (2018) and Emily Guendelsberger's *On the Clock* (2019). However, none devotes more than a few pages to third-party merchants.

4 The political scientist Jacob Hacker (2008) coined the latter term to describe a set of economic and ideological changes that have enabled corporations to shed their responsibilities for collectively insuring workers and families against economic shocks and other misfortunes—for instance, by eliminating health insurance and retirement programs.

Posada 2019), and to create new categories of "ghost work" (Gray and Suri 2019) and "digital piecework" (Dubal 2020) that are difficult to organize and exempt from labor protections (Rosenblat 2018). Through its marketplace, Amazon applies the logic of risk shift to retail. Third-party sellers take on the work and expense of sourcing and holding inventory, while Amazon takes their fees and data in return for connecting them to consumers.

In some respects, Amazon sellers resemble gig workers in sectors that have been better studied. However, the fact that they are small business owners—rather than contract workers—matters, even if a tendency to redefine all work as entrepreneurship has prevailed in policy (Weil 2014) as well as ideology (Brown 2015) for decades. Sellers tend to assume more debt and, if they succeed, take on a different kind of role in hiring and managing others than gig workers do. In these respects, Amazon sellers more closely resemble franchisees (Callaci 2018; 2021; Chatelain 2020). Amazon sellers resemble gig workers and franchisees in that they assume forms of risk and responsibility that entrepreneurship entails, while relinquishing much of the freedom it has historically provided. Insofar as sellers give Amazon, on average, 34% of each sale that they make through the platform (Mitchell 2021), they also facilitate the transfer of loans and other resources that the state has designated to support small businesses—including minority-owned businesses—to one of the largest corporations in the world. But retail involves a different set of relations than do the service industries and local businesses that apps like Uber and franchises like McDonalds transformed.

Scholars of logistics and of the history of capitalism have documented how computerization drove a "retail revolution" (Lichtenstein 2010; LeCavalier 2016; Moreton 2010). The advent of barcode scanners and satellites, as well as the creation of the Universal Product Code (UPC) in the 1970s, made it possible for retailers to gather, analyze, and transmit unprecedented amounts of data (Le 2017). Walmart and other chain retailers used this data to pressure manufacturers and centralize control over global supply chains, and they pioneered practices that anticipated early twenty-first century platformization. In 1987, Walmart began integrating its massive databases in Bentonville, Arkansas, with those of its major suppliers. These integrations made it possible to automate, and thus dramatically accelerate, the ordering and delivery processes that kept goods circulating rapidly through the Walmart system. And they enabled Walmart to harvest an enormous amount of information from vendors, while restricting the access that they granted vendors to their own data (Lichtenstein 2010). Amazon directly copied many of these innovations. Amazon followed in Walmart's footsteps in its global strategy, too. Walmart had opened offices in Hong Kong and Taipei in the early 1980s to oversee sourcing, and established a procurement center in Shenzhen in 2002, shortly after China acceded to the World Trade Organization. By 2006, 80% of the 6,000 factories in Walmart's supplier database were in China (Lichtenstein 2010).

Reconstructing a history of Amazon's marketplace from many conversations, I have triangulated the claims that my interviewees make with publicly available information whenever possible. But I have also taken the forms of "lore" that circulate widely among sellers as important facts in themselves.[5] Storytelling about Amazon does not only tell us about the history of Amazon—although it often does. It also reflects beliefs and self-understandings that drive the actions of Amazon executives, engineers, and investors, as well as sellers, politicians, and regulators. In this sense, we cannot dismiss common lore about Amazon that is difficult to prove as just "made up." We must recognize it as an active element of the process by which Amazon makes and remakes markets and worlds. ■

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5 In doing this, I join a growing body of science and technology studies (STS) scholarship that is, itself, built on a longer tradition of work at the intersection of anthropology, history, literary studies, and media studies, among other fields. In STS, Sheila Jasanoff and Sang-Hyun Kim (Jasanoff and Kim 2015) established an agenda, by adapting Benedict Anderson' s canonical work on "imagined communities" to attend more closely to the materialities of technology and the imperatives of legal regulation of science and technology development. danah boyd (boyd 2021) directly adapts their concept to describe "statistical imaginaries" surrounding the US Census. Ranjit Singh and Rigoberto Lara Guzmán (Singh and Guzmán 2021) have argued that "parables" and other forms of storytelling play a key role in creating knowledge about artificial intelligence, particularly in the Global South, where "given fractured data environments… building, maintaining, and appropriating data-driven technologies are infrastructural problems." Sophie Bishop (Bishop 2019) has documented how forms of "algorithmic gossip" shape the practices of YouTube content creations.

Account Histories

Over the course of my interviews, I noticed one set of phrases that sellers, developers, and consultants used repeatedly. Multiple interviewees referred to the early years of Amazon's marketplace as "The Old Times"; to the heady, early years after it started selling "fulfillment" services to third parties as The Wild West"; and to the era of Amazon-native "brands" and global sellers as The Jungle. Both The Wild West and The Jungle evoke violent histories of settler colonialism and nation-state formation or expansion. In the first case, the clear point of reference is the nineteenth-century United States. In the second, the referent is vaguer. The Jungle might suggest histories of Spanish and Portuguese conquest in Latin America, British imperialism in Africa, or US wars in Southeast Asia. In both instances, however, as I described above, the seller using the phrase implicitly described themselves as an agent of a distant state, or crown, represented by Amazon headquarters in Seattle, Washington. At the same time, both phrases highlighted the vulnerability that sellers must take on, in order to seize the opportunities that Amazon's global expansion presents. If The Wild West suggests a lawless, open space, The Jungle suggests somewhere denser, darker, and perhaps more dangerous. One interviewee even joked about Amazon exposing them to the "law of the jungle." In other words, through these terms, the sellers I interviewed expressed both their own—limited or constrained—agency and the global reach of Amazon's ambitions. It was at this intersection of their agency and Amazon's shifting goals that their opportunities and vulnerabilities emerged.

The Old Days

Opening the Virtual Infrastructure

In the beginning, there were the old timers. This is how the members of my cohort who had been selling through Amazon for 10 to 20 years referred to themselves and one another. When they started, Amazon marketplace functioned mostly like a catalog—an online version of the Sears Roebuck catalog from the 1890s, or of Stewart Brand's Whole Earth Catalog, where Amazon's first engineer, Shel Kaphan, had worked as a high school dropout in the late 1960s (Stone 2013:

32). Like manufacturers and brands that sold through older catalogs, sellers paid a modest fee to sign up to list goods on Amazon.com and for Amazon to handle the transaction.

Jeff Bezos has cited Brand and the Whole Earth Catalog as inspirations (Wiener 2018). In the 1990s, he often stated publicly that he did not envision Amazon as a retailer but as an intermediary (Stone 2013; West 2022). At that time, eBay, rather than Amazon, was widely regarded as "the perfect store" because it was a pure intermediary. Its low, fixed capital costs enabled it to take full advantage of network effects. With no warehouses or delivery routes to manage, scale was no object: eBay could easily accommodate as many small businesses and shoppers as flocked to its website.[6]

Amazon tried to acquire and imitate eBay several times (Stone 2013). And, between 1998 and 2000, it experimented with several live auction features. But the form that marketplace finally took was to merge third-party merchants with Amazon's first-party retail business. First- and third-party goods now appeared in a single catalog. And, crucially, goods had "single listings." On eBay, a search for, say, a teddy bear could turn up a dozen pages of the same teddy bear, offered by different merchants. On Amazon, a search for that teddy bear would turn up a single page, even if multiple sellers were supplying it behind the scenes. In order to make that possible, Amazon had to develop a single set of standards for tracking goods within the Amazon catalog, its warehouses, and logistics network. In the mid-1990s, an engineer named Rebecca Allen developed Amazon Standard Identification Numbers (ASINs). ASINs were a unique ten-character alphanumeric code, like the ISBNs and UPCs that the publishing and retail industries adopted in the 1970s. But ASINs were specific to Amazon (Allen 2021). An ASIN ties a product to its "listing"—the page that turns up in Amazon search results and displays the product information. When a seller signs up to sell something through Amazon, they use the ASIN to register it. If you are selling something that has never been sold through Amazon before, your product will receive a new ASIN. If you are selling a product that Amazon already offers, you and your inventory are simply "added" to the existing listing. When a customer searches for that product, or for keywords associated with it, that single page turns up.

While the Amazon interface has evolved over time, Amazon has never made it easy for customers to find information about sellers. For a customer to learn whether they are buying a teddy bear directly *from* Amazon or from a 3P seller *through* Amazon, they must click through and read the fine print; research shows that most customers never do. The vast majority simply click on the "Buy Now" button that displays as the default option in the "Buy Box" on the upper right-hand corner of the page without taking note of whether the seller Amazon has chosen is a third-party or Amazon itself. (In September 2020, in response to political pressure surrounding defective and dangerous goods, Amazon began providing Verified Seller Information through its website. However, that information is difficult to find. Moreover, it only includes street addresses. At the beginning of my study, I attempted to use this information to recruit participants. Francis Tseng, a designer and software engineer who is lead researcher at the Jain Family Institute, gathered a data set of 5,000 sellers using Verified Seller Information. However, I found that it was nearly impossible to use this data to get in touch with a human being.)

Amazon launched its marketplace in November 2000. The first product categories that they "opened" were books and CDs, enabling third parties to sign up and add their inventories to the

6 "It is widely recognized today that, in purely business terms, such 'many-to-many' sites are far more powerful than traditional 'one-to-many' sites, in which a company like Amazon sells directly to consumers," one reporter from *The New York Times* wrote in 2002 (A. S. Cohen 2002: 8).

existing ASINs and listings. The fact that these objects are easy to sell as interchangeable, no matter where they come from, is a major reason why Bezos himself had decided to start with them when he started Amazon's first-party business (Stone 2013). But other product categories soon followed. Brad Stone reports in *The Everything Store* that, when Bezos announced this change, managers in Amazon's retail division expressed outrage (Stone 2013). The change made their jobs harder. It was as though, to paraphrase one old timer I interviewed, Target or Walmart had invited anyone in the world to come and set up a flea market in their aisles to hawk the same goods that the store was selling, and potentially for lower prices. But, to extend this metaphor, Amazon was also renting out all the tables in the flea market, taking all the bids, and deciding who got to make the sale in each case, without telling either its tenants or its customers how it had arrived at the decision.

In effect, the decision to use single listings enabled Amazon to graft an eBay onto—or into—a Walmart. It decentralized the sourcing and marketing processes. Now, anyone could become a supplier. And customer reviews could, in theory, replace advertising, determining visibility in Amazon search results and informing buyer decisions. (In fact, fraudulent reviews have proven a persistent problem for Amazon, and advertising is now one of its fastest growing businesses; more on that to follow.) At the same time, the use of ASINs to tie products to single listings gave Amazon enormous power over every stage of the process.

A few of the old timers I interviewed had found their own way to Amazon during this era. Blake, a white woman who now lives in Texas, was studying at the naval academy in the early 2000s and was looking for used textbooks. She saw a button on the Amazon site that read "Sell Yours Here." "I was like, 'Okay, well I'll also flip my textbooks as soon as I'm done with them and move to the next.' And so I started doing that. And then I started just flipping everything that [I could] find." She kept that up, off and on, as she and the man who became her husband moved from post to post. They took a break only during a few years they spent stationed in Hawaii, where shipping to customers in the mainland US was too expensive.

However, other old timers had established businesses when they started. Noam, a white man in his fifties from New York state, has managed a company for decades that sells household goods such as fans and lamps to other businesses. He recalled hearing about Amazon marketplace shortly after it opened and being immediately intrigued. "We had to fill out a paper application and fax it into them to be approved to provide information about our business… Before there was fulfillment, we were just taking orders, shipping orders. They would email the orders to us with all the customer information. This was really early on, before there were concerns about privacy."

It would remain this way for some time. Eduardo, a Latino seller now in his sixties, was running a small chain of shoe stores with his father and brother in Florida, when family friends he saw at his kids' birthday parties started asking: When are you going to get online? "I told them, 'You know, shoes are tough, it's never going to work, people need to try them on. Even in the store it's a problem, so I can't imagine shipping all that and getting all the returns and everything.'" But the family friends kept on his case, and Ed gradually overcame his reluctance. "To this day, I tell those guys, 'It's your fault!'" He started by putting a few shoes on eBay in hard-to-find sizes. But when those sold, sometimes for four or five times the store price, he turned to e-commerce in earnest. He decided to focus on Amazon precisely because Amazon used the single-listing system. "It was much more clean and much more streamlined for the customer. I knew from the beginning that, as a consumer, that's where I'd want to shop—not on this messy site, but on this catalog-looking thing."

Amazon recruited other old timers directly. The team behind zShops, one of Amazon's early eBay clones, contacted Jim before the marketplace had even launched. In the late 1990s, Jim was running a flooring and construction business outside of Seattle, doing well enough that he had recently acquired a second business—a hardware store with a website. "That's the one we put on Amazon first." Even at the time, he was not sure how Amazon had found him. Although he lived near its Seattle headquarters, "everything was electronically done."

> As I recall, we set up EDIs [electronic data interchanges] with them to manage all the transactions in and out automatically. We were drop-shipping at the time through a distributor. So it was a lot of human interaction to set it up, but then it was just a bunch of computers talking to each other.

The venture "didn't go so great" and, in the mid-2000s, he closed it. Other old timers had similar initial experiences. Hank was running a small apparel chain in the Seattle area when Amazon contacted him in 2003. "We were familiar with Amazon and I didn't think they were going to survive. My mistake, I should have bought the stock then! But they approached me and made it very advantageous to go online." Yet, Hank, too, closed down his first Amazon store in the mid-2000s, before returning in 2012—with an Amazon-native business plan.

The Wild West

Opening the Physical Infrastructure

Around 2010, the old timers agreed, things started changing. Amazon's marketplace had been growing for some time. But in the early years of the new decade, an unprecedented flood of sellers and goods arrived. Numerous people whom I interviewed referred to this era as "The Wild West". Almost all who used the phrase describe The Wild West as having two primary characteristics. The first was a sense of possibility: if you were skilled, and lucky, you really could grow at sometimes alarming speed. The second was an absence of rules. Two specific Amazon initiatives made the opening of The Wild West possible. The first was the launch of the Fulfillment By Amazon (FBA) program in 2006; the second was the rebuilding of Amazon's Seller Central platform in 2009 to 2010 (Stone 2021). Changes in the Chinese platform economy, particularly the rise of Alibaba's AliExpress and Tencent's WeChat app, made a difference, too. But the key factor that dominated my conversations, besides the opening of FBA, was the 2008 financial crisis.

By launching a marketplace, and opening listings to third-party sellers, Amazon had already begun to platformize retail. They would complete the process by beginning to sell access to information and to their warehousing and logistics network as services. Initially, Amazon built warehouses modeled on Walmart's, using machines and software that they leased from third-party vendors. By 2002, however, it had become apparent that the system needed an overhaul. Packing and delivering the eclectic assortments of goods that online shoppers tended to put in their carts presented fundamentally different challenges than getting pallets of goods to big-box stores. Between 2002 and 2004, therefore, Amazon invested in designing new physical and software systems for their warehouses, which they now rebranded as "Fulfillment Centers (FCs)" (Stone 2013). In 2005, Amazon launched Prime—a subscription service that enabled customers to get 2-day free shipping on all orders for an annual fee of $79. (As I am writing this, in the fall of 2022, a Prime subscription costs $139 per year.) Shortly thereafter, in early 2006, Amazon also opened FBA. This program enabled third-party merchants to warehouse and deliver their goods through Amazon and made their products eligible for Prime shipping (Stone 2013).[7] It also enlisted them in paying for the ongoing renovation and development of Amazon's fulfillment system.

The communications scholar, Emily West (2022), has observed that Prime transformed how Americans shopped. Alessandro Delfanti (2021) documents the increased pressure that it placed on Amazon's Fulfillment Associates. The FBA program also profoundly changed how millions of Americans built businesses. Eventually, it changed how millions of entrepreneurs in other countries did, too.

Amazon's marketplace had been growing for some time. But in the early years of the new decade, an unprecedented flood of sellers and goods arrived.

Together with Amazon's seller platform, Seller Central, FBA dramatically reduced the barriers to getting into e-commerce. To sell through Amazon, and access FBA services, you simply signed up for an account through Seller Central; in 2014, Amazon also launched a mobile Seller App. Currently, an account costs $39.99 per month. In return, you gain access to training materials and some of the vast amounts of data that Amazon holds on its marketplace. You can use this information to conduct basic research. For instance, you can search by UPC or ASIN for information about which products are already selling on Amazon and their current prices. You can list products for sale, either by adding them to an existing listing or by registering a new ASIN. You can edit listings, adding bullet points and backend keywords that you believe will make your product discoverable through Amazon's search.

From 2012 on, Amazon developed a range of advertising tools. Amazon sellers told me, and have told the journalist Louise Matsakis (2022) on the record, that it has become effectively compulsory to pay for ads in order to appear in Amazon search results—it is impossible to appear on the first page without them. Throughout the decade, an ecosystem of software-as-a-service companies and solutions providers emerged to help sellers make use of Seller Central data. The experienced sellers I interviewed tended to express skepticism about the value that these companies offered, and to insist that online research could not replace sourcing trips or factory visits. But almost every seller I interviewed used them. I heard about the importance of Keepa, an app that tracks historical data on Amazon prices—and not just the current price you get from Seller Central—from everyone from Kim, the Missouri "couponing queen" and reseller; to Ming, an apparel merchant in Zhejiang.

In The Old Days, a person who wanted to sell on Amazon not only had to do their own market research, but they also had to have their own facilities for warehousing and contract third-party logistics providers themselves. By extension, they had to have the capital to operate at a scale that enabled them to maintain those facilities and get those contracts. FBA dramatically reduced the amount of overhead necessary. Now, anyone who could get goods into an Amazon FC could become a seller and even become eligible for two-day delivery through Prime. A seller who uses FBA simply logs into Seller Central and enters the UPC or ASINs of the products that they want to offer. Then, Amazon instructs them which Fulfillment Center, or centers, they can send these products to. (This algorithm, one former Amazon employee told me, was simple: "Basically just zip-code level data on purchase histories with a little seasonal demand layered in.") Through Seller Central, you can purchase

7 Amazon had piloted it under a service called Self-Service Order Fulfillment back in 2002, but it did not really take off (Stone 2021).

and print out stickers that you use to label your products for the Fulfillment Center that receives it.[8] This is how Amazon set their trickle-down monopoly in motion. The combination of Seller Central and FBA called a spate of new small businesses into being, simultaneously transferring risk onto them and enrolling them in the project of growing Amazon's catalog. It also incentivized them to do business *like* Amazon—using their sales data and relying on their Prime memberships—but in new, Amazon-native ventures.

Still, Amazon could not have anticipated how the misfortunes of the global economy would help propel the growth of its marketplace. The 2008 financial crisis and the recessions that followed motivated a new population to try to supplement or replace lost income by selling goods online. At the same time, it sent many of Amazon's big-box competitors into crisis.

Researchers have identified multiple ways in which the financial crisis and recessions shaped the rise of sharing economies and platform-mediated "gig work" in the 2010s. Falling interest rates drove finance to seek higher returns from software companies (Srnicek 2016). At the same time, growing debt and falling wages left many people seeking non-job work to supplement, or replace, their incomes (Rosenblat 2018). The recessions brought a large new population of potential sellers to Amazon, too.[9] Many of the sellers and former sellers I interviewed, were college-educated professionals whose careers were not turning out as they had hoped. Many were struggling to keep up with student debt and other kinds of debts.

In addition to motivating a growing population to seek new sources of income, the collapse of the stock market accelerated what came to be known in the 2010s as the "retail apocalypse" (Thompson 2017). Analysts have cited many causes for the struggles of brick-and-mortar retail and big-box stores in the 2010s. The rise of online shopping is only one. According to Morgan Stanley retail analysts, in 2022, e-commerce will only account for 24% of all retail purchases in the United States. Other factors that are equally, if not more, significant include the overbuilding of malls between 1970 and 2010.[10] The growth of private equity leveraged buyouts (LBOs) of chain retailers, and rising real estate costs in urban centers, also drove some into bankruptcy. These struggles of big-box stores not only weakened Amazon's competition, but they became important to how many sellers sourced products—particularly when starting out.

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8 As with its virtual platform, Amazon introduced add-ons over time. For instance, a seller could pay a fee in order to bundle their goods into fewer shipments, or to send them only to nearby fulfillment centers. Sometimes, it introduced new services to solve problems that its own practices had created. For instance, Amazon initially "commingled" goods at their FCs, combining every product that came in with a particular ASIN—regardless of the source—in order to make the packing process more efficient. However, sellers soon discovered that commingling created liabilities. For instance, you could be held responsible for counterfeit goods that another seller had supplied. Amazon began to offer the option of paying for an additional sticker with a code that linked the products that an individual had supplied to their Seller Account. That way, even if bad reviews stayed on the listing, you could not be faulted for someone else's behavior. We could interpret Amazon's recent shift to paid advertising similarly as a response to the persistent problem of sellers buying customer reviews—a way of charging sellers to fix the gap between Amazon' s rhetoric and reality, or the problems that its rapid expansion had created.

9 One former Amazon employee, who now works for an e-commerce consulting agency, told me: "The Great Recession played a big part. There were just so many people out of work looking for ways to make money. A lot of the success of marketplace was driven by retail arbitrage; a lot of people said, 'I can go to Walmart and Target and buy things that are on sale and turn around and sell them on Amazon.' ".

10 The history of this overbuilding is complex. One important reason was a change in the tax code that allowed mall owners to write off capital depreciation costs in new ways. Another was the desperation of municipalities to raise sales tax, following the slashing of property taxes in the 1970s, in California among other states; this led municipalities to give retailers real estate at steep discounts or to offer significant tax breaks, or both (Lichtenstein, 2009).

The Wild West inspired the rise to two kinds of Amazon-native business models. There were forms of reselling that came to be known as "retail arbitrage." And there were strategies of building brands—either by inventing something or, more commonly, by private labeling a product sourced abroad.

Retail Arbitrage

Many of the sellers I interviewed started in some form of reselling. Some had long-standing family ties in wholesale and simply saw Amazon as another channel. Shimon, who comes from the Hasidic community in Brooklyn, started selling phone accessories that he also sold at his family's brick-and-mortar stores through Amazon and shifted after being amazed by the scale. "Our best store would do $4,000 a day; on Amazon, I was doing $40,000 per day." A few chose arbitrage in order to learn the Amazon system, in the hopes that they would use the skills and capital that they gained in the process to launch a private label business or consultancy later on.

One former seller I spoke with, a white man in his thirties who now runs an e-commerce consultancy for health brands, told me that he has known since high school that he wanted to be an entrepreneur. He started buying supplements and other health products from Whole Foods and reselling them on Amazon. This was before Amazon acquired the grocery chain. ("Eventually Amazon caught up to me," he joked.) Many others, however, describe learning about Amazon by chance, through friends or social media, and starting with arbitrage because the barrier to entry was so low and because the main activity that arbitrage involved—shopping—combined easily with caring responsibilities.

Kerry, a seller turned consultant, calls herself an "old timer." But, in fact, she joined Amazon at the beginning of the new era. A gregarious blonde with just a hint of twang in her voice, Kerry had been running a boutique public relations (PR) agency for years when the 2009 recession hit. Clients disappeared, in some cases leaving hundreds of thousands of dollars of unpaid bills behind them. Kerry found herself scrambling to pay her own creditors. Several years earlier, she and her husband had adopted a child with special needs. Now, they were struggling to keep up with his expenses, too. "His special school alone cost $25,000 per year," she recalled. "I just wanted to make some money where people paid me upfront and I didn't have to chase a check."

Kerry decided to try reselling goods on Amazon's marketplace and soon discovered that she had a knack for doing it. She began with $200 worth of clothes that she had found on clearance at Targets in her area. By the end of the year, she had turned that $200 investment into $40,000 in profits. Back when she worked in PR, she had helped clients self-publish books on their businesses. Now, so many friends and relatives were asking her what she was up to, she wrote her own book. She used to keep copies in her car to hand out to anyone who asked.

Tori, a white woman who lives outside Phoenix, started in 2010. At the time, she was in her mid-20s, working as a youth minister and raising a six-month-old and a three-year-old. She found her way to Amazon by listening to evangelical Christian media. "I was doing the Dave Ramsey thing and he talked in CD 6 about making extra income," she told me. "He talked about this woman who was buying strollers at garage sales and reselling them on Craigslist, and I thought, 'Wow, I could do that.'" Tori started with eBay, then shifted to Amazon. "It was random," she said. "I worked in a grocery store when I was in high school. Other than that, before being a youth minister, I worked at a call center and a litigation support company, but I didn't really have any retail experience." She characterized the products that they sold as "random," too. "We were going to Big Lots! And Target and Costco and, you know, at the time there were just really big inefficiencies in the markets. There were things marked clearance in my part of the country that were in high demand in other parts of the country, and so we were just taking advantage of that inefficiency—there wasn't a rhyme or reason to the products. We've carried everything from lawn flamingos to groceries to toys, pretty much all the different kinds of categories that there are."

Tori's husband didn't have any experience with retail, either. He had been working at Vanguard for a decade but, "he had always had a little side hustle. He had done multilevel marketing and stuff like that." He was skeptical, at first. But online, Tori and her husband found a community of "accidental entrepreneurs" like them. Within a few years, they were running a warehouse that employed 10 people, and making regular "sourcing runs" to California. "We were just trying to make an extra couple hundred bucks a month and it ended up becoming a full-time business for us both." In addition to using the phrase "The Wild West," she captured the sense of lawlessness in that era another way. "We called it our *Breaking Bad* money. We were really careful never to do anything illegal. But at the same time, we were spending tens of thousands of dollars a day, moving all this stuff in and out of our house, making all this money and we couldn't explain to anyone what we did!"

They sold the house, bought an RV and hit the road; they visit big-box stores and resell as much as they can, between extended visits to their adult children.

Other sellers I interviewed turned to arbitrage after encountering some type of professional disappointment or financial difficulty. In 2008, Idan was enrolled in dental school, which he hated, and working for a cousin in wholesale during his downtime. He told the cousin he would start running Google ads for products that he sold. When these did well, Idan dropped out of dental school and started an online marketing company. Many members of his family—and broader community—began to seek his help. After he joined Amazon Seller Central in 2010, his business scaled rapidly. Between April 2010 and April 2011, he said, it went from $4,000 a month in revenues to $400,000.

One seller, based in Boston, had moved among several jobs—he worked as a high school sports coach and a sports journalist—before giving up on media. Keith loved telling stories but hated staying on the desk overnight just to churn out clickbait, especially after his kids were born. While living off unemployment and his wife's health insurance, he and his brother heard of a childhood friend who was reselling sports equipment in the Midwest. They now move $3 to $4 million worth of shoes through Amazon every year. At any given time, his apartment is full of hundreds of shoeboxes. There was a recurring theme, in my interviews with arbitrageurs, about partners and family members being dismayed by all the stuff piling up at home: María, who I described in my introduction, told me that her daughter's father could not believe the clutter. Another man I interviewed, in his sixties, discovered that he and his wife could not afford to retire with the second mortgage on their house. They sold the house, bought an RV and hit the road; they visit big-box stores and resell as much as they can, between extended visits to their adult children. Some of their most profitable items were books, he told me. *Books*? I asked, trying to hide my incredulity. After he spoke another minute, I realized he meant the blank kind—notebooks, calendars, and journals.

Still other sellers I interviewed engaged in arbitrage occasionally or opportunistically. The disorder that followed at the beginning of the pandemic created opportunities for anyone who had a warehouse and knew the Amazon system—in groceries in particular. Ed, the old timer who once owned 12 shoe stores across Florida, told me that Costco has a category called “Export” that they use to do wholesale through their back door, even though other company rules would seem to prohibit that practice. At the beginning of the pandemic, he began sending his 21-year-old nephew and five of the nephew’s friends to grocery stores up and down the western coast of Florida in a rented 26-wheeler. (“Arbitrage is for young guys.”) A few nights a week, they would arrive outside the Costcos at closing, pick up pallets of groceries, return to his warehouse, and spend all night packing and listing so they could get the food to Amazon FCs at sunup. But by the time I started conducting interviews in 2021, most people I spoke to believed that arbitrage was mostly a business model of the past.

Brands and the End of Arbitrage

When I asked why the age of arbitrage had ended, I heard three reasons. The first was simple: The marketplace had become too crowded. Many of my interviewees expressed frustration and moral judgment against a spate of YouTube videos and online courses promising to teach arbitrage. Would-be influencers claiming that they could teach anyone to get rich quick were bringing a flood of clueless competition, accelerating a race to the bottom on prices. Some of my informants recounted seeing other arbitrageurs picking over the aisles in the same big-box stores, and even sending their young children ahead to grab cheap items off the bottom shelves or out of bargain bins. Newcomers were selling at a loss in order to build up their Amazon metrics, in the hopes that would translate into a high search ranking in the future. Like the sellers turning their homes into miniature FCs, those selling at a loss in order to capture market share were replicating Amazon’s own methods. They aspired to attain a kind of trickle-down monopoly—but without access to Amazon’s capital. Or, for that matter, its legal standing.

The second reason that sellers cited for the fall of arbitrage was a shift in Amazon’s priorities, which several interviewees summed up with the phrase “pivot to brands.” In 2014, one former Amazonian told me, the company introduced a feature that they called “Exclusives,” which gave brand owners access to special advertising tools. Then, in 2015, Amazon introduced a service that it called “Brand Registry.” For an annual fee, Brand Registry enabled brand owners—that is, the holders of copyrights, trademarks, and patents—to easily flag listings and accounts that they claimed infringed on their rights. If a seller was waiting to receive their copyright, trademark, or patent from a government agency, they could pay Amazon a fee to recognize their brand while they were waiting. In 2017, Amazon updated the registry with a service called “Project Zero,” which allowed registered brands to preemptively suspend the ASINs of competitors who they alleged had infringed on their intellectual property.

The former Amazon employee who had worked on the Exclusives project told me that something like it became “absolutely necessary,” once Amazon opened its marketplace directly to sellers in China. (More on that soon.) However, in practice, it also facilitated many kinds of abuse. Brands could flag the accounts of smaller competitors, who would then struggle to survive the process of being suspended without access to their inventory or their past 2-to-4 weeks of revenues, until the dispute was resolved—*if* it got resolved. Small businesses could not afford to hire lawyers to litigate on their behalf. Brand Registry gave brands an edge over resellers, whether they were violating the law or not.

Amazon brands are not just the household names. There are also countless Amazon-native businesses, which have built up their visibility within Amazon’s search rankings by maintaining strong Account Health and Seller Performance metrics and developing clever search engine optimization (SEO) and ad-bidding strategies. Their priority is not always maximizing their visibility. Al, an old timer from the Midwest who had started in direct mail advertising, told me that he had developed an alternative approach: he did not want to rank number one, or even in the top 10, in any of the product categories that he sold in, he explained. Any product in the top 10 BSR (Best Seller Rank) attracted too much attention, forcing you to compete on price with manufacturers in Asia. Instead, he studied products in the top 10 and identified variations that were not currently available. For instance, if 6×10 and 8×12 tables were selling well, what about a 6×8? If there were black and blue beach umbrellas, what about a dark green? Developing a niche like that, then dominating it by bidding on the right long-tail keywords—specific terms that customers were likely to use only if they were seriously interested in buying that specific item—was smarter than trying to grab the most visibility. "I don't want my BSR to be 1. I want to have one hundred SKUs with a BSR around 30." He summarized this approach with a mantra that he repeated several times throughout our conversation: "Different is better than better."

He summarized this approach with a mantra that he repeated several times throughout our conversation: "Different is better than better."

When describing the pivot to brands, in addition to Brand Registry, several sellers also mentioned the growth of Amazon's advertising business, which is now the third-largest in the world after Google and Facebook. Resellers, who can only compete on price, do not buy ads. Brands do. So, as Amazon sought to grow its advertising business, it had a natural incentive to prioritize them. Advertising was also one way to solve a problem with fake reviews that would become even more persistent as the marketplace expanded. It effectively taxed sellers in order to solve that problem, while also discreetly changing the search algorithm into something rather different from what most people take a search algorithm to be—a technical process for automatically or neutrally delivering the "best" available information. (Two former Amazonians told me that, in response to the problem of fake reviews, the search division—A9—has dramatically reduced the weight of reviews in determining search results.)

In the fall of 2016, Kerry—the Texas Mom, reseller, and author—heard that Amazon was making a policy change that she believed would end arbitrage as it had been practiced in The Wild West. In one of the policy updates that Seller Central released regularly to announce dozens of new, small rules, they mentioned that they would no longer accept store receipts in the case of a dispute between sellers, even though in legal terms those receipts should constitute sufficient proof that a seller has the right to sell the good in question.[11] Instead, in any case where a brand, competitor, or customer raised a question about the legitimacy of your product, Amazon required an official invoice with a direct phone number to someone at the brand's headquarters. Kerry immediately stopped selling her book ("I just couldn't, in good conscience.") and published a post on her blog: "The End of Retail and Online Arbitrage." She started getting accosted at conferences by sellers she had never met. "Nothing I have ever written has made people that angry," she recalled. "But I was right."

11 US copyright and trademark law includes a concept called "first sale doctrine." First articulated in a 1908 Supreme Court ruling, *Bobbs-Merrill Co. v. Straus*, and codified in the Copyright Act of 1908, first sale doctrine carves out an exception to the control that a rights holder maintains over copyrighted or trademarked objects. First sale doctrine draws a distinction between "reproduction rights" and "distribution rights," giving the owners of a tangible copyrighted or trademarked object the right to dispose of it as they please. To offer a concrete example, while nobody else can reprint a copyrighted book, anyone who has purchased a copy of that book has the right to keep it, give it away, destroy it, or sell it at whatever price they see fit. A reseller can lawfully do the same with any object they have purchased.

This, I gradually learned, was a pattern. Rather than officially prohibit behavior, Amazon governed its sellers by introducing new, byzantine rules that rendered unfeasible the business models that many of them had once used. The result of the "No Receipts" policy was a growing contradiction between the theory and practice of retail arbitrage. "That is, between the idea that it was 'no risk' and the reality that it had become highly risky in practice. A brand or competitor raising a question about any of the products you had listed could suddenly leave you with your inventory seized—and, in the worst case, your funds frozen, too." When I asked Idan why he stopped reselling, he expressed a sentiment that I heard versions of from many former resellers: "I need to sleep at night." One former Amazon employee, who now consults sellers, put it bluntly: "Amazon will chew you up and spit you out."

Rather than officially prohibit behavior, Amazon governed its sellers by introducing new, byzantine rules that rendered unfeasible the business models that many of them had once used.

The Jungle

Opening the Global Infrastructure

I wrote above that the sellers I interviewed mentioned three broad reasons for the fall of retail arbitrage as a business model. I have named two so far. First, growing numbers of sellers drove price competition to the bottom. Second, Amazon made policy changes that tended to favor brands over resellers. Both factors were related to a third, dramatic transformation that had consequences for brands as well as for reselling businesses: the opening of Amazon's virtual and physical infrastructures to merchants abroad. In the second half of the 2010s, Amazon recruited hundreds of thousands of merchants from outside the United States to sell directly to the US market. At the same time, Amazon automated many of the support functions that they had previously provided for sellers, even as they introduced a flurry of new rules and programs intended to mitigate counterfeiting and other forms of fraud at scale. (Whether or not these rules and programs succeeded in addressing these problems is another question.)

The result was a shift that multiple sellers I interviewed in the United States evoked as an end, or closing, of the possibilities that Amazon's Wild West had once held forth. Few directly linked the opening of the marketplace with the increasingly complex and, sometimes, startlingly glitchy forms of automated governance that they experienced. But in their accounts, these factors converged to make Amazon increasingly competitive, opaque, and unpredictable. To them, it seemed, Amazon had ceased to feel like a horizon of endless opportunity. Instead, they referred to it as "The Jungle." No doubt, the term also reflected the spread of Amazon's own branding, as the growing number of social media groups and influencers offering Amazon advice and training tried to identify themselves with the language of the company itself.

Of the countries where Amazon opened its infrastructure to third-party merchants, China became the most important by far, despite the irony that Amazon failed at establishing a marketplace within China.[12] It was not that they did not try. In August 2004, Amazon bought Joyo.com—a Chinese e-commerce site that sold books and CDs. In 2007, they renamed it Joyo Amazon and in 2011, launched Amazon China. (I was studying in Beijing that year, living in a large apartment complex near Wudaokou, where both Peking and Tsinghua universities are located. I remember seeing Amazon bicycle couriers making deliveries to my neighbors at least several times per week.) But they struggled to attract either merchants or consumers to use their platform.[13] By 2016, Amazon's share of the Chinese e-commerce market had fallen to less than 1% (Stone 2021). Amazon closed their Chinese marketplace in August 2019. Now, Amazon.cn is a small site for buying goods from the United States, Europe, and Japan. Nonetheless, Amazon retained their infrastructure within China, using it as a conduit to recruit Chinese manufacturers to sell directly to other markets.

Amazon executives were not the first to realize that by cutting out intermediaries between Chinese manufacturers and western consumers, they could reduce the prices of the goods they offered. China has been a center, if not *the* center, of global manufacturing for decades. And Amazon's first-party business, like Walmart and other mass retailers before it, had long directly worked with Chinese factories (Lichtenstein 2010). Amazon executives were not the first to hit upon the idea of recruiting members of the growing class of merchants who sold goods through Alibaba within China to sell directly to the United States, either. Alibaba itself launched AliExpress for that purpose in 2010 (Clark 2016), and in the same year, a former Google engineer founded Wish.[14] Like Wish, they opened registration on their platform to IP addresses located behind China's Great

12 Starting in 2012, Amazon opened their United States marketplace to sellers in China (Ma 2022), India (PTI 2015), Mexico (Amazon Staff 2015), and, ultimately, hundreds of other countries. As of July 2022, Amazon's Seller Central platform (Amazon.com n.d.) lists 188 countries whose residents can register to sell goods directly to the US and ten other global marketplaces through the platform, as long as they have "a valid phone number and an internationally chargeable credit card." (Belarus and Russia are marked with asterisks, indicating that Amazon is not currently accepting new sellers from those countries.) Amazon also offers FBA services to third-party merchants in Canada, China, France, Germany, India, Italy, Japan, Spain, and the United Kingdom. This means that merchants in those countries can ship goods to customers in North America and ten other regions through Amazon warehouses in their home countries.

13 From the beginning, Amazon faced intense competition from a growing domestic and regional e-commerce industry. Alibaba, founded in 1999 in Hangzhou, Zhejiang province, launched Taobao, an eBay-like auction site, in May 2003 and Tmall, a fixed-price site, in 2008; its domestic b2b platform, 1688, followed in 2013 and, according to business reporting at the time (Hsu 2013), was soon transacting more than $30 million in goods per day. Jingdong Century Trading Company, founded in 1998 in Beijing, brought its retail platform JD.com online in 2004. Major investments from Tencent (in 2014) and Walmart (in 2016) would enable JD.com to continue to expand to compete with Alibaba as well as smaller rivals, such as Dangdang, also launched in Beijing in 1999. The 2010s saw continued growth in the sector, in China, as well as elsewhere in the region. In 2010, the search engine Baidu and the Japanese e-commerce giant Rakuten partnered to sell goods online in China (Kan 2010). Pinduoduo launched in 2015 in Shanghai and became a major platform for produce and groceries. Shopee, launched the same year in Singapore, became the largest e-commerce marketplace in Southeast Asia. Industry observers surmised that, for Chinese customers, the problem was Amazon' s interface; they were accustomed to more dynamic graphics and to better assurances to protect them from paying for counterfeit and defective goods. For merchants, the problem with Amazon was the fees. Alibaba only charged a 2% to 5% commission on sales, charging for ads on top of that. When Amazon decided to charge a flat 10% to 15%, and eschew ads, merchants balked. (Stone 2021)

14 Wish.com established offices in China and hired Chinese recruiters to bring Alibaba sellers onto its platform. These sellers took advantage of provisions of the Universal Postal Union treaty which dictated that senders of small packages from China to the United States only had to pay very low postal rates, and the fact that they did not have to collect sales tax in the United States or VAT in Europe. Their customers could buy an enormous assortment of unbranded goods for very low prices, as long as they did not mind waiting for several weeks to receive their purchase.

Firewall, and they translated all the content on it into Mandarin. In addition, just as Wish had done—and as they themselves had done in the United States during The Old Days—Amazon built a team to recruit and serve Chinese sellers. I have monitored Amazon job listings in China since June 2020, and they have consistently included openings for onboarders. In contrast to Wish, however, Amazon brought sellers into their own warehousing and logistics system. Initially, they had merchants ship to their operations centers in the coastal hubs of Shanghai and Shenzhen, which they had held since the Joyo acquisition.[15] Over the ensuing years, Amazon established a more extensive network of operation centers and continued to integrate them into their platform.[16] Their efforts worked. In 2015 and 2016, several thousand new Amazon seller accounts opened in China every day (Stone 2021).

While Brad Stone and others, such as the research collective Chuang 闯 (2017), have documented parts of this history, they fail to note that Amazon also benefited from a strong push by China's central government. In the wake of the 2008 financial crisis, Hu Jintao had encouraged domestic e-commerce as a potential solution to several persistent challenges, including low consumption levels, the income gap between city and countryside, and structural unemployment (Zhang 2023). Shortly after Xi Jinping took power in 2013, China's State Council called on agencies at every level of government to take action to support the development of cross-border e-commerce (*kuajing dianzi shangwu* or, more colloquially, *kuajing dianshang*).[17] Between 2015 and 2022, the central government created 132 "pilot zones" (*shiyanqu*) for cross-border e-commerce. In addition, provincial and city governments have provided direct financial support to SMEs engaged in cross-border e-commerce, in the form of tax breaks, low-interest loans, and even direct subsidies. Cross-border e-commerce grew dramatically during the final years of the decade. In the spring of 2022, Xinhua news reported that, as a percentage of China's foreign trade, it had increased by 15% in the first three-quarters of 2021, year over year (Xinhua 2022).

China has been a center, if not *the* center, of global manufacturing for decades.

Amazon has been a partner, as well as a beneficiary, of many of these initiatives. In 2017, Hao Wu and Robert Ireland, analysts at the World Customs Organization, reported (H. Wu and Ireland 2017) that Amazon and Alibaba were providing consulting and training to the administrators of the pilot zones on establishing their "bonded" duty-free warehouses (*baoshui cangku*) and integrating them with a new software platform developed by the General Administration of China Customs. In addition to translating Seller Central into Mandarin and hiring onboarders, Amazon co-sponsored conferences and courses to recruit and train prospective sellers in Shenzhen, Shanghai, and Hangzhou, among other cities. Lan Yingfen, an Amazon consultant who holds a day job at Tencent

15 Stone reports that, in internal documents, Amazon executives called this "Project Dragonboat." Interestingly, I heard several United States sellers use this term in a slightly different sense: They referred to a practice whereby Amazon bought out the factories of successful third-party products as "getting dragonboated.".

16 According to Baidu ("亚马逊中国 ('Amazon in China')" n.d.), Amazon currently has fifteen Operation Centers in China. There are two each in Beijing, Guangzhou, and Chengdu, and one each in Wuhan, Shenyang, Xi' An, Xiamen, Kunshan, Shanghai, Tianjin, Harbin, and Nanning.

17 On initiatives led by Xi and (especially) his Premier Li Keqiang to promote digital innovation and entrepreneurship, see Silvia Lindtner (2020) and Lin Zhang (2023).

has spoken at many of these conferences. During our interview, Lan confirmed what sellers I interviewed told me: the conferences continue to be a major source of new arrivals.

The people I interviewed who had started selling the earliest, from outside the United States, came from the sourcing industry and were foreign or had ties abroad. Thomas started an Amazon business before Amazon even offered its seller services in China. Thomas is originally from Sweden but has spent most of his adult life in China and Hong Kong. He moved to Shenzhen in 2007 to do sourcing work for a Swedish company and eventually rose to manage their factory in Dongguan. There, he met his wife, who comes from Yunnan Province. They married in 2011 and, shortly thereafter, decided to move across the bay to Hong Kong.

In 2013, Thomas heard about an online course for aspiring e-commerce entrepreneurs: Amazing Selling Machine. He signed up to take it. He could have gone on Alibaba to source products, but he planned a trip to Yiwu, a famous permanent exhibition of wholesellers in Zhejiang Province. (There is a saying I heard several times, that the sellers of Yiwu can predict who will win a US presidential election, based on the number of orders for campaign merchandise being placed during the spring and summer beforehand.) "Yiwu used to be hard to get to," Thomas recalled. He still has a photograph of himself, hunched against the cold, with his hands shoved deep into his pockets, outside the bus that he boarded to get there from the provincial capital of Hangzhou. "I remember freezing, thinking, *This is my entrepreneurial life*." Yiwu is full of stalls representing dozens of factories focused in one or another product category. The quality is inconsistent. But they offer buyers a low minimum order quantity (MOQ), which enables them to inspect prospective products at low cost. In Yiwu, Thomas could order 50 or 100 pieces for just hundreds of RMB. He settled on selling barware. He picked a name, designed a few simple graphics, and registered his trademark with the United States and UK patent offices.

There were no Global Seller Services in China at that time. Thomas had to register with an Employer Identification Number, clear customs on his own, and ship to Amazon FCs in the U.S. to access FBA. But the process was already pretty simple. For a year, Thomas treated it as a side gig. "Then, I started to think, if I spent 100% of my time on it, I could scale 3 to 4 times." He quit his job; his wife, who had left work after the birth of their second child, helped him manage. Things did not do quite as well as he had expected; still, they were not bad. "We topped out selling $500K/year, but with good profit margins, around 35%." (Across all my interviews, these were the highest profit margins I ever heard of.) For Thomas and his wife, Amazon's entry in China was a "turning point." When Amazon opened registration for Seller Central to Chinese IP addresses in 2015, price competition in their product category intensified immediately. In 2016, Amazon added recruiters and onboarding assistants to their offices in Beijing, Shanghai, and Hangzhou. US consultants and software companies that provide services for sellers began eagerly courting Chinese clients, promising to help them understand US customers and how to use Amazon to reach them. Soon, 90% of Thomas's competitors in the barware category were selling directly from the mainland. He and his wife determined that, in order to scale further, they would need to add new SKUs and lower their prices. When she became pregnant with their third child, they decided they did not want to take on the risk. In 2018, they sold their business to a Hong Kong fund and transitioned to full-time consulting for other Amazon sellers.

Rekha went straight from sourcing to consulting. For over 20 years, she worked for Global Sources, one of the most famous companies in the industry. She started in their office in New Delhi, where she is from, but spent the longest stretch of time in Tianjin. The city, which has 14 million inhabitants, lies between the municipality of Beijing and Hebei Province, overlooking the Bohai Sea. The treaties that ended the Second Opium War opened its port to foreign trade in 1860, and great quantities of goods have flowed through it ever since. Rekha lived there for a decade. She delivered her son in a Tianjin hospital, despite speaking little Mandarin. She laughed, telling me about her doctor entering the room where she had been laboring for hours, and announcing that she would need a C-section by miming a quick cut across his belly with his index finger.

Rekha said she remembers China fondly. But by 2018, she was tired; she wanted to live somewhere where she could read the street signs and where her son could grow up knowing other South Asians. She and her family moved to Singapore. Their timing turned out to be propitious. Chinese officials had been reducing subsidies to low-cost manufacturing for years, speaking of the country's need to ascend the value chain. At the same time, as Chinese living standards and labor costs rose, retailers in the United States and Europe had been seeking new sources of apparel, footwear, and household goods. When then-president Donald Trump announced the trade war with China, imposing tariffs on many categories of imports, Rekha saw her opportunity. She knew that Amazon had been expanding in India and trying to recruit Indian merchants onto the platform. When she attended the Delhi Fair—a large trade exhibition—during a visit home in 2019, she saw Amazon representatives going from stall to stall. She decided to open her own consultancy, advising third-party Amazon sellers on how to source in India and Indian manufacturers on how to navigate Amazon compliance.

An, like Rekha, is a mother who got into e-commerce for the flexibility that it afforded. But she has no use for consultants. "If they were doing so well, they would not have time to offer training courses," she told me. "Because doing well on Amazon takes a lot of time." An, who is in her fifties, comes from Shandong Province. She went to university in Beijing and worked there for years, in digital marketing. For most of her career, she specialized in business to business for the automobile and heavy machinery industries. But in 2018, her husband had the opportunity to take a job in Canada. They decided that he should; they wanted their son to grow up there.

"I knew I wouldn't be able to get the equivalent of my job in Canada," An recalled. "So I had to take advantage of my experience." Like Thomas, they went to Yiwu to scout products. They settled on shoe inserts because they were light and low cost and, in the language of retail, "replens." (Customers needed to regularly replace them.) "It was pretty random; I didn't do a lot of systematic research." An recalled buying a book in Beijing about "how to become a billionaire selling on Amazon in China—something like that." She remembers balking at one of the first pieces of advice: to price your goods to sell at a loss for the first six months, in order to climb up in Amazon's search rankings. "Most Chinese sellers start by losing money in order to get ranking," she told me. "They sell at unbelievably low prices." She maintained that this was a bad strategy. "Once you raise the price, you lose the sale; you stay for half a year, then someone else takes over."

An had classmates from university who had worked in the import/export industry and, at first, she thought she would focus on importing, too. Having arrived in Toronto, she hustled to build a business. "My products were small, so I stored all my stock in my garage." To find customers, An used Google. She searched for the names of wholesalers or other small businesses in her area that sounded like they might buy what she was selling—mostly shoe stores and nail salons—drive there and ask to speak to the manager. "I thought, these are small businesses; they have to see the products and the personality that they'd be dealing with." If she won them over, she made the delivery from her garage herself. But it was hard going. There were only a handful of wholesalers in the area, and they already had sourcing relationships, as did most of the stores and salons she tried. An had been mostly ignoring Amazon; she sold only two products, around $10,000 Canadian worth, through the site during her entire first year. But when the pandemic hit, she shifted to selling there exclusively.

It took a while for An to learn the system. "There are a few key things. The images are quite important. I spent a lot of time photo editing. Then there is the listing itself, the quality of the listing, including the product title and description are very important. Bullet points are important. If you have A+ Content [a special feature Amazon makes available to some Brand Registry members] that also helps you get more exposure, and to improve conversion rate." But the fundamentals, she says, were the same as in her past digital marketing work. "I spend 80% of my time optimizing keywords and adwords. I don't use any other social media channels to draw traffic to my store." When we spoke in 2021, An had around 30 SKUs active and had recently expanded to selling in Europe, where the competitors are fewer and bids for ad words are much lower. She was using Google Translate to come up with her listings, then checking with friends or friends of friends who live abroad. To handle taxes, she uses a provider that Amazon recommended. "They have those partner tax providers and they have a promotion this year to give one year service free to promote the European market, so I took advantage of that."

> "Most Chinese sellers start by losing money in order to get ranking," she told me. "They sell at unbelievably low prices"

An emphasizes that she is not a typical Chinese Amazon seller. Ai and Zhou Bingzhang fit more directly into the profile that I imagine the State Council had in mind when they promulgated policies promoting cross-border e-commerce. I mentioned Ai in the introduction to this report. Originally from the countryside, she started out working at Taobao, the eBay-like marketplace owned and operated by Alibaba. Taobao is renowned as a platform for rural Chinese merchants. In the early 2010s, Alibaba sponsored the creation of "Taobao Villages," encouraging inhabitants of rural villages to sell their produce and handicrafts to urban consumers directly through the platform, and thus to include rural people in the digital economy. As of 2019, a report by Alibaba's in-house think tank, AliResearch, claimed that there were more than 4,000 villages selling more than 10 million RMB of products per year through Taobao nationwide (Alibaba Group 2019). Ai shifted to working with an Amazon seller because she saw more opportunity—and less competition—in the US marketplace. By selling through Amazon, her company can capture more of the value of the products from the manufacturers that they work with. Doing this requires them to learn to anticipate the desires of consumers they will never meet, with whom they could not speak, and to navigate tariffs and US trademark law, as well as Amazon's complex and ever-shifting regulations.

Zhou, in his mid-20s, employs 10 people like Ai. He comes from Wenzhou, a city in southeastern Zhejiang Province that has long been renowned for its trade, but now lives in Hangzhou, the capital, where Alibaba headquarters are also located. Since graduating from university, he has tried his hand at a few things. He worked an entry level job at a company that offered business education and training in his hometown; then he started a domestic e-commerce business. Coming from Wenzhou, Zhou knew many people in the industry, including family members. One of his friends started selling watches through Amazon. The friend convinced him to try the site. Zhou had saved money during his years of working while living with his parents, and the government was offering huge advantages. Typically, he recounted, banks charged 4% to 5% interest on commercial loans. But for "micro-enterprises" (*xiaowei qiye*) selling overseas, the rate was less than 2%. Moreover, if a seller hit a certain volume of overseas sales, they did not have to pay export duties. The province of Hainan, an island south of the coast of Guangdong, was aggressively developing its Free Trade

Zone; if you cleared customs in Hainan, Hainan would cover your customs duties. After conducting research, Zhou decided to focus on women's and children's clothing.

Numerous sellers I interviewed—in both the United States and China—remarked that the entry of manufacturers directly into the marketplace made it difficult, if not impossible, for sellers located in the United States to compete on price. This change was particularly consequential for arbitrageurs, who can compete on little else. But the opening of Amazon's US marketplace to China affected brand owners, too. Many, if not most, of them sourced their goods in China. Now, they had to compete with their own factories, or with any manufacturer who could imitate their product. Several sellers I interviewed said that their businesses had been badly hurt—or even destroyed—by counterfeiters based in China, despite never having sourced there. Flora, a Latina woman now in her sixties, raised six children outside Las Vegas. When her youngest was in high school, she decided that she wanted to start her own small business. She had a background in beauty. After a year or so attending meetups for aspiring inventors, and giving herself crash-courses on Google, she hit upon an idea for a lip plumping product. While she could be self-effacing, laughing at the frivolity of her invention, she was also rightly proud. "I learned about chemistry and molding processes; I learned about manufacturers and certification." She identified herself repeatedly, in our conversation, as an "inventor."

By selling through Amazon, her company can capture more of the value of the products from the manufacturers that they work with. Doing this requires them to learn to anticipate the desires of consumers they will never meet, with whom they could not speak, and to navigate tariffs and US trademark law, as well as Amazon's complex and ever-shifting regulations.

Flora enlisted the help of two of her daughters and the ex-fiancé of a third daughter, who had stayed on good terms with them all. She found a manufacturer in Utah. The entire process was highly personalized; Flora even packed the boxes with copies of her business card that included her cell phone number. For several years, she sold a modest volume through an online storefront ("low six figures per year"). Then, something happened that should have been a break, but turned out to be a disaster: a prominent glossy magazine featured her product on their YouTube channel. Sales jumped more than tenfold from one day to the next. The magazine had not warned Flora and the ex-fiancé searched for some time before putting together what had happened. Then, suddenly, sales started to plummet. Again, it took time, but the ex-fiancé figured out that knockoffs were appearing on Amazon. One of Flora's daughters, who is a lawyer, started conducting test buys and sent the goods they received—under their mother's brand name—to testing labs. Several came back with traces of arsenic in them, which, Flora told me, is often used in cheap cosmetics molds.

The final straw came when Flora began to receive dozens of calls a day from customers angry about the quality of the lip plumper that they had purchased on Amazon. "My phone became unusable!" Eventually, she realized that one of her copycats had even been putting a copy of her business card with her name and number in the box. At the advice of a consultant, she registered with Amazon Seller Central and Brand Registry, in an attempt to compel Amazon to do something to protect her patent—but to no avail. Listings for counterfeits of her lip plumpers continued to appear on Amazon—and even in Google search results, above her own webstore. "We couldn't make page 1!" But, when I asked her if she was still selling through Amazon she replied: "Of course!" She does 80% of her business there.[18]

Counterfeits and knockoffs were not the only problem that I heard about. Sellers I interviewed described numerous other kinds of dangers in The Jungle. There were "brushing" scams in which merchants used stolen customer data to generate fake transactions in order to gain search rank. (One instance of this kind of scam, familiar from Taobao, inspired a wave of right-wing political commentary. During the early months of the pandemic, Amazon customers across the United States began to receive mysterious packs of seeds that they had never ordered [Heath 2021]. On Fox News, Tucker Carlson ran a segment asking, "Could Mysterious Seeds Be a Biological Attack?" In fact, the sellers had chosen seeds simply because they were so light that they cost almost nothing to ship.) There were ways to "hijack" a competitor's listing, to change their photographs and descriptions to make them less discoverable or appealing, or to add backend keywords that Amazon had prohibited in order to get them banned. Bad actors opened new accounts and took over "zombie listings" in order to benefit from their positive customer reviews. And given the emphasis that Amazon initially placed on customer reviews as an alternative to advertising, a flourishing cross-border traffic in fake reviews developed.

One brand owner in the United States told me that, when he visited factories in Guangdong in 2019, prospective manufacturers offered the first 1,000 to 2,000 reviews for a new product as an add-on service, for a couple hundred dollars. One Chinese seller admitted to me that they had bought reviews through a broker that they found in a WeChat group. "That was what everyone did." The agents used Facebook groups, so the seller assumed that they were working with agencies in South and Southeast Asia—India, Bangladesh, or the Philippines—that also sell clicks to drive social media engagement. Amazon eventually caught them. "My account got suspended for more than half a month. I had to submit three Plans of Action. Because I was new, they finally gave me a chance to make things right. After that, I never did this type of review anymore." The seller said it was a good thing for Amazon to police fake reviews, since the alternative was an arms race. People bought positive reviews for themselves and negative reviews on competitors or, as Amazon became

18 I heard a similar story from Erica Easley, a white clothing designer who lives in Los Angeles. She had been running one brick-and-mortar store and selling wholesale to larger retailers. During the 2016 presidential election campaign, a pair of socks Erica had made with a tuft of orange fake fur to represent Donald Trump' s hair, were featured on Steven Colbert's *The Late Show*. The clip went viral. Erica had no experience selling directly to consumers. Finding that she could not keep up with the sudden demand, she opened an Amazon account. Almost immediately, she said, dozens of poor-quality imitations appeared. Lily, an Asian-American entrepreneur in the Pacific Northwest, had a similar experience. After having her first child, the punk rock fan with an MBA found a niche creating baby clothing with band logos on them. But in the late 2010s, she started to find that her designs would be knocked off within a week of when she listed them. When we spoke in March 2021, she had just quit Amazon. Erica wanted to leave, too. She said she was spending a significant portion of her time and money with consultants and lawyers, trying to compel Amazon to do a better job protecting her trademark—and even these efforts were failing to improve her situation.

stricter, even bought positive reviews for competitors in order to get them suspended on the suspicion of having bought reviews themselves. "That kind of thing will never end."

In fact, in May 2021, a data breach of a server—likely in China—exposed 200,000 Amazon and PayPal accounts engaged in a fake review ring (Safety Detectives n.d.). Amazon summarily suspended 75,000 Chinese seller accounts and ultimately permanently banned 3,000 of them (Hollister 2021). Several people I interviewed also mentioned rampant bribery of Amazon employees by unscrupulous actors. Just as I was beginning my research, six consultants were indicted in a scheme to bribe Amazon employees to share sensitive data on their clients' competitors, share internal documents, and reinstate suspended listings. While I was conducting this research, two of the six pled guilty in return for reduced prison sentences (Department of Justice 2022). But I often heard sellers and consultants express resignation and conviction that such problems would continue. They spoke of a "game of whack-a-mole."

Many of my US interviewees complained that, exacerbating these difficulties was the fact that it had become much more difficult to contact Amazon. By 2018, Amazon had entirely automated the Support Team that had served most US sellers. In the past, it had been possible for anyone with a seller account to pick up a phone and reach a human being, even if that human was in Costa Rica or Chennai and was not exactly on your side. Now, one seller I interviewed paid a $60,000 annual retainer in order to have someone he could call directly and, he stressed, she did not always readily respond. (A consultant who has dozens of clients who pay for this service claimed that this was standard.) I spoke to two different sellers who lost more than $1 million in revenue during the time they struggled to reach a human being at Amazon—in one case, nine days; in another, three or four weeks—who could explain why several of their listings had been suspended.

Now, one seller I interviewed paid a $60,000 annual retainer in order to have someone he could call directly and, he stressed, she did not always readily respond.

Some US sellers described the problems of The Jungle in frankly nationalist—if not racist—terms. "You know how the Chinese are." Others asserted, correctly, that problems with fraud and abuse arose everywhere. The problem was that, given the 3P model, there was no way for a US seller or consumer to pursue legal action against a seller abroad (Weigel 2022). Some interviewees alleged that, even if Amazon suspended an account, it was easy for bad actors to open others.

Like their American counterparts, my interviewees in China struggled with the unpredictability of Amazon's rules and enforcement and developed strategies to adapt to it. One morning in the fall of 2021, Ai texted me photos of products for children such as a stuffed cat and a series of lunch boxes and backpacks shaped like SpongeBob SquarePants. Ai advised that these would sell great right now but are too risky, because of how Amazon had automated the enforcement of trademark infringement claims. "Toys," she said, "have gotten really dangerous." Like buying reviews, selling similar goods through "related accounts" is against Amazon's rules, for obvious reasons. Closing an account is the final means that Amazon has to prevent a seller from using its virtual and physical infrastructure to distribute goods that could be dangerous or defective, or to enforce trademark and intellectual property claims. However, as long as Amazon is automatically suspending tens of thousands of businesses and confiscating their funds, it makes sense for sellers to seek insurance, if they can. Ideas about this kind of behavior are far from uniform. A merchant outside Shanghai who has built a successful Amazon business selling outerwear told me that he had many friends and acquaintances who had been banned in the fake review sweep. When I asked him if Amazon's behavior had been fair (*gongping*), he replied: "Definitely. Amazon's number-one priority is the consumer, and it must protect them." He said that he himself has struggled with counterfeiters from Shenzhen.

Like their American counterparts, several Chinese sellers told me a story in which Amazon's marketplace had become more competitive and harder to navigate over time. An, for instance, said: "Five or six years ago, most Chinese sellers started by learning on their own or from friends. Amazon was not a big thing in China. There was not much competition. So if you started then, you could really get profitable. Now," she continued, "those people who started early on have all become training providers. It is hard to get information." She says that on Zhihu and Toutiao, you can sometimes find something. But on WeChat, people have become circumspect. She tells me that, in one of the closed groups that she joined—which required her to submit multiple receipts as proof that she was in fact a seller in the category that she claimed she was—"It is completely taboo to ask what someone sells."

Zhou also spoke about the complexity of Amazon's ever-shifting rules—about returns and about customer sevice chat. I asked Zhou what advice he would offer to someone like him who wanted to get into cross-border e-commerce and was considering Amazon. In interviews, I often pose this question, since I have found that soliciting advice tends to make subjects expansive. Speaking to hypothetical other people, or remembered versions of themselves, sellers usually speak freely, and offer more detail than I think they would if I had put them on the spot. But Zhou's answer was brief. "Amazon is not for newbies," he said. "I would tell them not to do it." ■

Conclusion: Trickle-Down Monopoly

Zhou's words highlight the ambivalence of the position that he and other third-party sellers occupy—where the opening of opportunity means accepting their own disposability and, above all, remaining nimble. They must be prepared to navigate the globally dispersed terrain that Amazon not only defines but also, sometimes, quickly shifts.

The account histories that I have gathered here demonstrate that the rise of Amazon has not only eliminated older businesses, but it has also given rise to new ones. Specifically, my interviews identify three key types of Amazon-native merchants: arbitrageurs, brand owners, and global sellers. They also highlight the slippage among these categories. Many sellers I spoke to had started out in arbitrage in order to "learn the Amazon system" or to try to earn the money to develop a brand, and some brand owners engaged in arbitrage occasionally. In many ways, the practices of global sellers fell between arbitrage and branding. Ai's company develops new branded products. But it develops them *for* Amazon, based on Amazon data. And it draws key advantages from its location in the Pearl River Delta, which has been a center of commodity arbitrage for centuries (Flynn and Giraldez 1995; Ngai 2021).

To borrow a figure of speech that two different interviewees used, all three business models look less like the kind of mom-and-pop stores celebrated by twentieth-century advocates of small business (Levinson 2012) than "like day trading." In each case, the merchant speculates on their location—physical and social—relative to Amazon systems. Like their typology, the chronology that my interviewees presented is not entirely fixed. Some arbitrageurs started after Amazon had stopped promoting the practice, while some brand owners tried the platform in its earliest days. Before it became possible to register an Amazon account with a Chinese IP address in 2016, some Chinese merchants had collaborated with relatives or friends to register accounts and rent warehouse space in the US. Still, the fact that so many interviewees converged on these three periods demonstrates their salience. And the fact that there were such distinct periods with such abrupt breaks between them illustrated a key fact about how third-party sellers experience Amazon's power. The comparison to day trading not only reflects the fact that selling is a way of speculating on a global marketplace that meets through personal computer screens, but it also captures the sense that many opportunities on Amazon are strictly time-bound. Critics who advocate antitrust action against the firm often describe it as a "gatekeeper," but this metaphor suggests a structure standing on fixed ground. In fact, unexpected changes to Amazon policies and algorithms have repeatedly—and suddenly—remade the terrain of e-commerce.

As I noted in my introduction, Amazon executives and critics frequently point to 3P sellers as evidence to support their claims about the firm's beneficence or malignancy. Testifying in the House of Representatives in July 2020, Jeff Bezos described a symbiotic relationship between his company and the Small and Medium Enterprises (SMEs) that used it. Amazon has often reiterated this point, for instance, by introducing an "Amazon Storefronts" feature that invites customers to search only for products from SMEs (BusinessWire 2018). Amazon executives have even attempted to rally 3P sellers to lobby their congresspeople against antitrust action—with mixed success. In June 2022, when Dharmesh Mehta, the Vice President of Amazon's Selling Partner Services, wrote a LinkedIn post encouraging sellers to oppose a bipartisan antitrust bill, many responded with sarcasm and derision. "Yes, I'm going to oppose that Amazon will be prohibited from undercutting, manipulating the Buy Box, and instituting restrictions on certain listings that unfairly bar me from selling an item," one posted. "Yup, writing to my senator right now" (cited in Palmer 2022).

Meanwhile, legal scholars, policymakers, and civil society organizations have focused on Amazon's power to endanger and eliminate third parties. "Amazon's market power is at its height in its dealings with third-party sellers," the authors of the 2020 report of the House Judiciary Subcommittee on Competition in Digital Markets stated in its opening pages (Nadler and Cicilline 2020). The report goes on to describe anticompetitive behaviors by Amazon such as "self-preferencing" (for instance, by ranking Amazon-owned brands higher than their competitors in search results) and "exploit[ing] its access to competing sellers' data and information" in order to produce cheaper versions of their products (16). Researchers, including Stacy Mitchell of the Institute for Local Self-Reliance, have shown that Amazon uses its dominance over e-commerce in order to set up a "monopoly tollbooth" (2021), imposing ever-higher fees on merchants. But both frames—Amazon helps small businesses get online; Amazon takes small businesses and destroys them—understate the ways that platformization redefines what small business is.

My interviewees were aware that Amazon has exploited their access to seller data to compete with third-party products, but seemed to accept that possibility as inevitable. I spoke with one seller in the Health and Beauty category, who talked at length about the profound despair, including thoughts of suicide, that he experienced when Amazon inexplicably suspended one of his "hero products"—a scented shower gel. His company, which employs six members of two families, lost more than $1 million in revenue during the nine days that he spent trying to reach an Amazon Seller Support person who could explain the problem. He stated repeatedly that he considered this treatment unjust. But when I asked whether he did not also worry about Amazon copying his products, he guffawed. "Oh, well *that* can always happen. That's a given!" One Amazon service-provider I interviewed, rattling off problems that his clients had encountered, said: "Of course, you can get knocked off. You can get dragonboated." When I asked what "dragonboated" meant, he explained that the term referred to having an Amazon-label brand "steal" your manufacturer in China by offering them a contract to make an almost identical product for them for the next several years. (Amazon frequently demands detailed information about sellers' supply chains, particularly when a complaint from a customer or competitor arises.)

For the most part, sellers I interviewed did not volunteer comments about these matters; when I asked, most accepted the risk of this kind of abuse by Amazon as a condition of participation in the marketplace. "It's their sandbox," or "you're playing in their sandbox," several of them said.

Instead, when expressing criticism, the sellers I interviewed focused on Amazon's failures to properly *govern* its platform. These included instances of unexplained automated action against their accounts—downranking or suspensions, like the seller of the shower gel experienced. They also included abuse by other third parties which Amazon's automated systems facilitated—such as data-theft or fraud by competitors or knockoffs by counterfeiters. Note: whether unexplained suspensions or unchecked abuse in fact constitute failures is a matter of perspective. From Amazon's point of view, it may be entirely rational to risk losing their cut of the sales of some small businesses unnecessarily by writing algorithms that over-enforce rules, if this policy makes a federal agency, such as the Environmental Protection Agency, less likely to fine Amazon. It may make sense not to intervene against counterfeiters, if it enables Amazon to continue arguing that they are "only a platform" and therefore deserve exemptions from product liability. But the same choices can devastate the livelihoods of sellers who depend on them.

In other words, the harms that my interviewees described did not only—or even primarily—result from Amazon's abuse of its third-party competition. They arose from how Amazon's platform has restructured the social relations that comprise the global retail industry. They did not have to do with Amazon eliminating competitors so much as it did with the rules it set for how business could be conducted.

Time and again, interviewees described how succeeding on Amazon required them to behave like miniature Amazons.

I wrote in my introduction that Amazon was not only hurting or helping small businesses, but rather transforming them—remaking the terms of the received opposition between "big" and "small." On Amazon's marketplace, centralization and decentralization are not opposites. On the contrary, each is the enabling condition of the other. Amazon has been able to grow as large as it has *because* so many small businesses use its services. In this respect, Amazon recapitulates dynamics that scholars have observed through social media platforms. In her crucial 2015 article, Anne Helmond (2015) used the example of Facebook to name a dynamic of "decentralization and recentralization" that, she argues, defines platformization. The programmability of Facebook, Helmond writes, enacted through its application programming interfaces (APIs), led far-flung developers to make their data Facebook-ready, spreading Facebook's logics across the web while feeding their data into Facebook's databases. Similarly, the opening of Amazon's infrastructures to third parties has led Amazon businesses to grow up in far-flung parts of the world, to supply goods and data to its systems.

A large body of scholarship has also attested that platform technologies facilitate outsourcing or risk shift, by taskifying and algorithmically assigning work to contractors who remain isolated and excluded from labor protections. My history illustrates how Amazon's marketplace has applied the logic of risk shift to retail. Large retailers such as Walmart and brands such as Nike have passed risk down global supply chains for decades, by outsourcing their production processes and writing contracts that allow them to delay payments to suppliers (Knight 2016; Lichtenstein 2010).
Amazon took outsourcing one step further by using platform technologies to—technically speaking—never hold inventory at all, while still enforcing high levels of control. Opening its marketplace enabled Amazon to avoid the work and upfront costs involved in sourcing, holding, and

advertising inventory, much as Uber and Lyft avoid employing drivers. At the same time, Amazon uses proprietary metrics and automated systems to manage the small businesses that use it, much as Uber and Lyft manage their drivers. But the ways that third parties interact with other entities gives them a distinct role.

Gig-work firms have strained the meaning of entrepreneurship by attempting to redefine every form of work in these terms. But Amazon sellers *are* small business owners, in a meaningful sense. They register limited liability companies; they qualify for small business loans, including loans to support women and minority-owned businesses, and sometimes for loan forgiveness, as through the Paycheck Protection Program (SmartBiz Team 2021). They hire and manage other people. As platform entrepreneurs, rather than platform workers, third-party sellers not only have to meet Amazon metrics and obey Amazon's managerial logics, but they must also adopt Amazon's logics as their own. Third-party sellers must then impose those logics on their workers and suppliers and, thus, disseminate them through the broader economy.

Amazon sellers do not only make business plans and take on debt—based on the data that Amazon and other companies using Amazon APIs give them—but they also become Amazon's agents. They must organize their supply chains and manage employees or contractors according to Amazon's imperatives—turning their cars into miniature delivery trucks, and their homes and garages into miniature FCs. Recall the Chinese merchants whom An described as selling their products at a loss in order to ascend Amazon's algorithmic rankings. By doing so, they gained market share—just as Amazon famously underpriced goods in order to win customers who, in turn, raised their valuations by Wall Street. Recall the arbitrageurs filling their apartments and garages with lawn flamingos and shoeboxes, to family members' consternation. Time and again, interviewees described how succeeding on Amazon required them to behave like miniature Amazons, and to discipline their employees or contractors to do the same. The key difference, of course, is that they must do so without access to the capital that Amazon commands, without insight into much of Amazon's data, or the ability to make any claim should they suffer harms from Amazon itself or from other third parties.

In addition to bearing costs and risks for Amazon, sellers grant Amazon access to new territories and to state resources. These can be family-owned factories in Zhejiang and Guangdong—regions that China has developed for light manufacturing for decades (Zhang 2023)—or subsidies, tax breaks, and low-interest rate loans that China and the United States alike, provide to small business owners. Recall that Amazon takes 34%, on average, of each third-party sale. In this sense, like the agents of historical empires to whom they compare themselves, these intermediaries facilitate territorial expansion and the expropriation of common resources. Amazon's marketplace facilitates the upward transfer of funds designated to fight poverty or inequality in racially marginalized communities—if not to comparatively privileged merchants who are better positioned to speculate on Amazon, then to Amazon itself.[19]

Sociologist Tressie McMillan Cottom has developed a theoretical framework for analyzing race and racism in the digital society that elucidates many of these dynamics. Building on the work of Keeanga-Yamahtta Taylor (2019) on the "predatory inclusion" of Black Americans in real estate markets in the late twentieth century, Cottom has argued that digital platforms enact "exclusion by inclusion." (Her fellow sociologist, Julia Ticona [2022] uses "precarious inclusion" to describe the experiences of low-wage workers who find work through their mobile phones.) "Predatory inclusion take[s] on particular qualities under platform capitalism," Cottom writes (2020b). Platforms and algorithms enable individuals who were historically prevented from accessing certain social goods—such as public education, credit, or waged work—to access versions of those goods under exploitative terms. Those terms might be by earning degrees at online or for-profit colleges, taking out high-interest loans, or participating in forms of low-paid gig work. In the process, platforms serve as totalizing "sociopolitical regimes" that not only determine access to social goods, but also extract resources—either from the individuals who use them or from the public through those individuals. Cottom further argues, drawing on the work of Gargi Bhattacharyya (2018), that platform capitalism works not only through coercion, but by mobilizing positive affects. "Racial capitalism must feel good at least part of the time," Cottom (2020a) argues, "or it would be unsustainable."

The sellers I interviewed for this report are predominantly white and Asian or Asian American. Given Cottom's focus on the predatory inclusion of Black Americans in higher education (2017) it would be inappropriate to apply her analysis of exclusion by inclusion too directly to their case. In many ways, Amazon's marketplace seems to reproduce pre-existing forms of stratification. Among my interviewees, those who had more literal and social capital to begin with were more likely to succeed in sourcing and branding products, as well as accessing Amazon services such as Brand Registry. But the opportunities offered by Amazon's marketplace platform did produce some genuinely new configurations. For instance, it inspired individuals like Ed—the Latino shoe seller in Florida—to mobilize kin networks to engage in grocery arbitrage. It also enabled Chinese petty capitalists to take direct advantage of warehousing and delivery services provided by Amazon's

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19 In some anecdotes about retail arbitrage, the class and racial politics of this process became frankly dystopian. One former seller turned consultant, who has gone to work for Amazon directly since I interviewed him in 2021, told me about someone he knew who had started arbitraging diabetes test strips that she sourced in housing projects in Chicago. She bought extras that people had gotten free or cheap from Medicaid and listed them on Amazon. She made $50,000 or $60,000 in profit per year. "It's not much," the consultant-turned-Amazonian said, "but it' s been enough to let her husband, who is a long-haul trucker, switch to short-haul trucking, so that he can see his kids." Later, I heard another version of this specific story—diabetes test strip arbitrage—but this time it was set in Brooklyn and the numbers were in the millions, not thousands. Idan told me about an older Hasidic man he knew who was selling tens of millions worth of strips per year out of his basement in Greenpoint. "At one point, Johnson and Johnson called him and was like, *Who the f*** are you?*" Then one day, driving out of Cambridge, I noticed a handwritten sign, beside the turn onto the highway urging anyone who had extra diabetes test strips to CALL THIS NUMBER. I happened to tell another friend, who lives between New York and New Haven, about it. *Oh yeah*, he said. *You see those signs everywhere*. From one perspective, this might suggest a market working as it should. Arbitrage creates an efficient market by eliminating differences across time and space. From another, this offers an image of a platform incentivizing slightly better resourced individuals to turn the meager public assistance that the US offers to the marginalized into their—and the platform's—opportunity.

predominantly Black and Latinx Fulfillment Associates. Further exploring the role of gendered and racialized identities in Amazon's marketplace will be a focus of my ongoing research.

For now, suffice it to say that Amazon's marketplace exhibits many of the dynamics of exclusionary inclusion that Cottom describes. It has lowered the costs of starting a small business and charged sellers a great deal for this access. It has enabled Amazon to take a substantial cut of any public resources that sellers can access. For sellers, becoming the medium of Amazon's managerial logics and its indirect appropriation of public resources is the price of their exclusionary inclusion in the exciting world of e-commerce. And many of the sellers I interviewed saw this as a good—or, at least, their best available—deal.

Most took intense pleasure in their Amazon "hustle," even if that pleasure was inseparable from the anxieties they also associated with it. Many described "Amazoning" as addictive; several shared that they were in recovery from addictions to drugs or alcohol and considered Amazon a substitute. Many spoke of the dream of "making money while you sleep," while also noting that they had suffered from insomnia ever since they had started. Their stories made it clear that Amazon wins their buy-in, or consent, to a system that is often quite predatory because it mobilizes deeply felt desires for belonging, status, and independence. In spring 2021, I spoke to Kim, the reseller from Missouri. She told me that many social media acquaintances whom she had advised over the years had, at one point or another, come to her wanting to quit. "I tell them, sure," she said. "But first, can you do just one thing for me? I want you to go to LinkedIn. I want you to find your last boss and print out a picture of his face. I want you to put that face up at home, by your computer, somewhere you can see it, and then try Amazon for just one more week." Kim claimed that, after getting this pep talk, none of the women she worked with had ever given up. And yet, in summer 2021 she herself quit selling on Amazon. When I emailed her to ask why, she reminded me. "I have four kids." Anyone could understand why she would need the stability of "corporate."

For sellers, becoming the medium of Amazon's managerial logics and its indirect appropriation of public resources is the price of their exclusionary inclusion in the exciting world of e-commerce.

What distinguishes e-commerce from other "digital hustles" may be the complexity of the operations involved—which often span continents—and the scale of possible success. The promise that Amazon's trickle-down monopoly holds forth is that, if a participant accepts its rules, they can win their own small corner in the market—claiming a stake of Amazon's customers and SEO. And I interviewed multiple small business owners who had made small fortunes by doing so successfully. The frames of settler colonialism and exploration that many of my interviewees used to describe the eras of Amazon's marketplace clearly expressed their sense of their own agency—in pursuing this goal, as well as the global reach of Amazon's ambitions.

During the time when I was conducting my interviews, sellers often spoke of a new space opening—or era commencing—in the history of e-commerce. They referred to COVID as accelerating Amazon's growth at such a speed that they were now on "a rocket" or "rocket ship." It was common to hear things like "COVID has accelerated us five" or even "15 years." Like The Wild

West, the rocket ship has become a tech industry cliché for the unprecedented opportunities to scale that software can make possible. While the "rocket ship" does not evoke histories of settler colonialism and extraction quite so bluntly as the other two terms do, it recapitulates many of the same themes. The "rocket" is a site of exploration by brave and talented individuals who are, nonetheless, acting on behalf of and backed by the power of their distant nation. It is also a way to identify with Bezos—who, since I began this research, has stepped down as CEO of Amazon in order to focus on going to outer space.

While the people I interviewed usually used the term "the rocket" to emphasize their confidence in the inevitability of Amazon's growth, the term also hinted at the unsteadiness of their position. "Turning the global economy into a data experiment on a single platform," as one Amazon engineer whom I interviewed put it, creates great fragility. The onset of COVID initiated a period of chaos at Amazon. "Amazon's Big Breakdown," as *The New York Times* declared it in May 2020, not only hit consumers but sellers, too (Herrman 2020). At the onset of the pandemic, Amazon suddenly stopped receiving and fulfilling goods through FBA. The merchants I spoke to understood, but they were badly shaken. For many, their revenue had been shut off overnight and without warning and their metrics and rankings plummeted. Their Amazon loans, at interest rates pegged to their inventory levels and garnished from their transactions, went into default—all while Amazon held hostage the inventory that they had already accepted. Like The Wild West and The Jungle, "the rocket" conveyed a sense of limited and precarious agency—an aspiration to hitch oneself to Amazon's rise that acknowledged the risks of being bound to trajectories that it set from afar and exposed to unknowns that even Amazon could not predict.

Recent years have seen several influential accounts of "surveillance capitalism" (Zuboff 2015), the "enclosure of the biopolitical public domain" (J. E. Cohen 2019), and "data colonialism" (Couldry and Mejias 2019) that focus on empirical examples from search and social media platforms. These accounts have compared platforms to states that either directly surveil user-citizens, or privatize previously common land. In these analogies, land serves as a metaphor for resources and relations that firms enclose in order to produce proprietary data. Turning to a different set of empirical examples—third-party businesses, working across global supply chains—may allow us to build new theories that reckon more deeply with those historical analogies. The stories of third parties, and their role in remediating the retail relations that Amazon disrupts, show how platforms interact with spatialized inequalities produced by decades of globalization—profiting from them, while also reconfiguring them. These stories also highlight how global platforms enroll some members of exploited populations as their agents—as indeed, many historical colonialisms did. Above all, attending to these hidden intermediaries demystifies the way that a firm like Amazon builds power—not simply by bringing old relations "online," but by shifting onto others the responsibility and risk of sustaining them. ■

Appendix: Methods

I used several methods to gather information for this report. From June 2020 to July 2022, at least several times per week, I read news about Amazon, visiting social media forums for Amazon sellers, and making notes about what I saw. I regularly read books and blog posts in both English and Mandarin and watched videos on YouTube, Facebook, TikTok, WeChat, and Zhihu, about various aspects of starting and running Amazon businesses. I collaborated with Francis Tseng, a designer and software engineer who is lead independent researcher at the Jain Family Institute, to scrape data from Amazon and construct a map depicting the locations of top sellers across five product categories. I attended several meetups and conferences for Amazon sellers and service providers. However, interviews comprised the core of my research.

Between March 2021 and July 2022, I conducted 40 long (one to two hour), semi-structured interviews in English and Mandarin. I spoke with individuals who currently sell through Amazon, or who used to but who now provide software or consulting services to active sellers. Given the constraints of the pandemic, and the fact that Amazon sellers and consultants are accustomed to conducting most of their business from their computers and mobile phones, I conducted all but one of these interviews remotely. In most cases, I used video-conferencing software (Zoom or Tencent Meetings). In a few cases where a video call was not feasible, I spoke with interviewees by phone, taking notes during and immediately after our conversations. A Northeastern University student, Zhaozhou Dai, helped me conduct two interviews; all others, I carried out on my own.

In recruiting sellers to participate in my study, I wanted to identify people who had sufficient experience with Amazon's marketplace to be able to explain it to me and who had enough of a material stake in it that it shaped their sense of self and of their social worlds. In other words, I was not looking for college students trying to make a little money on the side nor representatives of large corporations, such as Hewlett Packard or Adidas, that happen to sell through Amazon. Instead, I wanted to speak with the kinds of SME owners whom Jeff Bezos had invoked in the House of Representatives—people who depended on Amazon for their livelihoods. (Respected industry analysts say that the marketplace consists "mostly" of these kinds of SME; large brands are more likely to negotiate direct first-party relationships with Amazon [Marketplace Pulse 2019]). In practice, this meant focusing on people who sold at least $100,000 worth of goods per year through Amazon. Most people I interviewed were "7 or 8 figures" sellers—meaning that their businesses earned between $1 million and $10 million in gross revenue per year. Note that these gross revenues are substantially higher than the net profits that sellers see. Amazon takes, on average, 34% of every transaction in seller fees (Mitchell 2021). From the remaining 66%, sellers must acquire (and, if applicable, design or brand) inventory and to get it to Amazon FCs, as well as pay any contractors or employees involved in that. So $100,000—even $1 million—is less than it might sound.

My cohort included 31 sellers based in North America. Of those, 16 were men and 15 were women, 23 were white (including several Hasidic Jews who spoke Yiddish as their first language), four were Asian or Asian American, three were Latinx, and one was Black. I interviewed nine sellers based in China or Southeast Asia. Of them, seven were men and two were women, seven were Han Chinese, one was white, and one was South Asian. I have reasons to believe that the demographics of the sellers I interviewed roughly reflect the demographics of "7 and 8 figure" Amazon sellers and, if anything, overrepresent women.[20] Still, it is difficult to know how representative it is. While Amazon reports the demographics of its employees to the Equal Employment Opportunity Commission, it does not gather data on the gender, race, or ethnicity of third parties who open seller accounts. (In fact, I heard one anecdote about Amazon prohibiting sellers from sharing information about their race. An Asian American woman I interviewed complained that she had multiple product listings suspended because, in them, she had described her business as "WOC-owned" [woman-of-color-owned]. In so doing, she had unknowingly violated an Amazon rule against "adding seller-specific information to a detail page." A former Amazonian later explained to me: "It doesn't matter if you think you're the brand and you're the only one who lists or sells an item. Your listing has to be open to any other potential seller.")

As a result, this research raises some questions that it cannot fully answer. The specific ways that Amazon's government partnerships and its global selling and lending platforms mediate race and gender relations is a focus of my ongoing research. I am actively continuing to recruit and conduct interviews with participants in China, in particular. The considerable difficulties involved in gaining access at a distance, as a foreign researcher during a period of heightened geopolitical tensions, have meant that this group grew more slowly than the rest of my cohort. I remember one seller from outside Shanghai, whom I interviewed in late July 2022, amiably volunteering: "I could care less about Pelosi!" (Nancy Pelosi was due to visit Taiwan.) "I just want my customers to like my clothes." But understandably, I generally encountered even greater caution with members of this population than with their American counterparts.

This report, then, does not aim to construct a comprehensive sample, but rather to map multiple experiences of the Amazon marketplace, and to compare them for the purposes of theory-building. In order to ensure that there was variation in my sample, I used several different approaches to identify potential participants. In addition to a small number who came through my own professional

20 When I asked interviewees to describe their impressions of the demographic makeup of the community of Amazon sellers, based on their knowledge from social media groups and conferences they had participated in, they generally said there were more men than women. However, that might be changing—or, at least, conferences were attempting to invite more women speakers in order to appear inclusive. Three different white consultants, with combined decades of experience in the industry, said that the community they encountered at conferences was predominantly white. They included a large number of Hasidic Jews from New York, New Jersey, and Florida; a minority of Latinx sellers concentrated around Miami and Los Angeles; as well as Chinese and Chinese American importers in Southern California. One Black seller told me about going to a meetup in New Jersey to find that almost everyone there was Hasidic. He recalled a South Asian developer sidling up to him at the mixer, whispering, "I thought there'd be at least a couple more of us."

networks, I met interviewees through social media pages, virtual seminars and in-person meet ups and, subsequently, through personal introductions. Some emphatically stated that they did not want to be identified in this report. Others expressed indifference or reflected that they were well known enough in their subset of the Amazon community that anyone who knew them and read my work would know who they were. Out of caution, and the desire to avoid inadvertently de-anonymizing anyone by association, I have decided to give every seller whom I describe or quote here a pseudonym, with only two exceptions, involving individuals whose stories have previously been told, using their real names, in national media and public records. In cases where a seller's primary product—or the combination of their product and location—are unusual enough that they might be identifying, I have restricted myself to naming their product category ("electronics," "apparel," etc.) and occasionally disguising minor details. ■

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