Sellers Report - May 2026

Ads.txt Summary

Overall

May's net of **+19.7k** lines looks healthy on the surface. Look closer, and the removal-to-addition ratio sits at 95.4%, the tightest in the Feb–May window and a steep drop from April's +102k net on similar gross volume.

- Resellers drove 63% of that gain against direct's 37%. At 4.8% gross spread, the market is onboarding and pruning supply at near-equal pace.
- The direct segment produced a net of just +7k. Publishers are dropping authorized direct partners at nearly the same rate they're adding new ones.
- For mid-tier SSPs trying to get on publisher lists, that compression makes the window narrower even when overall activity looks busy.

Total Entries	Direct Entries	Reseller Entries
↑ 427,845	↑ 190,102	↑ 237,743

Total Entries	Direct Entries	Reseller Entries
↓ 408,091	↓ 182,741	↓ 225,350

SSP Overall

The changes in the ads.txt lines show notable improvements compared to previous months. Here are some top SSPs that have gained a good number of new lines.

- PubMatic led at +3k lines, but the number that matters more is the top-three total: PubMatic, Rubicon, and OpenX combined for 10k lines, which is 51.4% of the month's entire net from three players. The gap between first and second was just 242 lines, the tightest first-vs-second spread in the series. No breakout this month. Instead, a tightly grouped cohort of Established SSPs absorbed what growth was available.

PubMatic	rubicon project	OpenX
↑ 3,584	↑ 3,342	↑ 3,217

Index Exchange	nexxen
↑ 2,771	↑ 2,731

Reseller growth continuing to outpace direct adoption suggests DSP-led SPO efforts have yet to drive large-scale publisher consolidation, with many SSPs still scaling through reseller onboarding paths. PubMatic's gains reflect stronger publisher-focused SPO investments, while Nexxen's growth points to rising cross-screen and CTV inventory expansion.

Publishers:

Overall Ads.txt line changes

Low-Traffic publishers drove +16k net lines, which is 82.6% of total net. Mid-Traffic added +4k. The number that cuts against the trend is High-Traffic: -864 net lines, the only negative tier result and the first for premium publishers in this series. The top 500 are trimming their ads.txt files while the long tail is still building out its infrastructure for the first time. Two very different markets, same report.

High-Traffic	Mid-Traffic	Low-Traffic
↑ 50,258	↑ 97,658	↑ 279,929
↓ 51,122	↓ 93,355	↓ 263,614

Growth Leaders in the Publisher Landscape

We have noticed a good number of net increase in the number of ads.txt lines over the past few weeks. Below are the top SSPs that contributed most to this increase in the number of lines.

- Onetag and OpenX are the only SSPs showing up in both the High- and Mid-Traffic top fives, with OpenX spanning all three tiers. PubMatic's Low-Traffic gain of 3k is 14x Onetag's High-Traffic lead of 218. The premium tier tables are full of curation and contextual specialists: Onetag, Seedtag. Low-Traffic is all large-scale exchange infrastructure: PubMatic, Rubicon, OpenX. Same report, two completely different selection criteria.

High-Traffic	Mid-Traffic	Low-Traffic
onetag ↑218	onetag ↑478	PubMatic ↑3,122
OpenX ↑182	adform ↑423	rubicon project ↑2,907
SEEDTAG ↑172	OpenX ↑344	OpenX ↑2,691
media.net ↑152	Nativo ↑325	Index Exchange ↑2,435
PubMatic ↑149	PubMatic ↑313	AppNexus ↑2,429

Premium publishers reducing ads.txt relationships highlights growing SPO-driven supply chain consolidation, while low-traffic growth is being fueled by new creator-led publishers entering programmatic monetization. At the same time, curation and contextual SSPs are gaining traction as buyers increasingly prioritize privacy-safe, pre-qualified inventory.

Direct Connections Analysis

Big Winners:

Analyzing the changes in direct connections among the connected publishers in the past months, the following SSPs appear as top direct domain gainers across each category that we segregated SSPs based on their rank/coverage.

- Insticator and Blis led Established growth as publishers shifted toward differentiated engagement-driven monetization, while Kueez, Fabrik, and Mediavine reinforced demand for content-aligned SSP partnerships in Scaling.
- Display.io, SoundCast, and Trinity Audio drove Emerging growth, reflecting rising experimentation with cookie-independent formats such as audio, though the tier remains highly concentrated.

Established	Scaling	Emerging
Insticator ↑1,007	Kueez ↑329	display.io ↑295
blis ↑998	Fabrik ↑295	SoundCast ↑272
adform ↑839	MEDIAVINE ↑282	PRO GRAMMA TIC. ↑126
onetag ↑504	connectAD ↑181	Trinity Audio ↑106
KARGO ↑468	loopMe ↑164	APESTER ↑101

Leaderboard Dynamics:

We've assigned ranks to each SSP based on their direct coverage among the top 50,000 publishers. Below, we highlight the significant jumps in ranks for top SSPs observed in the past couple of weeks.

- Display.io's +113 jump highlights how niche Emerging SSPs are scaling faster than incumbents, while gains from LiveIntent and Opti Digital reinforce rising demand for cookieless, identity-driven monetization solutions.

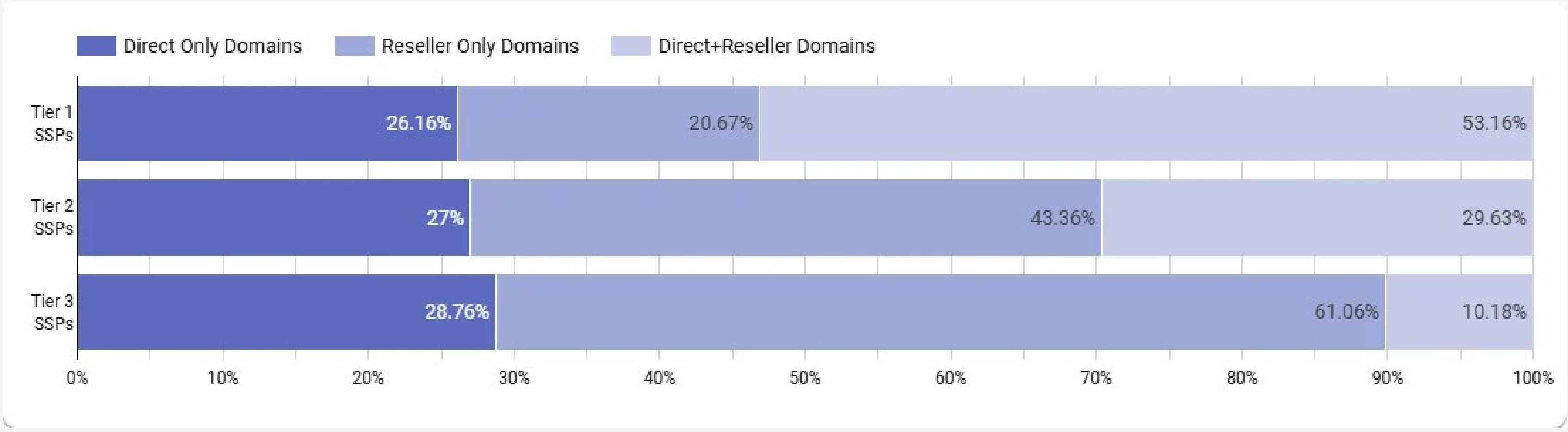
Established	Scaling	Emerging
Insticator ↑4	LiveIntent a Zeta Global company ↑7	display.io ↑113
blis ↑3	OPTi digital ↑7	APESTER ↑73
adform ↑3	STN VIDEO ↑5	video heroes ↑53
smile wanted ↑3	ucfunnel ↑4	AdKaora ↑46
media.net ↑1	PMC ↑3	PRO GRAMMA TIC. ↑38

SSP growth is increasingly being driven by privacy-safe engagement, audio, and contextual monetization models as the industry adapts to signal loss. Emerging-tier momentum also reflects a broader cookieless reshuffling favoring format- and attention-based SSPs.

Auction Duplication: A Critical Issue in the AdTech Industry

- 'Established' SSPs are expected to have a lower share of Direct Only Domains and a higher share of Direct + Reseller Domains in comparison to other groups. This is attributed because Scaling and Emerging SSPs rely on Established to serve as a demand partner.
- However, during this process, established SSPs may inadvertently be listed as a reseller on domains where they are already directly connected, leading to auction duplication and classification as Direct + Reseller Domains.
- For SSPs, especially established, managing intermediaries in choosing non-duplicate domains is challenging. Additionally, it becomes an added responsibility for SSPs to address both auction duplication and carbon emissions. Choosing the right intermediary is crucial for reaching unique domains where their ads.txt lines are not yet present.

At DataBeat, we offer assistance in identifying and managing ineffective intermediaries, reducing duplicate domains, and improving your green index score while not compromising on your net revenue. Leveraging our Competitive Intelligence (CI) Tool, we enable you to identify & address these challenges effectively.



Direct Only: Domains exclusively connected through direct relationships.
Reseller Only: Domains exclusively connected through reseller relationships.
Direct + Reseller: Domains with both direct and reseller connections

SSP Tier	Unique Domain %	Duplicated Domain	Average Intermediary Count
Tier 1	54%	46%	1.31
Tier 2	62%	38%	1.20
Tier 3	66%	34%	1.18

Unique Domains: Domains exclusively connected to an SSP through a single connection.
Duplicated Domains: Domains connected to an SSP through multiple intermediaries or integrations, resulting in duplications.

High duplication rates across Established SSPs continue to create unnecessary auction overhead and supply chain inefficiency, with many reseller paths adding limited incremental value. The industry is increasingly shifting toward selective path consolidation to reduce operational and carbon costs without impacting revenue scale.

Need More Insights:

For additional insights into this report and the CI Dashboard, which serves as the foundation for the seller's report, don't hesitate to contact us at hello@databeat.io.

Sellers Report DataBeat's Methodology:

- Analyzing ads.txt files from the top 50k US publishers
- Tracking changes in publishers and SSPs across various categories over the past two weeks
- Publishers are categorized into three groups based on their ranks, determined by traffic volume:
- High-Traffic: 1 to 500
- Mid-Traffic: 501 to 2000
- Low-Traffic: 2001 to 50000
- Similarly, SSPs are ranked based on the number of direct connections and are classified into three groups:
- Established: 1 to 50
- Scaling: 51 to 150
- Emerging: 151 to 500
- Ads.txt lines, Domain gains, and Ranking dynamics as key metrics

Need More Insights?

Check out our CI Tool: https://bit.ly/49ItUQZ

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