

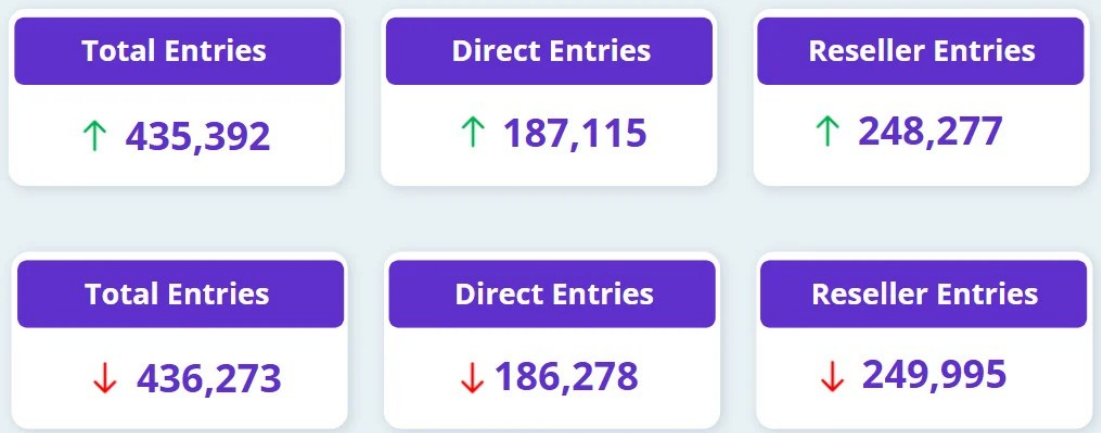
Sellers Report - August 2026

Ads.txt Summary

Overall

The market added 435.4k new ads.txt lines and removed 436.3k, for a net change of -881. With additions and removals now nearly balanced, the supply chain has shifted from expansion to optimization. This reflects a market reaching equilibrium after sustained growth.

- Reseller entries turned negative at -1,718 net, while direct stayed nearly flat at +837. Publishers are removing intermediary paths while protecting direct relationships that drive revenue. For reseller-dependent SSPs, visibility now matters more than ever.
- Direct staying flat during a contraction month shows publishers are making targeted cuts, removing reseller paths that duplicate direct relationships. SSPs with a clear, differentiated role are best positioned to remain.



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.

- TrustedStack led all SSPs with +6.6k lines, reflecting steady publisher adoption over the past year. In a month focused on optimization, its omnichannel platform helps publishers consolidate demand through a single supply path.
- Adform ranked third, strengthened by its partnership with Permutive to activate first-party data across multiple identity solutions. As cookie reliance declines, this makes Adform a stronger direct supply path for publishers.

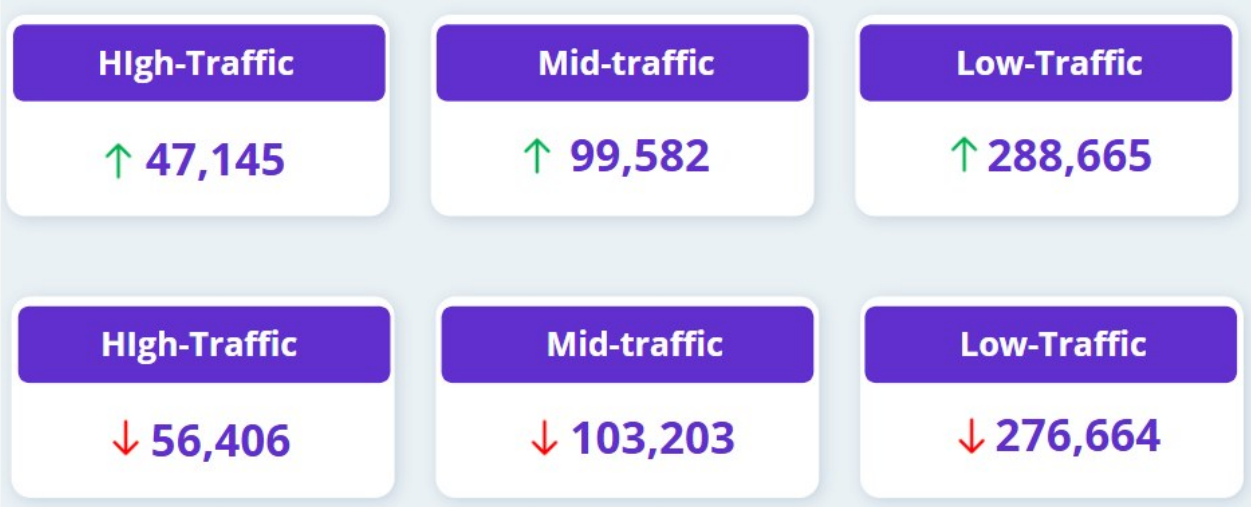


The market has hit a natural ceiling on supply expansion. Buyers are dealing with fragmented identity signals, cookie deprecation, and DSPs pushing for cleaner supply paths. The SSPs gaining lines this month, TrustedStack and Adform, address those problems directly: simplified omnichannel supply and identity-agnostic data activation. Publishers are adding the partners buyers are actually asking for.

Publishers:

Overall Ads.txt line changes

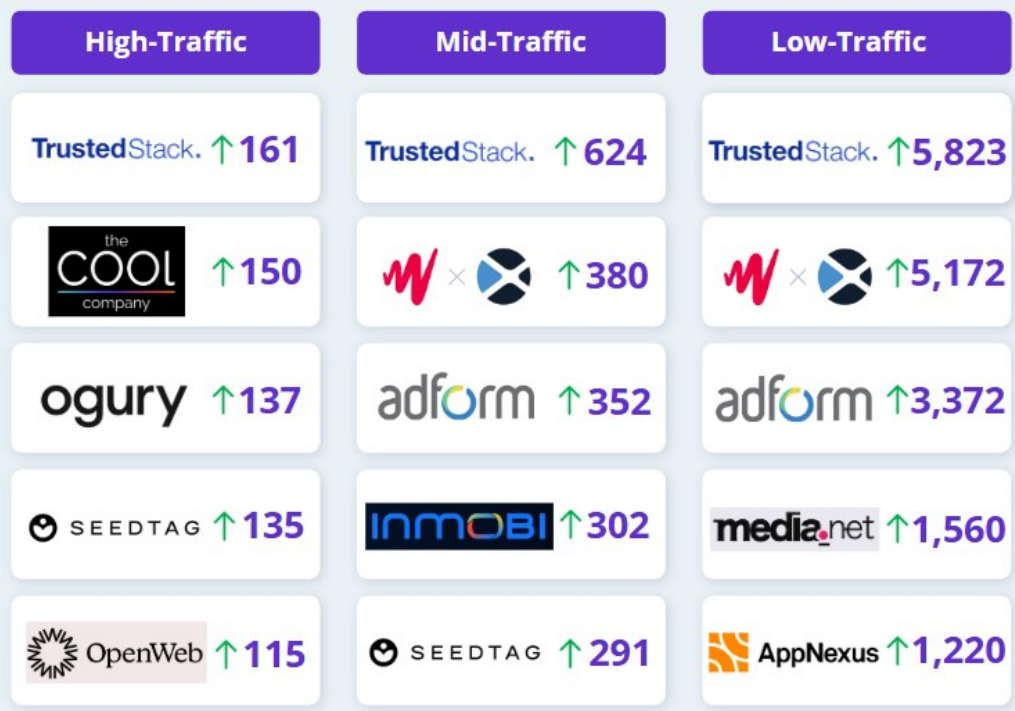
High-Traffic contracted the hardest at -9.3k (47.1k added, 56.4k removed), followed by Mid-Traffic at -3.6k. Low-Traffic remained positive at +12k, suggesting smaller publishers have not yet adopted supply-path optimization to the same extent as premium publishers.



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.

- TrustedStack leads all three traffic tiers in lines added this month, the only SSP with that cross-tier breadth. Adform appears in both the Mid- and Low-Traffic top fives. The pattern is consistent with what the overall data shows: in a month where publishers are removing more than they add, the only SSPs gaining lines across all tiers are ones offering either a simpler stack or a better data story. Broad demand access alone is no longer enough to earn a slot.



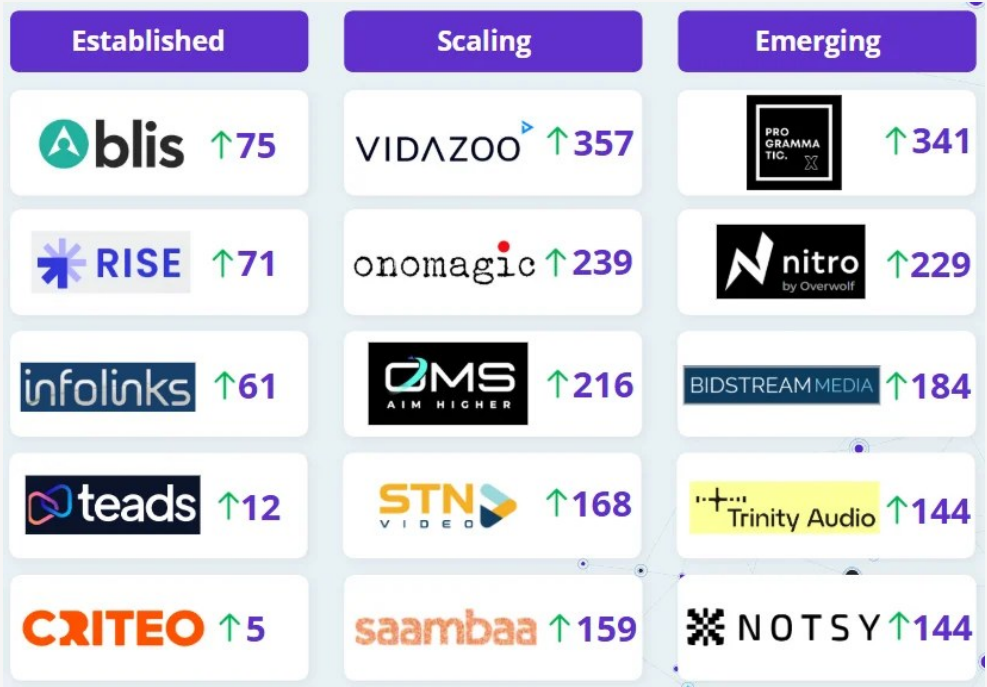
High- and Mid-Traffic publishers contracted this month, while Low-Traffic remained modestly positive, suggesting supply chain optimization is still being led by larger publishers. The long-tail buffer that previously offset premium-tier declines has weakened considerably, leaving the market close to neutral overall. The next signal to watch is whether Low-Traffic also turns negative, which would indicate supply chain discipline has fully spread across the publisher landscape.

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.

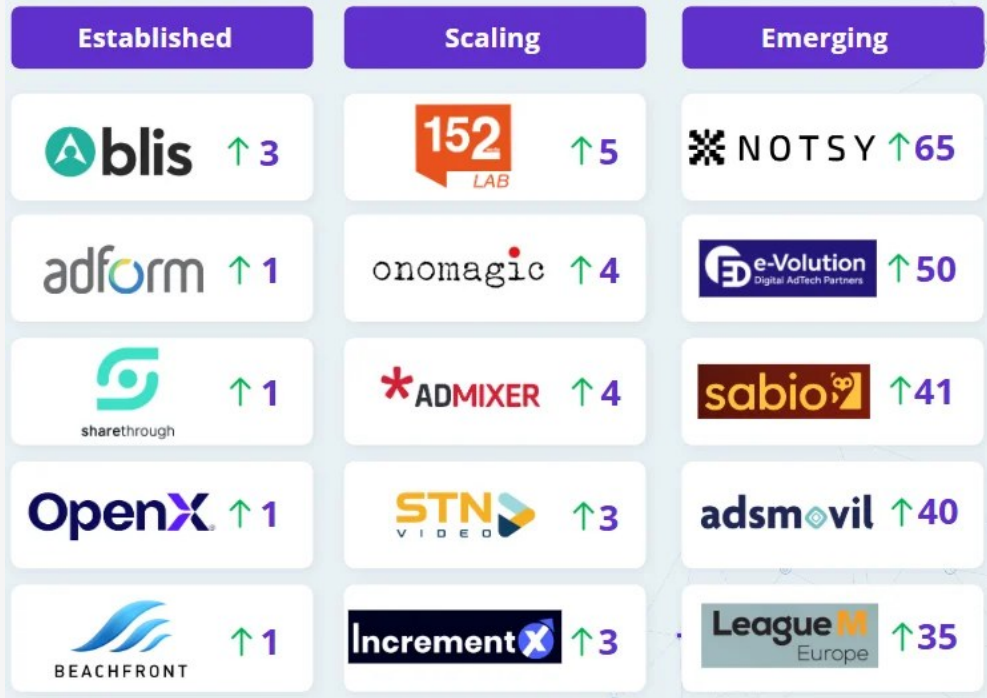
- Blis led the Established tier at +75 direct connections, followed by RISE at +71. Both specialize in privacy-first signals, with Blis focused on location and audience data and RISE on attention and CTV. Publishers seem to adding them for higher-value demand, not broader reach.
- Vidazoo led Scaling at +357, supported by its AI-powered video optimization. ProgrammaticX topped Emerging at +341, reflecting growing publisher adoption of curated, transparent supply paths over traditional open-exchange volume.



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.

- Blis leads Established with a +3 rank climb, consistent with its direct-connection gains. In Scaling, 152 Lab's +5 reflects growing publisher interest in performance-focused programmatic platforms. The real story is Emerging: NOTSY +65, e-Volution +50, and Sabio +41 in a contracting market means these SSPs are displacing existing players, not riding a rising tide.

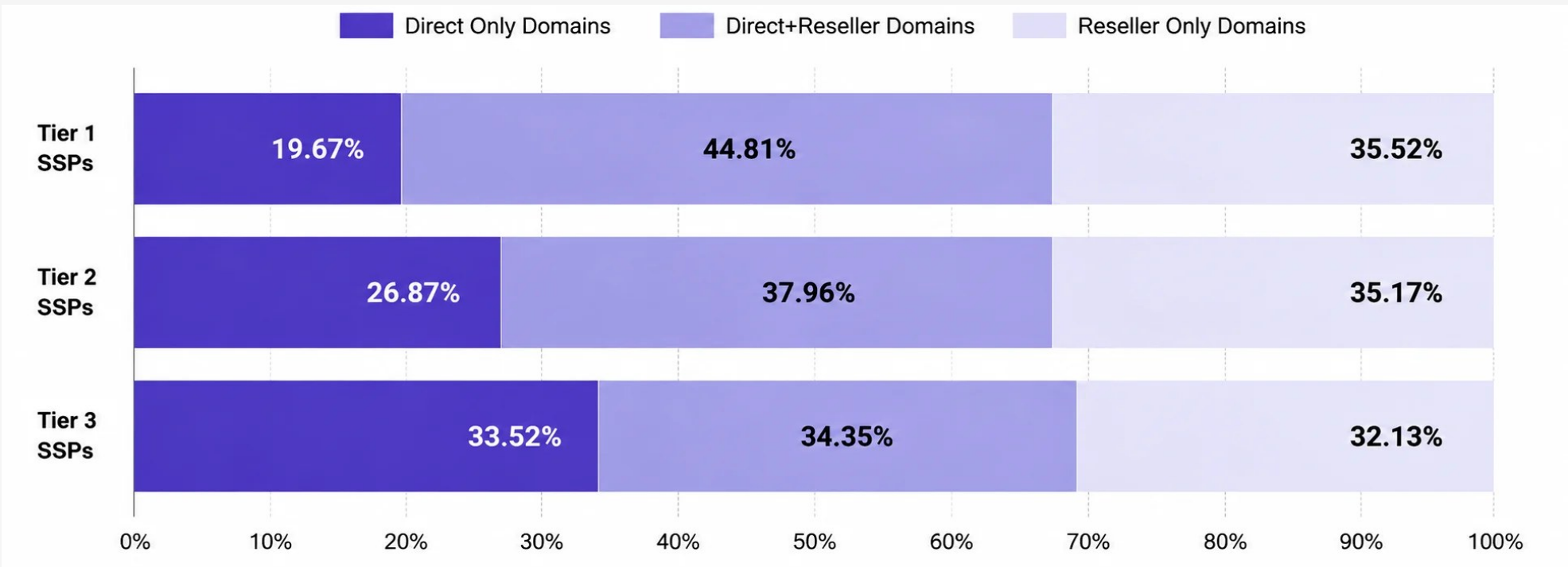


The SSPs winning direct connections this month share one thing: they bring inventory buyers cannot reliably source through the open exchange. Location-intent, attention signals, cookieless video, and curated supply paths are commanding direct relationships because buyers are specifically requesting them. Scale alone no longer justifies a slot in a publisher's ads.txt.

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%	1.32
Tier 2	61%	39%	1.20
Tier 3	65%	35%	1.19

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.

The more established an SSP gets, the harder it becomes to keep its supply chain clean. With 46% of Tier 1 domains duplicated, nearly half of every auction an Established SSP enters is competing against itself, wasting buyer budget, inflating bid density, and eroding the trust that premium supply is supposed to carry.

Need More Insights:

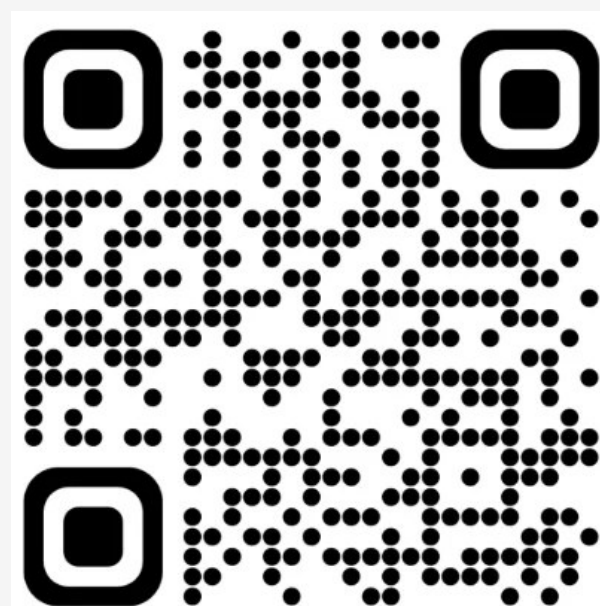
For additional insights into this report and the CI Dashboard, which serves as the foundation for the seller's report, don't hesitate to contact us at hello@databeat.io.

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 month
- 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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