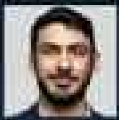
Pentaleap

H2 2025

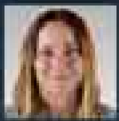
Sponsored Products Benchmarks Report

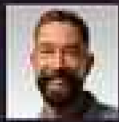
Table of Contents

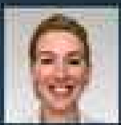
Contributors

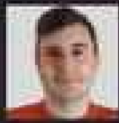

Ali Sasso
Sr. Marketing Analytics Consultant
Pentaleap


Sarah MacKinnon
Product Marketing Director
Pentaleap


Ana Laura Zain
Chief Marketing Officer
Pentaleap


Andreas Reiffen
Chief Executive Officer
Pentaleap


Emma Helsloot
Director of Sales EMEA
Pentaleap

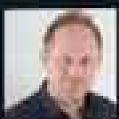

Mark Burton
Head of Product
Pentaleap

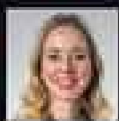

Damilola Kuteyi
Senior BI Analyst
Pentaleap

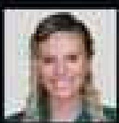

Johannes Tarnow
Consultant Business Analytics
Pentaleap

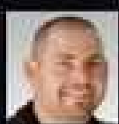

Lars Djuvik
Chief Revenue Officer
Pentaleap

Collaborators


Roger Dunn
Global Media Lead, Retail & Performance Media
Diageo


Kiri Masters
Retail Media Industry Analyst, Contributor to the Drum and Forbes
Retail Media Breakfast Club


Lauren Livak Gilbert
Executive Director
Digital Shelf Institute


Jordan Witmer
Managing Director
Salt XC, Nectar First


Justin Sparks
GM, Retail & Commerce Media
Teads


Michael Krans
VP, Retail Media
Macy's

Executive Summary

The Fluid Shift in Sponsored Products

Major U.S. retail media networks (RMNs) are expanding coverage — a clear signal of rising advertiser demand — but the real shift is how they're adding inventory. Some retailers still take the classic route of inserting more fixed ad positions.

Meanwhile, a growing cohort is adopting dynamic, fluid placements that harmonize with organic results to maximize both relevance and performance.

Macy's, CVS and The Home Depot are standout examples, with Macy's moving from fixed to dynamic and The Home Depot becoming more dynamic than last year.

> "The biggest shift we're seeing isn't about who has the most coverage— it's about how retailers are using it."

"Many major U.S. retailers tracked in this report are adding inventory. But beyond simply adding more slots, a growing number are placing ads dynamically or using a Fluid strategy, harmonizing ads and organic to maximize both relevance and performance."

Andreas Reiffen
Co-founder and CEO
Pentaleap

Growth Leaders: The Home Depot and Albertsons

Overall sponsored product coverage rose 7% YoY across tracked retailers, with The Home Depot (20%), Albertsons (81%) and Lowe's (35%) showing notable YoY growth.

The Home Depot grew overall coverage by 20% YoY (from an already high base), improving visibility across a broader set of search terms—where sponsored results expanded significantly.

Albertsons saw impressive coverage growth of 81% YoY and a 30+ pp increase in one-word coverage, reflecting a strategic evolution likely driven by tech innovation and new format testing.

Distribution and Keyword Strategy

While Amazon and Walmart still deliver the most balanced coverage across the page, others—like Staples and Best Buy—serve the majority of placements above the fold.

Most retailers are now optimizing for both short- and long-tail queries; this smarter keyword coverage is supported by improved ad serving and search algorithms.

Methodology

This report is based on publicly available desktop search results data collected from 12 leading retail media networks across the United States: Amazon, Walmart, The Home Depot, Target, Staples, Macy's, Kroger, CVS, Lowe's, Albertsons, Best Buy, Office Depot.

- **Time Period:** The data in this report focuses on insights from Q2 2025-Q3 2025, with year-over-year (YoY) comparisons with Q2 2024-Q3 2024.
- **Source:** This data is not sourced internally from retail media networks, but has been carefully collected and vetted, allowing for a small margin of error.
- **Keywords:** The data covers a representative set of 2,500 keywords across selected categories, including grocery, pharmacy, beauty, fashion, electronics, office, and furniture.
- **Brands:** This report includes data from over 3,500 tracked or identifiable brands only.

Methodology (continued)

- **Ad Formats:** We focus on the following sponsored ad units: in-grid, carousel, brand carousel, and video carousel.

- **Impressions:** The term "Impressions" used in this report refers to brand appearances—essentially, the frequency at which a brand appears on a search results page, serving as a proxy for impressions.

For any questions regarding our methodology or analysis, please feel free to reach out to marketing@pentaleap.com

Chapter 1

Sponsored Products Coverage and Formats

+7% increase in sponsored products coverage across retailers YoY.

Percentage of Searches that Show Sponsored Products (Q2-Q3 2024 vs Q2-Q3 2025)

How many searches show sponsored products by RMN?

Like what you see?

Share the Report

INSIGHTS

- Average sponsored products coverage increased 7% YoY across tracked retailers.
- Albertsons (81%) and Lowe's (35%) saw the largest coverage increases.
- No retailers saw significant decreases in coverage YoY. Most increased, or remained relatively constant.

“Retailers thought sponsored ads were solved”

"But this report shows that the most innovative retailers—who have gone 'back to the future' to optimize onsite ad performance—have unlocked the margin and revenue needed to power years of forward growth."

Lars Djuvik
Chief Revenue Officer
Pentaleap

Amazon, Walmart, and The Home Depot continue to lead sponsored products density with 25+ ads per load.

Average Number of Sponsored Products Per Page Load (Q2-Q3 2024 vs Q2-Q3 2025)

How many ads (and in which formats) are displayed per page load?

INSIGHTS

- Amazon still features the greatest number of sponsored products by a wide margin.
- Format flexibility remains a key lever for optimizing sponsored ad programs.

"Getting the balance right across user experience and relevancy"

"Pentaleap's Sponsored Products Benchmarks reports continue to demonstrate that there are still opportunities for the retail networks to increase the number of ad placements per page, if they are getting the balance right across user experience and relevancy.

Increasing the number of opportunities to influence and ensure your products are discoverable - particularly in mid-to-high ticket categories where there is a longer consideration period - is how brands can drive return from their retail media dollars. The page load density report is a view we will continue to track at Teads across RMNs globally."

Justin Sparks
GM, Retail & Commerce Media
teads

Sponsored products adoption expands slightly, but gaps remain in format usage: In-grid dominates, brand carousel and video remain underutilized.

Formats of Sponsored Products (Q2-Q3 2024 vs Q2-Q3 2025)

Which sponsored formats are RMNs using?

$\boxed{}$ New formats added by retailer since Q2 2025

Retailer	In-Grid	Product Carousel	Brand Carousel	Video Carousel
Walmart	✓	✓	✓	✓
amazon	✓	✓	✓	✓
BEST BUY	✓	✓	✓	✓
macy's	✓	✓	$\boxed{\checkmark}$	✓
The Home Depot	✓	✓	✓	–
CVS	✓	✓	✓	–
Staples	✓	✓	✓	–
Albertsons	✓	–	–	$\boxed{\checkmark}$
Office Depot	✓	–	–	–
target	✓	–	$\boxed{\checkmark}$	–
Lowe's	✓	–	–	–

INSIGHTS

- Most retailers have maintained their formatting options throughout the year.
- Macy's joins the club offering brand carousel over the past year.
- Since 2024, Albertsons started using video carousel.

"It's thrilling to see our Sponsored Products Report come so far in just a few years"

"With enough data to report on year-over-year trends, we are tracking the evolution of sponsored products with more insight than ever before. Future editions could include an expanded list of retailers and verticals--stay tuned!"

Ali Sasso
Senior Marketing Analytics Consultant
Pentaleap

Chapter 2

Sponsored Products Delivery

Most RMNs concentrate sponsored product ads in center-bottom.

Location of Sponsored Products (Q2 2025-Q3 2025)

Where do retailers place sponsored products on the page?

INSIGHTS

- Amazon and Walmart continue to plot the most even distribution of sponsored products across the entire page.
- Most retailers prefer the populating the bottom of the page with additional sponsored products, placing their product carousels in that real estate.
- A handful of retailers prefer the top of the page such as Staples and Best Buy.

"Ads can be additive to the customer experience"

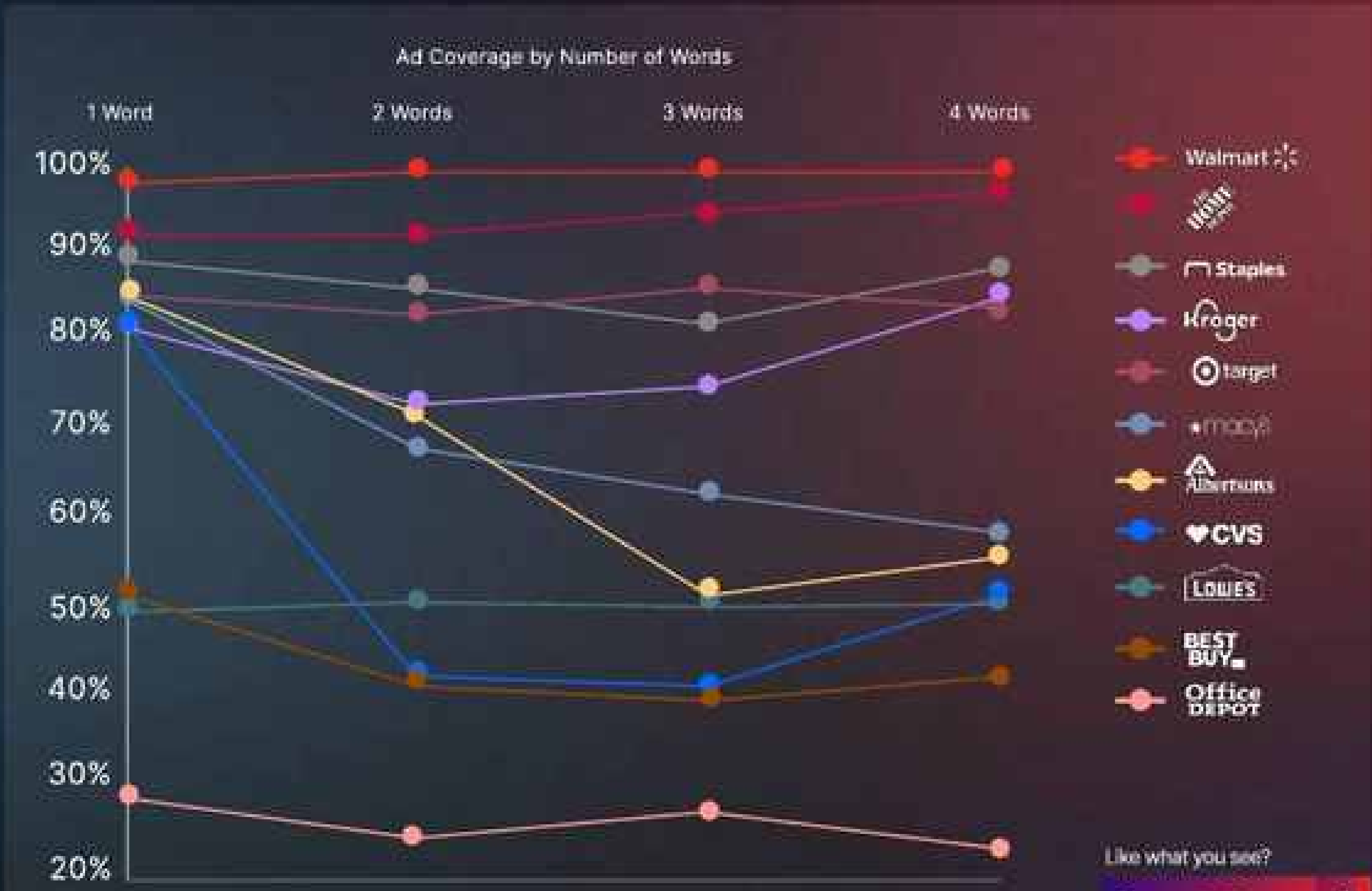
"Through this Pentaleap partnership, we've become laser-focused and invested to ensure that our sponsored products ads align even more tightly with our customers' needs when exploring products on Macy's and Bloomingdale's. We've always believed that ads can be additive to the customer experience. Now, we're doubling down on making that ring true."

Michael Krans
VP, Retail Media
macy's

Better search algorithms and ad serving improves long-tail ad coverage across retailers.

Ad Coverage by Number of Words in Search Query (Q2 2025-Q3 2025)

How effectively can retailers show sponsored products for search queries as they get more complex?



Like what you see?

Share the Report

INSIGHTS

- We see a consistent drop off in sponsored product coverage on keyword length after 1 word for retailers such as CVS, Albertsons and Macy's.
- Lowe's and Office Depot have low overall coverage but remain consistent across keyword length.
- Amazon, Walmart, Staples, Kroger and Target had the highest coverage and also remained consistent across keywords.

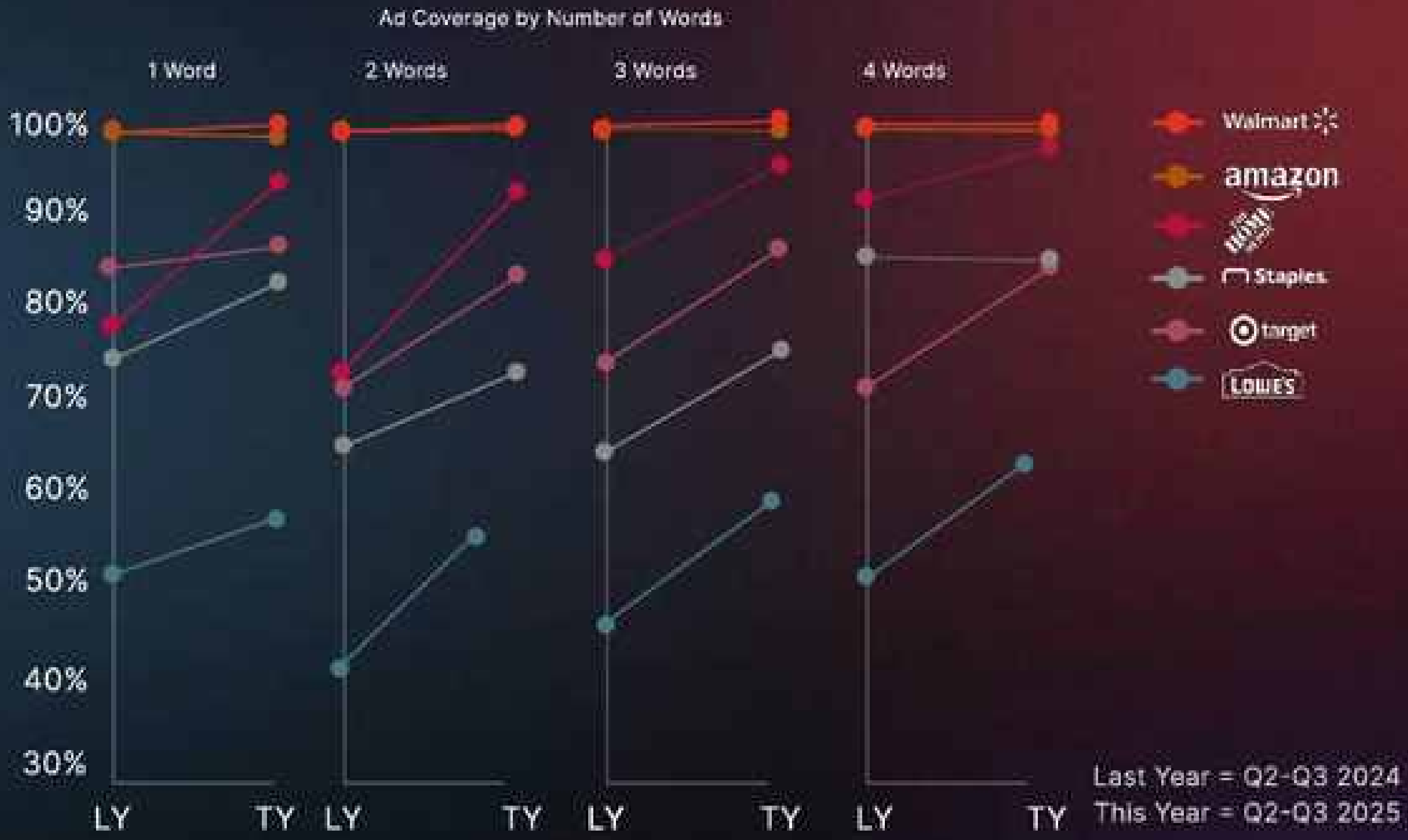
You might wonder...are we comparing apples to apples? As best we can! For each retailer we compare one to two to three to four word queries, trying to understand who has the most robust coverage.

For example:
🍎
One word query=red apples
🍎🍎🍎🍎
Four word query=
red, delicious, local apples

The Home Depot sees notable search coverage improvement increase YoY.

Ad Coverage by Number of Words in Search Query (Q2-Q3 2024 vs Q2–Q3 2025)

How effectively can retailers show sponsored products for search queries as they get more complex?



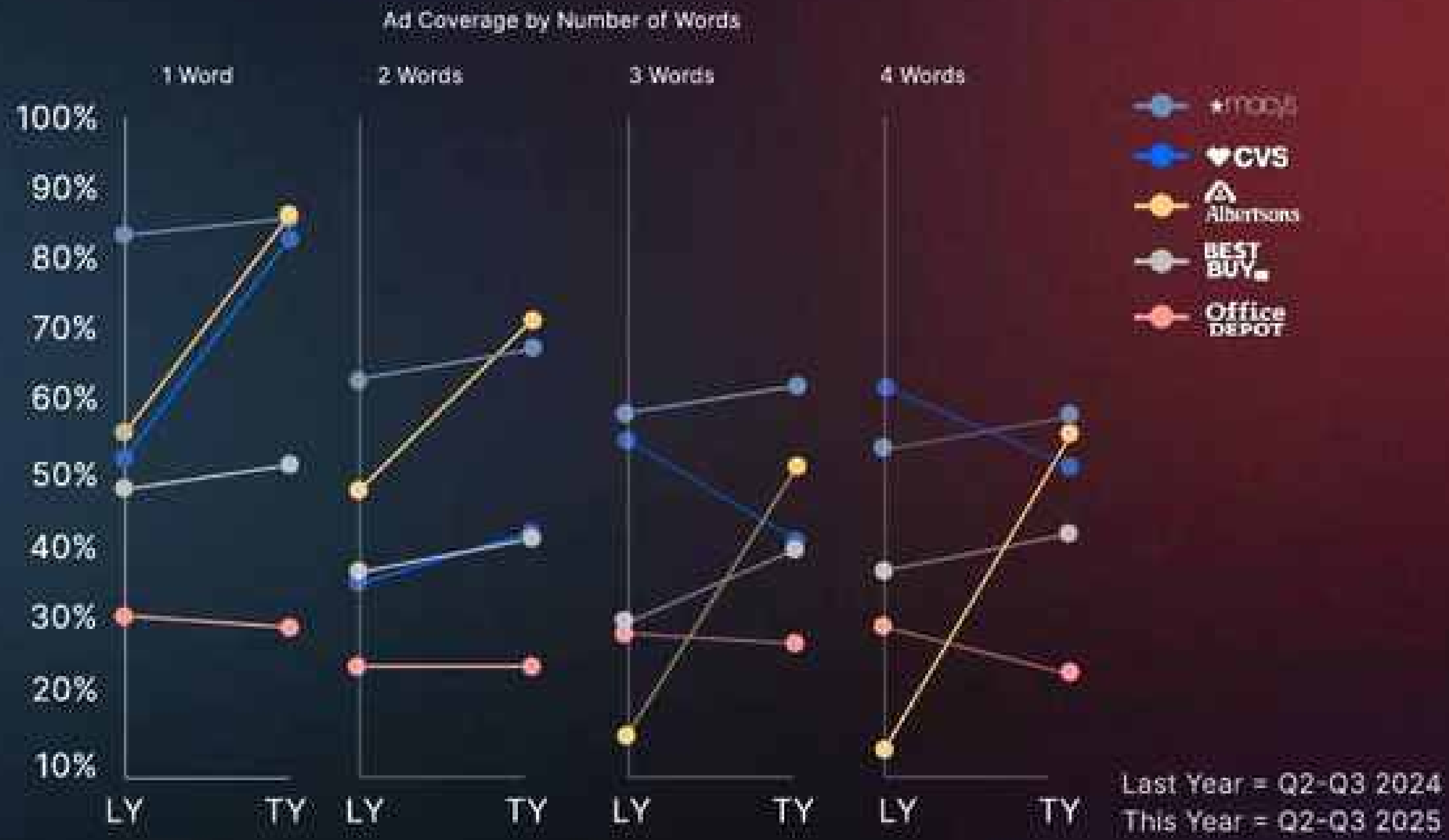
INSIGHTS

- Analyzing the YoY differences in coverage we see that most retailers increased coverage on shorter and longer tail keywords.
- The Home Depot saw a notable increase YoY, especially on 2-keyword long search queries.

Albertsons and CVS make significant improvements in search coverage for one-word queries.

Ad Coverage by Number of Words in Search Query (Q2-Q3 2024 vs Q2–Q3 2025)

How effectively can retailers show sponsored products for search queries as they get more complex?



INSIGHTS

- Both Albertsons and CVS made massive strides in improving their one-word coverage from the mid 50s to mid 80s over the past year.
- Albertsons kept up the pace with longer-tail search terms as well improving by 40 pp for three and four word queries.
- On the other hand, Office Depot remained constant or even decreased coverage in some cases.

Chapter 3

Fixed vs. Fluid Strategies

Fixed vs. Fluid Strategies

Since we began tracking ad coverage across grid positions 2 years ago, we've seen retailers diverging into two distinct strategies: Fixed (concentrating sponsored products in a few key slots) and Fluid (distributed ad placements across the grid).

Fixed Ad Units

- **What is it?** Traditional, static ad placements, such as grid tiles or banners, where ads are served based on simple metrics like bid values.
- **Pros** Easy to set up and allows advertisers to push their products to specific placements for guaranteed visibility.
- **Cons** Can indicate limited relevancy, weak personalization, can lead to ad blindness and the potential risk of dragging down the site's overall conversion rate due to less relevant ads.

Fluid Ad Units

- **What is it?** A modern method that integrates sponsored products directly with organic listings, optimizing placement based on user behaviour and contextual data.
- **Pros** Highly relevant placements, increased click-through rates, and scalable inventory through a user-friendly interface.
- **Cons** Requires products to be contained in the organic ranking. While some may see this as a limitation, it is a powerful feature that ensures only relevant products are boosted, enhancing user experience and ad effectiveness.

More Inventory, More Sophistication in 2025

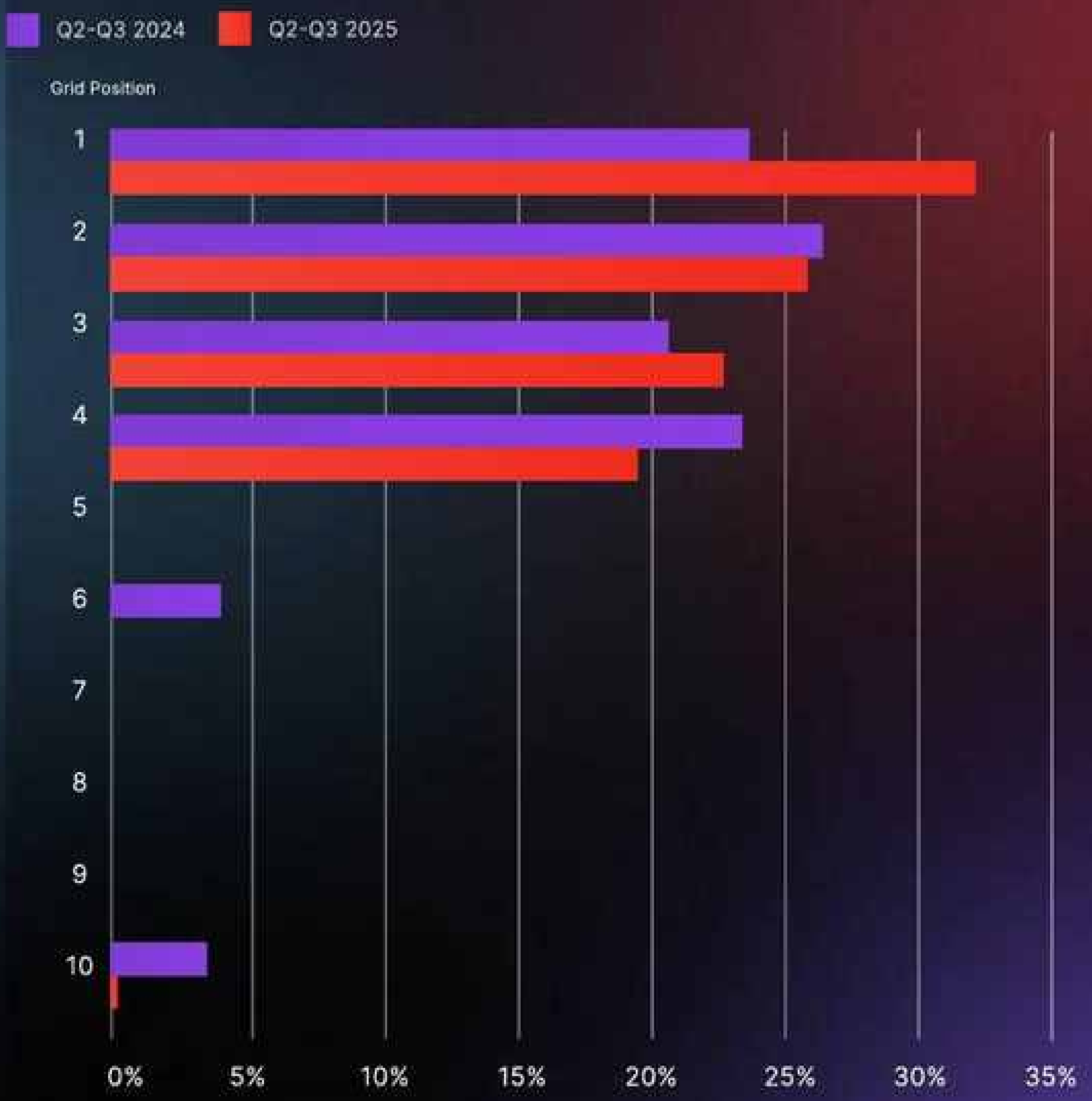
With increased ad coverage and demand, retailers have been adding inventory in the last quarters.

While retailers like Walmart appear to have added more fixed slots, a growing cohort now including Macy's, CVS and The Home Depot now place ads dynamically in the grid, indicating a shift towards fluid strategies from many retailers.

Albertsons concentrates ad coverage in top positions, slightly expanding prominent coverage in position one.

Sponsored Products Coverage by Grid Position (Q2-Q3 2024 vs Q2-Q3 2025)

How did Walmart monetize the grid with ads over the last 12 months?



Albertsons Sponsored Products Coverage

INSIGHTS

- Albertsons continues it's fixed approach, focusing sponsored products in the first four grid positions.
- They increased coverage for position one by eight pp YoY.
- This year, Albertsons retired positions six and ten.

"Retailers are finally moving past the old 'fixed slot' mindset"

"The data is in: Retailers are finally moving past the old 'fixed slot' mindset. When sponsored products can flow dynamically across the grid, you unlock more relevant inventory, better performance, and a smoother shopper experience.

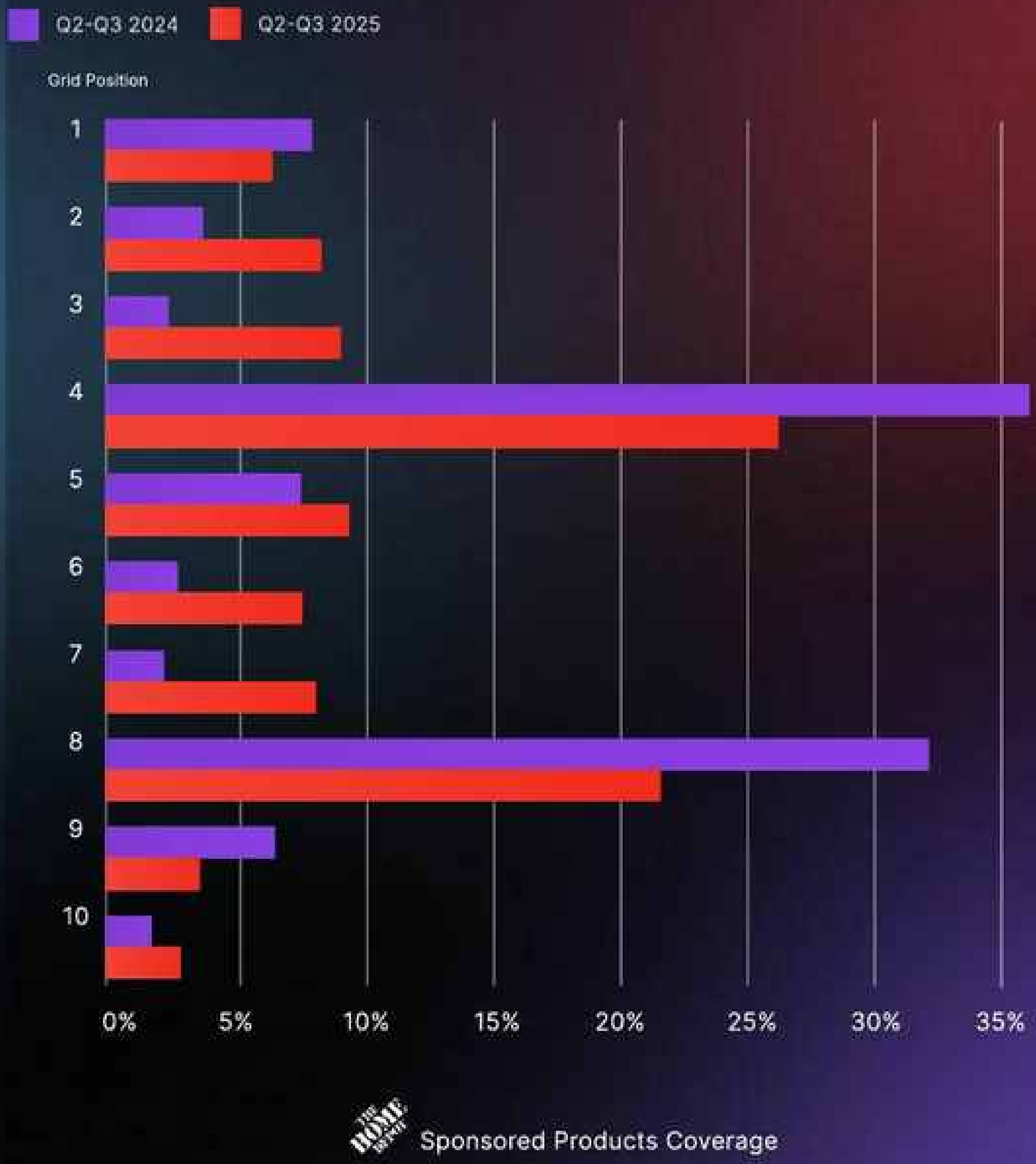
That's exactly why many leaders are shifting to a more dynamic sponsored products strategy, and why our customers choose the Fluid Ad Server. It gives them the flexibility to monetize smarter without compromising the journey."

Emma Helsloot
Director of Sales, Retail Media EMEA
Pentaleap

The Home Depot continues to follow agile ad delivery, moving away from fixed to flexible positions.

Sponsored Products Coverage by Grid Position (Q2-Q3 2024 vs Q2-Q3 2025)

How did The Home Depot monetize the grid with ads over the last 12 months?



INSIGHTS

- The Home Depot doubles down on fluid approach to ad serving, increasing coverage on slots that previously saw low coverage.
- This retailer also toned down their reliance on positions four and eight to serve the majority of their sponsored products throughout the grid.

“More retail leaders are moving from fixed to fluid sponsored products”

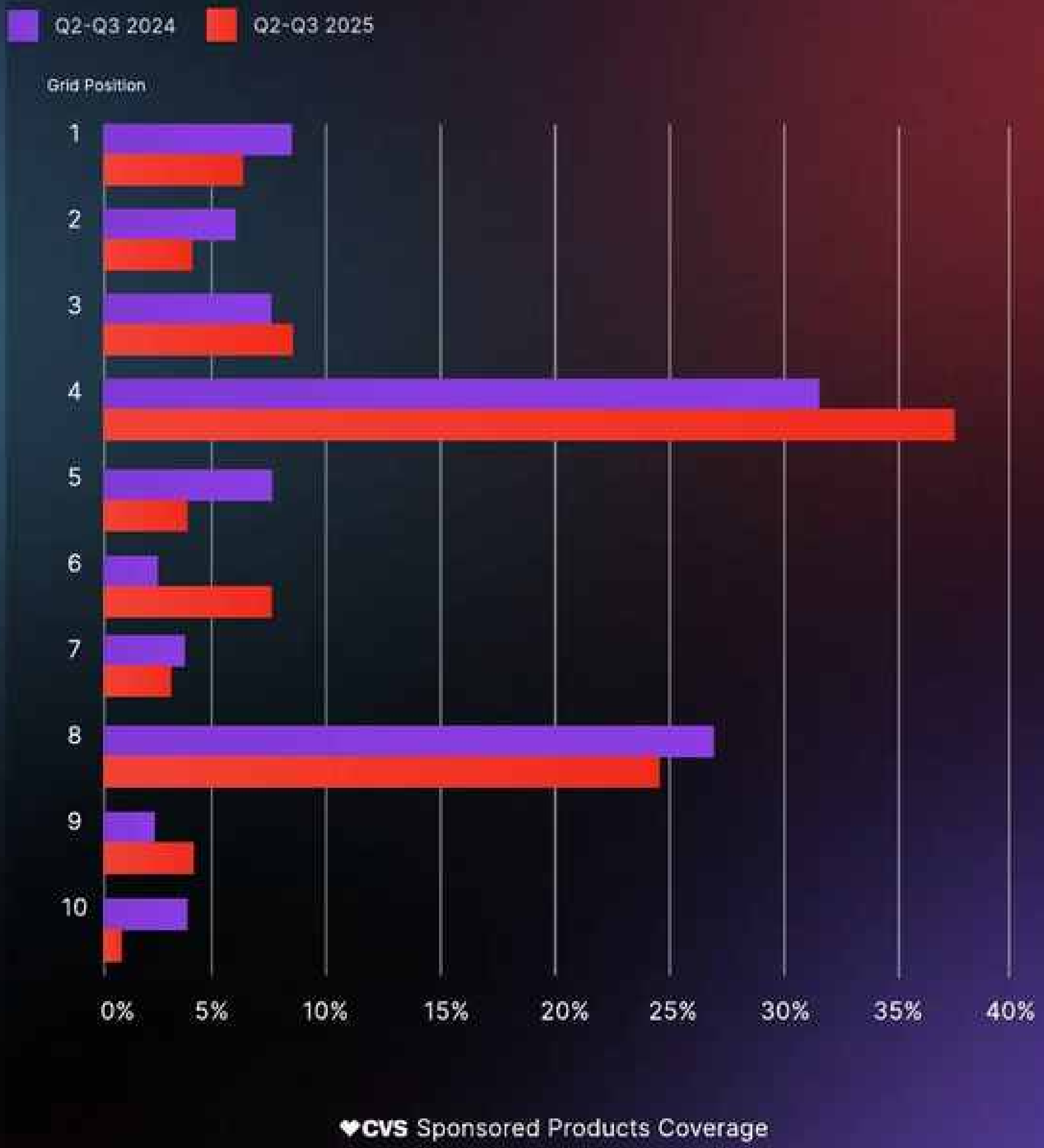
“We're seeing more and more retail leaders move from having only fixed slots in the grid, to dynamically placing products around the grid. This increases ad inventory, and it also suggests smarter integration between organic and ad decisioning. When done well, this approach boosts both customer and advertising metrics.”

Mark Burton
Chief Product Officer
Pentaleap

CVS continues a balanced and agile strategy to promote ads across the whole grid.

Sponsored Products Coverage by Grid Position (Q2-Q3 2024 vs Q2-Q3 2025)

How did Lowe's monetize the grid with ads over the last 12 months?



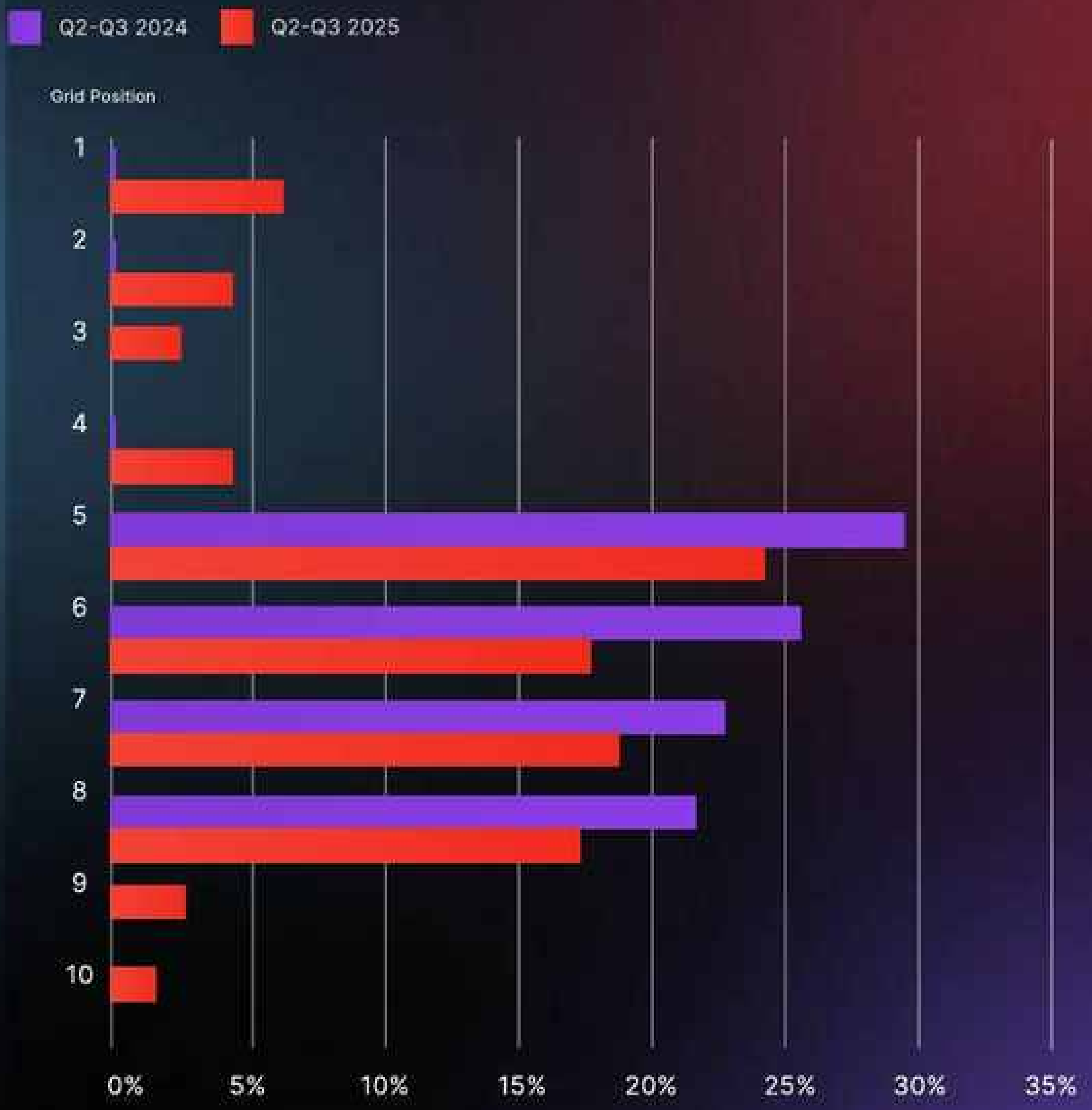
INSIGHTS

- CVS maintains a consistent fluid strategy YoY, accessing the entire ad grid to serve sponsored products, based on performance.

Macy's rolled out an update to show ads more fluidly across the grid, building on last year's strategy.

Sponsored Products Coverage by Grid Position (Q2-Q3 2024 vs Q2-Q3 2025)

How did Macy's monetize the grid with ads over the last 12 months?



★macy's Sponsored Products Coverage

INSIGHTS

- Macy's follows suit as well, opening up the ad grid fluidly to up to ten sponsored positions.
- There is still a bias towards positions 5-8 but with relative reduction YoY in favour of more ad slots.

"Over the months Macy's Media Network tested Pentaleap's Fluid Grid..."

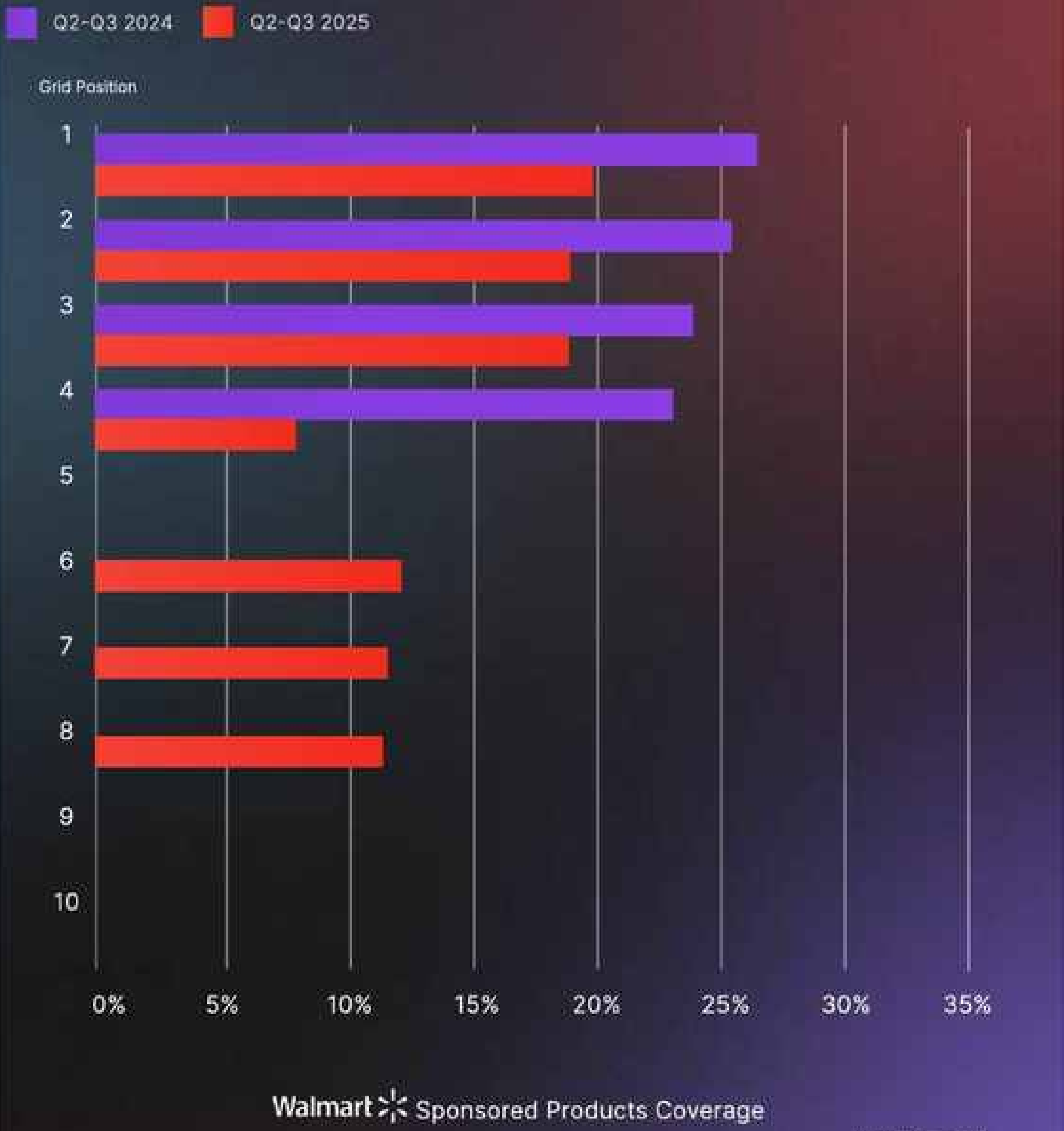
"Over the months Macy's Media Network tested Pentaleap's Fluid Grid, we found the following to be true consistently: our customers click more readily, convert at a much higher rate, and deliver materially better attributed sales and ROAS. As an RMN, we've also seen substantial increases to inventory, creating additional headroom to scale our sponsored products business."

Michael Krans
VP, Retail Media
★macy's

Walmart shifts sponsored products coverage from positions 1-4 ads into 6-8 in 2025.

Sponsored Products Coverage by Grid Position (Q2-Q3 2024 vs Q2-Q3 2025)

How did Walmart monetize the grid with ads over the last 12 months?



Like what you see?

Share the Report

INSIGHTS

- Walmart opened up their grid this year to additional positions (6-8) while toning down their reliance on the first four slots.
- Walmart is following Amazon's lead in the retail media space.

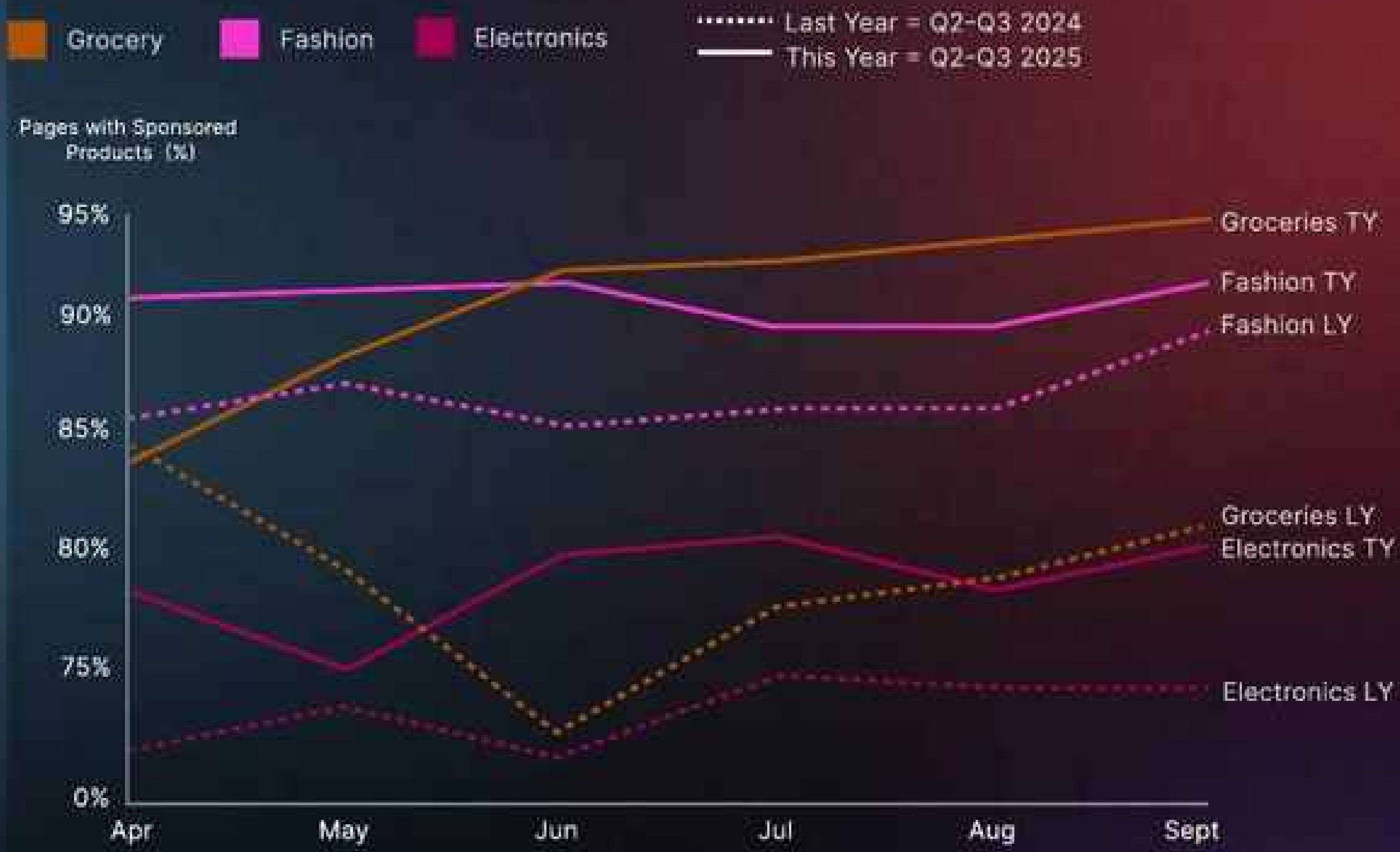
Chapter 4

Competitive Categories

Groceries picks up strongly, vs 2024, while Electronics reaches new highs.

In-Grid Sponsored Products Category Evolution (Q2-Q3 2024 vs Q2-Q3 2025)

How has sponsored products coverage evolved across categories over the past 12-months?



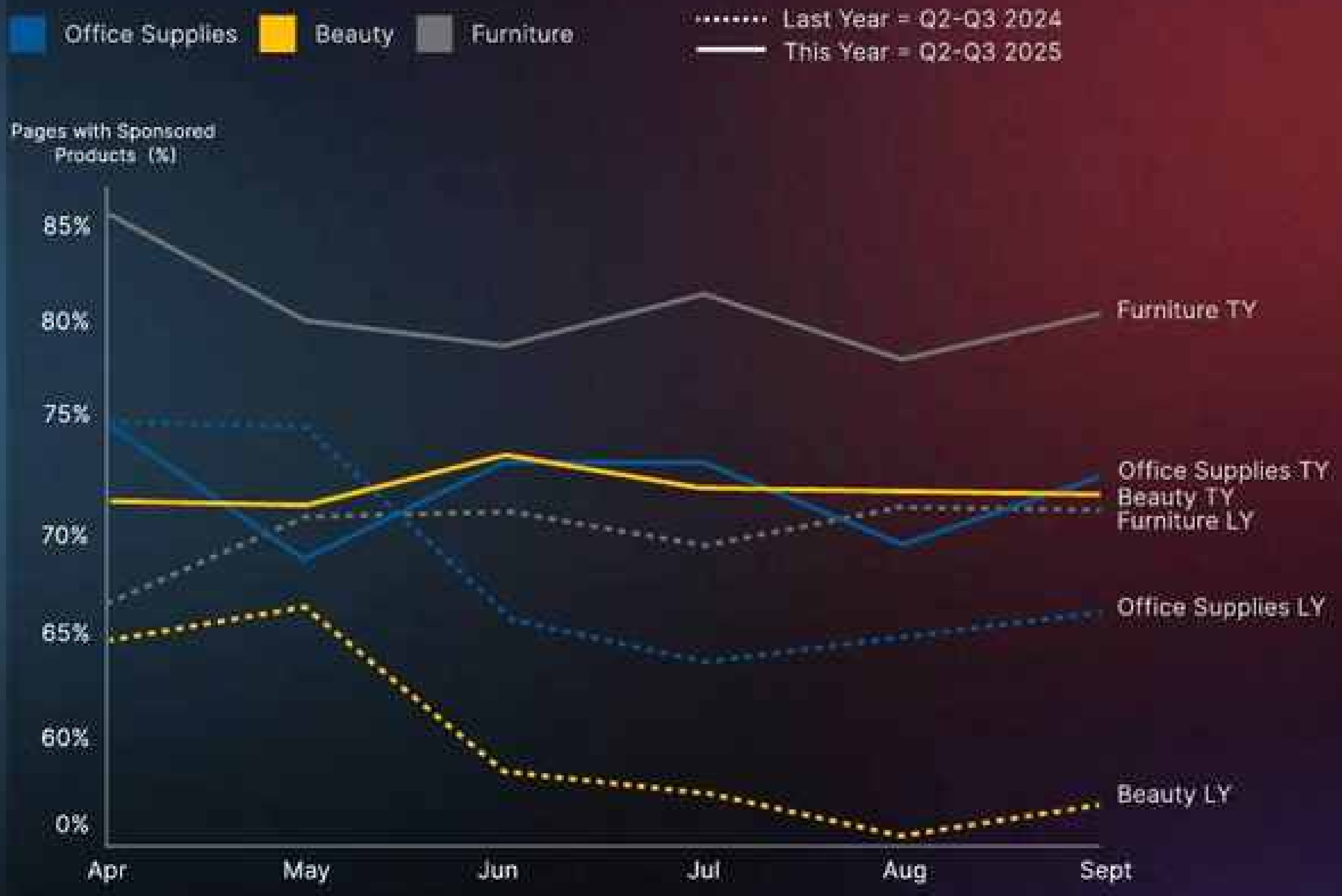
INSIGHTS

- Groceries overtook Fashion this year as the leading category with the most sponsored products coverage as of June 2025 hovering at a stable 94%.
- Electronics continues on a very stable trend, with an 10pp average increase versus the same period in 2024.

Furniture drops slightly after impressive YoY sponsored products high, Beauty is now in full swing.

In-Grid Sponsored Products Category Evolution (Q2-Q3 2024-Q2-Q3 2025)

How has sponsored products coverage evolved across categories over the past 12-months?



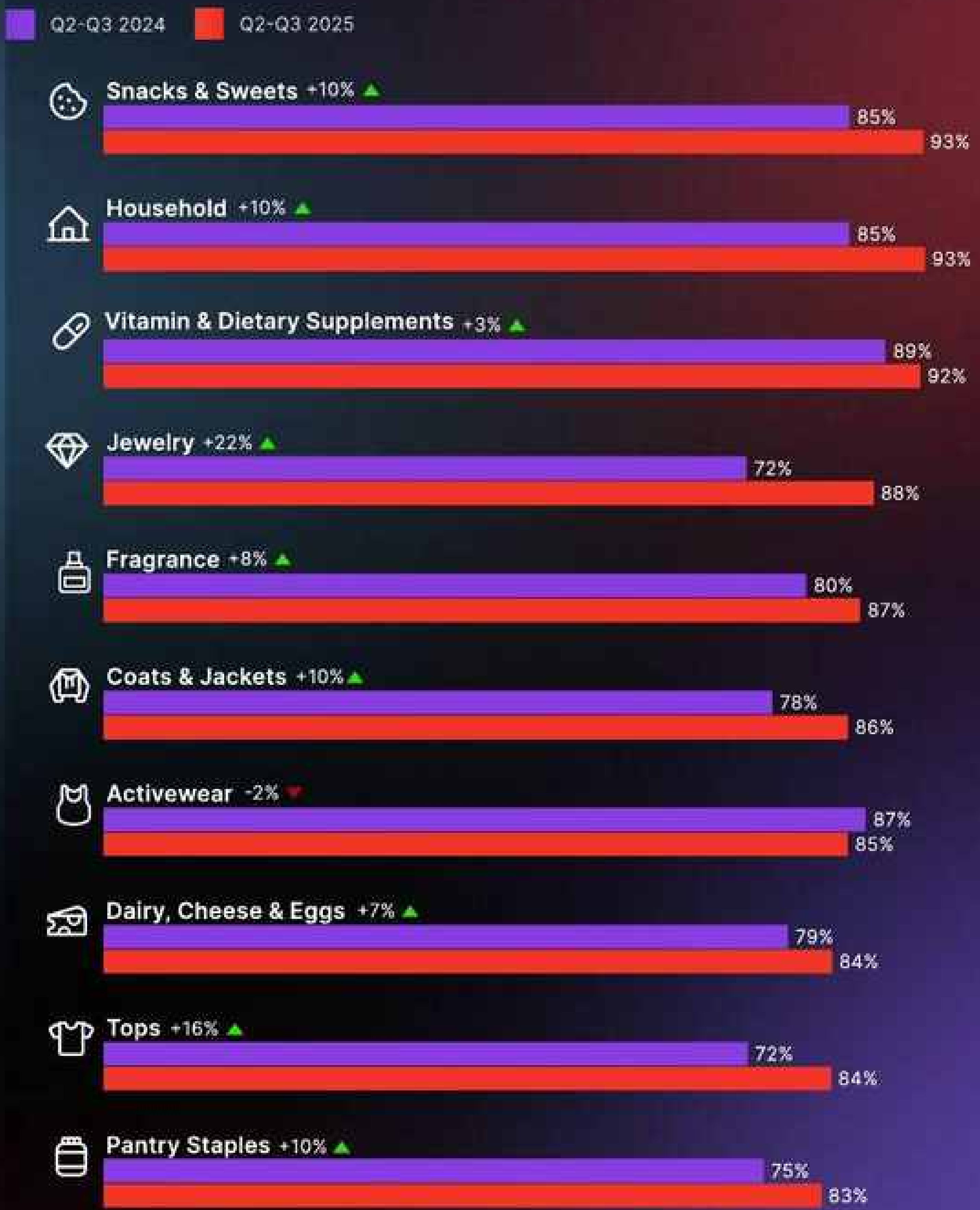
INSIGHTS

- Beauty (+15pp YoY) catches up to Office Supplies as the latter shows moderate YoY growth.
- Furniture made the largest YoY jump in Apr moving up 17 pp but slowly decreased coverage from there.

Strongest YoY growth in jewelry, while nearly all subcategories see steady coverage increase.

Percentage of Searches that Show Sponsored Products (Q2-Q3 2024 vs Q2-Q3 2025)

How many searches show sponsored products by RMN?



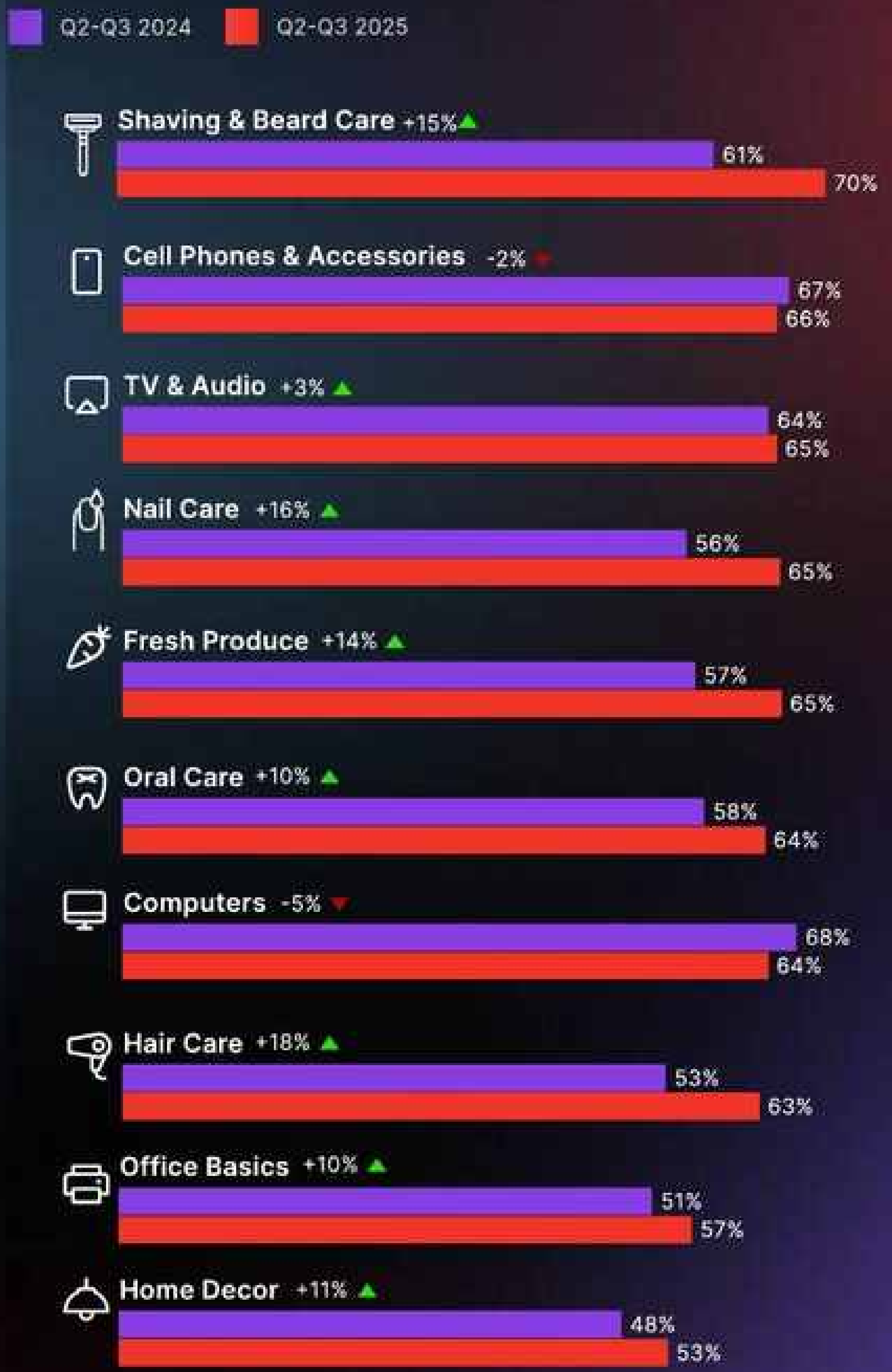
INSIGHTS

- Subcategory coverage grew an average of 9.4%.
- Strongest growth was seen in the Jewelry category (+22%), followed by Tops (+16%).
- Activewear saw a minor regression.

Even subcategories with the lowest ad coverage see growth for high-priced categories such as Furniture and TVs.

Percentage of Searches that Show Sponsored Products (Q2-Q3 2024 vs Q2-Q3 2025)

How many searches show sponsored products by RMN?



INSIGHTS

- Even the 10 subcategories with lowest coverage grew on average 12% YoY, closing the gap between top and bottom.
- Hair Care at 18% grew the most from the bottom 10, followed by Nail Care at 16%.

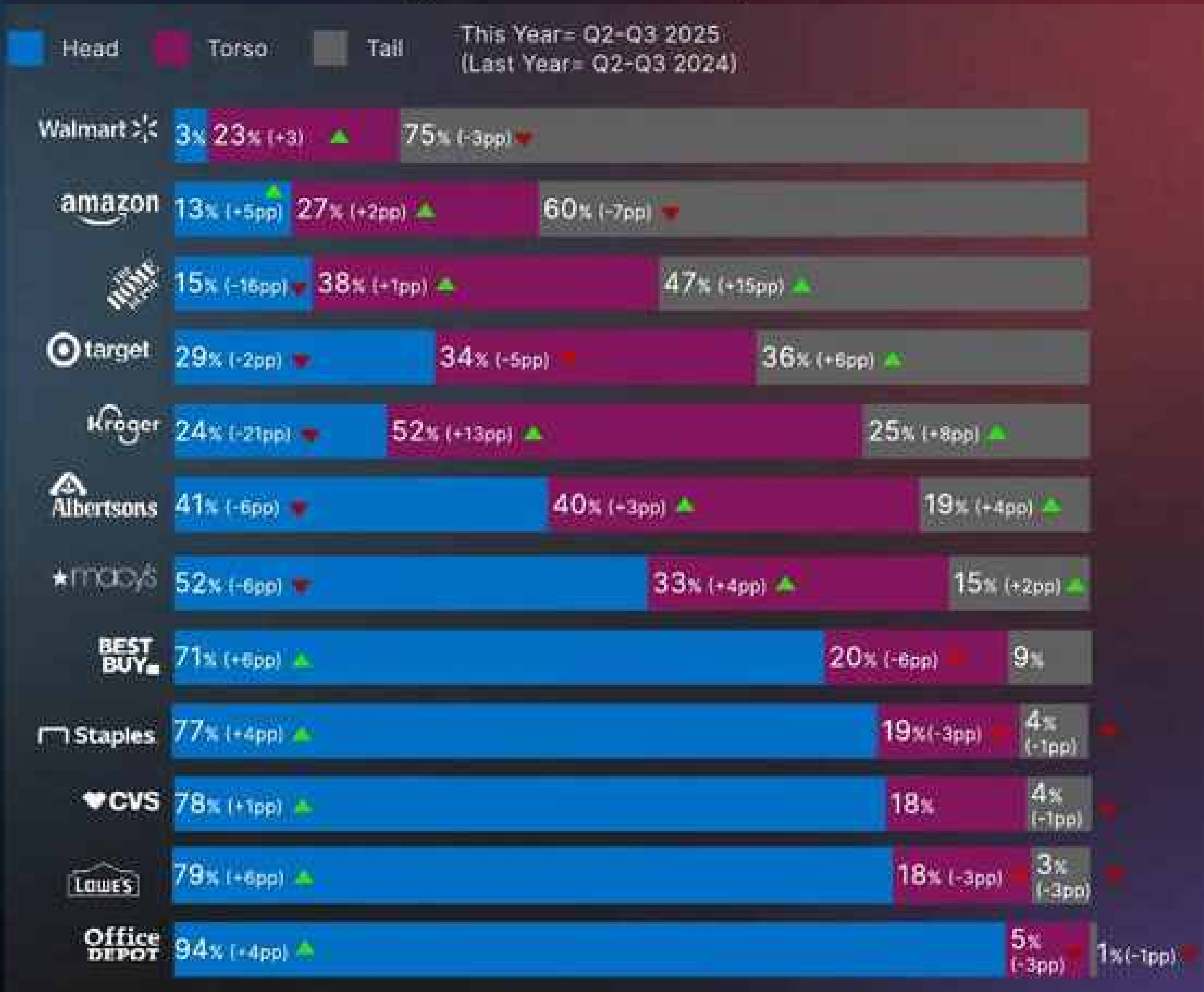
Chapter 5

Brand Investment Across RMNs

Torso and tail diversification grows among top retailers towards ecosystem dominance. Some retain head-focused strategies for efficiency, but risk stifling growth.

Percentage of Head-Torso-Tail Impressions by RMN (Q2-Q3 2024 vs Q2-Q3 2025)

What is the breakdown of large to small advertisers by retailer?



We classified Head / Torso / Tail brands as follows:

- **Head:** Brand appears in ad slot at a frequency of 1.0%+
- **Torso:** Brand appears in ad slot at a frequency of 0.2%-0.99%
- **Tail:** Brand appears in ad slot at a frequency of 0.19%-0.00%

INSIGHTS

- Overall, the Tail share of impressions grew 2% YoY as reliance on Head share of brands reduced by 2%. Torso share of impressions remained rather constant.
- The Home Depot and Kroger saw the largest shift in impression distribution, growing their Tail by 15pp and 8pp respectively while decreasing their Head portion of impressions by 16pp and 21pp respectively.
- Interestingly, Amazon increased its Head portion by 5pp but still remains one of the most diversified approaches, exceeded only by Walmart.

Note on Classification

1. **What we call "impressions"** in this report is actually brand appearances as a proxy for impressions. In other words, the frequency at which a brand appears on a search results page.
2. **Please Note:** this analysis includes tracked or identifiable brands only.
3. **The methodology** was developed in collaboration with Colosseum Strategy.

“The Most Innovative Brands Blend Shelf-buying with Brand-building to Create More Leverage Across the Path to Purchase”

“We’ve been anticipating this catching on for a few years and it’s finally hitting critical mass. Sponsored Products share shifting from large advertisers to small and medium-sized brands always appeared to be the next evolution. For challenger and growth-stage companies, Sponsored Products offer a rare opportunity: Access premium shelf space that would typically take years of brand equity and retail relationship-building to earn. These placements allow newer brands to appear alongside category leaders, creating a perception of parity and relevance that accelerates both trial and trust.

On the flip side, the dominant, established brands (many of whom helped scale Sponsored Products in the first place) are confronting a different reality. Each year, the bill to maintain their presence is growing, but the return is increasingly flat. They’re spending more each year just to hold ground. That’s a tough sell to your CFO and your analytics teams. That reality is leading to a strategic reallocation of dollars—away from bidding wars and into activations that drive branded search, improve visibility through content, and build more durable, less subsidized demand.

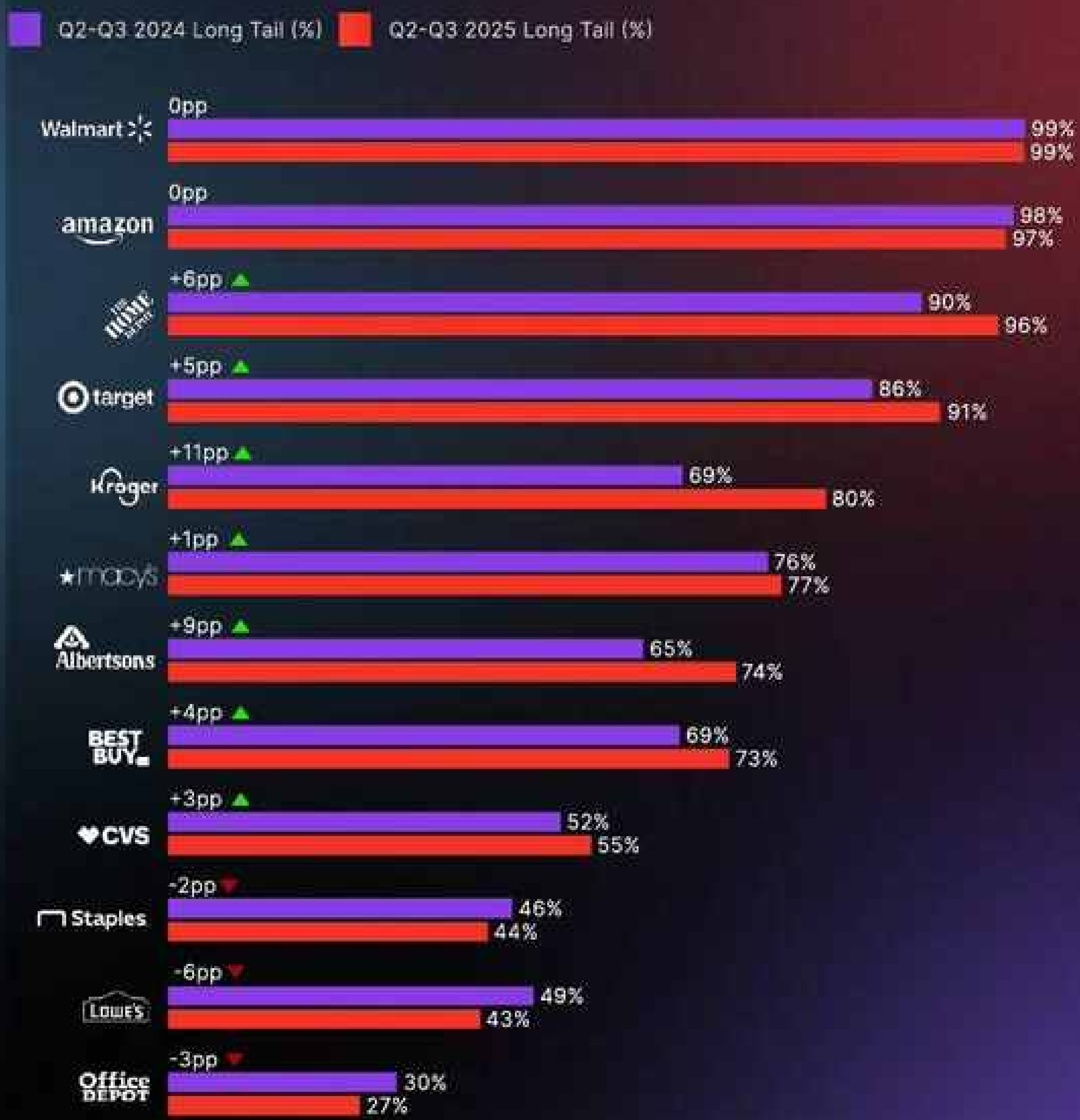
The most innovative brands, large and small, are learning how to blend shelf-buying with brand-building to create more leverage across the path to purchase.”

Jordan Witmer
Managing Director - Retail & Commerce Media
SALT

Bigger retailers offer thriving ecosystems for long-tail advertisers, building a more resilient marketplace.

Percentage of Advertisers in Long Tail by RMN (Q2-Q3 2024 vs Q2-Q3 2025)

Which retailers are maximizing the long tail of advertisers?



Please note: Comparing count of long-tail advertisers rather than the sum of impressions, we can scope the volume of new/smaller advertisers being onboarded to retailers.

INSIGHTS

- Kroger and Albertsons saw the largest increase in their tail shares of impressions by +11pp and +9pp respectively.
- Lowe's increased their share of head impressions as they likely onboarded larger ticket advertisers through their 3p marketplace initiative while still managing to increase advertiser count by 23% YoY.
- Overall, Tail advertisers jumped 2pp from an average of 69% to 71% YoY.

"Lowe's expanded its 3P marketplace in late 2024 and has quickly capitalized on those sellers as advertisers."

"3P sellers, when provided with the right tools, can drive considerable incremental advertising revenue for retailers."

Kiri Masters
Retail Media Industry Analyst,
Retail Media Breakfast Club,
Contributor to
The Drum. Forbes

Tail growth dominates in 2025 with YoY shifts towards smaller advertisers.

Percentage of Impressions in Head-Torso-Tail for Marketplace vs Non-marketplace (Q2-Q3 2024 vs Q2-Q3 2025)

What is the breakdown of large to small advertisers across marketplaces vs non-marketplaces?

INSIGHTS

- Non-marketplaces shifted distribution with more volatility (+8pp Tail & -8pp Head) than Marketplaces, which remained rather stable YoY.
- The trend towards greater tails and smaller heads continues for both Marketplace and Non-marketplace retailers.

We classified retailers as:

- **Marketplace:** Amazon, Walmart, Target, The Home Depot, Albertsons, Macy's, Lowe's
- **Non-marketplace:** Best Buy, Staples, CVS, Kroger, Office Depot

Smaller brands find more space to shine within multicategory.

Percentage of Impressions in Head-Torso-Tail for Specialty vs Multicategory (Q2-Q3 2024 vs Q2-Q3 2025)

What is the breakdown of large to small advertisers across specialty vs multicategory?

INSIGHTS

- With the increase in category-level coverage we saw earlier in the report, we see distribution shifts towards Torso and Tail reflected here as well.
- Speciality and grocery retailers increased their Tail significantly at the expense of Head.

We classified retailers as:

- **Grocery** = Kroger, Albertsons
- **Multicategory** = Amazon, Walmart, Target
- **Speciality** = The Home Depot, Macy's, Lowe's, Best Buy, Staples, CVS, Office Depot

> “Smaller brands are 'finding more space to shine', especially within multicategory retailers.”

“This in turn is creating a more competitive marketplace that is shifting more and more in real time as new players emerge. It is now easier for smaller challenger brands to take share of larger players and compete. They can also move more quickly to capture trends, update content and adjust their strategies as retailers shift theirs.”

Lauren Livak Gilbert
Executive Director
DIGITAL SHELF INSTITUTE

Chapter 6

Brand Trends

Electronics brands lead the charge in sponsored products volumes across RMNs while Fashion and Beauty mark a notable presence.

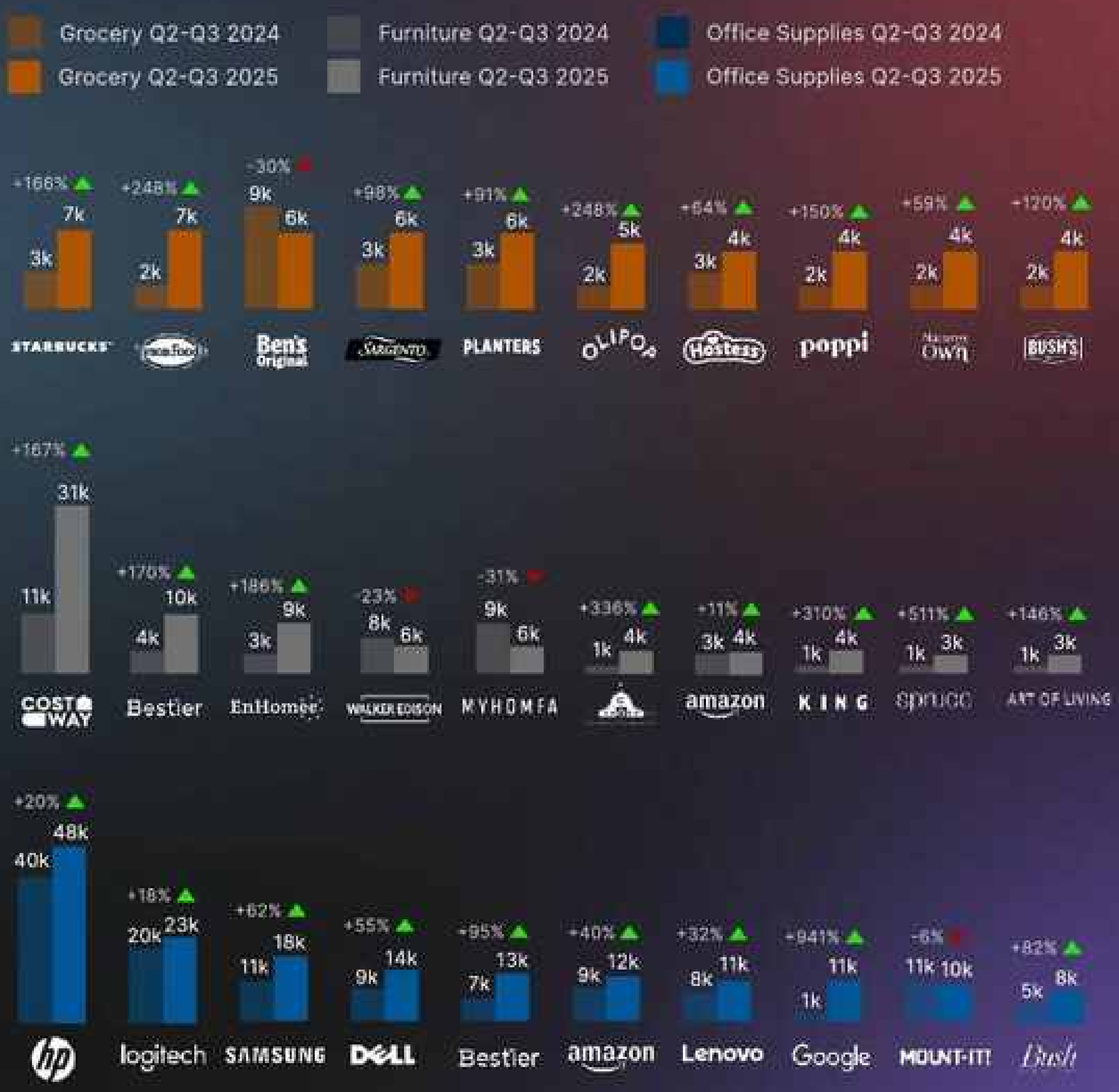
Top 10 Advertisers by Impression Volume, Per Category (Q2-Q3 2024 vs Q2-Q3 2025)

Which brands appear most frequently in sponsored products by category?

Electronics brands lead the charge in sponsored products volumes across RMNs while Fashion and Beauty mark a notable presence (cont'd).

Top 10 Advertisers by Impression Volume, Per Category (Q2-Q3 2024 vs Q2-Q3 2025)

Which brands appear most frequently in sponsored products by category?



Like what you see?

Share the Report

INSIGHTS

- Office supplies has the one brand with the most impressions (HP) across all categories while Electronics is the category with the most impressions overall.
- Furniture had the most volatility with new brands such as Spruce, King and Farmhouse moving into the top 10 with very strong growth.
- Furniture's top 10 advertisers impression volume was the fastest growing YoY increasing by 182%, followed by Electronics at 83% and Groceries at 80%.
- In Beauty, Neutrogena takes the lead moving from tenth to first position YoY as Clinique experiences a decline.
- Fashion experiences the least amount of growth among the top 10 brands in the category at +18% with Nike dropping off -27% YoY.

"Fashion and Beauty brands compete for 'digital shelf' space in fiercely competitive categories"

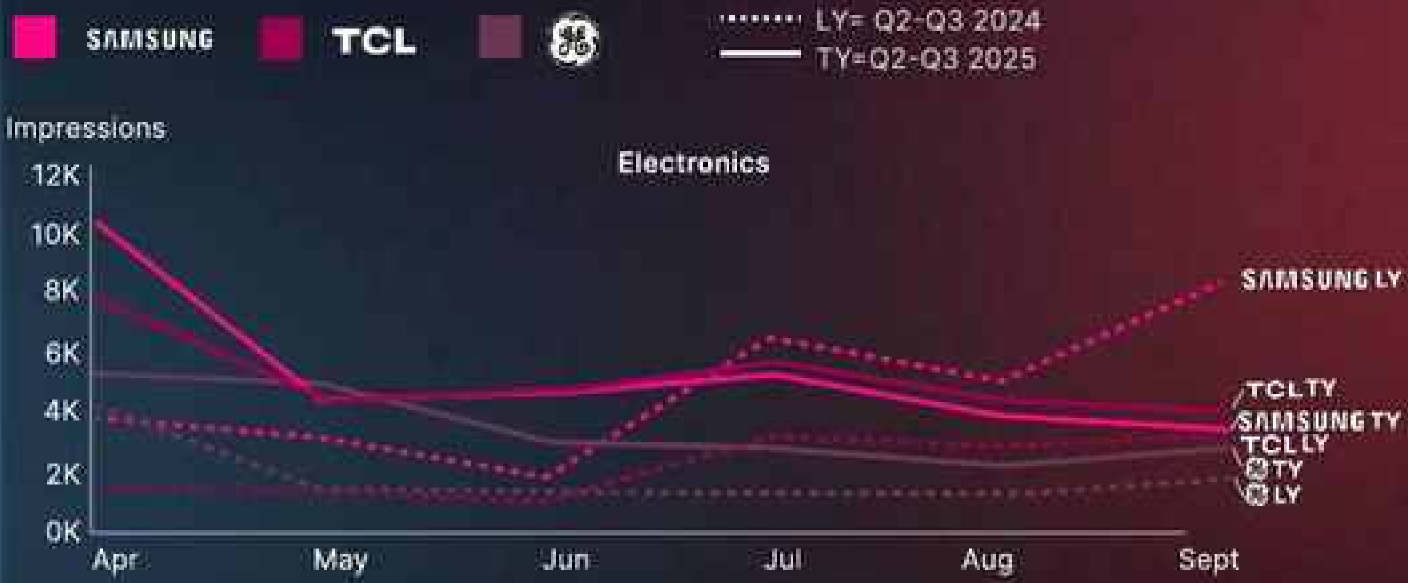
"At Teads, we are looking to support our brands across the entire consumer journey in the content consumption and discovery environments that ultimately lead them to product sales. As consumer electronic, fashion and beauty brands compete for 'digital shelf' space in fiercely competitive categories -- it is no surprise that these categories are leading the way in a tough macro environment in 2025 for CPG operators."

Justin Sparks
GM, Retail & Commerce Media
teads

Slight YoY growth in impressions recorded for top 3 Electronics brands.

Top 3 Electronics Advertisers by Sponsored Products Impression Volume (Q2-Q3 2024 vs Q2-Q3 2025)

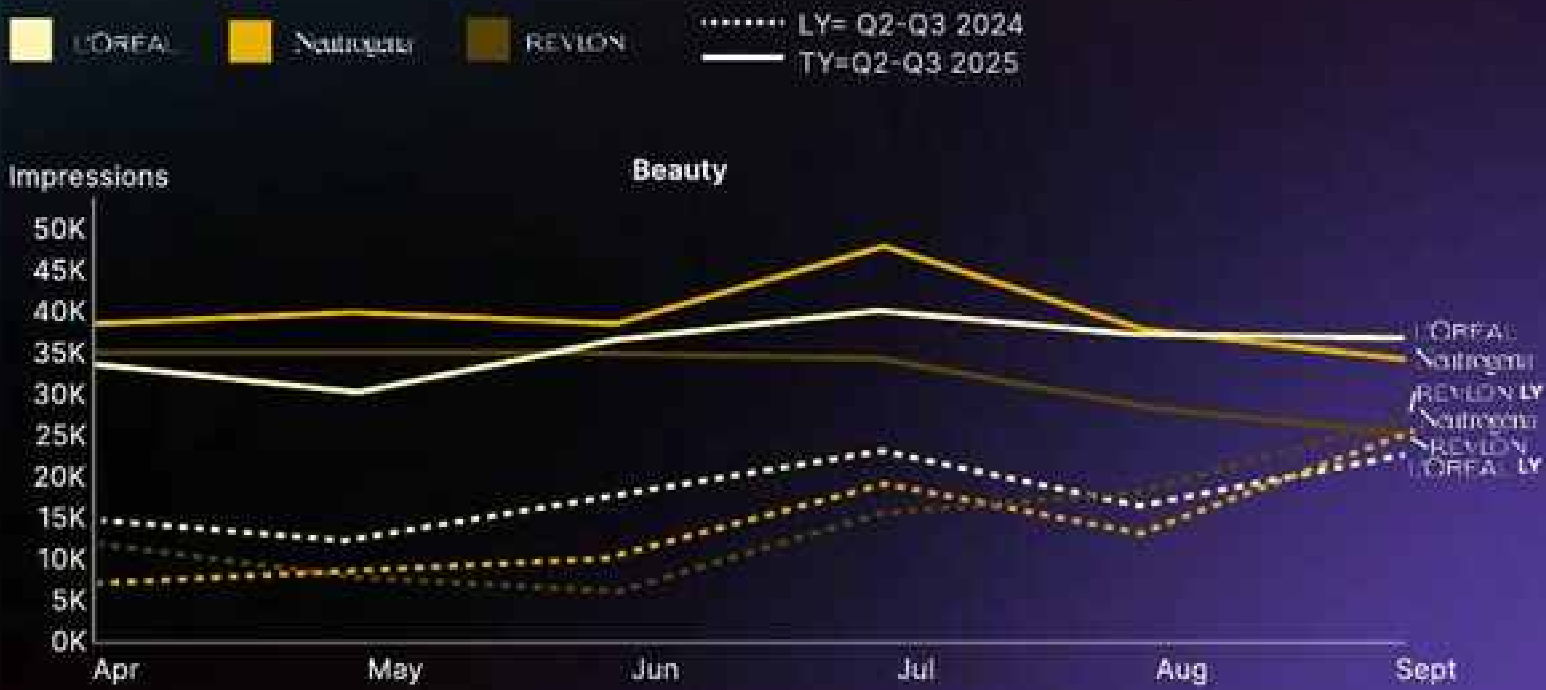
How do YoY impressions compare across top electronics brands?



Strong growth YoY in top Beauty brands following seasonality trends.

Top 3 Beauty Advertisers by Sponsored Products Impression Volume (Q2-Q3 2024 vs Q2-Q3 2025)

How do YoY impressions compare across top beauty brands?



Fashion impressions vary among top 3 brands: Levi's and Jockey surge, DKNY declines YoY.

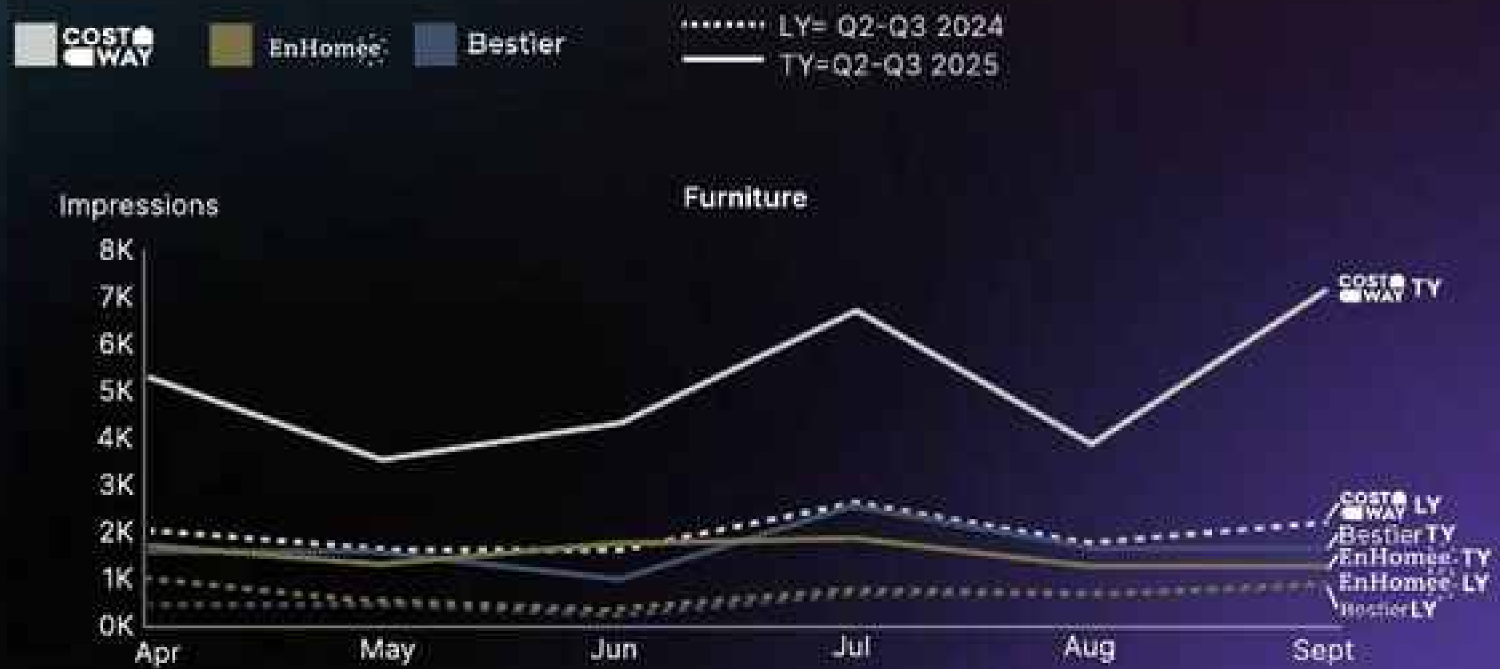
Top 3 Fashion Advertisers by Sponsored Products Impression Volume (Q2-Q3 2024 vs Q2-Q3 2025)

How do YoY impressions compare across top fashion brands?

Booming Furniture sector: Triple-digit YoY growth across top 3 brands.

Top 3 Furniture Advertisers by Sponsored Products Impression Volume (Q2-Q3 2024 vs Q2-Q3 2025)

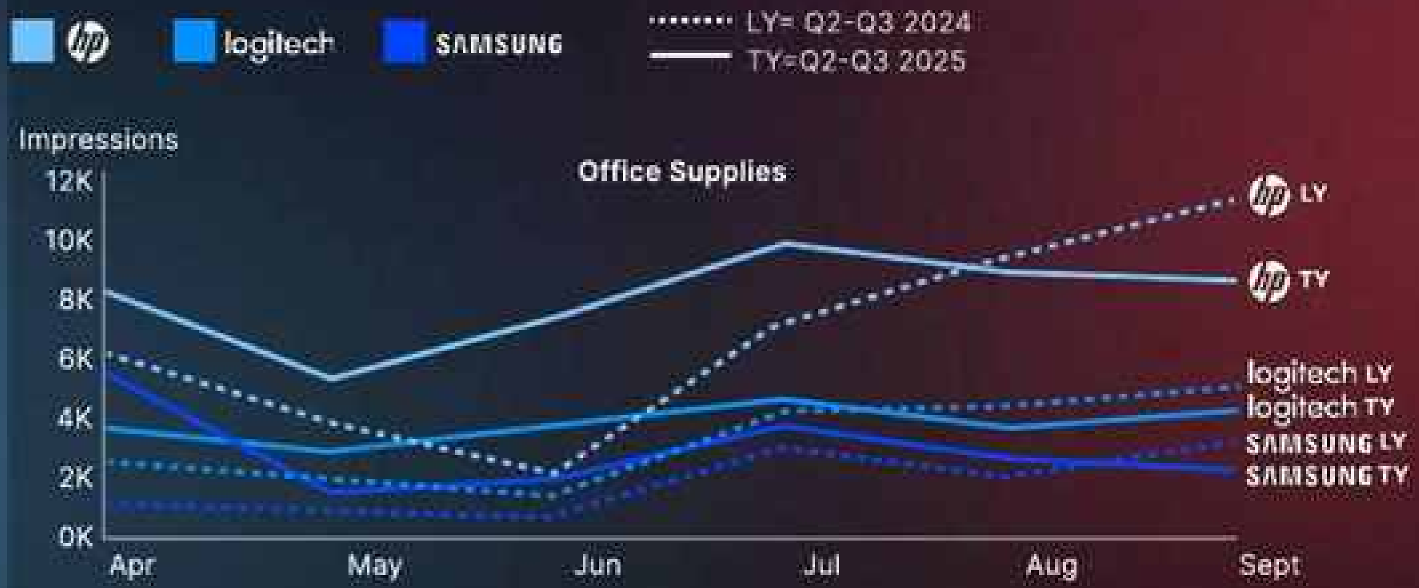
How do YoY impressions compare across top furniture brands?



Strong YoY growth across Office Supply brands; HP maintains dominance despite high volatility.

Top 3 Office Supplies Advertisers by Sponsored Products Impression Volume (Q2-Q3 2024 vs Q2-Q3 2025)

How do YoY impressions compare across top office supplies brands?



Strong growth in Grocery across top brands following seasonality trends.

Top 3 Grocery Advertisers by Sponsored Products Impression Volume (Q2-Q3 2024 vs Q2-Q3 2025)

How do YoY impressions compare across top grocery brands?

INSIGHTS

- Zooming into the top three Electronics brands we see growth tapering down towards the end of the year.
- Beauty's top three brands on the other hand maintained their YoY growth more consistently from April to September.
- Fashion's top three performance was mixed with Jockey maintained a very strong lead on its previous years performance while DKNY and Levis faltered towards September.
- Ben's originals in Grocery had a choppy 6 months starting out absent from the auctions before retaking it's place by September as the top brand in the category but still failing to meet last years volumes.

"Furniture's growth shows how quickly new players can scale when they align with smarter retail media systems.

The same evolution we've seen at The Home Depot and Albertsons with fluid placements, broader coverage, and intent-driven optimization is now enabling new brands to ramp up visibility and impact at a remarkable speed."

Ana Laura Zain
Chief Marketing Officer
Pentaleap

Chapter 7

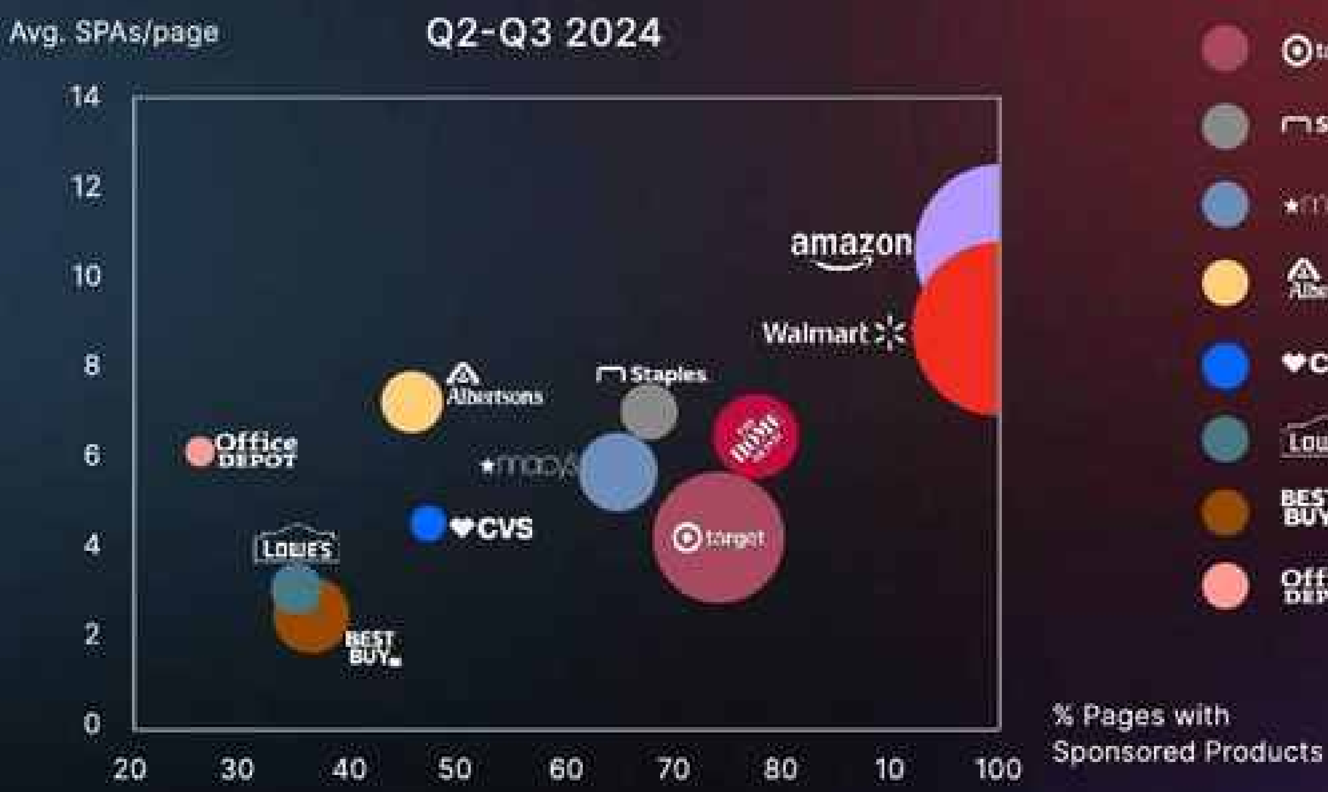
Retail Media Network Trends

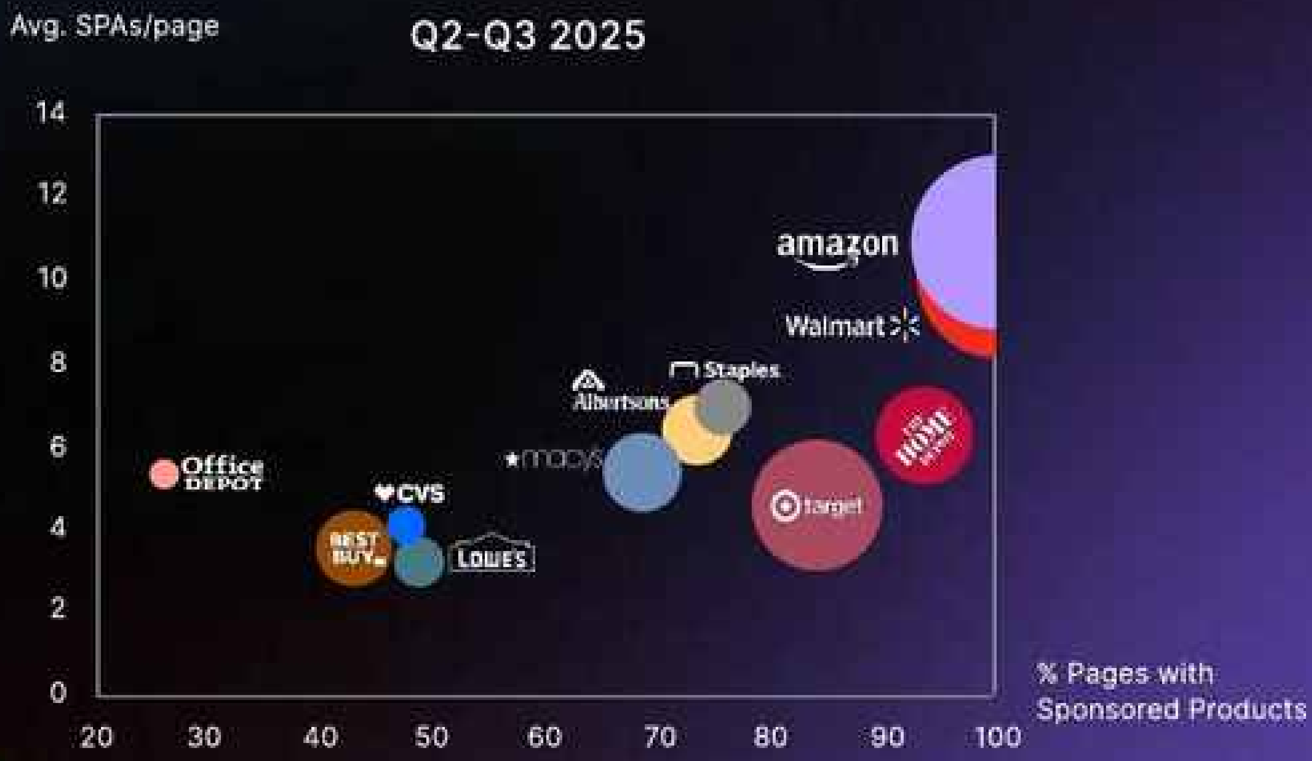
Albertsons and Kroger significantly improved their search coverage and now sit in the right half. The Home Depot nearly caught up with Amazon and Walmart.

Average In-grid Sponsored Products Coverage (Q2-Q3 2024 vs Q2-Q3 2025)

How do retailers' breadth and density of sponsored products compare over the past year?

Bubble size = Number of pages with SPAs*





INSIGHTS

- Similar to last year, most retailers saw an increase in coverage percentage, with little movement in average total sponsored products per page.
- Walmart and Macy's saw no significant changes YoY.

“There is still so much headroom in onsite performance advertising for retailers"

"The 300lb gorillas in the room -- Amazon and Walmart -- prove there is still so much headroom in onsite performance advertising for retailers. Separate reporting shows CPCs continue to climb on these properties, demonstrating that demand still outstrips supply from brand advertisers, even with near-total ad coverage."

Kiri Masters
Retail Media Industry Analyst,
Retail Media Breakfast Club,
Contributor to
The Drum. Forbes

Albertsons slightly decreased ads per page, likely a byproduct of strong growth in covered searches: they now have a larger base of monetized pages to scale

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Albertsons?

Amazon follows a consistent seasonal trend – changes only in decimals.

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Amazon?

Best Buy sees impressive YoY growth in ad density.

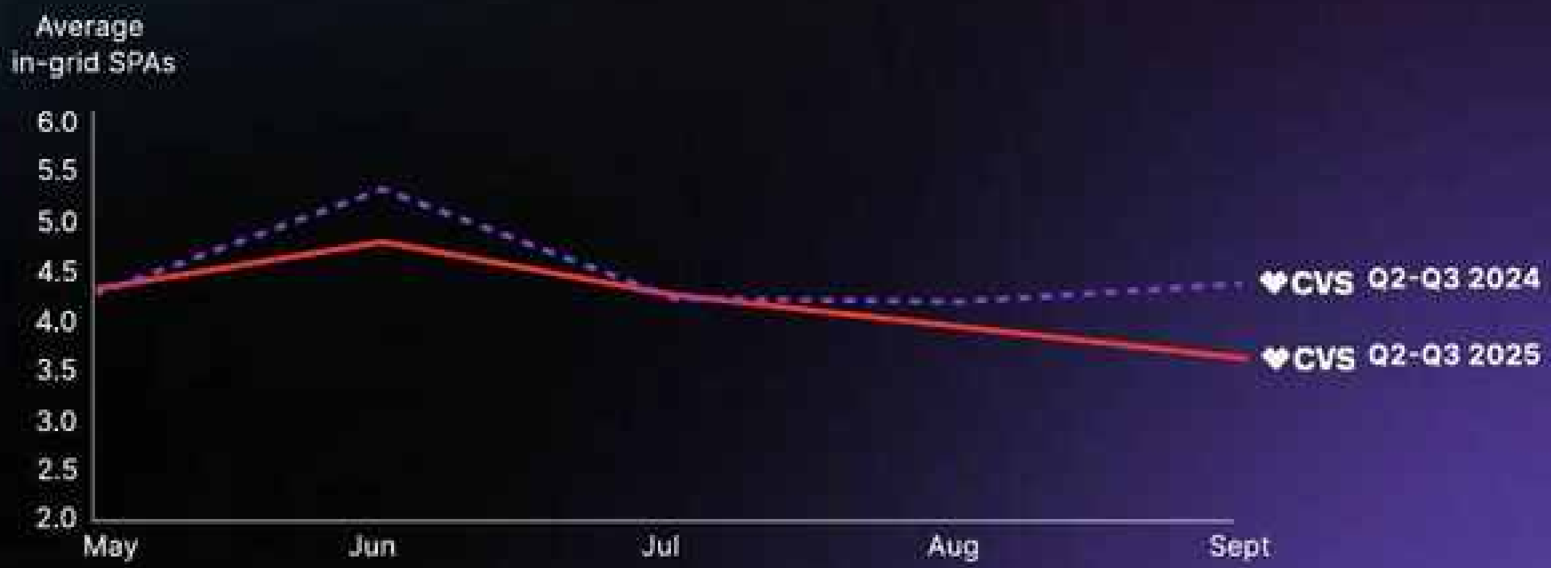
RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Best Buy?

CVS is very stable in ad density per page.

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for CVS?



The Home Depot slightly decreased ads per page but makes up for it with more search terms containing ads.

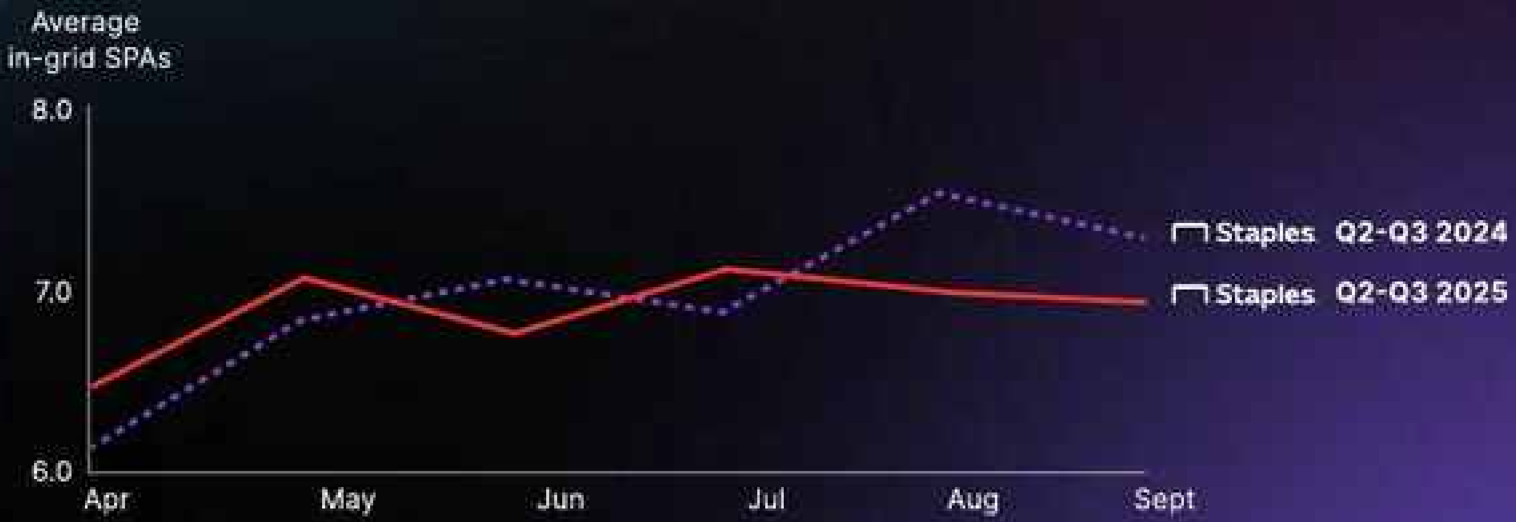
RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for The Home Depot?

Staples follows last year's seasonality trends, maintaining a high number of in-grid ads.

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Staples?



Lowe's sees a marginal increase in sponsored products load

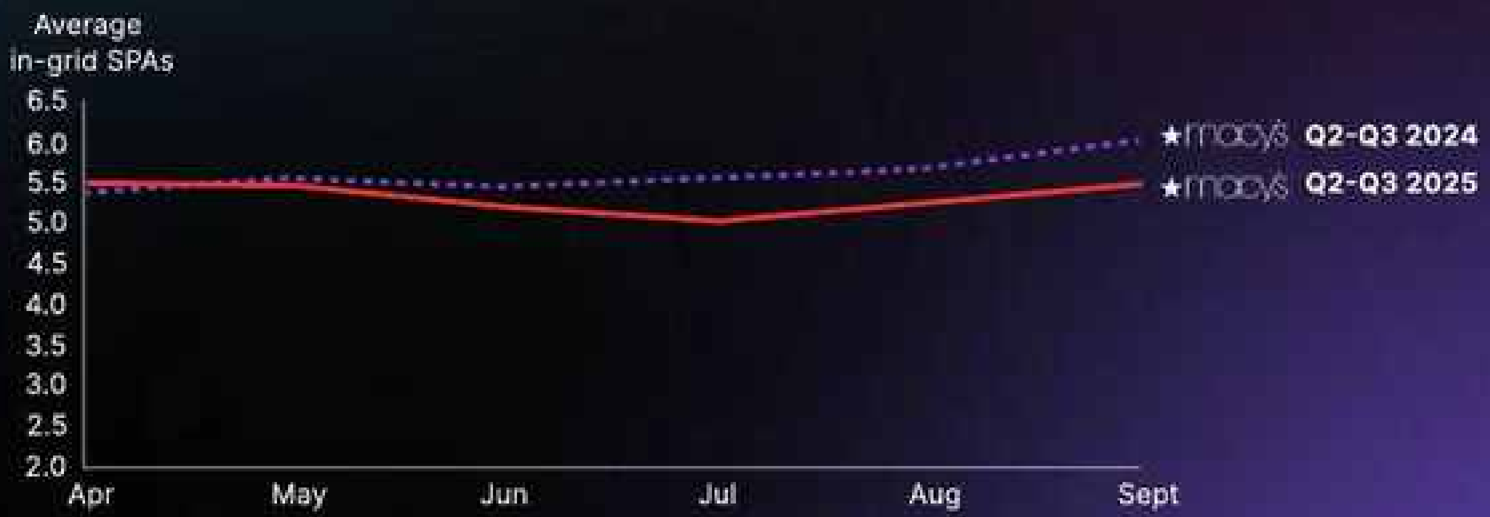
RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Lowe's?

Macy's drops off slightly throughout the year for a larger relevancy gain

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

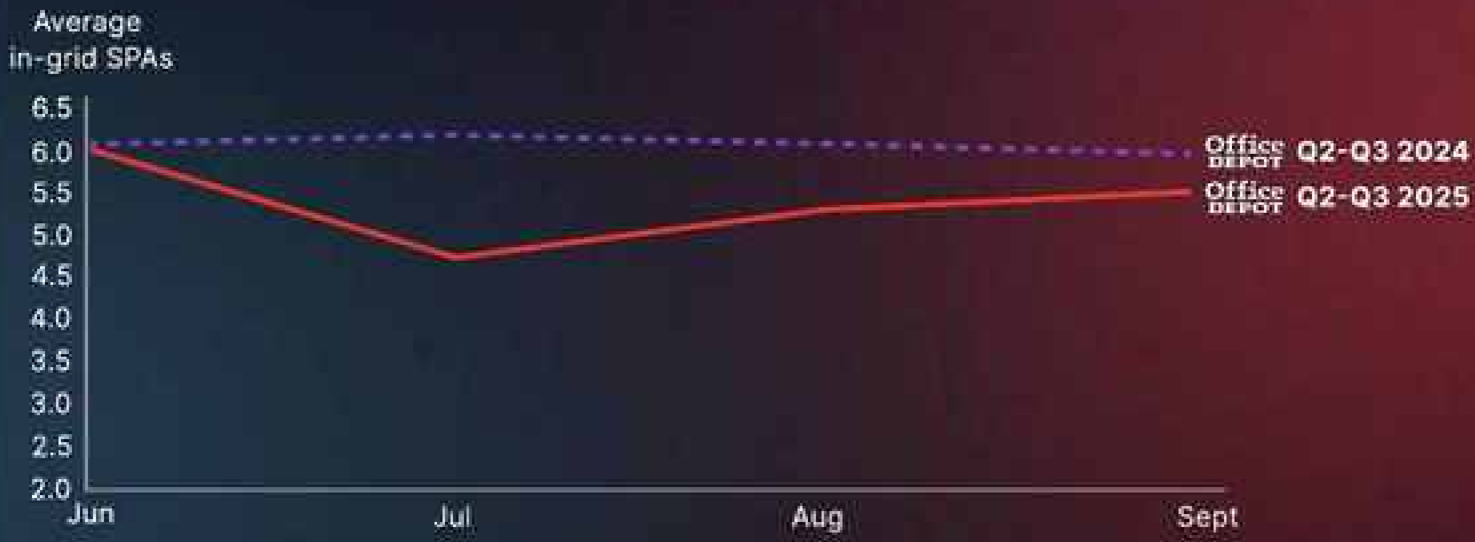
How has average ad load per page evolved for Macy's?



Office Depot maintains a steady ad load without interruption this year

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

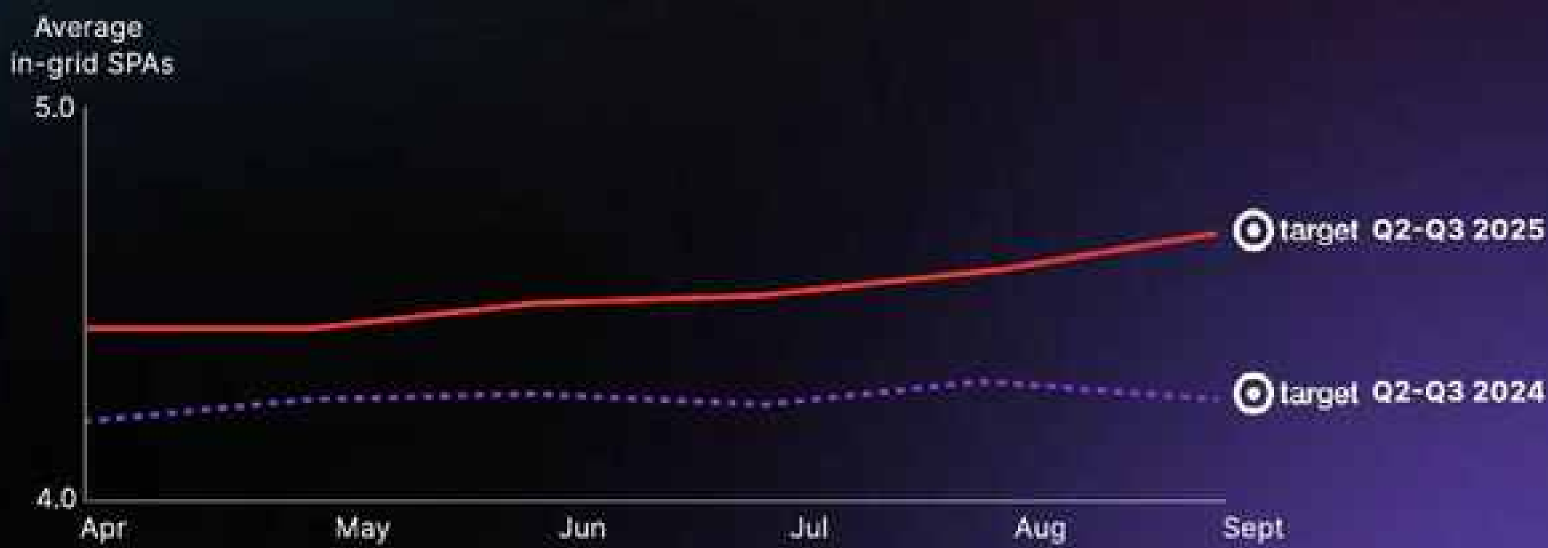
How has average ad load per page evolved for Office Depot?



Target scales moderately with steady growth in ad load per page and 10% increase in search coverage YoY

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Target?



Walmart's YoY growth is similar to Target's: maximizing ad revenues with more ads per page across all searches.

RMN Trends (Q2-Q3 2024 vs Q2-Q3 2025)

How has average ad load per page evolved for Walmart?

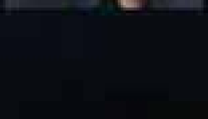
INSIGHTS

- Diving into the average ad loads per page over time we see steady YoY growth and very stable development.
- Target and Walmart experienced moderate to strong growth.
- Albertsons reduced its average sponsored products per page load in exchange for more coverage on various pages

"Retail media is no longer about who spends the most in peak season. It is about who stays visible every day."

"Sponsored product volumes are rising fast across categories, and the winners are the brands that treat retail media as a year-round investment rather than a seasonal spike. The report shows that consistency now beats bursts.

The biggest gains are going to brands that protect their presence in auctions. Volatility creates openings, and competitors are taking them. Staying active across the year is now a defensive strategy as much as a growth one."



Roger Dunn
Global Media Lead, Retail & Performance Media
DIAGEO

Have you met our family?

Dysfunctional but lovable, from show-off Sponsored to In-store Grandpa, they'll turn up on your campaigns when you least expect it.

Stay tuned on Pentaleap LinkedIn for upcoming episodes!

Pentaleap PRESENTS

Retail Fam @ Pentaleap

NOW STREAMING ON LinkedIn

In-store Grandpa

He's low-tech, high-trust, and refuses to die (in media plans or otherwise). Doesn't trust digital. Or automation. Or sometimes.....electricity.

Dad Server

The dad who makes sure that household (campaigns) don't collapse under ego wars.

Mama Site Search

a.k.a Passive-aggressive organizer. The one who knows where everything should be.

Show-off Sponsored Products

The golden child who sells arrogance as confidence, drops cricket analogies in every performance review.

Glitzy Display

Glamorous, oblivious and emotionally needy, she brings main character energy to every room.

Moody Organic

Claims he doesn't do "metrics", but checks his engagement in private.

Foxy DSP

Welcomes new demand into the ecosystem without ego or friction. Doesn't brag just delivers.

Sharp SSP

Enforces transparency like a judge in a shadow courtroom. Doesn't just handle supply — manages the rules of the game.