

Asia-Pacific Programmatic Advertising - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Programmatic Advertising Market size is estimated at USD 27.20 billion in 2025, and is expected to reach USD 61.21 billion by 2030, at a CAGR of 17.61% during the forecast period (2025-2030).

Based on a survey conducted by Carousell Media Group in collaboration with IAB SEA and India, it was found that 99% of respondents plan to increase their retail media spending over the next year. China's Alibaba.com and JD.com are the largest retail media networks globally, with retail media spending accounting for 40.7% of all digital ad spending in the country. Asia-Pacific (APAC) region is expected to see strong growth in retail media spending, with an anticipated increase of 20% in the Philippines and 18% in Vietnam.

Key Highlights

- Ad-techs successfully adopted program-based applications that eliminate the need for human execution methods required with premium inventory sectors often employed by brand campaigns. It is one of the key factors driving the rise of programmatic advertising in APAC region, as it is more effective and efficient than manual tag-based reservations.
- In particular, AD innovators like MOCA focused on Asian markets, setting up local teams in China, India, Indonesia, and Vietnam. It is to collaborate with top global publishers for user acquisition, branding, social media, CTV, beauty, weather, and other customized advertising solutions.
- However, the Programmatic Advertising Market still faces significant challenges, such as measuring marketing results, maximizing cross-channel campaigns, and deprecating cookies. Companies like Google and AppNexus are already working to develop and refine platforms that detect fraudulent clicks before they appear in client analysis or consume their budget.
- The COVID-19 pandemic rapidly changed the Asia-Pacific programmatic advertising market. For instance, Google developed the Topics API solution to identify a handful of user interests via the Chrome browser, representing their top interests for that week.

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These interests were further utilized to categorize individuals into anonymous groups for advertising purposes.

Asia-Pacific Programmatic Advertising Market Trends

Increasing use of AI & ML for Programmatic Advertising drives the growth.

- AI and ML are causing disruptions and transforming the technological landscape in almost all domains of every industry, and the marketing industry is still catching up to adopt this change. AI-based marketing utilizes detailed information on buying patterns and behavior. Companies like Google are reinventing their products by integrating AI and introducing techniques like speech recognition and language understanding to create real-world conversations.
- Advertisers are empowered to make data work more efficiently and increase business results through the use of artificial intelligence platforms. Advertisers can benefit from increased precision in targeting, more appropriate placement of advertisements and a greater campaign effectiveness through the use of artificial intelligence in programmatic marketing..
- AI/ML algorithms are used to analyze large amounts of data and make data-driven decisions faster and more accurately than humans. This would contribute to an improvement in media purchasing efficiency as well as the targeting of advertising. For individual users, AIML can help them to tailor the advertising that they receive according to their behaviour, preferences and interests. This would increase the rate of engagement and better customer experience.
- Using artificial intelligence, programmatic advertising is able to produce top performing audience segments that correspond with your campaign goals and serve ads to users who are the best candidates for conversion. Only if it is determined that this increases the effectiveness of campaigns willmatic algorithms be able to classify a target audience.

Mobile Programmatic Advertisements to Drive the Market Growth

- Mobile programmatic advertising is an automatic buying and selling of mobile ad inventory with software AS It replaces the request for proposal (RFP) process, in person negotiation and the insertion order (I/O) system.
- This technology will enable advertisers to purchase ads more effectively and at an affordable price, because they can access a broad range of advertising inventory through ad exchanges. In addition, it allows the highest possible inventory prices to be found at any given moment in order to maximise value.
- Increased digitization across Asia-Pacific is driving significant growth in digital marketing. Mobile apps are the key channel for digital marketing in APAC. There are 460 million internet users in Southeast Asia alone, so the opportunities for brands to leverage retail media to access new consumers are vast.
- A survey conducted by checkout.com outlined that 63% of respondents use mobile apps as their primary online shopping method. This number is expected to grow further along with smartphone penetration in Asia, reaching up to 78% by 2025.
- The rising popularity of social media and online content platforms like Instagram, TikTok, Pinterest, and Facebook resulted in the development of a new business model called Social commerce, which provides small businesses with a direct and affordable path to their clients.
- February 2023 - Foodpanda unveiled a suite of integrated advertising features, including the foodpanda app, digital marketing assets, and new partnership programs, along with Group M. By activating Foodpanda's in-app advertising and other media assets, GroupM clients will experience a fast-growing Mobile Programmatic Advertisements Growth.

Asia-Pacific Programmatic Advertising Industry Overview

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The Asia-pacific programmatic advertising market is fragmented as more brands enter the mobile space and become serious about programmatic advertising, the opportunities for Programmatic Advertising Providers in the market continue to increase. The existing players in the market are expanding their range of product offerings to compete with the new entrants. With the help of innovative tools and solutions, programmatic advertising providers can select the right place and target the right people to maximize the potential of ad campaigns. Prominent leaders such as InMobi, Arki, and Inspire Asia Co., Ltd. dominate the market.

- March 2023- Winkel Media partnered with Hivestack, a programmatic digital out-of-home (DOOH) solutions champion. Winkel Media's AI-powered, data-driven DOOH screens are strategically designed to deliver impactful and measurable campaigns in retail stores, enabling advertisers worldwide to activate campaigns via open exchange and private marketplace deals (PMP).
- December 2022- Dentsu Programmatic launched its strategic programmatic supply solution, 'Dentsu Curate,' in India. The solution will assist advertisers in buying digital inventory across media in a brand-safe and fraud-free environment through robust evaluation mechanisms. The AD developer plans to improve media quality by consolidating supply and involving deeper integrations.
- April 2022- InMobi collaborated with Anzu to provide its advertisers with direct access to Anzu's premium mobile programmatic inventory across the globe. Anzu's in-game advertising solution provides ads designed to complement the gameplay, respecting gamers and, in many cases, enhancing the gameplay experience.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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