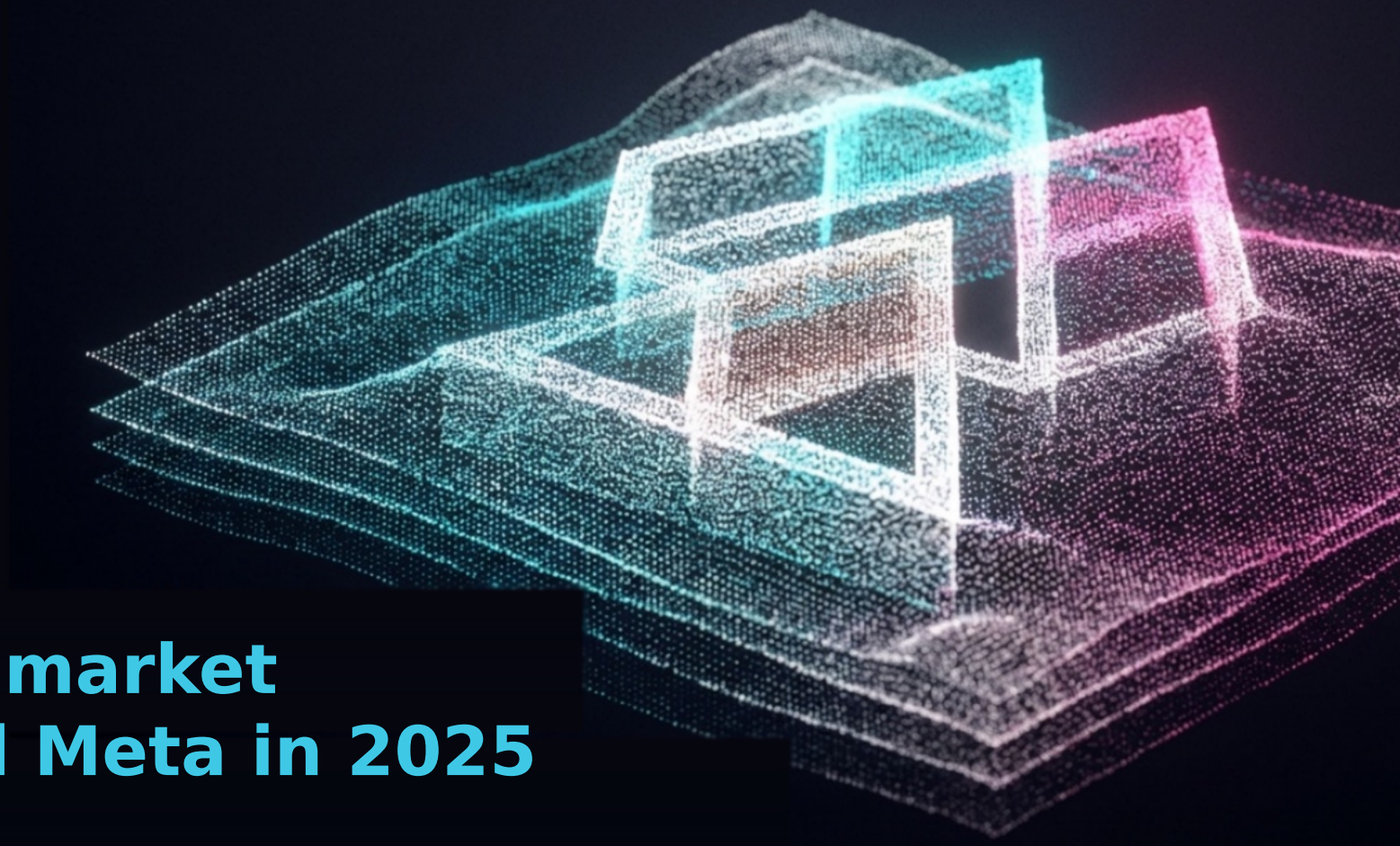
ZIRCON TREE



The German digital market through Google and Meta in 2025

A look at real data from Google Ads Transparency Center and Meta Ad Library

ZIRCON TREE • 2025 in numbers

The digital advertising market via Google nearly doubled year-over-year

2 047 mld

impressions of ads active in 2025 (upper estimate)

+75 % year-over-year

534 511

active advertisers

+75 % year-over-year

14,0 mil

active ads

+73 % year-over-year

5+1

channels (Search, YouTube, Play, Maps, Shopping + Display and others in the remainder)

Germany is by far the largest market in the region — more than 2 000 billion ad impressions in 2025 across over half a million advertisers. Both the number of advertisers and the number of ads grew by roughly three quarters year-over-year (+75 % and +73 %), so the market expanded broadly rather than just intensifying among existing players. 2025 shows a mature, highly automated ecosystem: launching an ad is easier than ever, but standing out among 14 million active ads takes real momentum and technological proficiency.

YouTube shot up by 199 % and is the fastest-growing channel

YouTube has taken over the role of the main growth engine. Impressions soared by 199 % year-over-year and the number of advertisers on YouTube doubled — from 124 507 to 250 392 (+101 %). Big players are massively increasing their video budgets and new advertisers are appearing in large numbers.

CHANNEL	2025	YoY
Search	886 mld	+33 %
Display & others*	606 mld	+110 %
YouTube	**450 mld**	**+199 %**
Maps	47,8 mld	+54 %
Play	41,9 mld	+142 %
Shopping	15,4 mld	+3 %

* Display and others — the remainder of total impressions after subtracting the measured channels. We assume GDN dominates here, but it also includes Gmail, Discover and other unattributed placements.

TOP 10 advertisers in 2025.
Amazon defends the lead, Temu closes in fast

KEY FINDINGS

- **Amazon defends #1** (57,7→65,2 mld, +13 %), but **Temu exploded from 7,26 to 56,09 mld** (+672 %) into a close #2.
- **eBay leapt #13→#4** (+103 %), Otto #9→#5, **idealo #15→#9** (+66 %).
- **Adobe is the only B2B / SaaS brand**, entering the top 10 as new (#8).
- **OBI (2024 #6), billiger.de (#8) and HORNBACH (#10) dropped out.**
- The top 3 delivered ~130,6 mld — about **6,4 % of all measured impressions**.

ADVERTISER	IMPRESSIONS	YoY
1. Amazon	65,16 mld	**+13 %**
2. ELEMENTARY (Temu)	56,09 mld	**+672 %**
3. CHECK24	9,34 mld	**+31 %**
4. eBay	9,17 mld	**+103 %**
5. Otto	8,01 mld	**+54 %**
6. Douglas	7,63 mld	**+13 %**
7. Etsy	7,11 mld	**+11 %**
8. Adobe	6,78 mld	**NEW**
9. idealo	6,53 mld	**+66 %**
10. Booking.com	6,40 mld	**+16 %**

TOP 10 in Search.
Amazon dominates, Temu breaks in at #2

KEY FINDINGS

- **Amazon dominates Search** (49,9→56,3 mld, +13 %) — roughly **five times** the #2.
- **Temu climbs #6→#2** (+131 %); **eBay leaps #12→#3** (+108 %); Otto #14→#10 (+46 %).
- **HORNBACH (2024 #9) and guenstiger.de (#10) dropped out** of the top 10.
- The ranking mixes marketplaces, retailers and price-comparison portals (CHECK24, billiger.de).

ADVERTISER	SEARCH IMPRESSIONS	YoY
1. Amazon	56,30 mld	**+13 %**
2. ELEMENTARY (Temu)	10,64 mld	**+131 %**
3. eBay	6,92 mld	**+108 %**
4. Douglas	6,41 mld	**+11 %**
5. CHECK24	6,37 mld	**+18 %**
6. Etsy	5,52 mld	**+5 %**
7. OBI	5,05 mld	**+3 %**
8. Solute (billiger.de)	4,92 mld	**+22 %**
9. Booking.com	4,51 mld	**+6 %**
10. Otto	4,29 mld	**+46 %**

TOP 10 on YouTube.
Where the big FMCG brands move in

KEY FINDINGS

- **Temu leads YouTube**, exploding from 2,03 to 14,56 mld (+617 %) — a different order of magnitude.
- The **FMCG giants move in: L'Oréal, Procter & Gamble and Henkel** enter straight into the top 4, all new.
- **Four of the top 10 are new entrants** (L'Oréal, P&G, Henkel, TikTok); Etsy and Klarna dropped out.
- eBay (+98 %) and Amazon (+116 %) roughly doubled their video presence; even **TikTok enters at #10**.

ADVERTISER	YOUTUBE IMPRESSIONS	YoY
1. ELEMENTARY (Temu)	14,56 mld	**+617 %**
2. L'Oréal	4,09 mld	**NEW**
3. Procter & Gamble	3,54 mld	**NEW**
4. Henkel	2,84 mld	**NEW**
5. eBay	2,59 mld	**+98 %**
6. Otto	2,46 mld	**+84 %**
7. Fruugo	2,25 mld	**+15 %**
8. Thalia	2,24 mld	**+47 %**
9. Amazon	1,80 mld	**+116 %**
10. TikTok	1,56 mld	**NEW**

The most significant players in Display. Temu dominates the largest hidden segment

KEY FINDINGS

- **Display & others is a huge segment** at 606 mld (+110 %), roughly 30 % of all measured impressions.
- **Temu jumped from #3 (2,25 mld) to #1 (32,24 mld)**, +1334 % — about 4,5× the #2.
- Adobe rose to #3 (+108 %), **Tchibo climbed #15→#9** (+92 %); Enpal and Shop-Apotheke enter as new.
- Former leader **Amazon slipped to #2** (flat, +1 %); **idealo dropped out** (2024 #7).

ADVERTISER	IMPRESSIONS	YoY
1. ELEMENTARY (Temu)	32,24 mld	**+1334 %**
2. Amazon	7,09 mld	**+1 %**
3. Adobe	6,06 mld	**+108 %**
4. congstar	3,03 mld	**+55 %**
5. bonprix	2,70 mld	**+41 %**
6. Otto	2,30 mld	**+28 %**
7. Enpal	2,22 mld	**NEW**
8. Shop-Apotheke	1,98 mld	**NEW**
9. Tchibo	1,88 mld	**+92 %**
10. expert e-Commerce	1,87 mld	**+21 %**

Digital advertising is democratizing
the number of active advertisers grew by almost 230 thousand

+228 284

advertisers year-over-year

from 306 227 (2024) to 534 511 (2025)
= year-over-year growth of +75 %

Advertisers with more than 10 000 impressions

197 418 → 336 456

Large and mid-sized advertisers who really invest in digital.

Advertisers with 10 000 impressions or fewer

108 809 → 198 055

Small businesses, local companies, individuals — the entry into digital is opening up.

The top 10 advertisers form the visible peak, but an equally important story is the long tail. In 2025 almost 230 thousand more advertisers were active via Google than in 2024. The barrier to entry is low — small businesses are gaining access to advertising once reserved for the big players.

The same brands on Meta: OTTO dominates reach, Amazon dominates volume

KEY FINDINGS

- Of the top 10 Google advertisers, **9 have an active Meta presence** — all run on both Facebook and Instagram.
- **Amazon is the most active by volume** — 5 961 ads in 2025, nearly five times the next brand.
- But **OTTO turns it around on reach**: 872 mil cumulative reach from just 1 185 ads — the largest on Meta, dwarfing Amazon (382 mil).
- Marketplaces and retailers run high-reach campaigns too — eBay (373 mil), Booking (325 mil) and idealo (303 mil).

ADVERTISER	ADS	CUM. REACH*	PLATFORMS
1. Amazon.de	5 961	382 mil	FB + IG
2. idealo	1 278	303 mil	FB + IG
3. Douglas	1 278	149 mil	FB + IG
4. OTTO	1 185	872 mil	FB + IG
5. eBay.de	680	373 mil	FB + IG
6. Etsy	680	187 mil	FB + IG
7. Booking.com	394	325 mil	FB + IG
8. Adobe	270	16 mil	FB + IG
9. CHECK24	192	28 mil	FB + IG

* Cumulative reach is the sum of the reach of individual ads, not unique people reached.

Methodology

DATA SOURCE	Google Ads Transparency Center and Meta Ad Library (publicly available APIs)
PERIOD	Calendar years 2024 and 2025 (Google); year 2025 (Meta)
GEOGRAPHY	Impressions / reach generated in the German market
GOOGLE CHANNELS	Search, YouTube, Play, Maps, Shopping
DISPLAY AND OTHERS	The remainder of total impressions after subtracting the measured channels — we assume a dominant share of GDN, but it also includes other unattributed placements
RANKINGS WITHOUT AGENCIES	Media agencies (e.g. GroupM, Zircon Tree) are excluded from the advertiser rankings — they aggregate multiple end clients in a single account
METRICS	Number of impressions, advertisers, ads (Google) and number of ads + cumulative reach (Meta). No € estimates or calculations from rate cards.

ABOUT ZIRCON TREE

Zircon Tree is a Slovak company operating in digital advertising. We prepare this analysis with the aim of bringing a more transparent view of real digital advertising data to the German market.

CONTACT

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What you need to know when reading the numbers

Our data is publicly available, but it has limitations that we acknowledge transparently.

Bucketing from the top

Google reports impressions in ranges (e.g. “more than 10M”). For such ads we use an upper estimate of 20M. Total impression figures are therefore upper estimates, not exact values. The year-over-year trends remain valid, because we make the same error in both 2024 and 2025.

Multi-year ad overlap

Ads active in 2025 may also have been running in 2024 or earlier — some run for as long as 3 years. Their impressions are counted in each year of activity. “Active in 2025” is therefore not the same as “launched in 2025”.

Display as the remainder

In the Transparency Center, Google does not list the Display Network as a separate channel. We calculate “Display and others” as the difference between total impressions and the measured channels. We assume the dominance of GDN, but it also includes Gmail, Discover and other placements.

Meta — sample and reach

For Meta we track only the brands from the Google rankings — this is not an independent ranking of all of Meta. Cumulative reach is the sum of the reach of individual ads, not unique people reached (who overlap between ads).