



Switch ON Data Monetisation

# Rewinding Y 2022 for Advertising in **FMCG Sector**



**MEDIA: TV, PRINT, RADIO & DIGITAL**  
**PERIOD: YEAR 2022**

## Highlights – Part 1

Period : **Y 2022**

### Television

**1.** 21% ad volume growth for **FMCG** on Television in Y 2022 over Y 2020.  
Compared to 1st Quarter of Y 2022, Q3 and Q4 witnessed 5% and 9% increase in ad volumes'.

**2.** 5 out of Top 10 Categories constitutes **Food & Beverages** brands.  
**GEC (36%)** was the top channel genre followed by **Movies (24%)** during Y 2022.

### Print

**3.** 14% ad volume growth for FMCG in Print in Y 2022 over Y 2020.  
Ad Space in Print witnessed **double digit** share in Jan'22 & Feb'22.

**4.** 49% of the **FMCG** Ads were in the Hindi language Publications.  
Sales Promotions for '**FMCG**' sector accounted for 21% share of ad space in Print.



## Highlights – Part 2

Period : **Y 2022**

### Radio

**5.** FMCG ad volumes on Radio saw **51%** growth during Y 2022 over Y 2020.  
7 out of Top 10 list of categories constitutes **F&B** brands in Y 2022 on Radio.

**6.** **Gujarat** topped the states with **21%** share of the sector's ad volumes in Y 2022.  
Advertising for **FMCG** was preferred in **Evening** and **Afternoon** time-band on Radio.

### Digital

**7.** FMCG ad insertions on Digital saw **2.8 Times** rise during Y 2022 over Y 2020.  
Initial 5 months of Y 2022 witnessed **double digit** share of ad insertions on Digital with **Apr'22** on the peak.

**8.** Top 10 Advertisers accounted for **37%** share of ad insertions in Y 2022 with **L'Oreal India** leading the list.  
**Programmatic (59%)** was the top transaction method for Digital advertising of **FMCG** sector in Y 2022.



**TV**



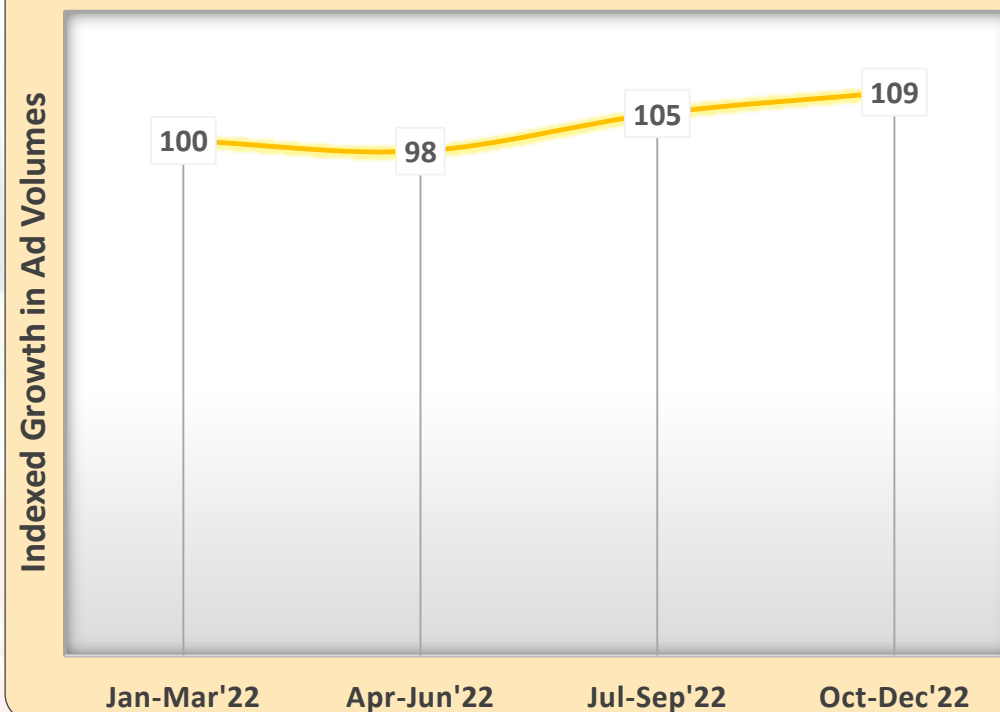
# Ad Volumes for FMCG sector on TV

## Indexed Growth in Ad Volumes



Index: Y 2020=100

## Quarterly Trends : Y 2022

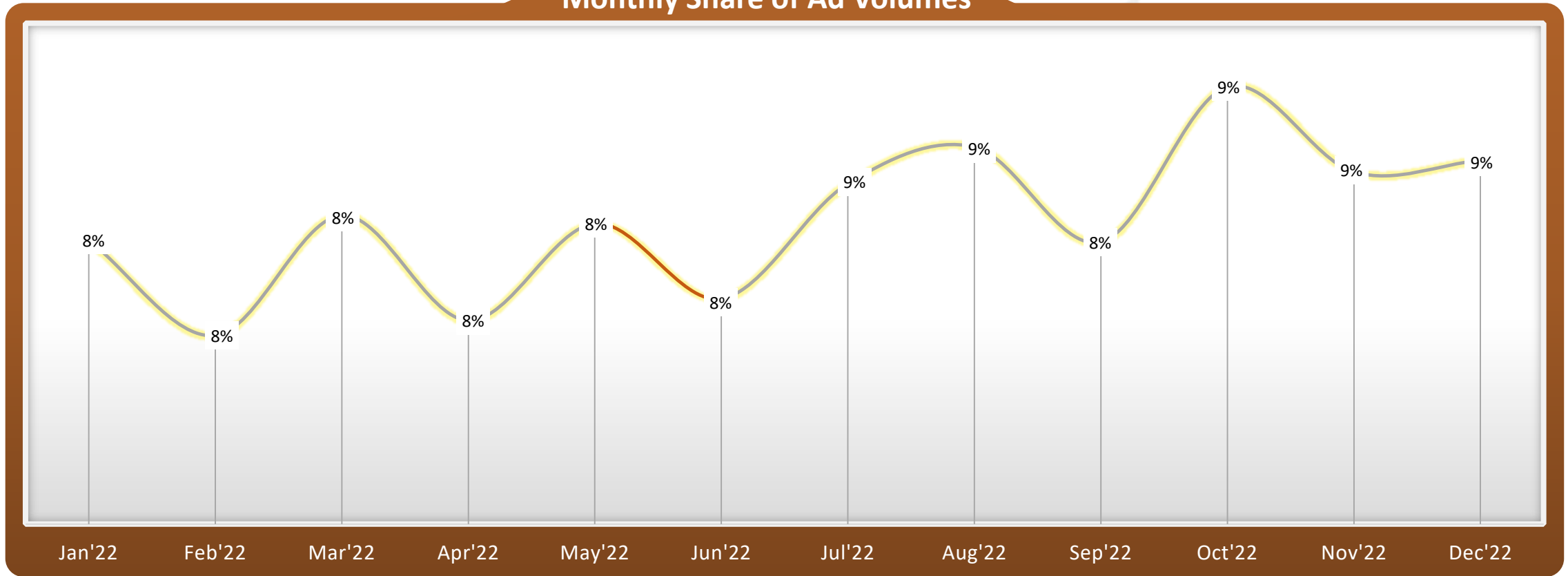


- In Y 2022, **FMCG** ad volumes on Television rose by **21%** over Y 2020.
- Compared to 1<sup>st</sup> Quarter of Y 2022, Q3 and Q4 witnessed **5%** and **9%** increase in ad volumes.



# Monthly Ad Volume Trend of FMCG sector on TV

## Monthly Share of Ad Volumes



- Television Ad Volumes had highest share during **Oct'22**, whereas **Feb'22** saw lowest advertising in Y 2022.





# Top 10 Categories and Advertisers of FMCG for TV

Top 10 Categories	% Share
Toilet Soaps	6%
Toilet/Floor Cleaners	6%
Milk Beverages	4%
Washing Powders/liquids	4%
Shampoos	4%
Tooth Pastes	4%
Soft Drink Aerated	3%
Chocolates	3%
Biscuits	3%
Tea	3%

Top 10 Advertisers	% Share
Reckitt Benckiser (India)	18%
Hindustan Unilever	17%
Godrej Consumer Products	4%
Brooke Bond Lipton India	3%
Cadburys India	3%
Coca Cola India	3%
Ponds India	3%
Procter & Gamble	2%
ITC	2%
Colgate Palmolive India	2%

- 5 out of Top 10 Categories constitute of **Food & Beverages** brands.
- Top 10 Advertisers accounted **59%** share of ad volumes in Y 2022 with **Reckitt Benckiser** leading the list.



## Top 10 Brands from FMCG sector on TV

Top 10 Brands	% Share
Dettol Antiseptic Liquid	2%
Harpic Power Plus 10x Max Clean	2%
Lizol All In 1	2%
Dettol Toilet Soaps	2%
Harpic Bathroom Cleaner	1%
Vanish Oxi Action	1%
Horlicks	1%
Clinic Plus Shampoo	1%
Glow & Lovely Advanced Multivitamin	1%
Surf Excel Easy Wash	1%

- Among the Top 10 **FMCG** brands, initial 6 belonged to **Reckitt**.
- Top 10 Brands accounted **14%** share of ad volumes in Y 2022 with **Dettol Antiseptic Liquid** topping the list.



# Top Channel Genres preferred by advertisers of FMCG sector on TV

Channel Genres	% Share
GEC	36%
Movies	24%
News	16%
Music	15%
Kids	5%
Others (7)	4%

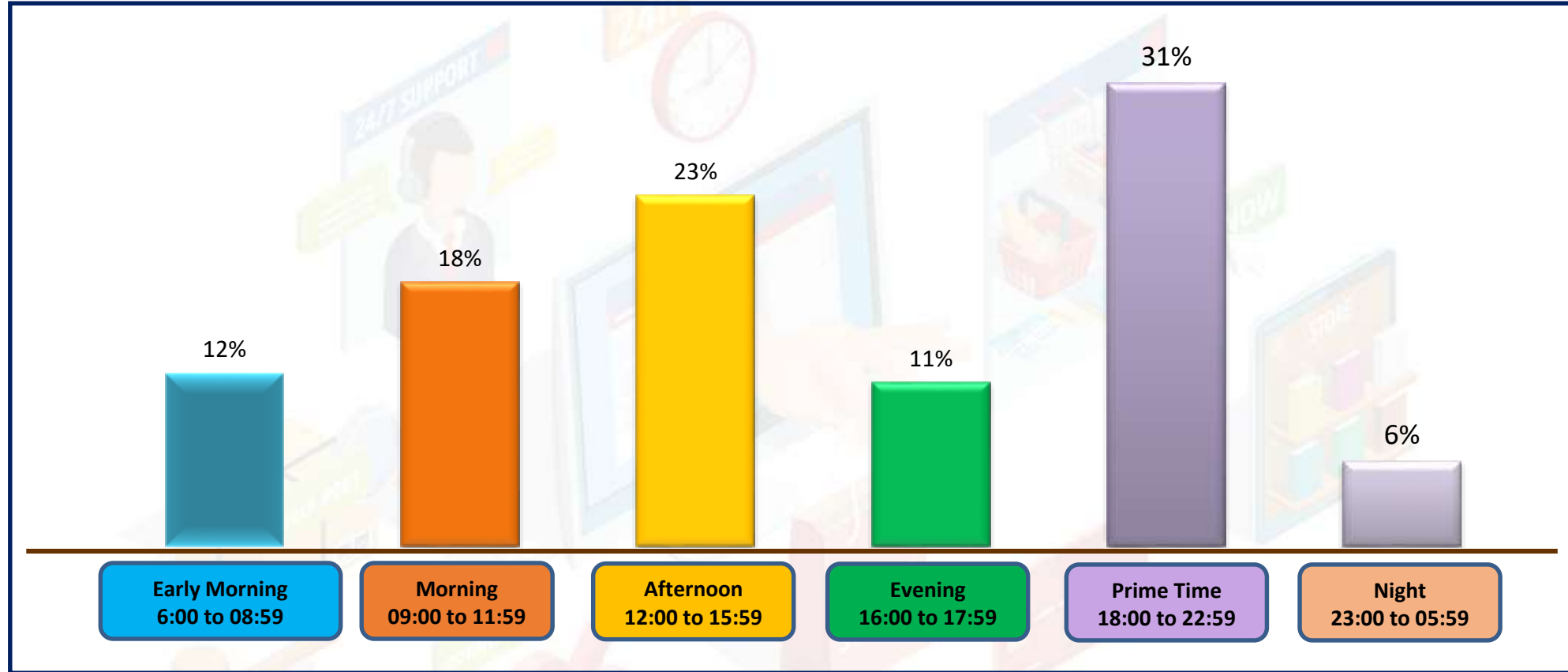
- Top 2 channel genres on TV together accounted **60%** of ad volumes share for **FMCG** sector during Y 2022.
- **GEC** Channel Genre most preferred by FMGC players during Y 2022.

## Top 10 Program Genres preferred by advertisers of FMCG sector on TV

Program Genres	% Share
Feature Films	28%
Drama/soap	13%
News Bulletin	12%
Film Songs	11%
Cartoons/animation	8%
Music Shows/songs	5%
Religious/devotional/astrology	3%
Film Based Magazines	3%
Comedies	2%
Mythological/costume Dramas	2%

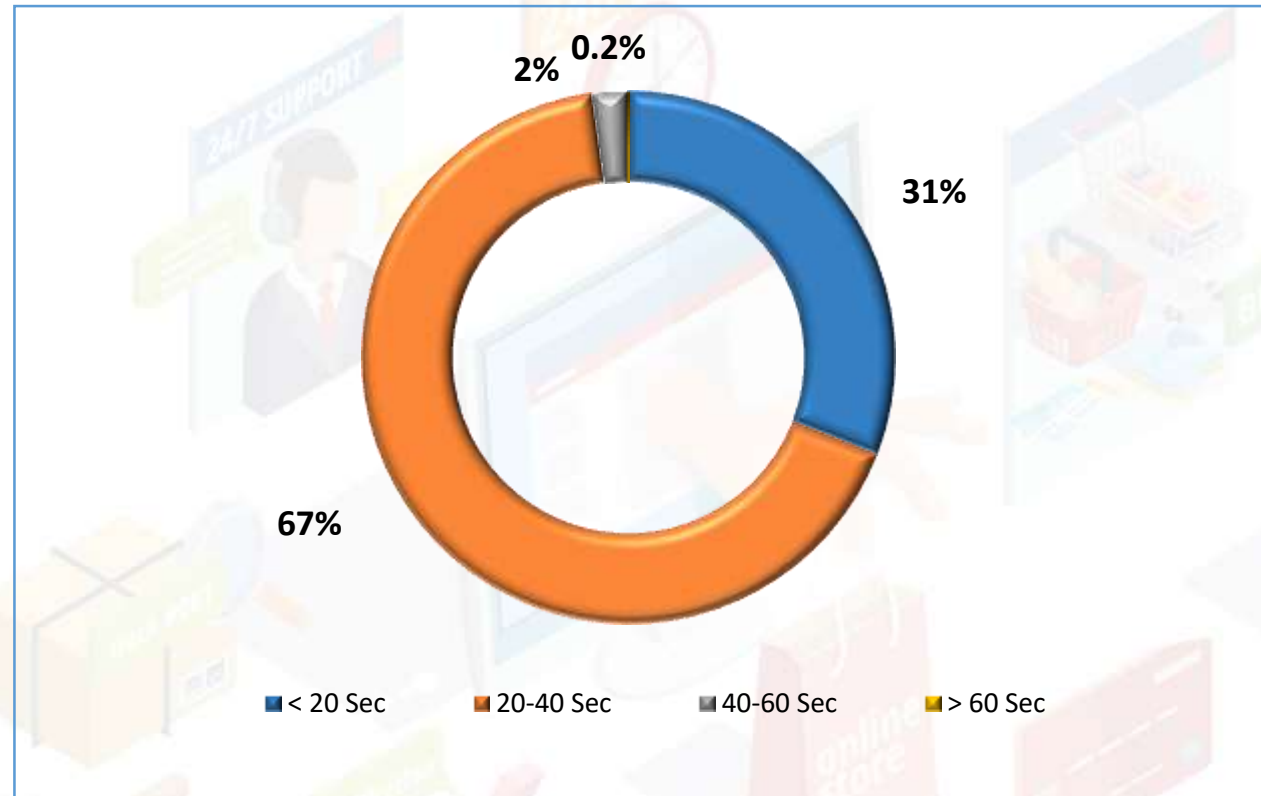
- Feature Films** is the most commonly used genre for promoting **FMCG** brands on Television. Top 2 program genres i.e. **Feature Films** and **Drama Soap** together added more than **41%** share of ad volumes on TV.

# Time band analysis for FMCG advertising on TV



- Prime Time garnered highest advertising on TV followed by **Afternoon** and **Morning** time-bands.
- Prime Time, Afternoon & Morning time bands together accounted for **72%** share of ad volumes.

## Preference of ad size by advertisers of FMCG on TV



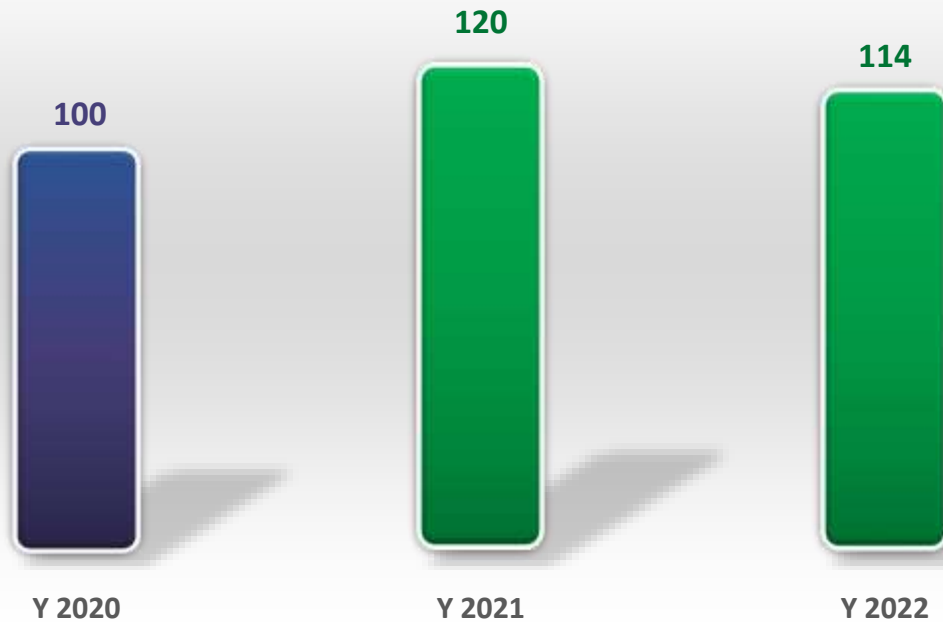
- Advertisers of **FMCG** sector preferred **20 - 40 secs** ad size on TV.
- **20-40 seconds** and **<20 seconds** ads together covered **98%** shares in Y 2022.

# Print



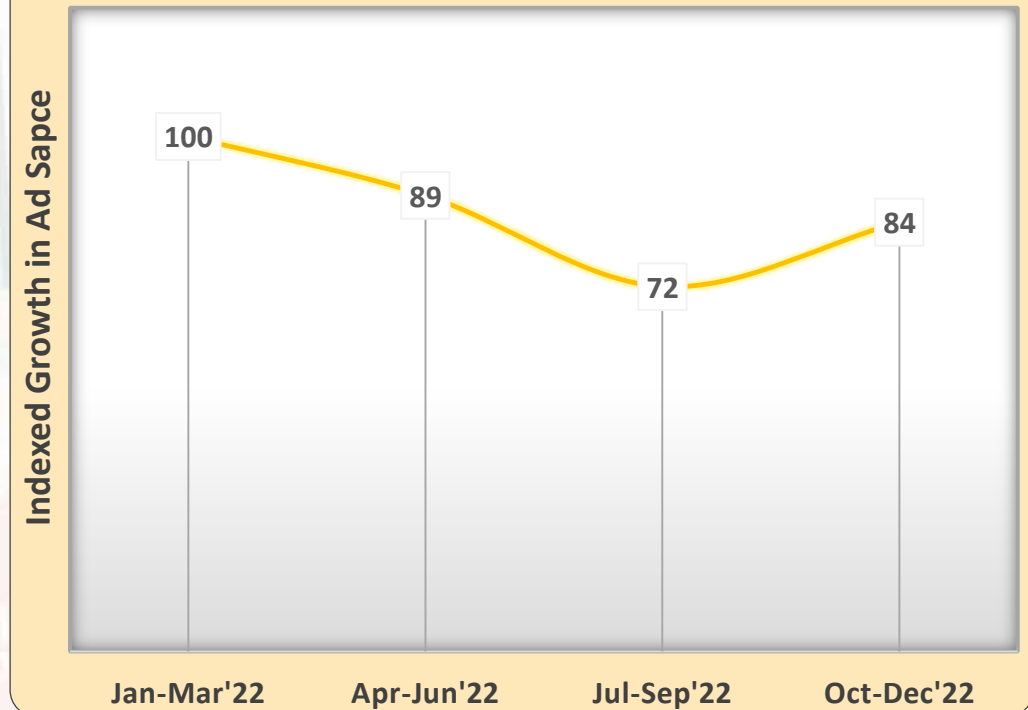
# Ad Space for FMCG sector in Print

## Indexed Growth in Ad Space



Index: Y 2020=100

## Quarterly Trends : Y 2022



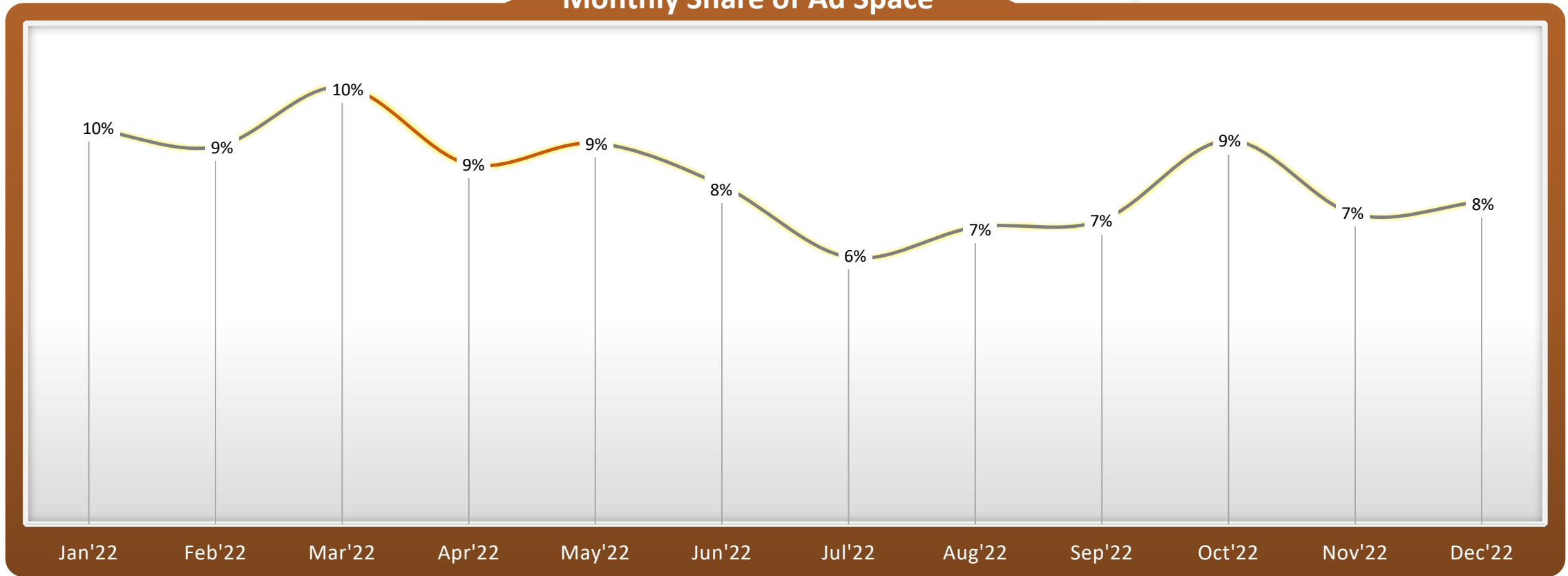
- As compared to Y 2020, both Y 2021 & 2022 witnessed a hike of **20%** and **14%** in ad volumes respectively.
- As compared to 1<sup>st</sup> Quarter of Y 2022, Q3 and Q4 witnessed **28%** and **16%** ad space decline.





# Monthly Ad Space Trend of FMCG sector in Print

### Monthly Share of Ad Space



- Even though initial months of the Y 2022 observed a decent share of ad volume, Dec'22 witnessed decline in ad share by 6%.



## Top 10 Categories and Advertisers of FMCG for Print

Top 10 Categories	% Share
Vitamins/Tonics/Health Supplements	8%
OTC Products Range	7%
Digestives	6%
Rubs And Balms	5%
Hair Oils	4%
Skin Care Products Range	3%
Pan Masala/Zarda /Gutkha	3%
Furnitures	3%
FMCG Products Range	3%
Food Products Range	3%

Top 10 Advertisers	% Share
SBS Biotech	15%
Patanjali Ayurved	6%
Emami	4%
Ruchi Soya Industries	3%
Torque Pharma	3%
Hindustan Unilever	3%
GCMF (Amul)	3%
Godrej Consumer Products	2%
Divya Pharmacy	2%
Rohit Surfactants	1%

- 5 out of Top 10 Categories constitutes Personal Healthcare brands.
- Top 10 Advertisers accounted more than **43%** share of ad space in Y 2022 with **SBS Biotech** retaining its **1<sup>st</sup>** position.



## Top 10 Brands from FMCG sector in Print

Top 10 Brands	% Share
Patanjali Range Of Products	2%
Dr Ortho Oil	2%
Patanjali Nutrela Range Of Products	2%
Pet Saffa Range	2%
Eye Mantra Eye Drops	2%
Roop Mantra Skin Care Products	1%
Sachi Saheli Ayurvedic Tonic	1%
Patanjali Divya OTC Products	1%
Dr Ortho Range Of Products	1%
Pet Saffa	1%

- Top 10 Brands accounted for **17%** share of ad space in Y 2022 with **Patanjali Range of Products** leading the list.

# Newspaper: Publication Language and Genre for FMCG sector in Print

Publication Language	% Share
Hindi	49%
English	13%
Marathi	12%
Kannada	7%
Telugu	4%
Others	14%

Focus on Advertising on General Interest Newspapers by advertisers

Publication Genre	% Share
General Interest	98%
Business/Finance/Economy	1%

- Top 5 Publication Languages accounted **85%** share of sector's Ad space.
- **General Interest** publication genre made a clean sweep with **98%** of sector's ad volume.

# Zone wise Advertising share of FMCG sector in Print

Zone	% Share
North Zone	36%
West Zone	26%
South Zone	21%
East Zone	16%

Top 2 Cities - North Zone
New Delhi
Lucknow

Top 2 Cities - West Zone
Mumbai
Nagpur

Top 2 Cities - South Zone
Bangalore
Hyderabad

Top 2 Cities - East Zone
Kolkata
Patna

- **North Zone** topped with **36%** share of **FMCG** advertising in Print in Y 2022.
- **Mumbai & Nagpur** were top 2 cities in **West Zone** as well as **Pan India**.



# Advertising Promotions of FMCG sector in Print



- **Sales Promotion** for 'FMCG' sector accounted for **21%** of ad space share in Print medium.
- Among Sales Promotions, **Volume Promotion** occupied **37%** share of the pie followed by **Add On Promotion** with **23%** share in Y 2022.



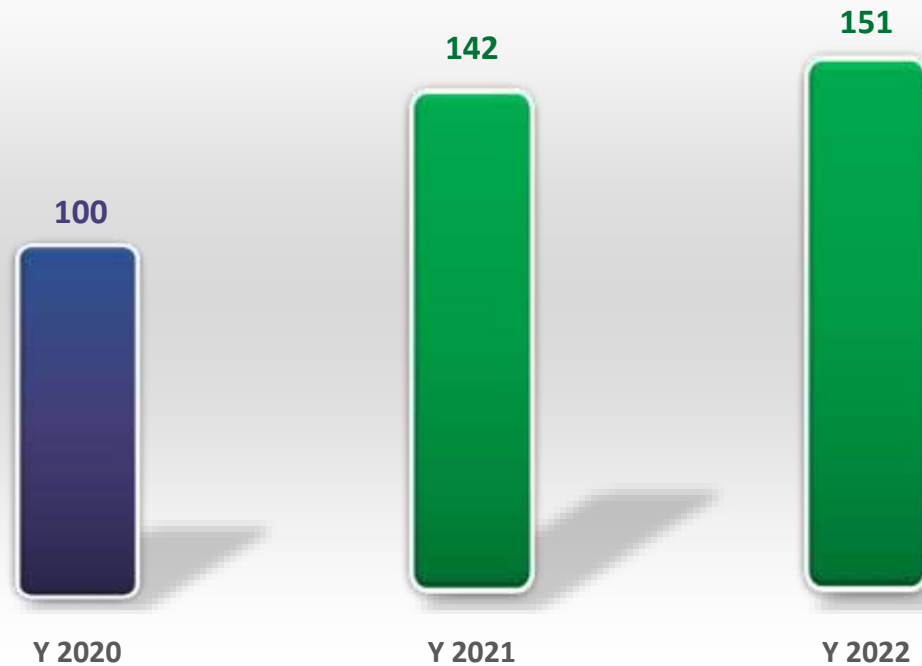
# Radio

FMCG



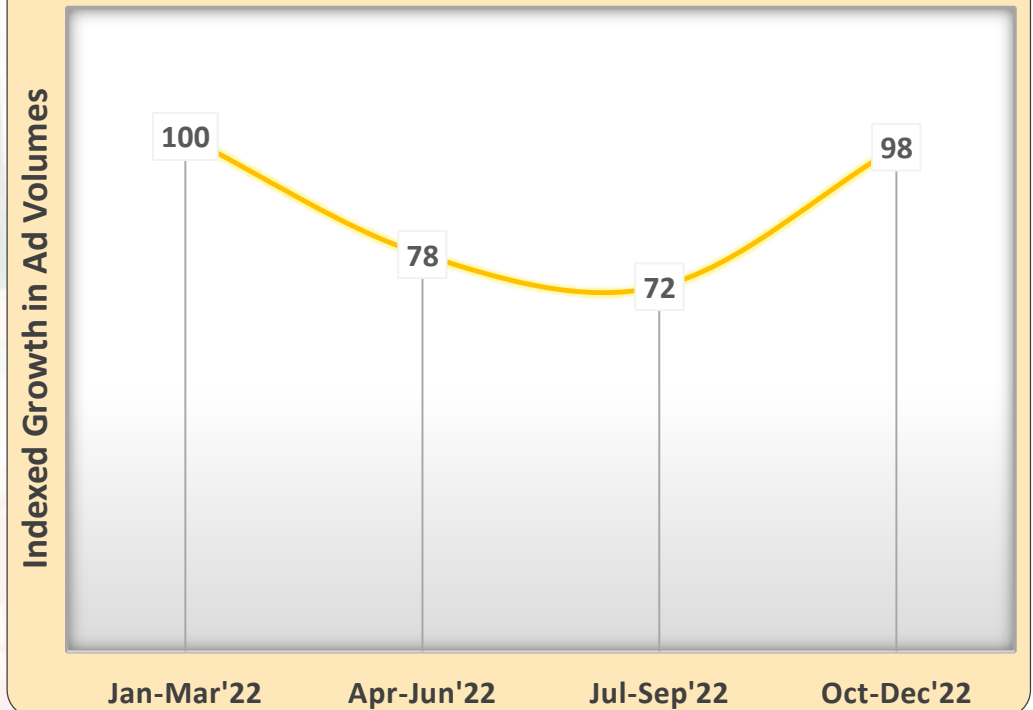
# Ad Volumes for FMCG sector on Radio

## Indexed Growth in Ad Volumes



Index: Y 2020=100

## Quarterly Trends : Y 2022

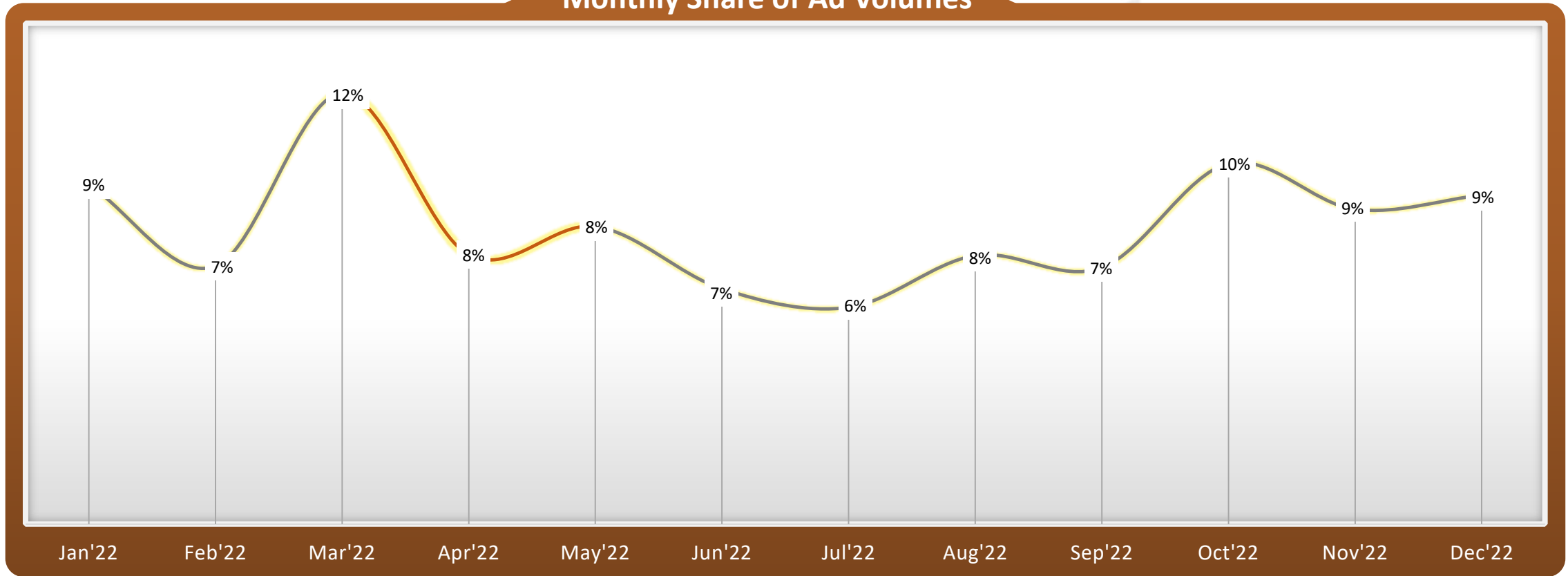


- In Y 2022, **FMCG** ad volumes increases by **51%** on Radio over Y 2020.
- Compare to 1<sup>st</sup> Quarter of Y 2022, Q4 witnessed decline of **2%** ad volume growth.
- The lowest Ad Volume was observed in **3<sup>rd</sup>** quarter.



# Monthly Ad Volume Trend of FMCG sector on Radio

## Monthly Share of Ad Volumes



- **FMCG** Ad Volumes on Radio witnessed the lowest share of ad volume during Jul'22 with **6%**.
- **Mar'22** had the highest share of ad volume of with **12%**.



## Top 10 Categories and Advertisers of FMCG for Radio

Top 10 Categories	% Share
Milk	8%
Pan Masala /Zarda /Gutkha	8%
Tooth Pastes	7%
Face Wash	6%
Edible Oil	6%
Digestives	6%
Food Products Range	6%
Spices	5%
Tea	4%
Sweets/Other Milk Products	3%

Top 10 Advertisers	% Share
Vicco Laboratories	12%
SBS Biotech	8%
Mother Dairy Fruit & Veg	6%
GCMMF (Amul)	6%
Vishnu Packaging	4%
Hamdard	3%
Ashok & Co	2%
Century Plyboards India	1%
Jivraj Tea	1%
Sri Renuka Sugars	1%

- Out of the Top 10 Categories, **7** of them belonged to **Food & Beverages**.
- Top 10 Advertisers accounted for **45%** share of ad volumes in Y 2022 with **Vicco Laboratories** leading the list.

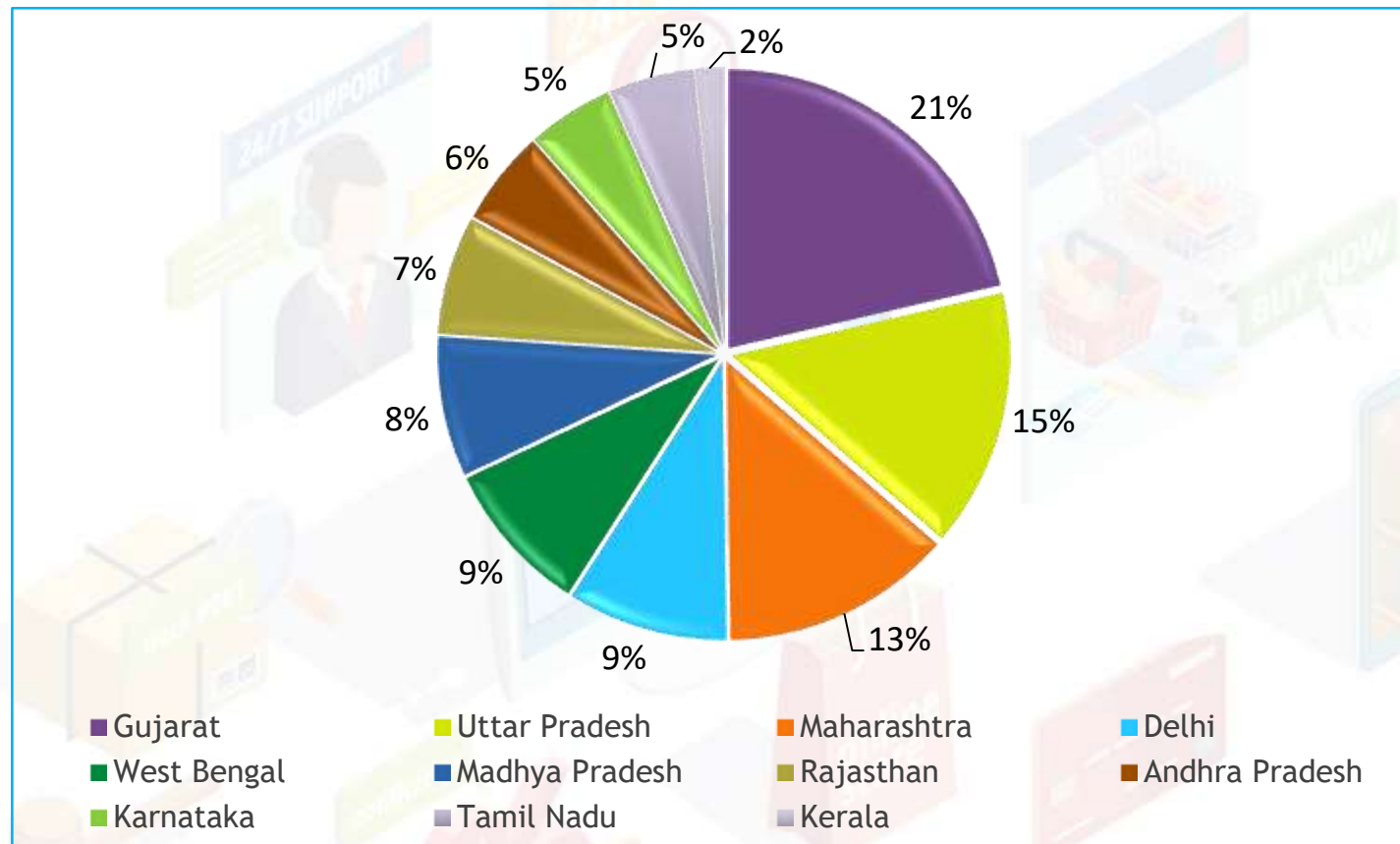


## Top 10 Brands from FMCG sector on Radio

Top 10 Brands	% Share
Vicco Vajradanti Paste	7%
Vicco Turmeric Face Wash	5%
Vimal Pan Masala	4%
Amul Milk	4%
Pet Saffa	4%
Mother Dairy Milk	3%
Dr Ortho Range Of Products	2%
Mother Dairy Dailycious Range Of Prod	1%
Roop Mantra Face Wash	1%
Wah Pan Masala	1%

- Top 10 Brands accounted for **32%** share of ad volumes in Y 2022 with **Vicco Vajradanti Paste** leading the list.

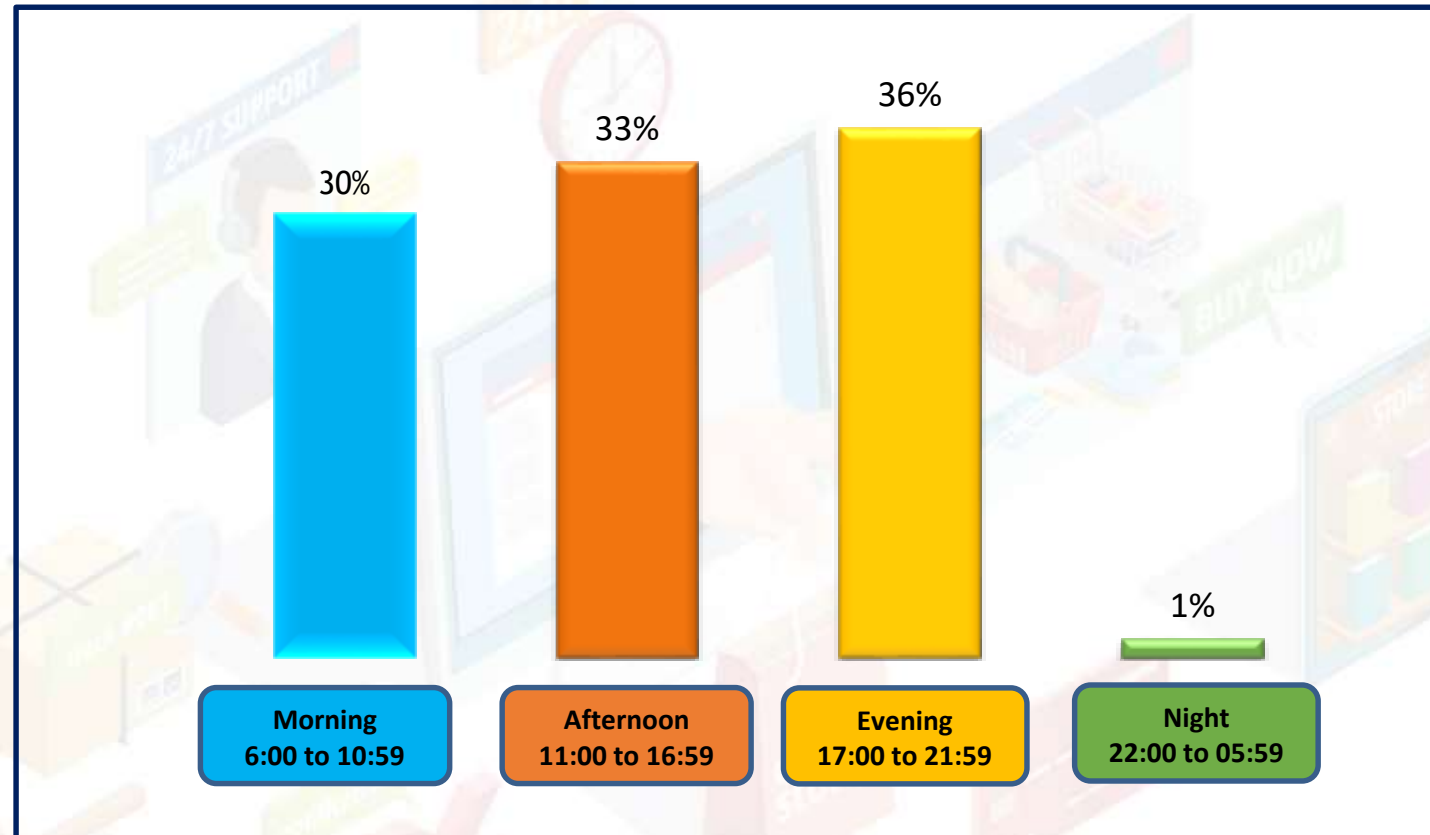
# State-wise share of FMCG advertising on Radio



- The Top 3 states occupied **50%** share of Ad Volumes for the **FMCG** sector.
- **Gujarat** tops the states with **21%** share of the sector's ad volumes in Y 2022.



# Time band analysis for **FMCG** advertising on Radio



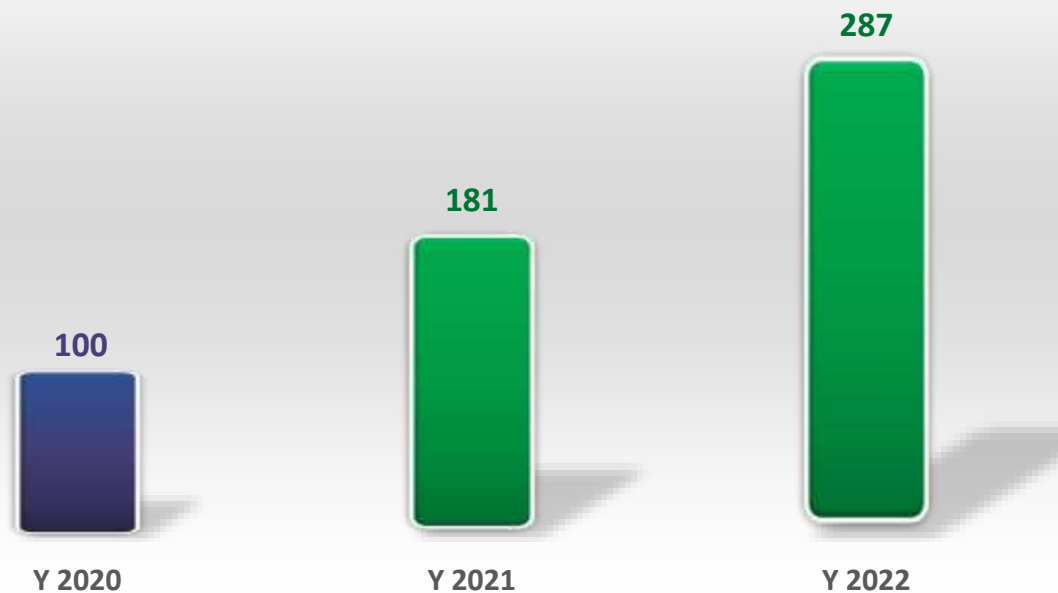
- Advertising for **FMCG** was preferred in **Evening** closely followed by **Afternoon** time-band on Radio.
- **69%** share of the **FMCG** Ad Volumes were in **Evening** and **Afternoon** time-bands in Y 2022.

# Digital



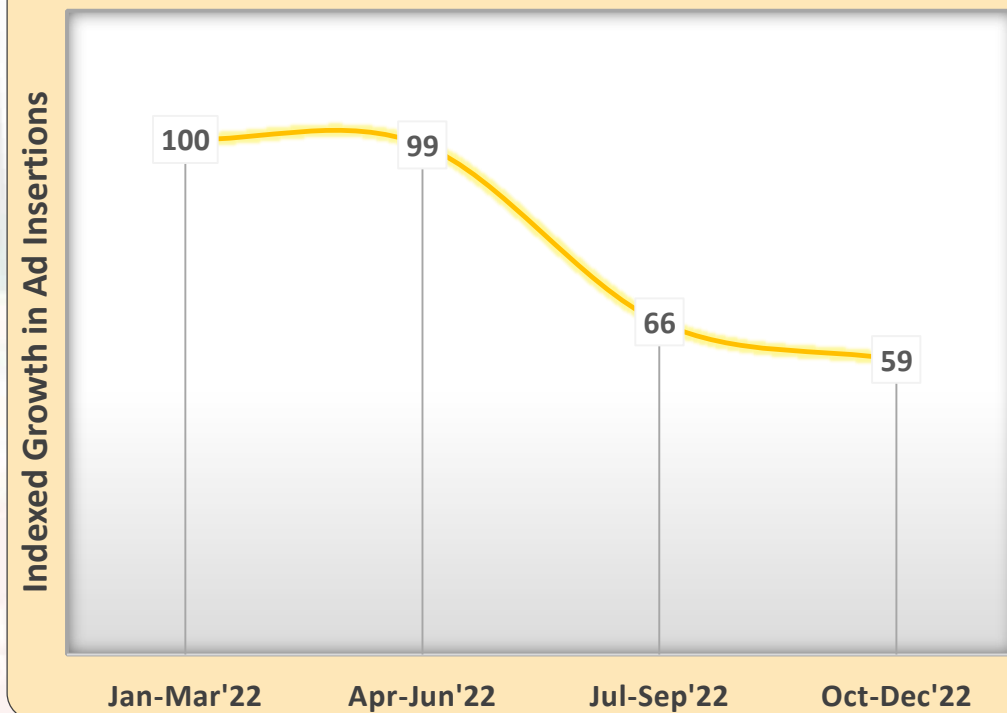
# Ad Insertions for FMCG sector on Digital

## Indexed Growth in Ad Insertions



Index: Y 2020=100

## Quarterly Trends : Y 2022



- **81%** ad insertions' gain for **FMCG** ads on Radio in Y 2021 over Y 2020. Compared to Y 2020, Y 2021 saw **2.8 Times** rise in ad volumes.
- Compared to Q1, **Q4** witnessed the lowest share of ad volumes.

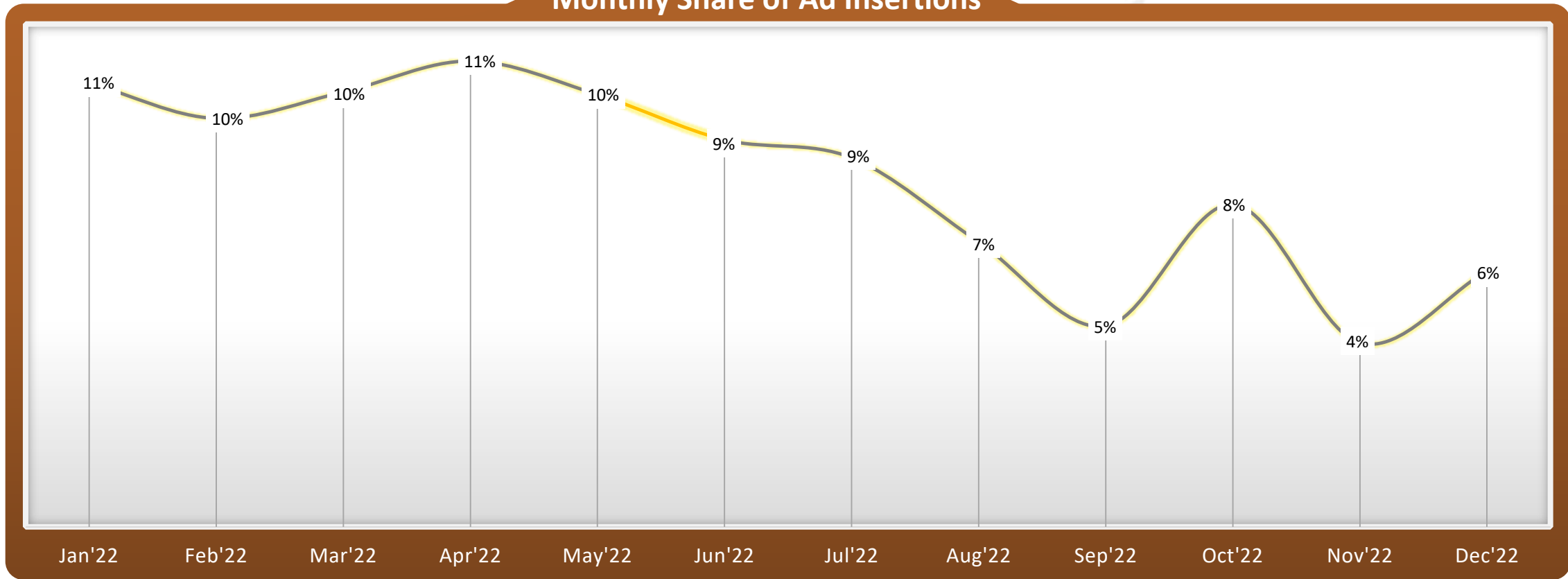
Note: Figures are based on Insertions for Digital;

Period : Y 2020-22



# Monthly Ad Insertion Trend of FMCG sector on Digital

## Monthly Share of Ad Insertions



- On Digital, Share of **FMCG** ad insertions was the lowest in **Nov'22**.
- Initial 5 months of Y 2022 witnessed **double digit** share of ad insertions on Digital with **Apr'22** observing the highest share of ad volumes.

Note: Figures are based on Insertions for Digital;

Period : Jan'22-Dec'22



# Top 10 Categories and Advertisers of FMCG for Digital

Top 10 Categories	% Share
Hearing Aids	5%
Face Wash	5%
Chocolates	4%
Range of Skin Care Products	4%
Sweets/Other Milk Products	4%
Vitamins/Tonics/Health Supplements	4%
Furnitures	4%
Non Aerated Soft Drink	3%
Range of Hair Care	3%
Aerated Soft Drink	3%

Top 10 Advertisers	% Share
L'Oreal India	10%
Drums Food International	5%
Soundrise Hearing Solutions	5%
Cadburys India	4%
Hindustan Unilever	4%
Homevista Decor And Furnishings	2%
Nivea India	2%
Coca Cola India	2%
Monginis Food	2%
Ferrero India	2%

- The Top 10 categories mainly constitutes Personal Healthcare, Hygiene, Food and Beverages brands in Y 2022 on Digital.
- Top 10 Advertisers accounted for **37%** share of ad insertions in Y 2022 with **L' Oreal India** retaining its 1<sup>st</sup> position.



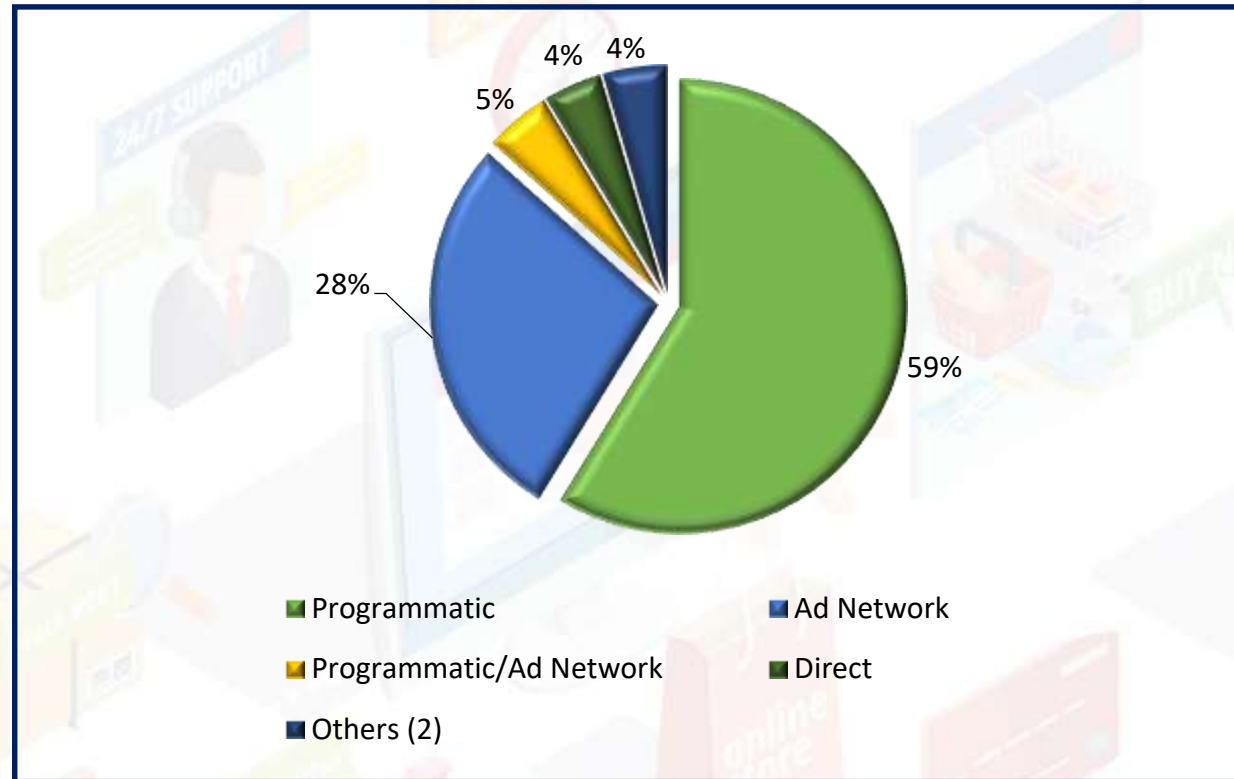
## Top 10 Brands from FMCG sector on Digital

Top 10 Brands	% Share
Hear.Com	5%
Epigamia Greek Yogurt	4%
Homelane.Com	2%
Epigamia Milkshake Chocolate	2%
Garnier Men Acnofight	2%
Monginis Cake	2%
Rage Coffee	1%
L Oreal Revitalift 1.5 Pct Hyaluronic Acid Serum	1%
Friends Adult Diapers	1%
Aashirvaad Atta	1%

- Top 10 Brands accounted **20%** share of ad insertions in Y 2022 with **Hear.Com** leading the list.



# Transaction Methods of Digital Advertising in FMCG sector



- **Programmatic (59%)** was the top transaction method for Digital advertising of **FMCG** sector in Y 2022.
- **Programmatic and Ad Network** transaction methods together captured **87%** share of **FMCG** ad insertions on Digital.

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