

Half Yearly Report (Jan-Jun'24)

TELEVISION ADVERTISING

Advertising Overview on Television



A **Television** advertisement (also called a **television commercial**, **commercial**, **ad** **TV advert** or simply an **advert**) is a span of **television** programming produced and paid for by an organization. It conveys a message, aimed to market a product or service.

TAM AdEx monitors more than 600+ TV Channels

This section mainly focuses on understanding the advertising trends in comparison to the past 3 half yearly, Top Spenders (Categories , Advertisers & Brands) on TV.

Highlights

01

Indexed Ad Volumes/channel on Television dropped by **10%** in Jan-Jun'25 over Jan-Jun'24.

02

Food & Beverage Sector topped with **22%** during Jan-Jun'25.

03

Toilet Soaps led the categories during H1, 2025; '**Aerated Soft Drink**' & '**Ecom-Online Shopping**' were the new entrant among the Top 10.

04

Toilet/Floor Cleaners was the top grown category in terms of Ad Volumes in Jan-Jun'25 over Jan-Jun'24.

05

FMCG players dominated the list of Top 10 advertisers with **HUL** leading the list.

06

6 out of Top 10 brands were from **Reckitt Benckiser** and **2** brands from **HUL** during Jan-Jun'25.

07

During Jan-Jun'25, **GEC** outperformed **News** channels as the leading genre for advertising, similar to the same period in 2024.

08

The Top 5 channels genres accounted for more than **95%** share of TV Ad Volumes during both Jan-Jun'24 and Jan-Jun'25.

Indexed Ad Volumes per channel on Television in H1, 2024-25



INDEXED GROWTH IN AD VOLUMES

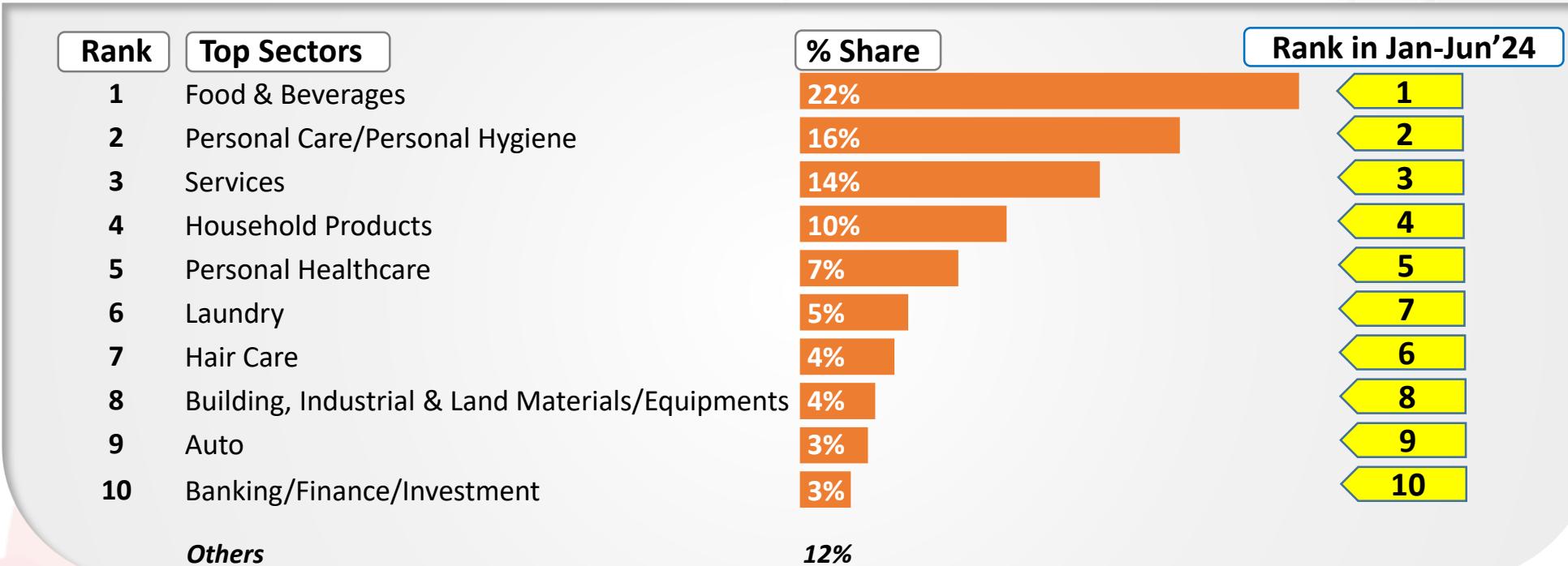


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- Television Ad Volumes during Jan–Jun'25 witnessed a modest 10% correction compared to the same period last year, indicating a phase of strategic recalibration in advertiser spending.

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'Food & Beverages'-The Leading Sector with 22% share of Ad Volumes

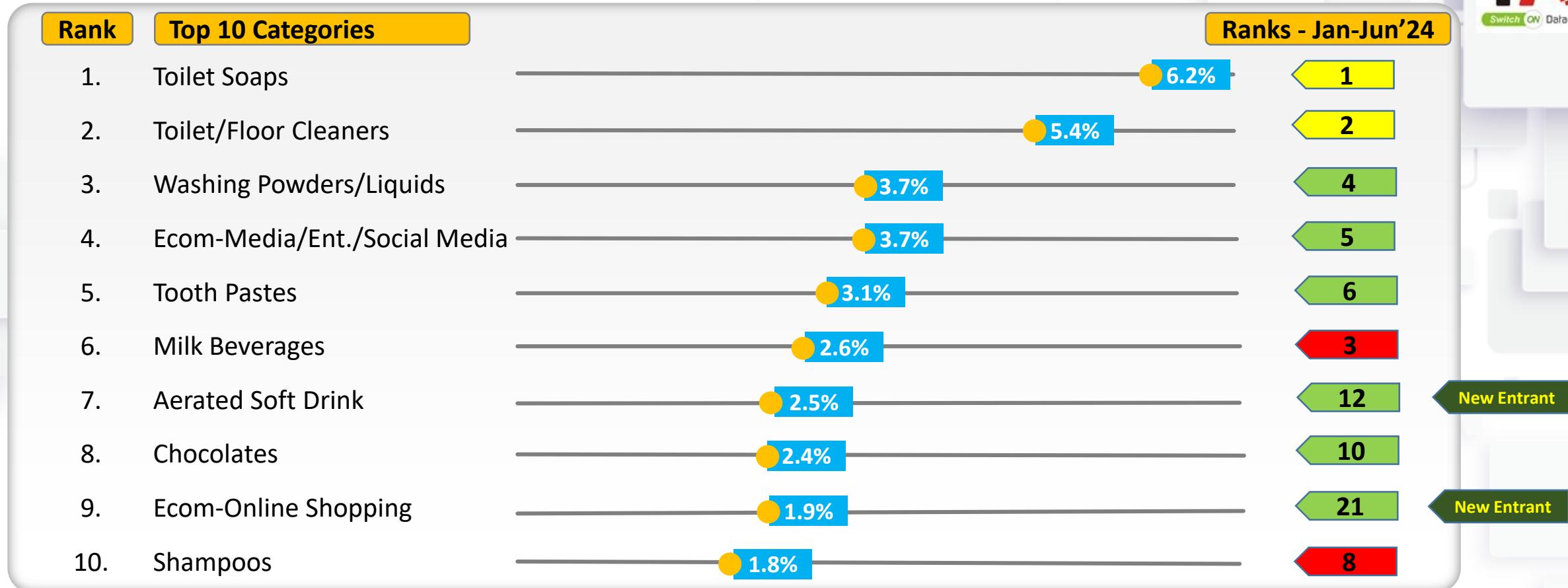


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- In Jan-Jun'25, 'Food & Beverage' (22%) was on top followed by 'Personal Care/Personal Hygiene' sector with 16% share.
- Except, Laundry & Hair Care sectors, all sectors in the top 10 list retained their respective ranking during Jan-Jun'25 over Jan-Jun'24.
- Top 10 Sectors contribute nearly 90% of the ad volume share in Jan-Jun'25.

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'Toilet Soaps' led the categories during H1, 2025



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- The Top 10 categories together added **33%** share of ad volumes in Jan-Jun'25.
- In the period from Jan-Jun'25, 6 categories showed a positive shift in rank compared to the same period in 2024.
- **'Aerated Soft Drink' & 'Ecom-Online Shopping'** were the new entrants among the Top 10 categories during Jan-Jun'25.
- Categories, **Toilet Soaps** and **Toilet/Floor Cleaners** maintained their respective rankings in H1'25 compared to H1'24.

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Top Growing Categories : 140+ Categories registered Positive Growth



Rank	Top 10 Growing Categories (Jan-Jun'25) (based on highest increase in actual Ad Volumes)	Growth
1	Toilet/Floor Cleaners	16%
2	Ecom-Online Shopping	48%
3	Vocational Training Institute	3.83 Times
4	Non Aerated Soft Drink	39%
5	Retail Outlets-Jewellers	31%
6	Ecom-Media/Entertainment/Social Media	12%
7	Aerated Soft Drink	14%
8	Corporate/Brand Image	67%
9	Paints	13%
10	Ecom-Financial Services	33%

“ ‘Toilet/Floor Cleaners’ category saw highest increase in Ad secondages with growth of **16%** followed by ‘Ecom-Online Shopping’ with **48%** growth during Jan-Jun’25 compared to Jan-Jun’24.

Leading Advertisers: FMCG Players dominated the top 10 list



Top 10 Advertisers (Jan-Jun'25): [3,900+]		Rank (Jan-Jun'24)
1.	Hindustan Unilever	1
2.	Reckitt Benckiser India	2
3.	Godrej Group	3
4.	Coca Cola India	8
5.	Procter & Gamble	4
6.	Cadburys India	6
7.	Glaxosmithkline Group	10
8.	Pepsi Foods (G)	7
9.	Nestle India	16
10.	Tata (G)	12

New Entrant

New Entrant

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- ‘HUL’ topped the list followed by ‘Reckitt’ during Jan-Jun’25.
- The Top 10 advertisers together added **47%** share of Ad Volumes during Jan-Jun’25.
- ‘Coca Cola India’ observed positive rank shift along with **Glaxosmithkline, Nestle and Tata**.

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'Harpic Power Plus 10x Advanced' was the top brand on TV during Jan-Jun'25



Rank	Top 10 Brands (Jan-Jun'25): [6,600+]
1	Harpic Power Plus 10x Advanced
2	Dettol Toilet Soaps
3	Dettol Antiseptic Liquid
4	Lizol Shakti
5	Maaza
6	Harpic Bathroom Cleaner
7	Close Up Ever Fresh
8	Lizol All In 1
9	Surf Excel Matic Liquid
10	Sensodyne Tooth Paste (GSK)

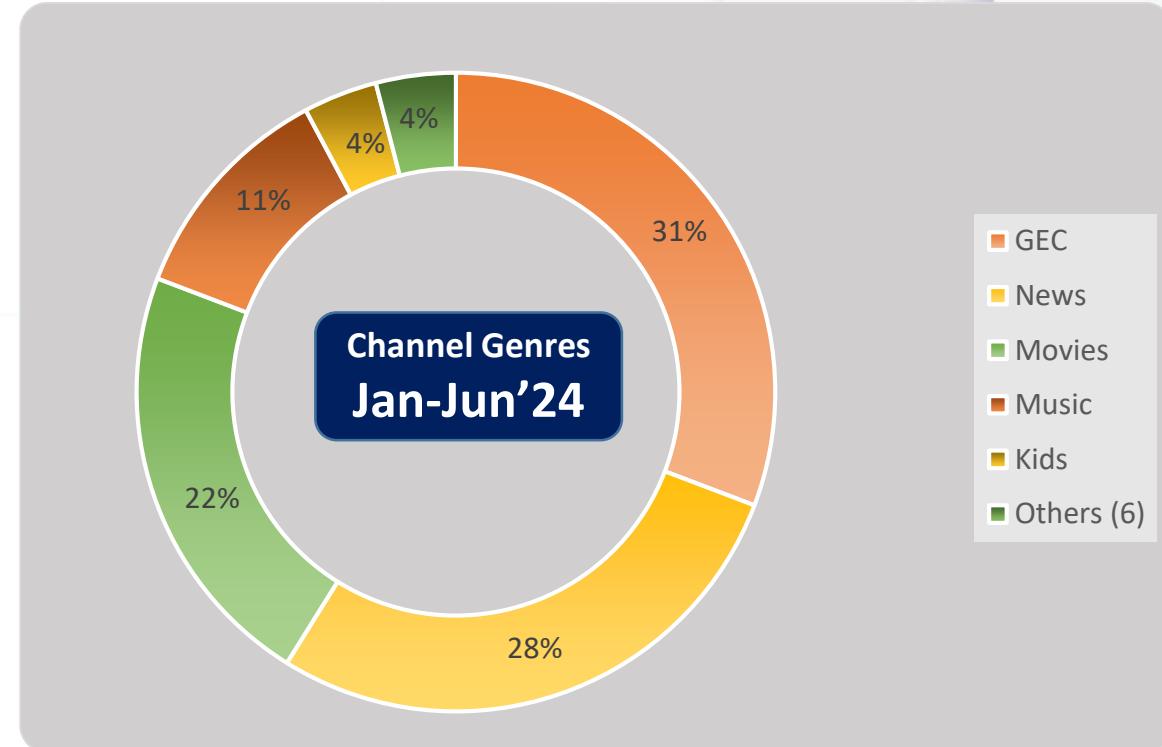
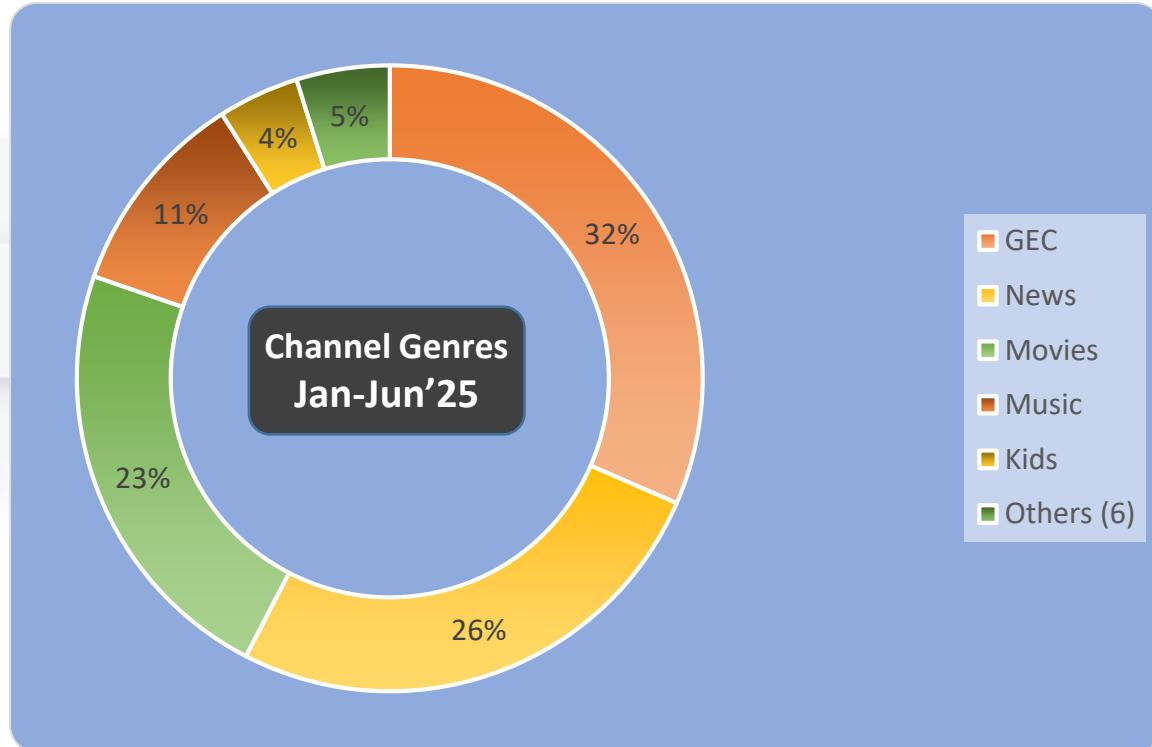
Top 10 Brands contributed **11%** share of Television Ad Volumes

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- During Jan-Jun'25, total **6.6K+** brands were present on Television.
- **6** out of Top 10 brands were from '**Reckitt Benckiser**' and **2** were from '**HUL**'.

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Top 5 Channel Genres Jan-Jun'25 : GEC and News had 58% of Ad Volumes



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- During Jan-Jun'25, 'GEC' outperformed 'News' channels as the leading genre for advertising, similar to same period in 2024.
- Top 5 channels genres accounted for more than **95%** share of Ad Volumes during both Jan-Jun'25 and Jan-Jun'24.

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