

2025 TELEVISION ADVERTISING RECAP: UNRAVELING THE YEAR



Source: AdEx India
A division of TAM Media Research Pvt. Ltd

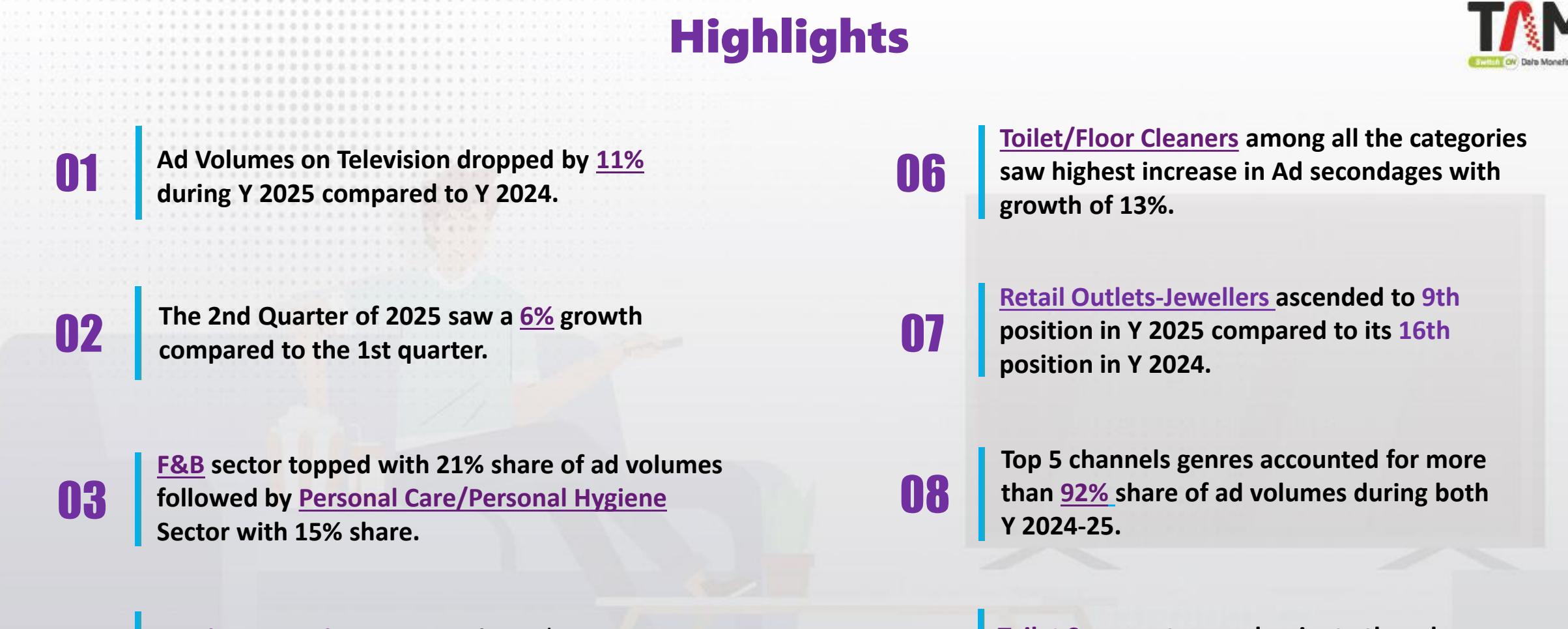
Advertising Overview on Television

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 5 years, Monthly Trends, Top Spenders (Categories , Advertisers & Brands), Co-Branding Ads associated with Movies & Celebrity Endorsement on TV.

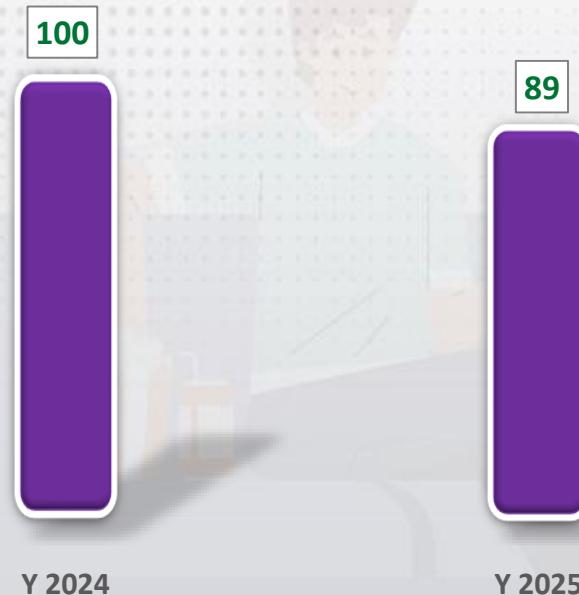
Highlights



- 01** Ad Volumes on Television dropped by 11% during Y 2025 compared to Y 2024.
- 02** The 2nd Quarter of 2025 saw a 6% growth compared to the 1st quarter.
- 03** F&B sector topped with 21% share of ad volumes followed by Personal Care/Personal Hygiene Sector with 15% share.
- 04** Hindustan Unilever retained its 1st position with 14% share of ad volumes in Y 2025 over Y 2024.
- 05** 7 out of Top 10 brands were from Reckitt Benckiser (India) and only 1 brand from HUL during Y 2025.
- 06** Toilet/Floor Cleaners among all the categories saw highest increase in Ad secondages with growth of 13%.
- 07** Retail Outlets-Jewellers ascended to 9th position in Y 2025 compared to its 16th position in Y 2024.
- 08** Top 5 channels genres accounted for more than 92% share of ad volumes during both Y 2024-25.
- 09** Toilet Soaps category dominate the ad volumes shares during both Y 2024-25.
- 10** Brands associated with Pushpa 2 covered 23% of the total share of co-brands ads during Y 2025.

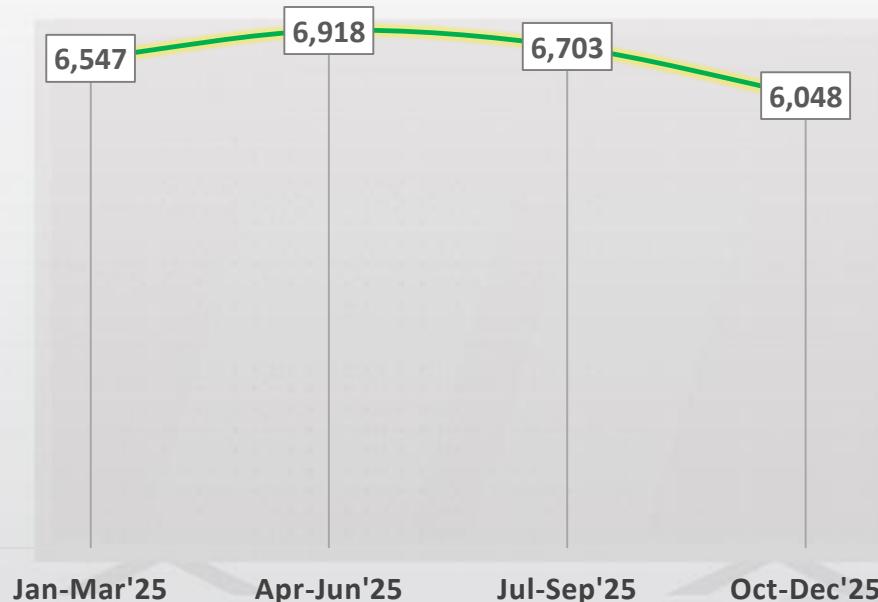
Television Ad Volumes Adjusted by 11% in 2025 vs. 2024

Indexed Growth in Ad Volumes/Channel



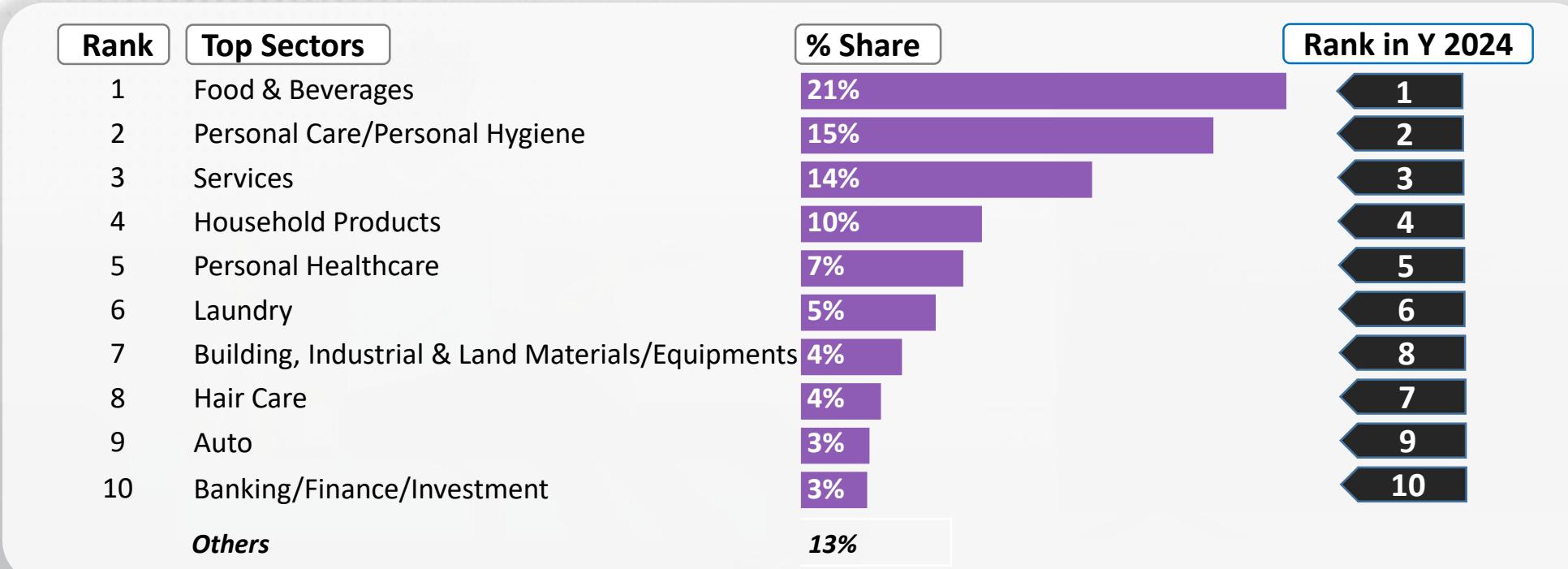
Index: Y 2024=100

Avg. Ad Volumes/Channel/Day (in Sec)



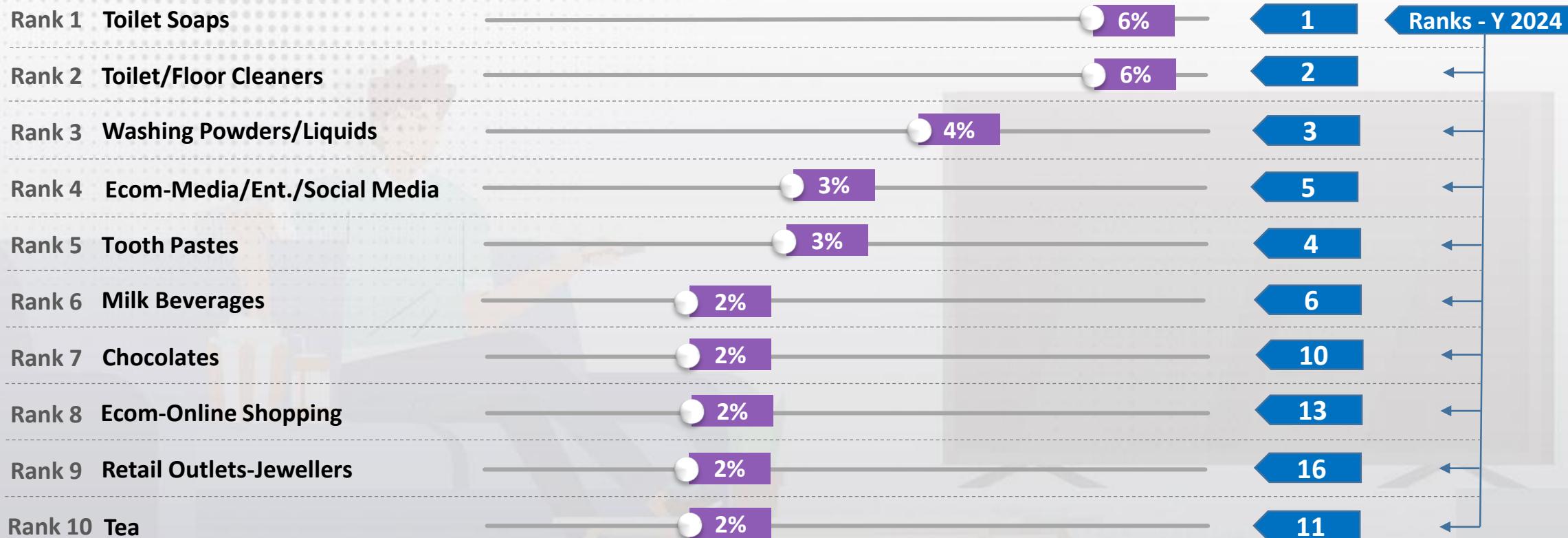
- Ad volumes registered an **11% year-on-year decline** in 2025 versus 2024.
- While **Q2 2025 recorded a 6% sequential growth over Q1**, momentum softened toward the year-end, with **Q4 volumes falling 10% compared to Q3**.

'Food & Beverages': The Leading Sector with 21% share of Ad Volumes



- Compared to Y 2024, **Top 6 Sectors** retained their respective positions in Y 2025.
- Building, Industrial & Land Materials/Equip** was the only sector that observed positive rank shift in Y 2025 over Y 2024.
- The top 10 sectors collectively added **87%** share of ad volumes during Y 2025.

Categories Y 2025: 'Toilet Soaps' topped the list



- During Y 2025, **Toilet Soaps**, **Toilet/Floor Cleaners** & **Washing Powders/Liquids** categories retained their **Top 3** positions with **6%**, **6%** and **4%** ad volumes share respectively over Y 2024.
- **Retail Outlets-Jewellers** ascended to **9th** position in Y 2025 compared to its **16th** position in Y 2024.
- Together, the top 10 categories added **32%** share of ad volumes.

Leading Advertisers: FMCG Players ruled among the Top 10

Top 10 Advertisers (Y 2025): [7,750+]		Rank (Y 2024)
1.	Hindustan Unilever	1
2.	Reckitt Benckiser (India)	2
3.	Godrej Group	4
4.	Procter & Gamble	5
5.	Cadburys India	6
6.	Coca Cola India	12
7.	Tata (G)	3
8.	Glaxo Smithkline	8
9.	Nestle India	15
10.	ITC	7

- In 2025, Hindustan Unilever emerged as the leading advertiser, accounting for 14% of total ad volumes.
- The top 10 advertisers together covered **44%** ad volumes shares in Y 2025.
- Coca-Cola India and Nestlé India were the only new entrants to the top 10 in 2025, securing the 6th and 9th positions, respectively—up from 12th and 15th ranks in 2024.

Leading Brands in Y 2025: 'Dettol Toilet Soaps' topped the list

Rank	Top 10 Brands (Y 2025): [11,050+]
1	Dettol Toilet Soaps
2	Harpic Power Plus 10x Advanced
3	Dettol Antiseptic Liquid
4	Jio Hotstar App
5	Lizol All In 1
6	Harpic Bathroom Cleaner
7	Lizol Shakti
8	Harpic Power Plus 10x Total Clean
9	Close Up Ever Fresh
10	Sensodyne Tooth Paste (GSK)

Top 10 Brands contributed 10% share of Television Ad Volumes

- **Reckitt Benckiser (India)** demonstrated strong brand dominance in 2025, with 7 of its brands featuring in the Top 10.
- **Lizol Shakti** recorded a significant year-on-year rise, climbing over 17 positions to secure the 7th rank in 2025.
- The Y 2025 rankings saw two new entrants—**Lizol Shakti** and **Sensodyne Toothpaste (GSK)** compared to Y 2024.

Top Growing Categories: 170+ Categories registered Positive Growth

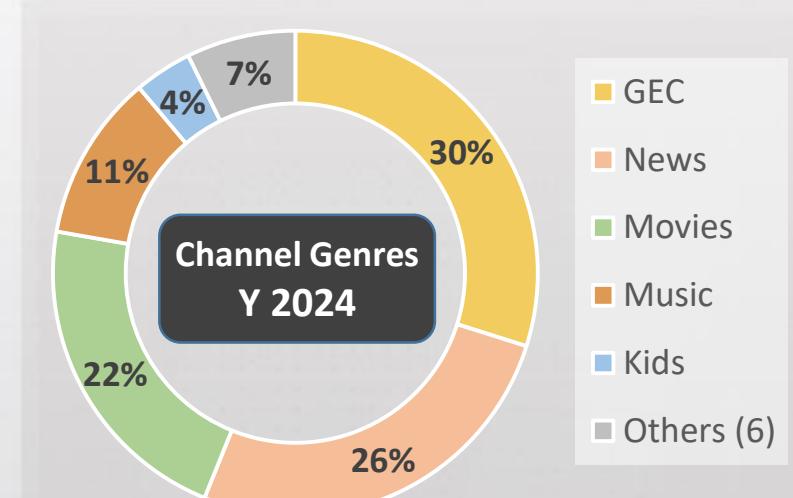
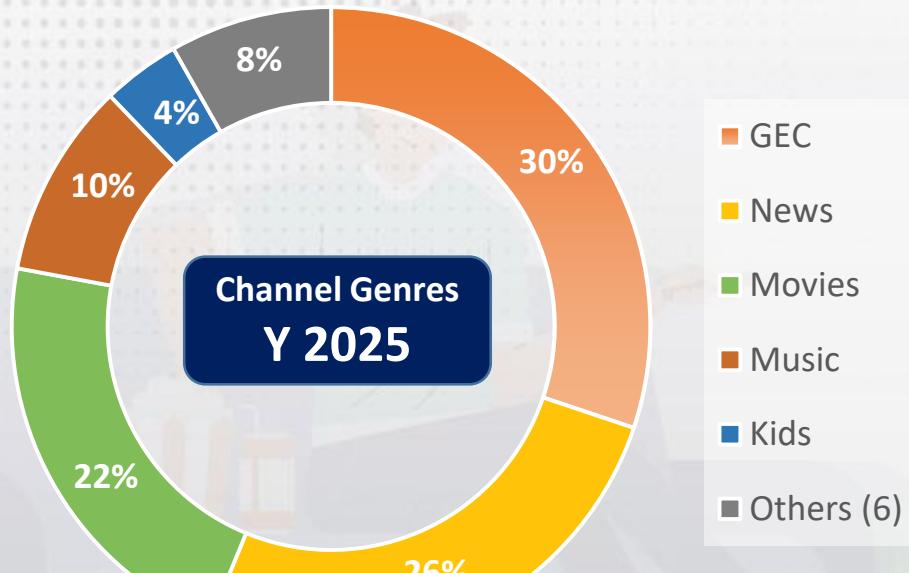


Rank	Top 10 Growing Categories (Y 2025) (based on highest increase in Ad Volumes)	Growth
1	Toilet/Floor Cleaners	13%
2	Vocational Training Institute	2.5 Times
3	Ecom-Online Shopping	24%
4	Aerated Soft Drink	15%
5	Retail Outlets-Jewellers	13%
6	Non Aerated Soft Drink	19%
7	Ecom-Financial Services	26%
8	Branded Jewellery	76%
9	Ecom-Matrimonials	35%
10	Chocolates	5%

Growth in Y 2025 over Y 2024

- **Toilet/Floor Cleaners** among the categories saw highest increase in Ad secondages with growth of **13%**.
- While in terms of percent growth, **Vocational Training Institute** leads among top 10 with **2.5** time growth during Y 2025 compared to Y 2024.

Top 5 Channel Genres Y 2025: GEC and News had 56% of Ad Volumes



- GEC was the leading Channel Genre with 30% share of ad volumes in both Y 2024 and Y 2025.
- Top 5 channels genres accounted for more than 92% share of ad volumes during both Y 2025 and Y 2024.

Movies partnered with brands for 570+ hours of TV ads in 2025

Co-branded advertising has garnered a lot of traction in past few years. A brand and movie both form an alliance to work together, creating marketing synergy.

On television, there have been various co-branding efforts, which have created fantastic symbiotic relationship between the brands and movies.

TAM AdEx monitors co-branding ads in association with movies on television. In this section, we have showcased the co-branding advertising scenario on the TV channels.

Co-branded Ads: 571 Hours of Co-branded ads in 2025

Rank	Top 10 Brands Associated with Movies	% Share
1	Comfort Fabric Conditioner	23%
2	Cadbury Gems	18%
3	Dr Ortho Strong Oil	8%
4	Action Tesa Boilo	6%
5	Cycle 3 In 1 Parampara	4%
6	Vim Shudham	4%
7	Pet Saffa	3%
8	Action Tesa HDHMR Board	2%
9	Bharat Masala	2%
10	Jolly Fat Go Range Of Products	2%

- **Comfort Fabric Conditioner** was the top brand associated with movies with **23%** share of Co-Branding Ad Volumes.
- The top brand **Dr Ortho Strong Oil** partnered with **5** movies and one of them was '**Raid 2**'.
- Brands associated with **Pushpa 2** covered **23%** of the total share of co-brands ads during Y 2025.

Nearly 60 Movies Partnered with Brands

Rank	Top 10 Movies in Co-Branding	Count of Brands
1	120 Bahadur	7
2	Fateh	6
3	Ground Zero	5
4	Mere Husband Ki Biwi	5
5	De Pyaar De 2	5
6	Jolly LLB 3	5
7	Raid 2	4
8	Maa	4
9	Maalik	3
10	Projapati 2	3

- The movie '**120 Bahadur**' partnered with highest number of brands i.e. **7** in Y 2025.
- '**Fateh**' movie had **6** Co-Brandings while **4 other movies** associated with 5 brands each in Y 2025.

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