

Quote by Charu Malhotra, Co-Founder & Managing Director, Primus Partners

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Small regional films face streaming challenge despite rising demand

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The surge in regional-language content on streaming platforms hasn't really benefited small-budget films in languages other than Hindi, such as Kannada, Malayalam, Marathi, Punjabi and others.

Trade experts and industry executives said while acquisitions are mainly limited to Netflix, Prime Video and JioHotstar, and to a lesser extent SonyLIV and ZEE5, only about half of the movies made in many regional film industries find buyers, thanks to the packed calendars and limited

budgets of streaming services. This means these films either remain completely unreleased or have to wait for a streaming platform to buy them after their theatrical release.

This is despite the fact that India's streaming audiences are no longer binge-watching just in Hindi. Regional originals—from Tamil thrillers to Malayalam crime sagas—are steadily climbing the charts.

The mid-year list of the top 50 originals published by media consulting firm Ormax in 2025 underscored this trend. Among the most-watched titles were series two of Tamil fiction series Suzhal—The Vortex (8.3 million), Office (5.4 million) and Heart

Beat (7 million); season two of Malayalam fiction series Kerala Crime Files (6.9 million), Tamil film Test (6.5 million), and Telugu fiction series Devika & Danny (5.2 million).

In October Netflix announced six new Tamil and Telugu originals, and in December JioHotstar said it would roll out 1,500 hours of fresh south Indian programming over the next year, alongside an investment of ₹4,000 crore over five years to strengthen the region's content and creator ecosystem.

"The main challenge right now is that national OTT (over-the-top) platforms are simply not focusing on regional markets. Because the



Some producers are delaying projects or are going for much smaller budgets as they can't rely on OTT revenue. ISTOCKPHOTO

audience size for regional languages isn't as large as Hindi, producers always work within tight and fixed budgets, so every project has to be

planned very carefully," said Nitin Gupta, chief content officer at Chaupal, a platform specializing in Punjabi, Haryanvi and Bhojpuri content.

Greenlighting hasn't stopped but has become more measured, Gupta added. Instead of rushing into big-budget films, producers are checking how the film will recover costs, whether the cast can deliver value, and whether the idea has longevity on streaming platforms. At Chaupal, he said, the aim is to make sure that even smaller or low-performing films get visibility.

If the content reaches more people, it naturally helps producers recover costs better

over time, he added.

Charu Malhotra, co-founder and managing director, Primus Partners, a management consultancy firm, agreed that in Hindi, Tamil and Telugu, OTT rights are almost a certainty for mid-to-large films. "But in Marathi, Gujarati, Punjabi, Bengali and other languages, there are quite a few films that don't find buyers. The basic reason is scale. OTT platforms prioritize languages with wide national traction or strong diaspora value. Smaller

industries don't always generate the kind of viewership that justifies platform spend, so a lot of titles get stuck in limbo," Malhotra said.

Due to this, some producers are becoming cautious, she added. A few are delaying projects, while others are going for much smaller budgets because they can't rely on OTT revenue to cushion the risk. So films are going to floors, but not at the same frequency or scale as before, she said.

Experts said regional OTTs do step in sometimes, but their pockets are smaller, so the rates they offer rarely help a film fully recover its costs.

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SOUTH SURGE

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