
INDIA FILM INDUSTRY

India Box Office Report

Q3 2026: July–September

Theatrical performance of Bollywood, South Indian and regional cinema

Disclaimer: Figures are compiled by CinemaIP on a best-efforts basis. While every care has been taken, CinemaIP does not guarantee the accuracy or completeness of every figure, and some data may be missing.

Q3 box office grew 39%, but the growth came from a handful of outsized hits; for the typical film, the market got harder

Our view: Q3 was a hits-driven quarter, not a broad recovery. Footfalls, prices and occupancy all rose, but a few films captured most of the gain, while the median release grossed less and fewer films grossed their budget than in Q2.

	Evidence	Slides
1 The market grew on attendance and price	Footfalls rose 29% to 18.9 Cr and the average ticket price 7.7% to ₹236. Occupancy rose 4.8 points to 25.6%, and every city tier and screen format grew.	3–10
2 But growth was concentrated in a few films	The top 10 releases took 62% of Q3 gross, up from 51% in Q2. Fifteen Super Hits and Blockbusters earned 53% of Indian-language gross, and the top seven films took half of all Q3 gross.	11–13
3 For the typical film, Q3 was harder	Among releases grossing ₹50 lakh+, the median earned ₹3.4 Cr, 22% less than in Q2. Only 18% of Indian-language films grossed their budget (30% in Q2), and 65% grossed under half of it. None of the three ₹200 Cr+ films grossed its budget.	14–17
4 Breakouts were rare and built after release	The average release earns 44% of its run in the opening weekend, and 122 of 130 had their best week in week 1. Among releases grossing ₹50 Cr+, only three peaked later: Hanuman Ansh (₹413 Cr from a ₹0.8 Cr opening), Bethlehem Kudumba Unit (₹176 Cr) and Premada Oorali (₹94 Cr).	18–20

Bigger films drove the quarter: Q3’s top five grossed ₹1,785 Cr, ₹741 Cr more than Q2’s top five

GROSS BOX OFFICE

₹4,468 Cr

+39.3% Q2: ₹3,208 Cr

TOTAL FOOTFALLS

18.89 Cr

+29.4% Q2: 14.60 Cr

AVERAGE TICKET PRICE

₹236

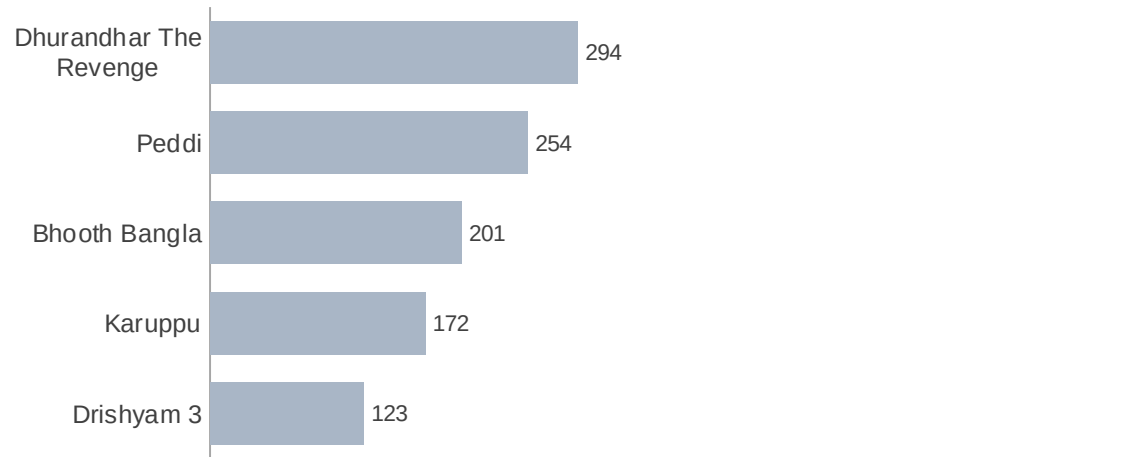
+7.7% Q2: ₹220

SCREENS · CINEMAS TRACKED

9,786

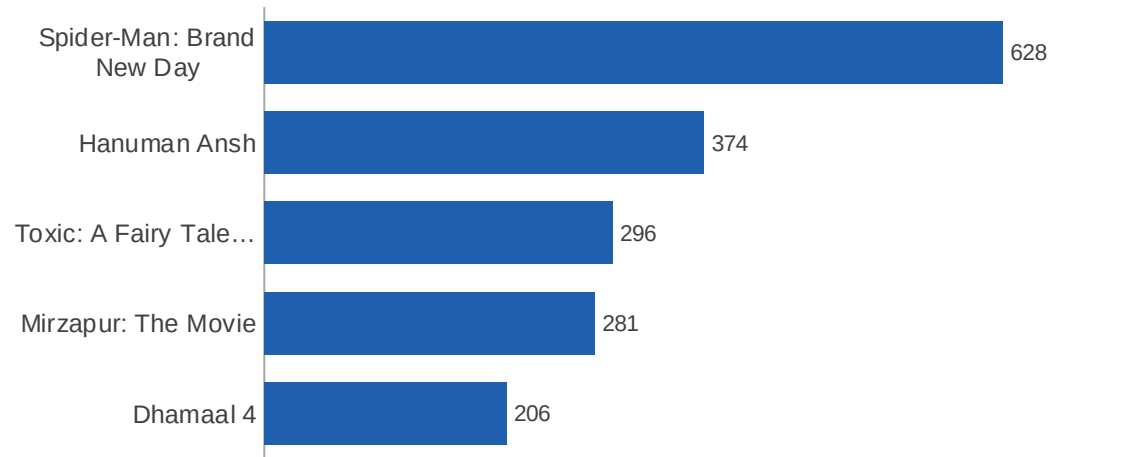
4,429 cinemas Q2: 4,223 cinemas

Q2 (Apr–Jun) top 5 Gross box office by show date, ₹ Cr



Top 5 total: ₹1,044 Cr · 33% of Q2 box office

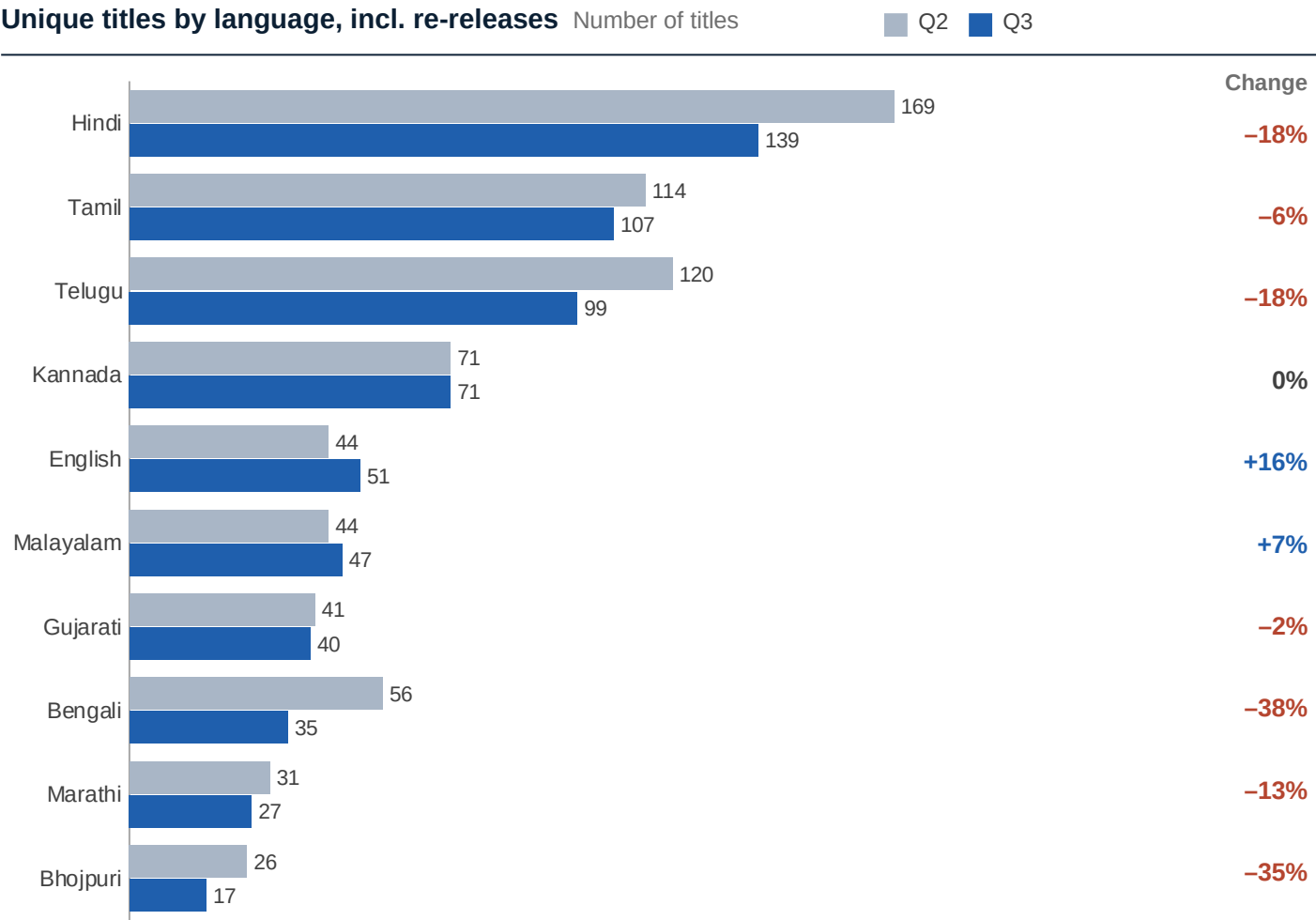
Q3 (Jul–Sep) top 5 Gross box office by show date, ₹ Cr



Top 5 total: ₹1,785 Cr · 40% of Q3 box office

Q3’s top film (₹628 Cr) was more than twice Q2’s No. 1, and the top five added ₹741 Cr, about 60% of the ₹1,260 Cr quarter-on-quarter growth.

Titles fell 12% in Q3 while box office rose 39%, and only 150 of 365 new releases grossed ₹50 lakh or more

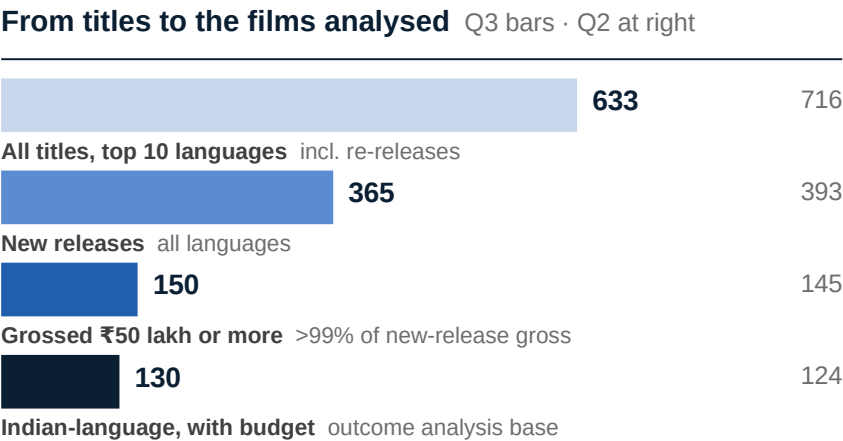


Key takeaways

Fewer titles, bigger market. Titles in the top 10 languages fell 12% (716 → 633) while box office rose 39%.

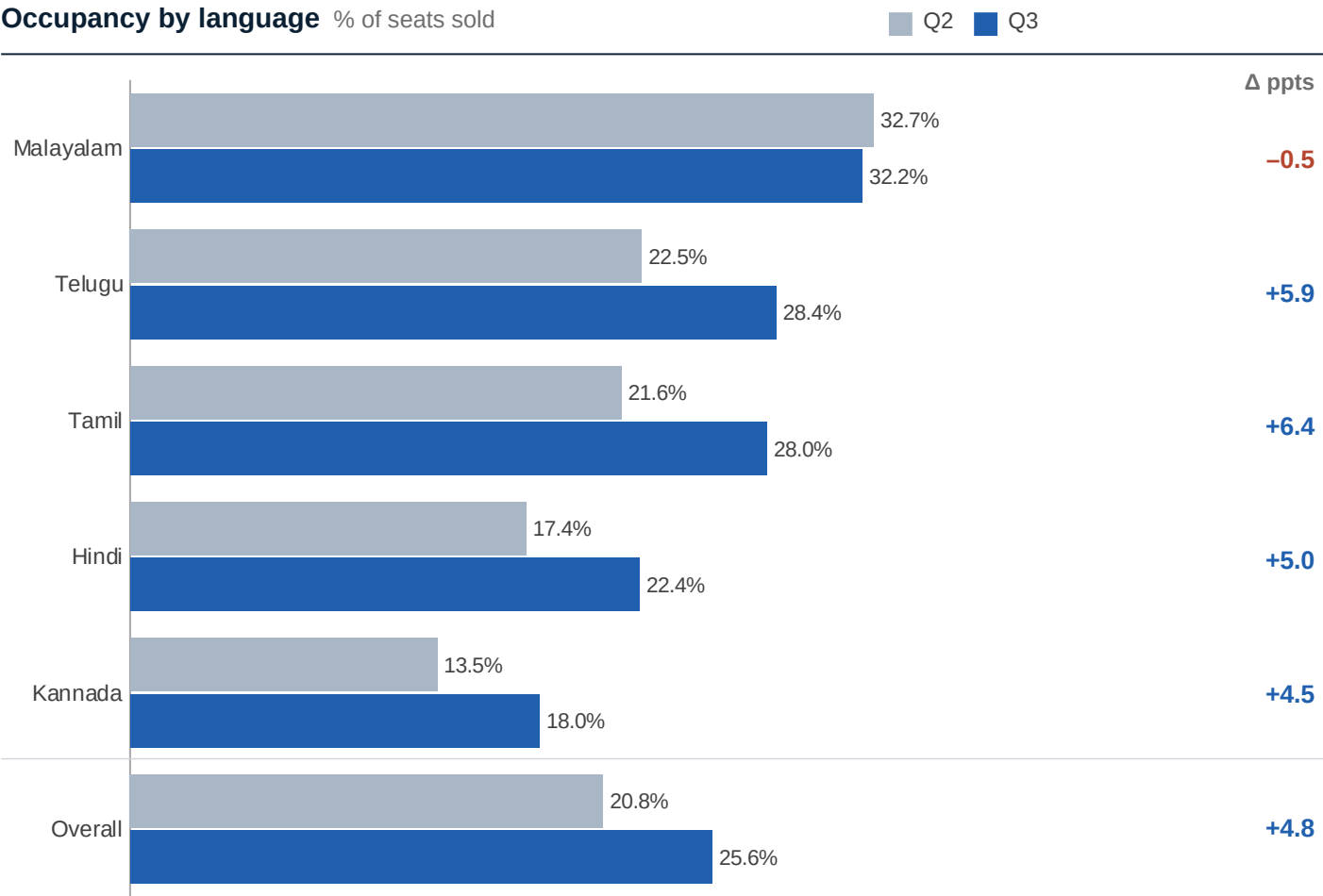
English and Malayalam added titles. English (+16%) was driven by Hollywood tentpoles; Malayalam grew 7% and Kannada held flat as most languages declined.

Bengali and Bhojpuri shrank most. Bengali fell 38% (56 → 35) and Bhojpuri 35%. Hindi released 18% fewer films but grew box office 68%.



Occupancy rose ~5 points to 25.6%, led by Tamil and Telugu; Malayalam stayed highest but flat

Occupancy by language % of seats sold



Houseful shows % of shows >95% full



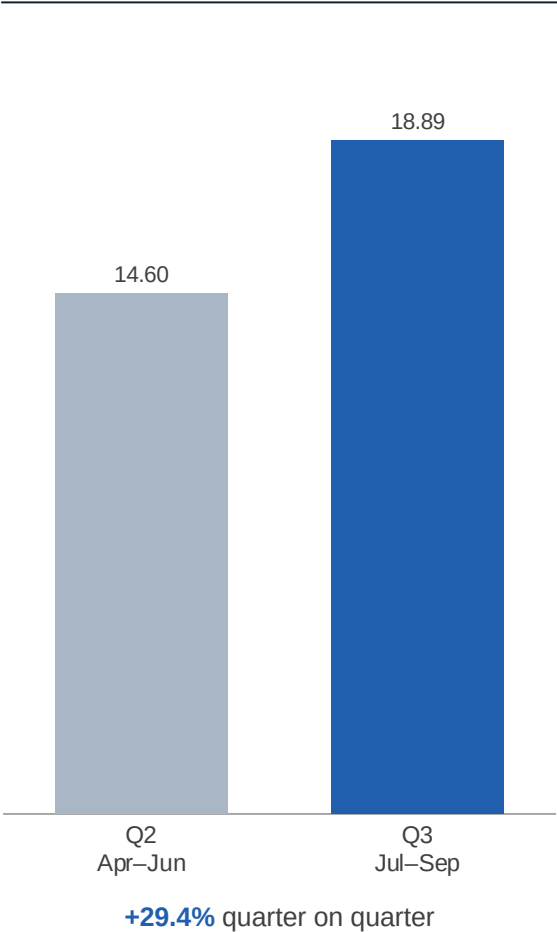
Weekend vs weekday, Q3 Occupancy



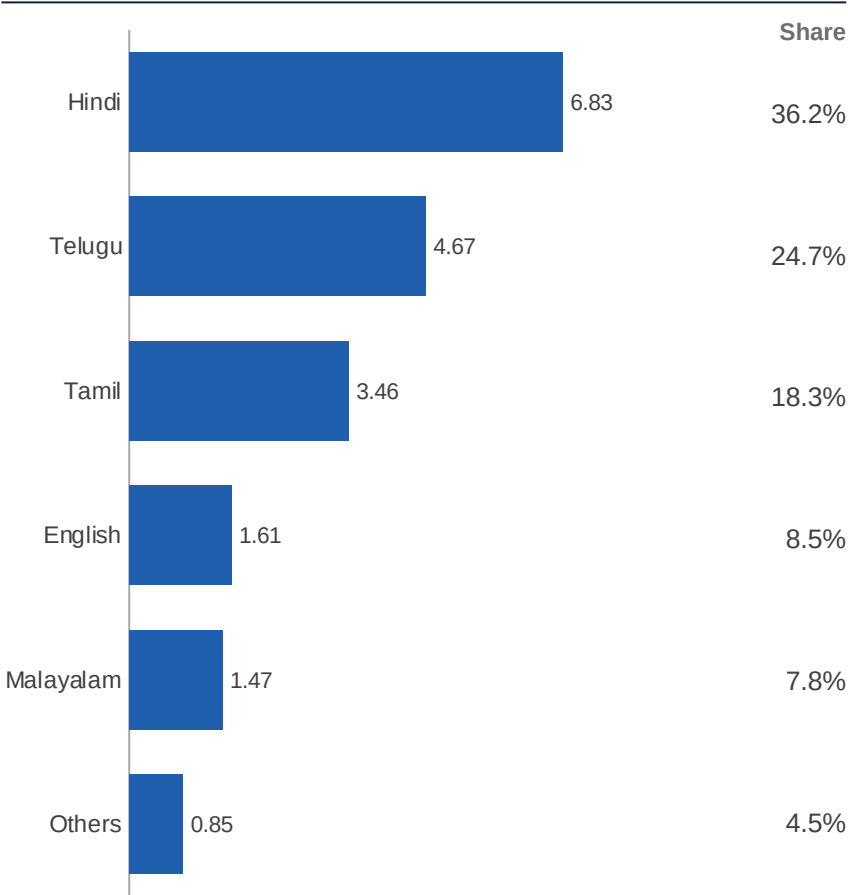
Demand is peaky: weekends fill 1.8× the seats of weekdays, and the share of houseful shows rose by 40% (3.3% → 4.7%).

Admissions rose 29% to 18.9 Cr; Hindi and Telugu supplied 61% of Q3 footfalls

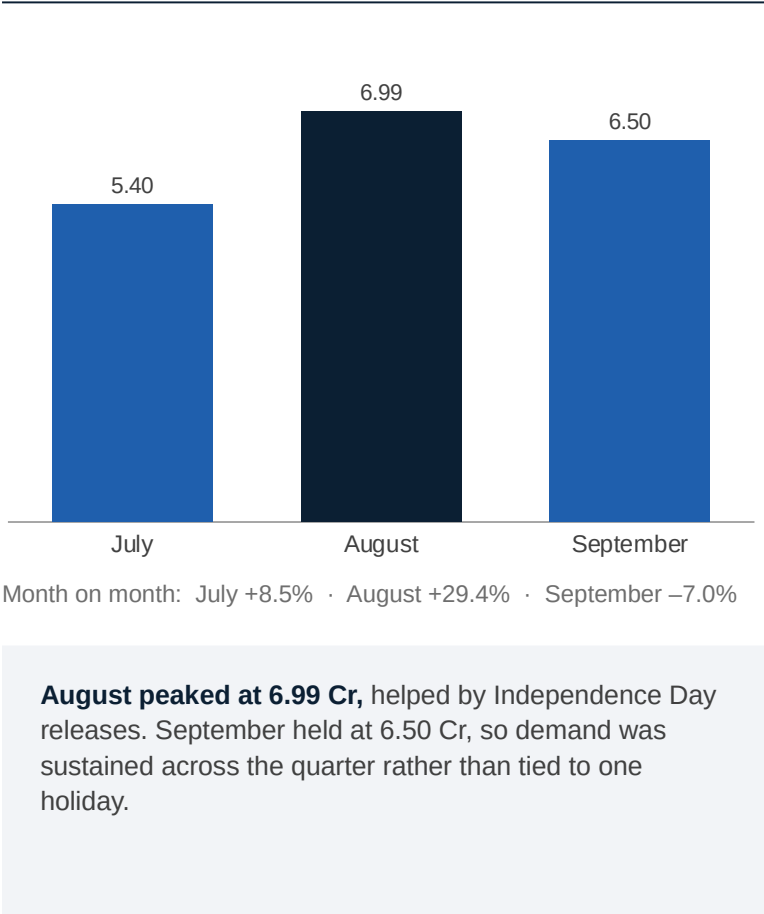
Total footfalls Cr admissions



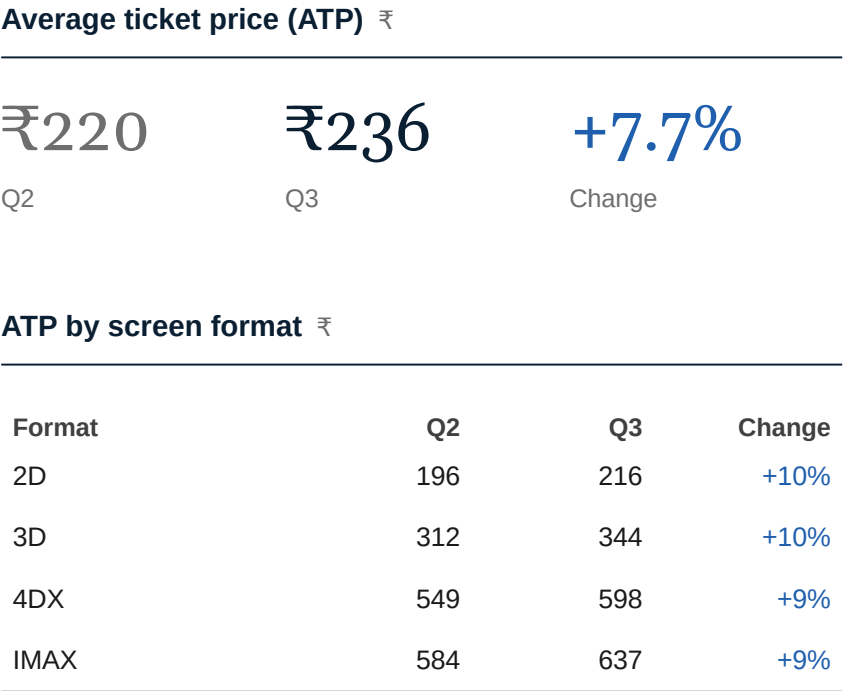
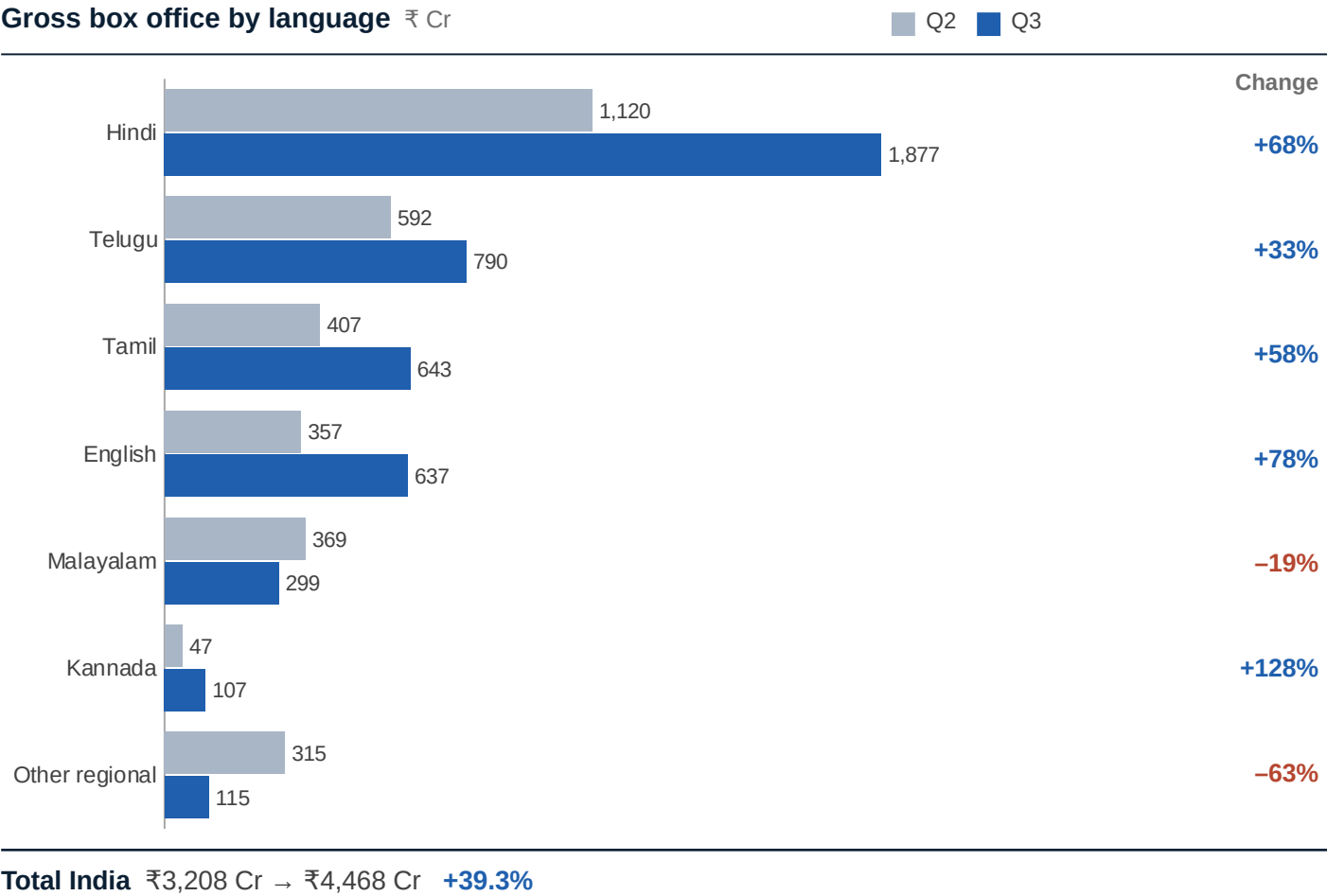
Q3 footfalls by language Cr · share of total



Q3 footfalls by month Cr



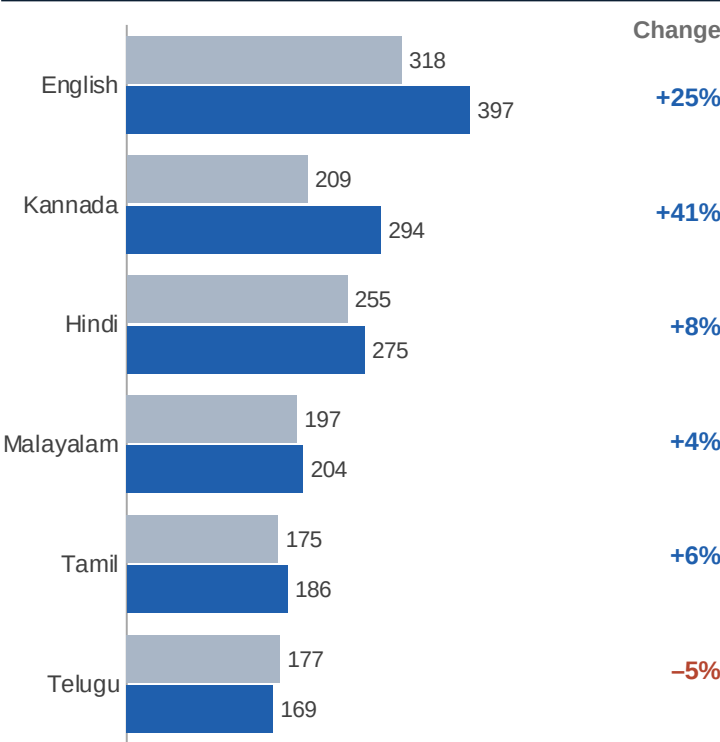
Box office rose 39%: Hindi, English and Tamil drove the gain while Malayalam and other regional languages fell



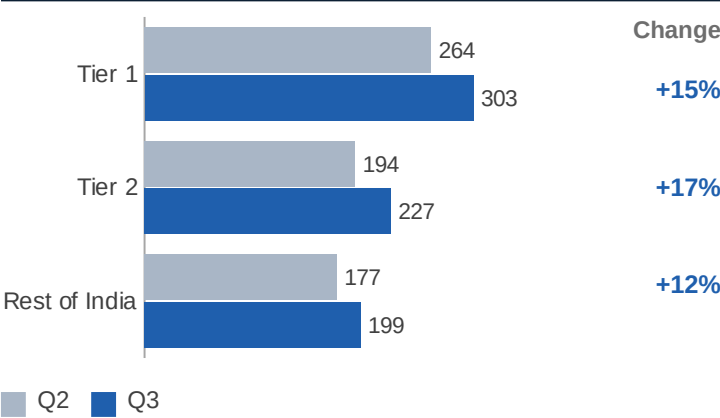
Premium formats carry ~3× the 2D price, and all formats rose 9–10%, so price growth was broad rather than a format-mix effect.

Ticket prices rose on multiplex and Tier 1 pricing; single screens stayed flat and Telugu prices fell

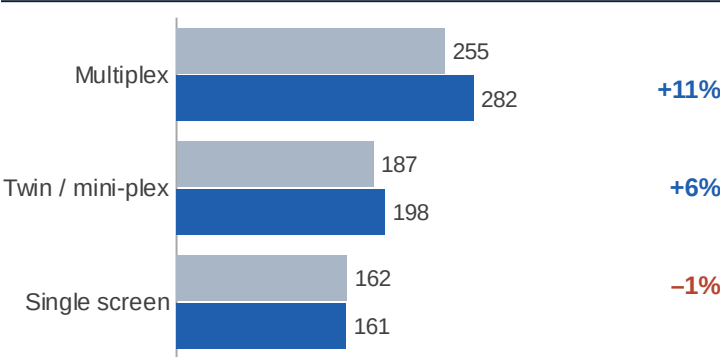
By language ATP, ₹



By city tier ATP, ₹



By screen type ATP, ₹



HIGHEST-ATP FILM, Q3

The Invite

English · ₹463 ATP · 93,083 tickets sold

Key takeaways

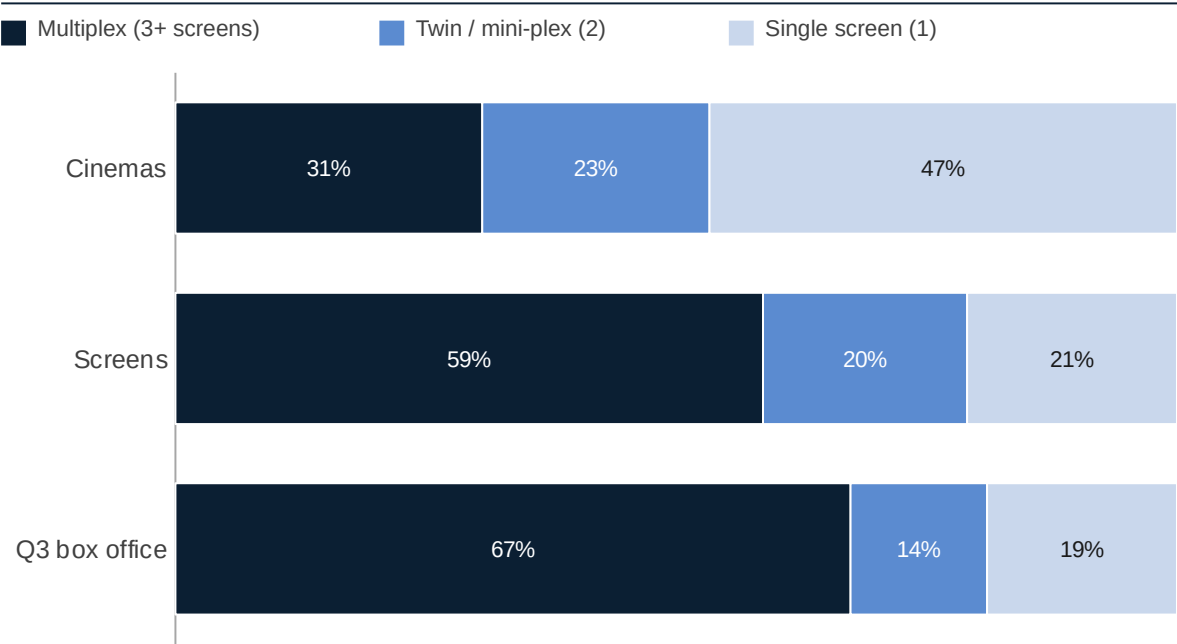
English and Kannada led. English rose 25% to ₹397 and Kannada 41% to ₹294.

Price growth is a multiplex story. Multiplex ATP rose 11% while single screens were flat at ₹161.

Telugu was the exception. It was the only language where ATP fell (₹177 → ₹169).

Multiplexes earn two-thirds of box office from under a third of cinemas

Share of cinemas, screens and Q3 box office by format %



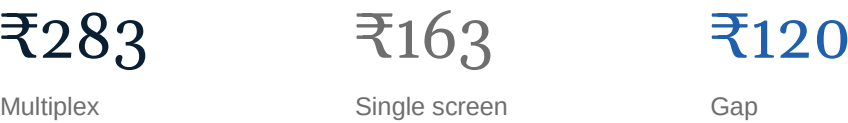
₹ Cr for box office; ₹ for ATP

Format	Cinemas	Screens	Q2 BO	Q3 BO	Change	Q2 ATP	Q3 ATP
Multiplex	1,357	5,789	2,153	3,012	+40%	255	283
Twin / mini-plex	1,005	2,010	398	609	+53%	186	200
Single screen	2,067	2,067	657	847	+29%	163	163
Total	4,429	9,786	3,208	4,468	+39%	220	236

Key takeaways

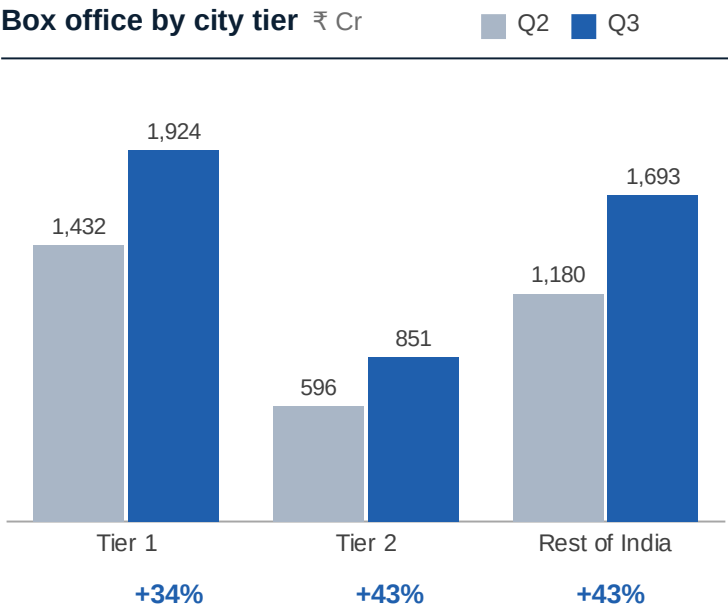
- Multiplexes dominate value.** 31% of cinemas and 59% of screens earn 67% of box office, at ₹283 ATP.
- Single screens are numerous but low-yield.** 47% of cinemas earn 19% of box office at a flat ₹163, ₹120 below multiplexes.
- Twin / mini-plexes grew fastest.** Box office rose 53% to ₹609 Cr at ₹200 ATP, the mid-tier between the other two formats.
- All formats grew.** Multiplexes +40%, single screens +29%.

ATP gap, Q3 ₹ per ticket

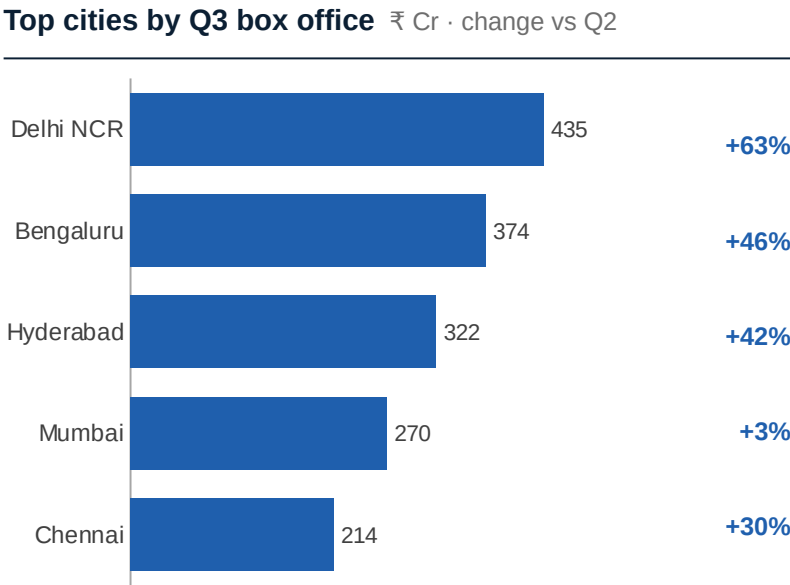


Source: CinemaIP; team analysis | Format rows sum to 9,866 screens vs 9,786 total; ~96 single-screen cinemas not yet in capacity data

Smaller markets grew fastest: Tier 2 and rest of India rose 43% vs 34% for Tier 1



Share of Q3 BO: Tier 1 43.1% · Tier 2 19.1% · Rest of India 37.9%



Next five (Pune, Kochi, Kolkata, Ahmedabad, Jaipur): ₹463 Cr, +23%

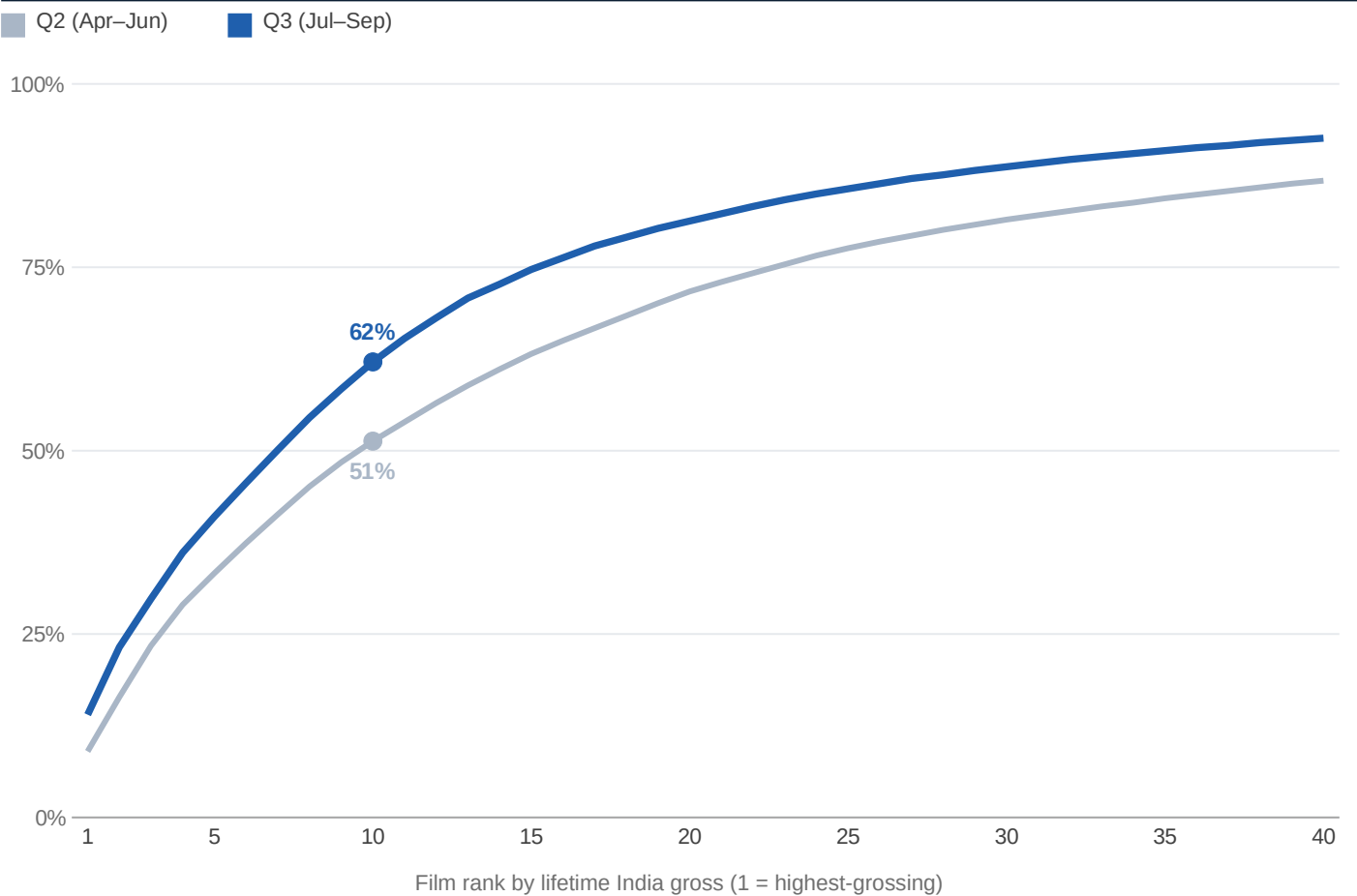
Regional strongholds, Q3

State / region	BO ₹Cr	Lead language
Andhra + Telangana	809	Telugu
Tamil Nadu	539	Tamil
Maharashtra	506	Hindi
Karnataka	468	Kannada
Kerala	359	Malayalam

So what: growth was national rather than metro-led. Mumbai was nearly flat (+3%) while Delhi NCR grew 63% to lead all cities, and the two Telugu states remain the single largest regional market at ₹809 Cr.

Box office concentrated further: Q3's top 10 releases took 62% of gross, up from 51%, while the median film grossed 22% less

Cumulative share of quarter gross, by film rank % of total gross



Top 10 films' share of gross

51% → 62%
Q2 Q3

Films needed for half of gross

10 → 7
Q2 Q3

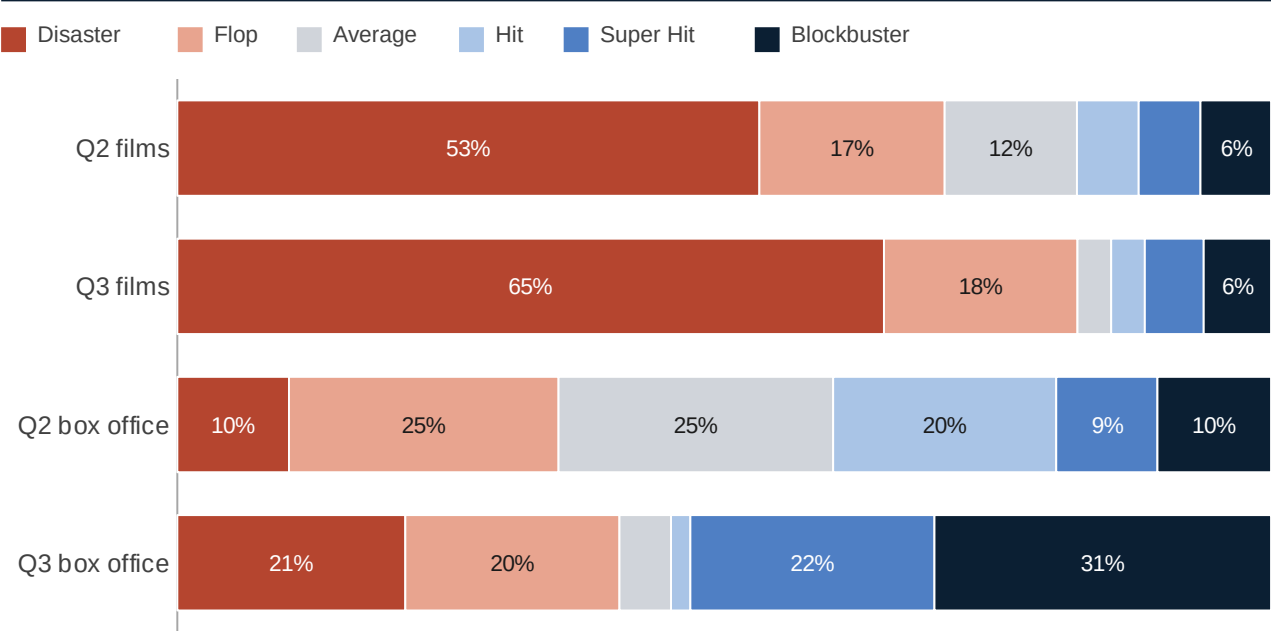
Median film's lifetime gross

₹4.4 Cr → ₹3.4 Cr
Q2 Q3

Bigger, not broader: gross from films released in Q3 rose 56% (₹2,883 Cr → ₹4,488 Cr), yet the median release earned less than in Q2.

Q3 was a barbell: 15 Super Hits and Blockbusters earned 53% of gross, while 65% of films grossed under half their budget

Distribution of films and box office by outcome % of total



Gross ÷ budget: Disaster <0.5× · Flop 0.5–1× · Average 1–1.5× · Hit 1.5–2× · Super Hit 2–3× · Blockbuster ≥3×

Films, gross and median gross ÷ budget by outcome

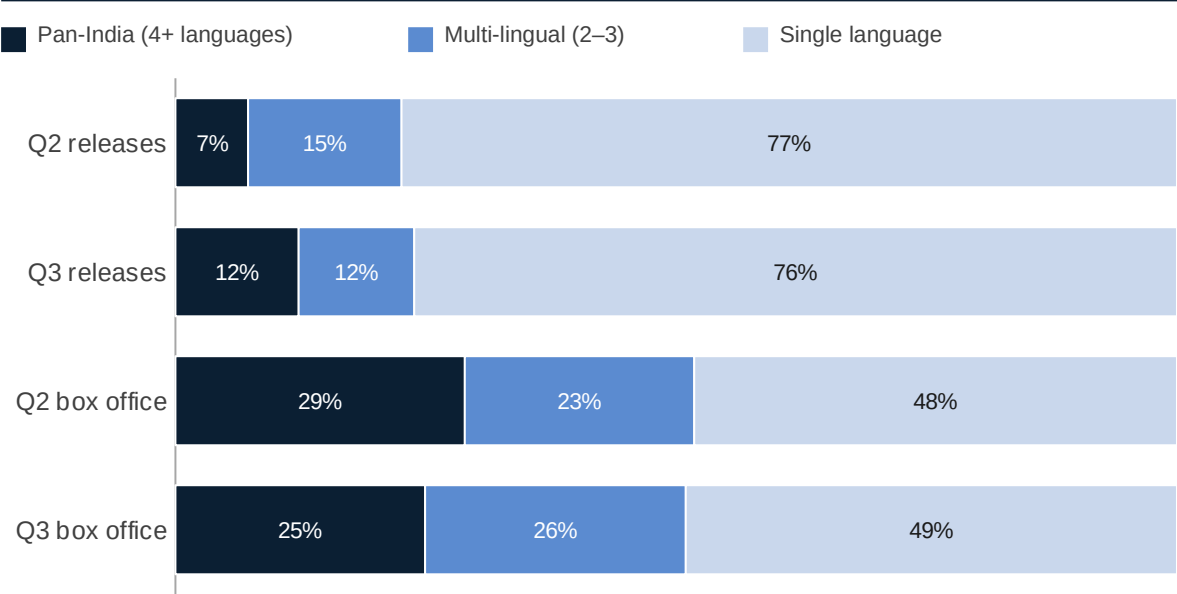
	Films		Gross, ₹ Cr		Median ×	
Outcome	Q2	Q3	Q2	Q3	Q2	Q3
Disaster	66	84	259	720	0.22×	0.21×
Flop	21	23	624	676	0.68×	0.69×
Average	15	4	636	163	1.22×	1.31×
Hit	7	4	517	61	1.72×	1.80×
Super Hit	7	7	235	771	2.46×	2.46×
Blockbuster	8	8	263	1,063	8.07×	5.01×
Total	124	130	2,533	3,455		

Median gross ÷ budget of the films in each outcome band.

- 1 **More misses.** Disasters rose from 66 to 84 films (53% → 65%); 18% grossed their budget vs 30%.
- 2 **Big wins drove growth.** Super Hits and Blockbusters made ₹1,834 Cr vs ₹498 Cr in Q2.
- 3 **Middle hollowed out.** Average and Hit films fell from 22 to 8.

Films released in several languages were 24% of Q3 releases and earned 51% of gross, about the same share as in Q2 (52%)

Share of releases and box office by release type %



Release type	Q2 films	Q3 films	Q3 avg gross	Q3 gross ≥ budget
Pan-India (4+)	9	16	₹54 Cr	25%
Multi-lingual (2–3)	19	15	₹60 Cr	20%
Single language	96	99	₹17.1 Cr	16%
Total	124	130	₹26.6 Cr	18%

Top multi-lingual releases at release, Q3 India gross

Film	Origin	Versions	Gross ₹Cr	Q3 rank
Toxic	Kannada	6	296	#3
Mirzapur: The Movie	Hindi	2	283	#4
Jana Nayagan	Tamil	3	220	#5
Irumudi	Telugu	2	197	#8
The Paradise	Telugu	8	144	#11

Key takeaways

Flat, not rising. Multi-lingual releases took 52% of gross in Q2 and 51% in Q3. Dubbing often followed success: Hanuman Ansh and Bethlehem Kudumba Unit added versions after release, which earned 2% and 7% of their gross.

Pan-India scale did not guarantee hits. Releases nearly doubled (9 → 16) but average box office fell from ₹81 Cr to ₹54 Cr as several large releases under-delivered.

Q3 budgets shifted to Mega films: two releases took 25% of spend but grossed only 0.54× their budgets

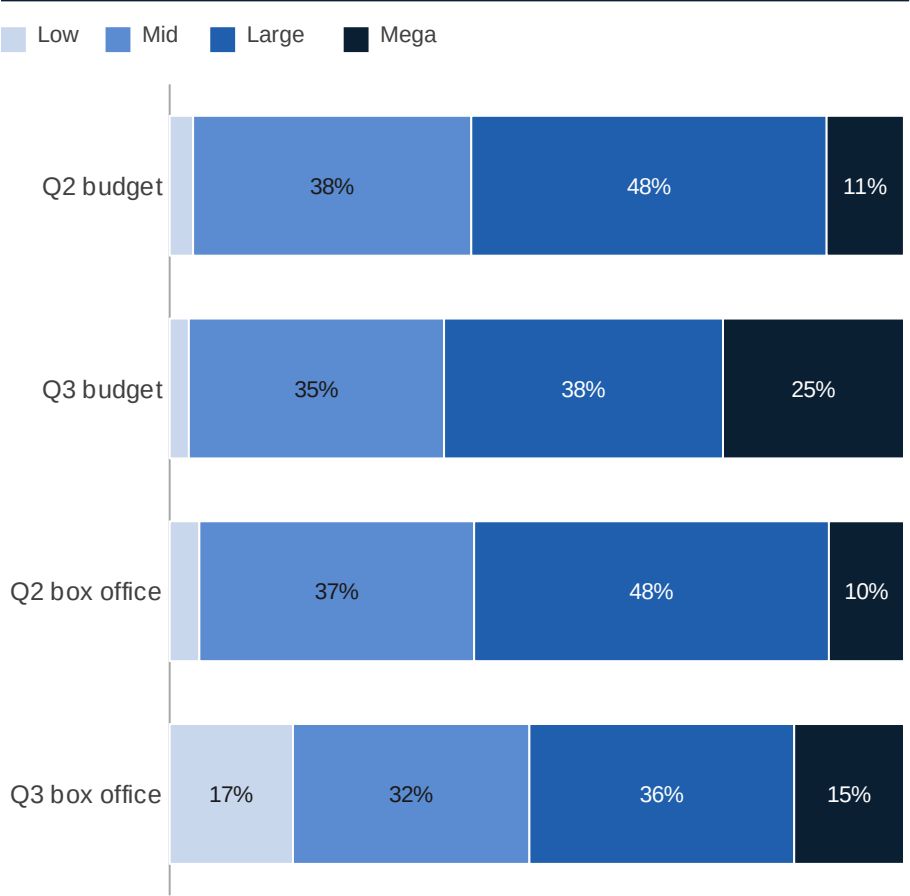
Films, gross and gross ÷ budget by budget band

Budget band	Films		India gross, ₹ Cr			Gross ÷ budget	
	Q2	Q3	Q2	Q3	Change	Q2	Q3
Low (≤₹5 Cr)	35	31	103	580	+465%	1.04×	5.75×†
Mid (₹5–50 Cr)	72	83	948	1,113	+17%	0.81×	0.83×
Large (₹50–200 Cr)	16	14	1,224	1,246	+2%	0.82×	0.85×
Mega (>₹200 Cr)	1	2	259	516	+99%	0.80×	0.54×
Total	124	130	2,533	3,455	+36%	0.82×	0.90×†

† Without Hanuman Ansh (₹413 Cr on a ₹2 Cr budget): Q3 Low 1.69×, Q3 total 0.79×.

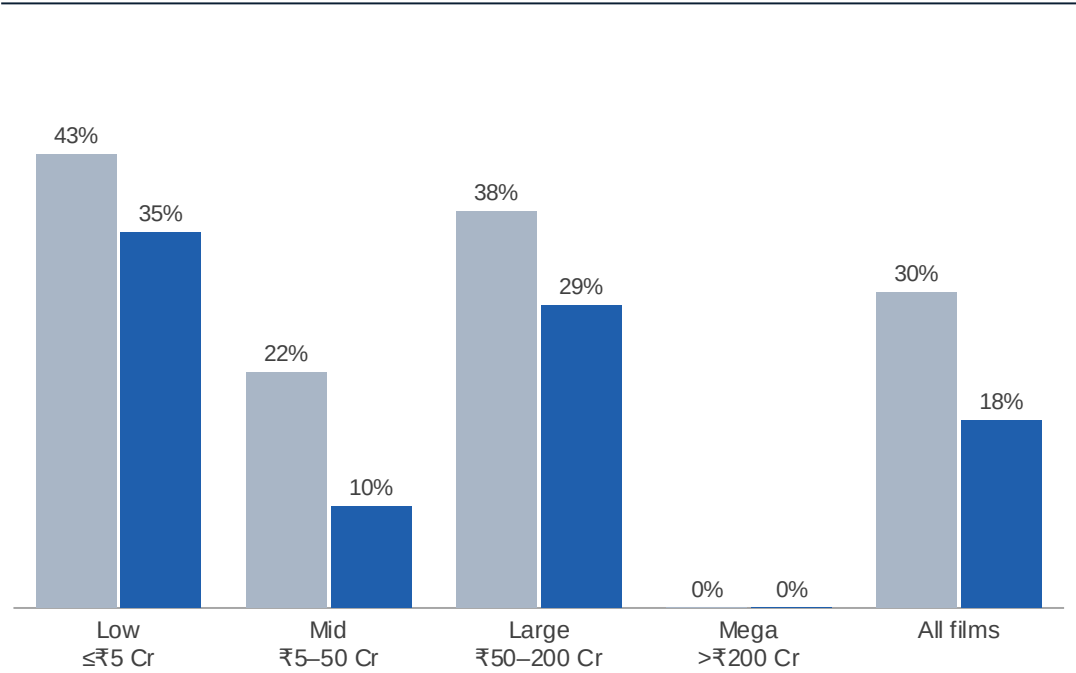
- 1 **Mega concentration.** Mega budgets rose from ₹325 Cr (1 film) to ₹950 Cr (2 films), which together grossed 0.54× their budgets.
- 2 **Core bands were steady.** Mid and Large grossed ~0.8× their budgets in both quarters; growth came from Mega (+₹257 Cr) and Hanuman Ansh.

Share of budget spend vs share of gross %



Fewer films grossed their budget in the Low, Mid and Large bands; in the ₹5–50 Cr Mid band, only 10% did

Share of films grossing at least their budget % of films in band



Films by outcome and budget band

Budget band	Films		Disaster		Flop		Super Hit + Blockbuster	
	Q2	Q3	Q2	Q3	Q2	Q3	Q2	Q3
Low	35	31	13	16	7	4	7	6
Mid	72	83	48	60	8	15	8	6
Large	16	14	5	7	5	3	0	3
Mega	1	2	0	1	1	1	0	0
All films	124	130	66	84	21	23	15	15

- 1 **Mid band collapsed.** Disasters went from 67% to 72% of Mid films; only 8 of 83 grossed their budget in Q3.
- 2 **Breakouts come from small films.** In both quarters, 5 of the 8 Blockbusters cost ₹5 Cr or less.
- 3 **Mega never got there.** None of the three Mega films across the two quarters grossed its budget.

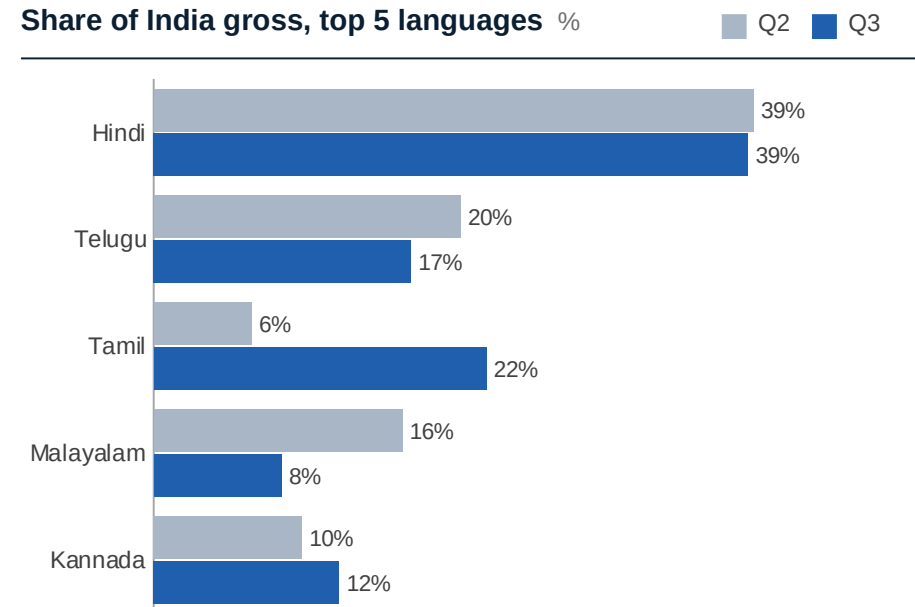
Tamil and Hindi drove Q3's box office gain; Malayalam and the smaller language markets fell back

Films, gross and gross ÷ budget by primary language

Language	Films		India gross, ₹ Cr			Gross ÷ budget	
	Q2	Q3	Q2	Q3	Change	Q2	Q3
Hindi	22	21	986	1,333	+35%	0.92×	1.30×†
Telugu	27	27	505	577	+14%	0.65×	0.91×
Tamil	16	24	161	746	+364%	0.44×	0.76×
Malayalam	17	13	409	287	-30%	0.88×	0.92×
Kannada	7	12	244	416	+71%	0.93×	0.60×
Marathi	4	5	111	13	-88%	4.12×	0.52×
Punjabi	7	11	52	39	-26%	0.90×	0.37×
Gujarati	8	7	24	12	-48%	1.49×	0.34×
Others*	16	10	43	31	-27%	0.90×	0.76×
Total	124	130	2,533	3,455	+36%	0.82×	0.90×†

*Bengali, Odia, Assamese, Chhattisgarhi, Haryanvi, Tulu.

Share of India gross, top 5 languages %



So what

Tamil rose from 6% to 22% of BO; Malayalam halved to 8%. Kannada grew 71% but grossed only 0.60× its budgets.

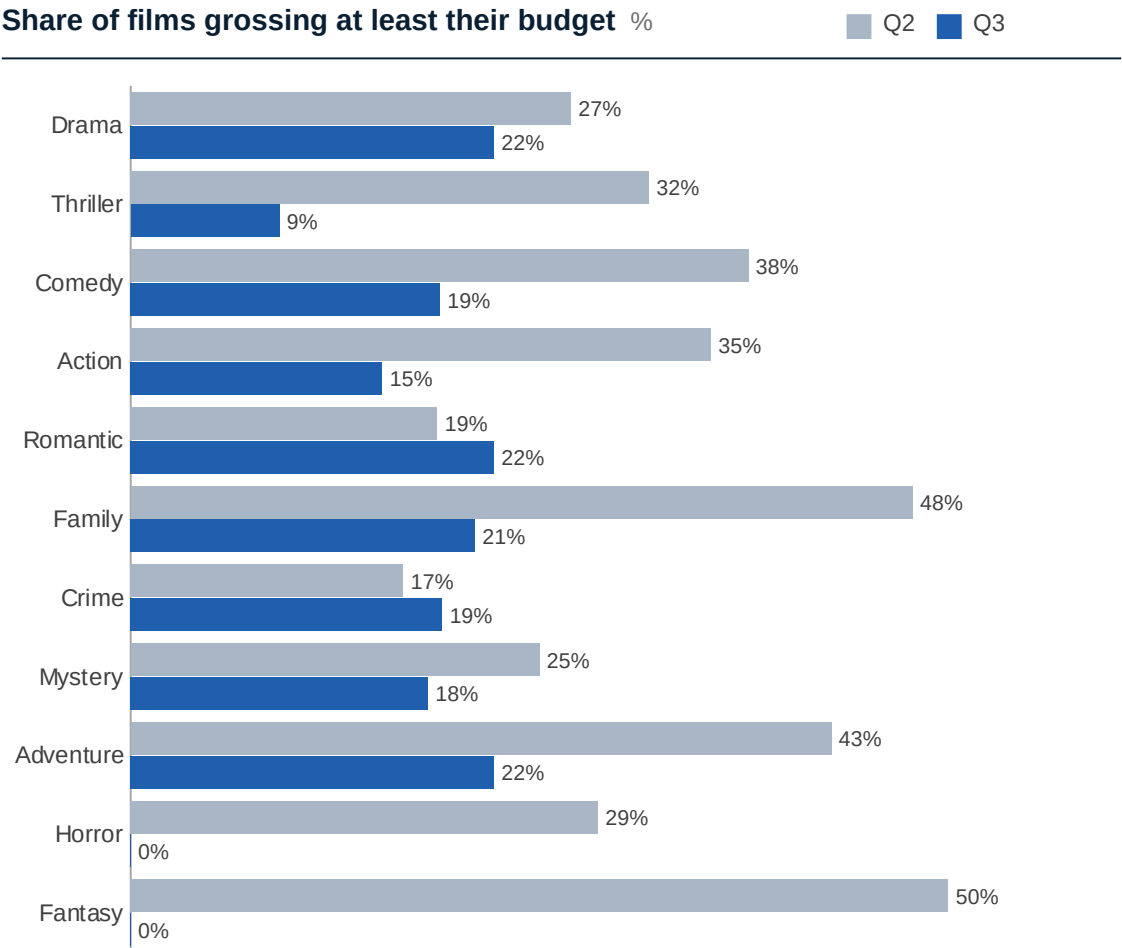
Fewer films grossed their budget in 9 of 11 genres; Fantasy and Horror fell from 50% and 29% to zero

Films, gross ÷ budget and share grossing their budget, top 11 genre tags of 25

Genre tag	Films		Gross ÷ budget		Gross ≥ budget	
	Q2	Q3	Q2	Q3	Q2	Q3
Drama	78	90	0.80×	1.11×†	27%	22%
Thriller	41	44	0.76×	0.66×	32%	9%
Comedy	45	37	1.12×	1.16×	38%	19%
Action	31	39	0.82×	0.75×	35%	15%
Romantic	32	36	0.71×	1.26×	19%	22%
Family	23	19	1.60×	1.29×	48%	21%
Crime	18	21	0.74×	0.65×	17%	19%
Mystery	12	11	0.72×	0.68×	25%	18%
Adventure	7	9	0.82×	1.10×	43%	22%
Horror	7	9	1.25×	0.58×	29%	0%
Fantasy	6	10	1.18×	0.51×	50%	0%

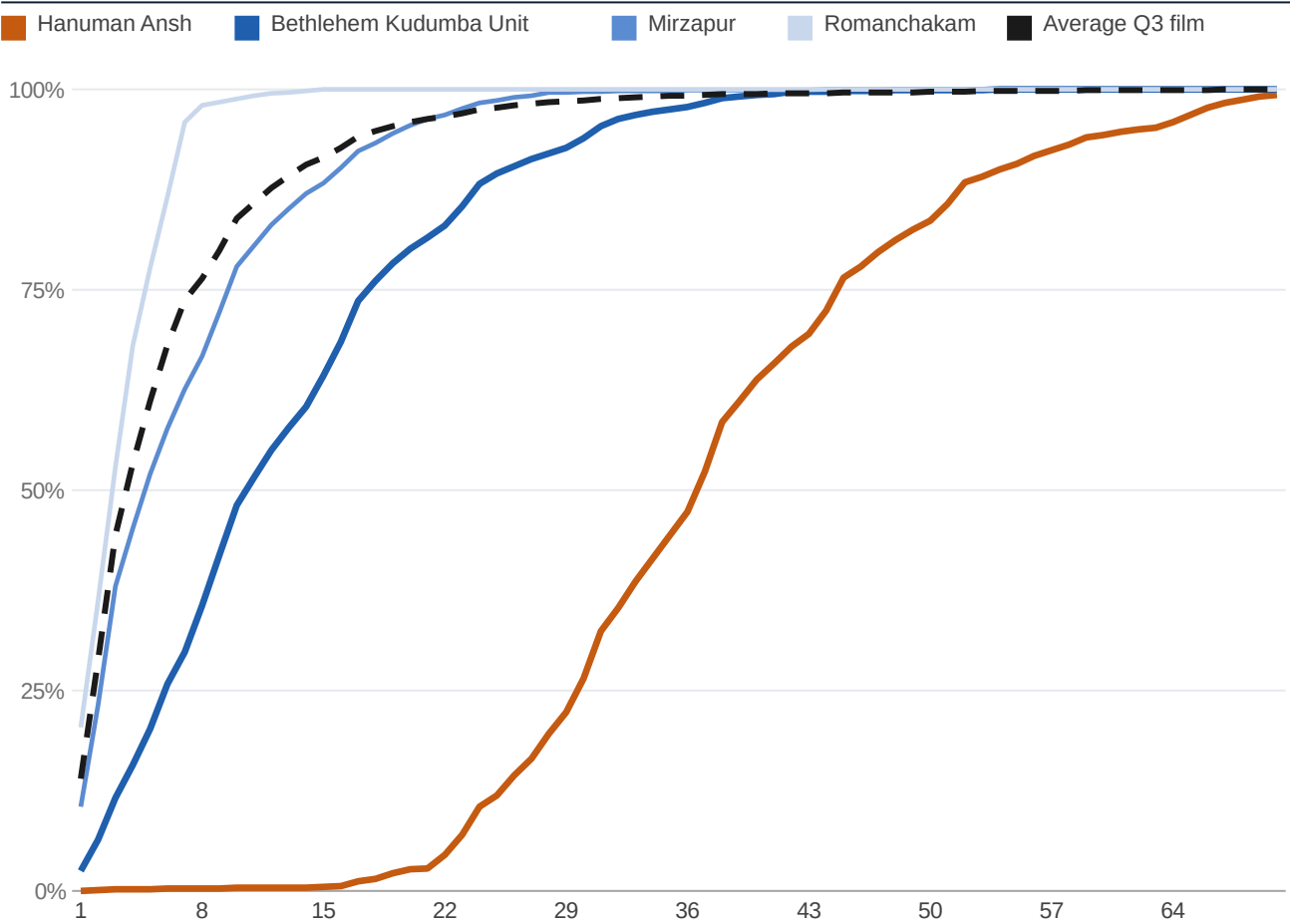
Films carry 2.7 tags on average, so rows overlap. † Drama Q3 is 0.90× without Hanuman Ansh.

Share of films grossing at least their budget %



Most films are decided in their first week: the average Q3 release earns 44% of its run in three days and 74% in seven

Cumulative share of lifetime India gross, by day of release %



How the runs compare

Metric	Hanuman Ansh	Bethlehem	Mirzapur	Roman-chakam	Q3 avg
Budget ₹Cr	2	23	115	3	—
India gross ₹Cr	413	176	283	9.5	26
Gross ÷ budget	206×	7.65×	2.46×	3.16×	—
Opening wknd share	0.2%	12%	38%	53%	44%
Lifetime ÷ opening	512×	8.7×	2.6×	1.9×	2.2×
Best week	Week 5	Week 2	Week 1	Week 1	Week 1
Week 1 occupancy	15%	72%	40%	24%	20%
Peak day	Day 38	Day 10	Day 3	Day 1	Day 3

Q3 avg: mean gross, opening share and occupancy; median lifetime ÷ opening, best week and peak day. 122 of 130 films had their best week in week 1.

The exceptions are rare: the average film has 44% of its run by day 3 and 91% by day 14. Among releases grossing ₹50 Cr or more, only three had their best week after week 1: Hanuman Ansh (0.2% by day 3), Bethlehem Kudumba Unit (12%) and Premada Oorali (under 1% of its ₹94 Cr).

Hanuman Ansh nearly left cinemas in week 2, then grossed ₹413 Cr, 206× its ₹2 Cr budget

INDIA GROSS

₹413 Cr

206× its ₹2 Cr budget

OPENING WEEKEND

₹0.8 Cr

0.2% of lifetime (Q3 avg: 44%)

BEST WEEK

Week 5

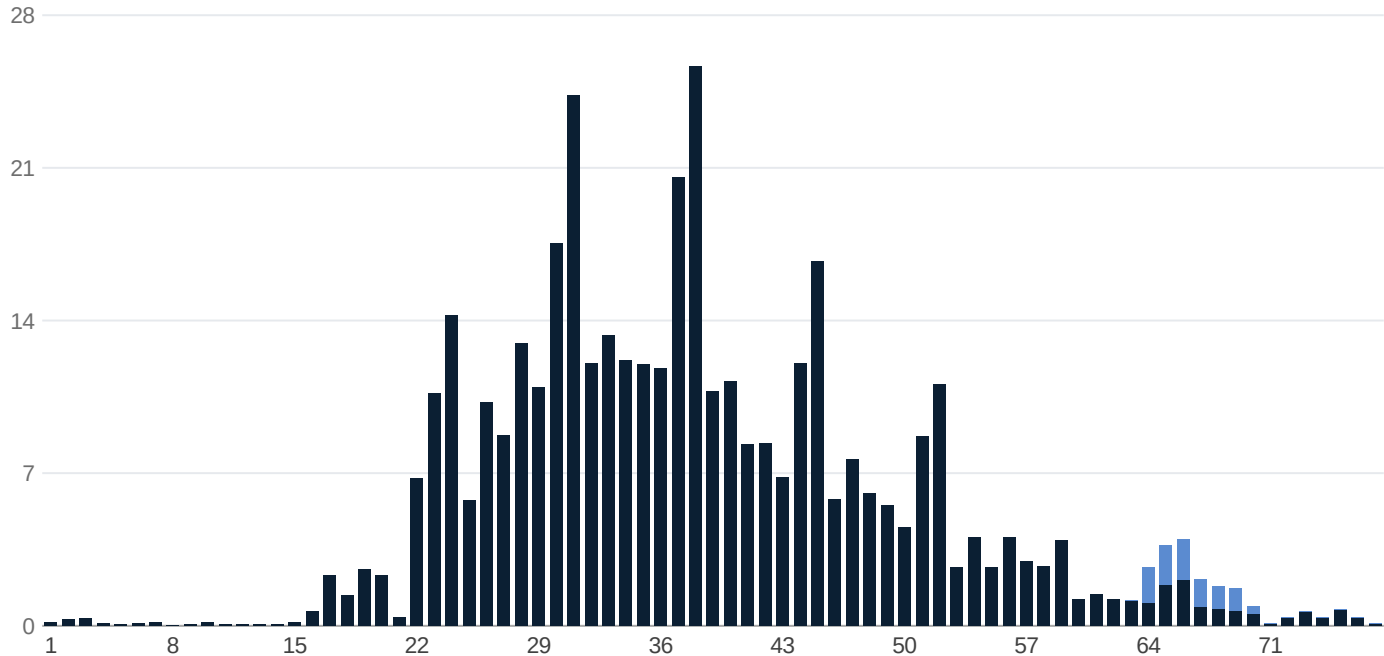
₹102 Cr; peak day 38: ₹25.7 Cr

THEATRES

36 → 1,976

week 2 low → week 7 peak

Daily India gross by language version ₹ Cr, by day of release



Run by phase ₹ Cr · peak theatres · occupancy

Phase	Weeks	BO ₹Cr	Share	Theatres	Occ.
Launch	1	1.3	0.3%	270	15%
Near-exit	2	0.5	0.1%	36	46%
Rebuild	3–4	79.2	19%	1,182	40%
Peak	5–7	259.6	63%	1,976	32%
Tail + Telugu	8–11	72.1	17%	1,878	22%
Total	1–11	412.6	100%	1,976	30%

Nearly pulled, then rescued: shows fell from 2,044 to 306 in week 2, but those screens ran at 46% occupancy. Exhibitors added theatres back from week 3 and the run peaked in week 5.

Bethlehem Kudumba Unit opened at ₹20 Cr, had a bigger second week than its first, and built to ₹176 Cr

INDIA GROSS

₹176 Cr

7.65× its ₹23 Cr budget

OPENING WEEKEND

₹20.3 Cr

12% of lifetime (Q3 avg: 44%)

LIFETIME ÷ OPENING

8.7×

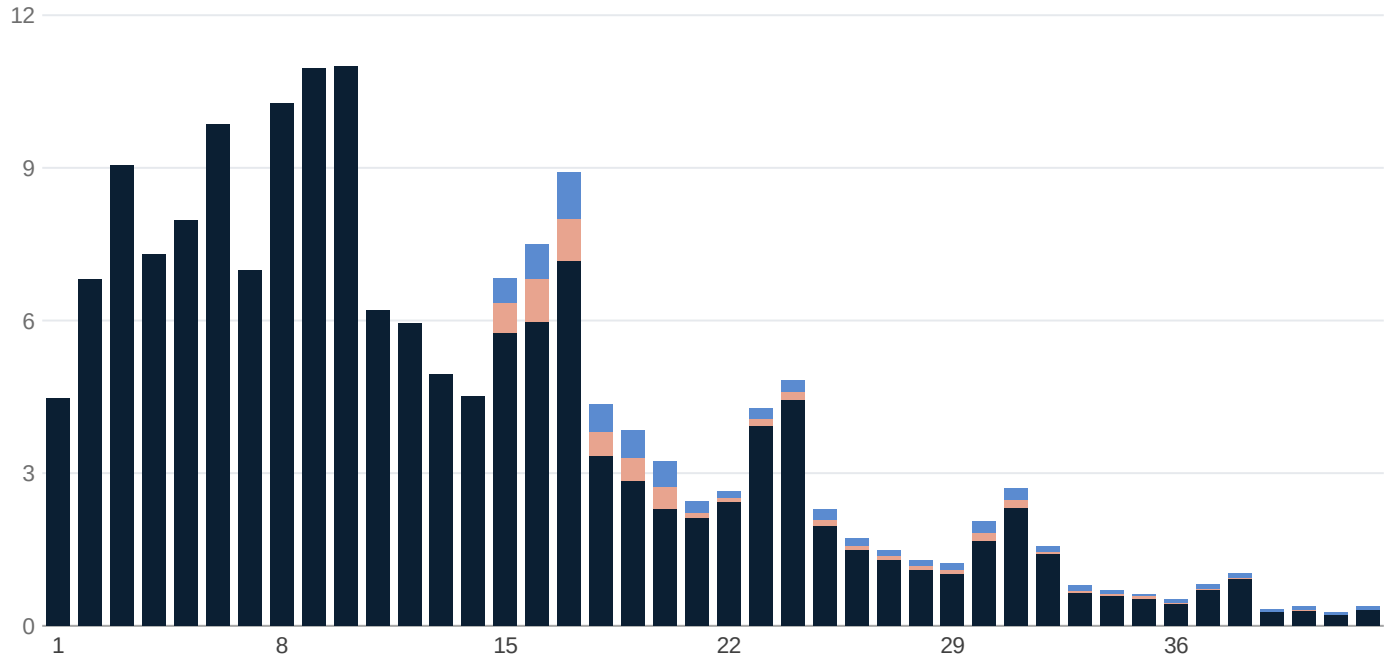
Q3 median: 2.2×

PEAK DAY

Day 10

₹11.0 Cr, 2.5× day 1

Daily India gross by language version ₹ Cr, by day of release



Week by week ₹ Cr · shows · occupancy · peak theatres

Week	BO ₹Cr	Change	Shows	Occ.	Theatres
Week 1	52.4	—	14,315	72%	554
Week 2	53.8	+3%	16,568	65%	577
Week 3	37.1	−31%	18,408	37%	868
Week 4	18.5	−50%	10,611	34%	519
Week 5	9.7	−48%	7,506	27%	459
Week 6	3.7	−61%	4,784	16%	320
Week 7+	0.6	—	—	—	—

How the run built: week 2 grossed 3% more than week 1 at 65% occupancy. Theatres then rose from 554 to 868 in week 3 as the Tamil and Telugu versions opened. Kerala gave 78% of India gross.

How the analysis was built: data, definitions and limitations

Data and coverage

Source. CinemaIP daily box office data for the 4,429 cinemas and 9,786 screens it tracks. Figures reflect tracked cinemas, not every cinema in India; coverage may be less complete for single screens.

Period. Q2 = April–June 2026; Q3 = July–September 2026. Daily data runs to 23 October 2026, so late-September releases are still in their runs.

Market metrics (slides 3–10). Counted by show date: everything screened in the quarter, whatever the release date.

Film metrics (slides 11–20). Counted by release quarter, using each film’s lifetime India gross to date.

Definitions

Gross. Theatrical gross box office across tracked cinemas.

Occupancy. Tickets sold ÷ seats offered, across all shows.

Average ticket price. Gross ÷ tickets sold.

Gross ÷ budget. India theatrical gross ÷ reported production budget (public and trade estimates). Outcome bands: Disaster <0.5×, Flop 0.5–1×, Average 1–1.5×, Hit 1.5–2×, Super Hit 2–3×, Blockbuster ≥3×.

Run shape. Day 1 = release date, with paid previews added to day 1; opening weekend = days 1–3. The Q3 average weights each of the 130 films in the outcome base equally.

Scope and limitations

Film base. Releases with lifetime India gross ≥₹50 lakh (Q2 145, Q3 150; >99% of new-release gross). Outcome analysis uses the 124 Q2 and 130 Q3 Indian-language films among them with a reported budget; English is excluded because its budgets are global while gross is India-only.

Not profitability. Gross ÷ budget excludes producer share and non-theatrical revenue (OTT, satellite, music).

Language and genre. Primary language for budget analysis; multi-lingual films counted once by top-grossing language on slide 4. Films carry several genre tags, so genre rows overlap.

Small samples. Some cells are small (e.g., 1 Mega film in Q2, 2 in Q3) and should be read as indicative.

Accuracy. Figures are compiled on a best-efforts basis; CinemaIP does not guarantee the accuracy or completeness of every figure, and some data may be missing.

The data behind this report powers CinemaIP's AI product suite, from greenlight to release to rights

Every product trains on 500+ outcome-linked attributes; the intelligence compounds with every model deployed.

Casting & Marketing

- GreenlightIQ
- FindMyCast
- ScriptSense
- CampaignRAG

Related report themes: budget bands and outcomes (chapter 3)

Distribution & Exhibition

- Day1 Predictor
- BoxOfficeLive
- ScreenPlanner AI
- CineYield

Related report themes: footfalls, occupancy, pricing and run shapes (chapters 1 and 4)

Advertising & OTT

- AdSlot AI
- RightsIQ
- DemandRadar

Related report themes: concentration and multi-lingual reach (chapter 2)

Cinema SLM — the layer that connects every product

Fine-tuned on outputs from all products across every lifecycle stage