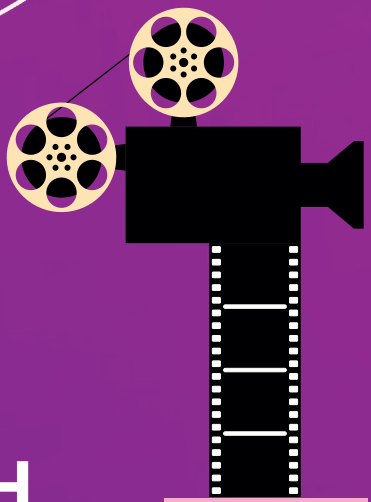
UP GLOBAL INVESTORS SUMMIT

10-12 FEBRUARY, 2023 | LUCKNOW

New India's Growth Engine



# UTTAR PRADESH
# FILM & MEDIA SECTOR



# INDIA SCENARIO

- With around 1,500 to 2,000 films produced every year in more than 20 languages, the Indian Film Industry is the largest in the world in terms of the number of films produced.
- In 2021, India's filmed entertainment segment grew 28% with approximately 757 films released (as compared to 441 releases in 2020), and over 100 films released directly on streaming platforms. Approximately 2,000 hours of filmed content were produced in 2021.
- The Indian Media & Entertainment sector is expected to grow at a CAGR of 13% and reach INR2.32 trillion by 2024. Films, television and digital (together adding 65% of the growth) will be the key contributors to this growth.
- Indian M&E sector recovered 16.4% to reach INR1.61 trillion in 2021 which further exceeded pre-pandemic levels in 2022. In 2024, cinema is expected to account for 9% of the Indian media market.
- India has a large broadcasting and distribution sector, comprising approximately 7,800 satellite TV channels, 6,000 multi-system operators, around 60,000 local cable operators, 7 DTH operators and a few IPTV service providers.
- The country has over 950 animation and VFX studios, 185k electronic artists and 139 universities – and is fast becoming the content back office of the world.
- In the Union budget of 2022-23 the budget for the Films and Television Institute of India (FTII) is Rs. 55.39 crores (the US $ 7.18 million)
- By 2025, the Indian film industry is expected to employ 3.30 lakh people.

**Revenue projection for the Indian Film industry (in crores)**

| Fy 2023 | Fy 2024 | Fy 2025 |
|---|---|---|
| 20,200 | 22,000 | 24,000 |

**Employment projection in the Indian Film industry**

| Fy 2023 | Fy 2024 | Fy 2025 |
|---|---|---|
| 278,005 people | 303,026 people | 330,298 people |

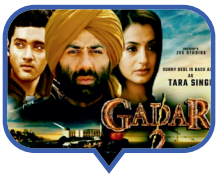
# UTTAR PRADESH SCENARIO

- As of 2021, approximately 60 Indian films have been shot in Varanasi alone. Uttar Pradesh was adjudged India's most favorable state for film shooting at the 52nd International Film Festival of India-2021 in Goa.
- There has been an important role of Uttar Pradesh in the history of Indian cinema. It has given several renowned film producers, directors, artists, lyricists, musicians and story/scriptwriters to the film industry.
- **Shaan-e-awadh -** An annual International Film Festival based on the cultural, tourism, historical heritage and composite culture of Uttar Pradesh is being organized since 2011. This festival consists of screening films in different languages at multiple locations in the city.
- **Film Bandhu -** Nodal agency to promote film related activities.
- **Film Development Fund -** For sanctioning subsidies to films produced in the State, scholarships to students, arrangement of film equipment, setting up of film training institutes, organization of film festivals, financial assistance on film, etc.
- **Film Development Council -** To ensure the long-term development of the film sector in UP and monitor the implementation of the State Film Policy and State Film Division to provide easy and timely certification of films, especially regional films have been created.

## List of Recent films shot in UP




**The Vaccine War**
**2023**




**Gadar 2**
**2022**




**Bhool Bhulaiya 2**
**2022**




**Vikram Vedha**
**2022**




**The Last Signature**
**2022**




**Khuda Hafiz – Chapter 2**
**2022**




**Kaagaz -2**
**2022**




**Kaagaz**
**2021**




**Satyamev Jayate**
**2021**




**Shubh Mangal Zyada Saavdhan**
**2020**




**Gulabo Sitabo**
**2020**




**Family Of Thakurganj**
**2019**




**Prasthanam 2019**



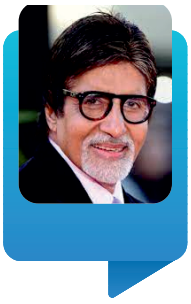

**Sonu Ke Titu Ki Sweety**
**2018**




**Raid 2018**

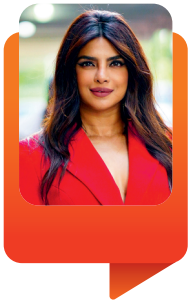
Press-release-9dec21-4 (up.gov.in)
Same as above

# List of Film Stars from UP


Amitabh Bachchan

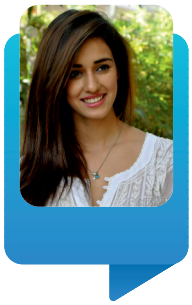

Boney Kapoor


Saurabh Shukla


Priyanka Chopra


Ravi Kishan

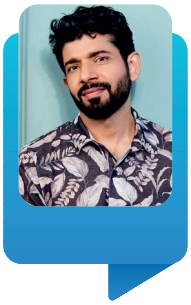

Jimmy Shergill


Disha Patani


Anushka Sharma

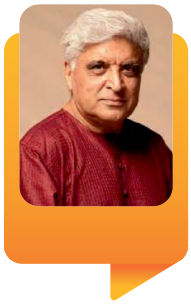

Dinesh Lal Yadav (Nirahua)

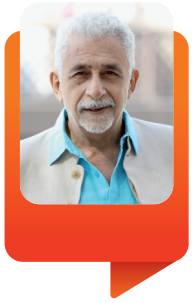

Rajpal Yadav

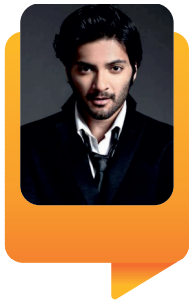

Vineet Kumar Singh

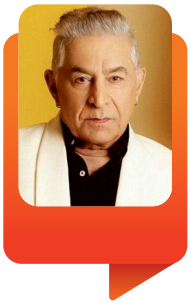

Nawazuddin Siddiqui


Javed Jaffrey


Jawed Akhtar


Naseeruddin Shah


Ali Fazal


Dalip Tahil

## Key enablers in UP

# Famous shooting locations:

**Heritage Sites**

### Agra



Taj Mahal

### Fatehpur



Agra Fort



Jahangir Mahal

### Sikri



Panch Mahal

### Lucknow



Imambara

Rumi Darwaza

Kaiserbagh Heritage Site

## Key enablers in UP

# Famous shooting locations:

**Varanasi**



Sarnath

**Prayagraj**



Sangam

**Jhansi**



Jhansi Fort

## Pilgrimage & Holy Sites

Varanasi



Kashi Vishwanath, Ghats

Prayagraj



Sangam Kumbh Mela every 6 years
Maha-Kumbh every 12 years

## Nature and Scenery



Lucknow :
Janeshwar Mishra Park



Mirzapur
Belan River Valley



·Sonbhadra
Mukha Waterfall

## Street and Townscapes

**Lucknow :** Old Markets

- **Varanasi :** Old Streets
- **Lucknow & Varanasi :** Exquisite and varied local cuisine, culture and finesse of ancient cities

# Available Infrastructure

## (1) Film City Noida

- This has become an important center for shooting TV serial films being produced in Northern India. The campus is situated in the heart of the sprawling 100 Acre landscape in Noida. It is a lush green campus near various aesthetic locations including lakes, ponds, hills, the banks of the Yamuna River, Massoori village on the Ghaziabad Hapur stretch, bewitching gardens available at the Marwah Studios. It houses major media houses like BAG films, India TV, INOX, The India Today Group, Eagle Films, Network 18, Z Network, T Series, The Times of India and others. About 150,000 people earn their living thanks to the film city.

## (2) Upcoming Film City

- A 1,000 acre film city is being constructed near the Jewar airport at the Yamuna Expressway Industrial Development Authority, Uttar Pradesh with an investment of 10,000 crores.

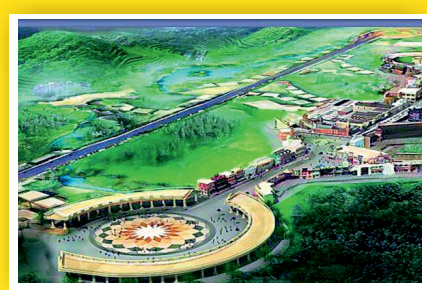
a. The project will be completed in three phases with the first phase to be developed on 230 acres and completed by 2024.

b. The entire project is targeted to be completed by 2028-29. The objective is to provide an integrated media infrastructure for the movie business value chain.

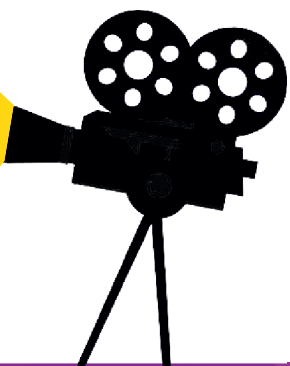
c. The site will include 740 acres for filming, 40 acres for film institutions, 120 acres for the park and retail, and the remaining 100 acres for commercial use.

## (3) Use of Government Airstrips

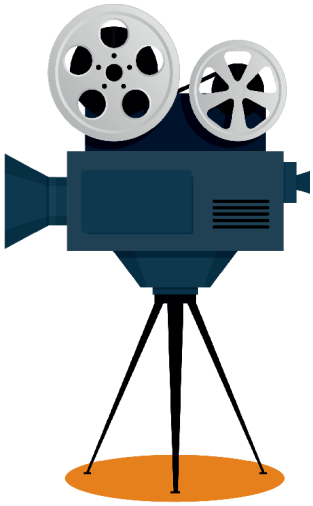
- The Government has allowed the film units engaged in outdoor film shooting in the State to use airstrips located in various parts of the State like Agra, Lucknow, Varanasi on payment as per prescribed rent.
- Nodal officers have been nominated in every district for providing requisite facilities for film shooting. The list of district-level officers with their contact details is available on the Film Bandhu website.
- Online facility for applying for film subsidy under the Film Policy and single window clearances for film shooting in the State.







# Policy Support



## Highlights of New Film Policy 2022

- New film policy/amended film policy 2023 is under consideration and in process for approval. Various stakeholder consultations were done by officials of Film Bandhu, UP in which suggestions and recommendations from leading producers, directors, actors as well as senior officials from various Govt. departments were given.
- Suggestions were given to include web series, web films released on O.T.T. platforms as eligible for subsidy as per policy and rules. Incentives for setting up studios, labs, film training institutes and setting up of single screen cinema halls are also being considered in the new policy.
- ·Government officials from various departments agreed to review and revise the high shooting fees of locations across the state and consider appropriate concession to encourage film production in the state.

# Investment Opportunities in Uttar Pradesh

1) **Production Houses –** With the growing film and entertainment sector in UP, investment in production houses with Animation studios, Recording studios, Photography studios etc is an emerging opportunity
2) **International Film Studios –** Collaboration of international studios with local film production houses to develop in-house Hindi & Bhojpuri movies in the State is a promising investment opportunity
3) **3D Cinema-** With emerging techniques and 3D Cinema gaining trend across the globe, UP is an ideal destination to establish 3D animation centers and production houses.
4) **Printing & Publishing Houses –** With the advent of the film and entertainment sector in the State, printing & publishing houses are also gaining momentum. Gautam Buddha Nagar, Lucknow, and Agra are prominent destinations for such investments.






5) **Regional & Niche Cinema –** Uttar Pradesh is also a promising destination for small-budget movies, emphasizing content-driven cinema. The market for regional cinema portraying local culture and languages is gaining wide popularity in India and the State.

6) **Multiplex -** Multiplexes are expected to gain significant market share going forward with expanding presence in Tier 2 and Tier 3 regions. With a wide consumer base of over 200 million, Uttar Pradesh is one of the most promising destinations for expansion multiplexes in India.

7) **VFX & Animation –** India has emerged as a preferred destination for outsourcing VFX and 3D conversion work. With a vibrant IT & ITeS and Startup ecosystem in the State, VFX & 3D animation is another promising area of investment.

8) **Skill Development –** Several eminent artists like Amitabh Bachchan, Priyanka Chopra, Nawazuddin Siddiqui hails from UP. The citizens of the State are exposed to top cultural ethos. This provides a huge opportunity for film training institutes and skill development in the sector.

9) **Film Training Institute -** The State Government has proposed to develop Film training institutes at Varanasi and Gautambuddh Nagar. This will offer various educational programs including graduation, post-graduation, Ph.D. programs and others.

10) **Film City –** The upcoming film city along Yamuna Expressway is a huge investment opportunity for business community in the sector. Besides, the State Government is planning to develop more film city projects within UP to promote and provide the proper facilities required for making films.

11) **Film Festival -** Various periodical festivals and film events will be conducted within the State to support and strengthen the filmmaking industry.






# Details of Investible Projects

## Total proposed investment incentives received (in Rs.): 672 crores

## Total proposed employment generation: 1015

| Sl. | Name of Project | Location | Type of Project (PPP/ non-PPP) | Brief Status | Expected Investment (Rs Cr) | Employ ment potential |
|---|---|---|---|---|---|---|
| 1. | Subhash Educational Society | Lucknow | non-PPP | Work in final stage | 8 | 50 |
| 2. | Lucknow Film Tourism Pvt Ltd | Barabanki | non-PPP | Work in progress | 96.29 | 150 |
| 3. | Mumbai Arts Hub | Saharanpur | non-PPP | Investor yet to identify land | 50 | 300 |
| 4. | Film Tourism & Studio | Lucknow | non-PPP | Work in progress | 100 | 150 |
| 5. | Prakash Deep Sewa Sansthan | Raebareli | non-PPP | Work in progress | 1 | 20 |
| 6. | Vishal Multiplex | Azamgarh | non-PPP | Work in final stage | 5 | 20 |
| 7. | Madho Cineplex | Amroha | non-PPP | Work in final stage | 1.25 | 25 |
| 8. | Reshu Advertising Pvt Ltd | Muzaffarnagar | non-PPP | Work in progress | 400 | 100 |
| 9. | RKG Multiplex Cinema | Maharajganj | non-PPP | Work in final stage | 10 | 200 |

















# Note

# Note

# FILM BANDHU
## UTTAR PRADESH

POWERING NEW INDIA
INVEST UP


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