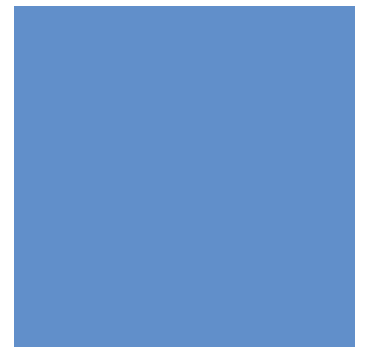
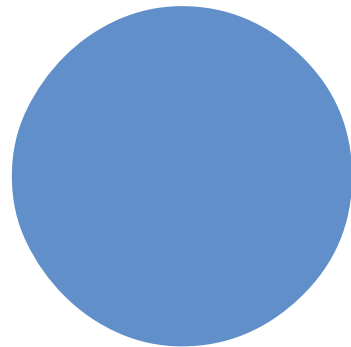


**TURKEY
FILM INDUSTRY
REPORT
2019**



TURKISH FILM INDUSTRY 2019 REPORT

Having started to come alive in the middle of 1990s, the 2000s have been the most productive and most successful years for Turkish film industry, both nationally and internationally. Whilst a total of 394 films were released in 2017, of which 151 were Turkish, in 2018 a total of 442 films were released and 180 of them were local productions. In 2019, 408 films were released and 146 of them were Turkish.

In 2018, the number of admissions for 180 Turkish films has been 44.635.574. In 2019, 33.790.600 tickets were sold for 146 Turkish films. When it is compared with 2018, there was a decrease in total number of theatrically released films and a 15% decrease in total admissions. Market share for local films decreased from 63% to 56%, when it is compared with 2018. It is also observed that Turkey is still behind European countries in terms of admissions with proportion to the population. Though, the country still has a small film market compared to its population of 80 million, and as such it has a high potential for growth and it is very important to mention that Turkish films still have the strength to dominate local box office.

Distribution

Free market conditions apply for the Turkish film distribution industry, with no subsidies or incentives. In 2019, 20 distribution companies have been active in Turkey, among which CGV Mars, UIP, TME Films, CJ Entertainment and Warner Bros dominated the market.

Among the 408 new releases in 2019, 7. *Koğuştaki Mucize*, which is based on 2013 South Korean movie *Miracle in Cell No. 7*, became the most watched film with 5.310.542 admissions. In 2019, 6 of the top 10 films at the box office were Turkish productions. In spite of the fact that six of the top ten films were Turkish ones, the total number of admissions of these six films represent 54% of total admissions of the 146 new Turkish releases. Looking at this picture, it goes without saying that the increase in the numbers of productions and admissions do not support each other in the Turkish cinema. Although the Turkish cinema manages to make popular films that draw millions of people to movie theaters during the recent years, the films that are not competitive in the commercial sense can only reach a limited admission figure.

Support from Turkish Ministry of Culture and Tourism General Directorate of Cinema for the Films Released in 2019

	Film's Title	Support Year	Support Type	Support Amount (TL)	Support Amount (Euro) ¹	Admissions
1	Kaos (Chaos)	2015	Feature	900.000	128.571	-
2	Görölmüştür (Passed by Censor)	2015	First Feature	300.000	42.857	11.736
3	Söz Vermiştin	2015	Feature	750.000	107.142	12.750
4	Çınar (Plane Tree)	2016	First Feature	400.000	57.142	1.859
5	Dilsiz (The Mute)	2016	First Feature	550.000	78.571	14.398
6	Güven (Trust)	2016	First Feature	400.000	57.142	828
7	Eksi Bir (Minus One)	2016	Feature	650.000	92.857	611
8	Güzel Aşk	2016	Feature	800.000	114.285	28
9	Kader Postası (Fated Hearts)	2016	Feature	700.000	100.000	782
10	Kapı (The Gate)	2016	Feature	850.000	121.428	60.454
11	Kardeşler (Brothers)	2016	Feature	700.000	100.000	1.720
12	Nebula (Dead Horse Nebula)	2016	Feature	450.000	64.285	1.587
13	Saf	2016	Feature	650.000	92.857	6.592
14	Güller	2017	First Feature	650.000	92.857	118
15	Güvercin Hırsızları (The Pigeon Thieves)	2017	First Feature	450.000	64.285	2.680
16	Yaralı Keklik (Injured Partridge)	2017	Feature	800.000	114.285	667
17	Beyaz Hüznün - Sarıkanımış (White Sadness)	2018	First Feature	600.000	85.714	54.425
18	Bağlılık: Aslı (Commitment: Aslı)	2019	Feature	1.200.000	171.428	5.497
19	Cinayet Süstü	2019	Feature	1.000.000	142.857	823.878

2005-2019 Theatrical Release Data

Year	Total Admissions	Total Number of Films Released	Turkish Films	Admissions for Turkish Films	Share of Admissions for Turkish Films	Foreign Films	Admissions for Foreign Films	Share of Admissions for Foreign Films
2019	59.556.020	408	146	33.790.600	56%	262	25.765.420	44%
2018	70.408.244	427	170	44.616.187	63%	257	25.792.057	37%
2017	71.188.594	393	151	38.743.901	54%	242	32.44.693	46%
2016	58.287.316	356	135	31.102.760	53%	221	27.184.556	47%
2015	60.228.409	402	136	34.273.257	57%	266	25.955.152	43%
2014	61.248.838	357	108	35.781.569	58%	249	25.467.269	42%
2013	50.405.020	321	86	28.990.793	58%	235	21.414.227	42%
2012	43.935.763	281	61	20.487.442	47%	220	23.448.321	53%
2011	42.298.500	288	70	21.222.541	50%	218	21.075.959	50%
2010	41.064.394	252	65	21.706.524	53%	187	19.357.870	47%
2009	36.899.954	255	69	18.790.700	51%	186	18.109.254	49%
2008	38.465.046	265	50	23.074.291	60%	215	15.390.755	40%
2007	31.161.700	247	40	11.875.820	38%	207	19.285.880	62%
2006	34.860.844	238	34	17.800.496	51%	204	17.060.348	49%
2005	27.250.989	221	27	11.441.856	42%	194	15.809.133	58%

¹ The TL amounts were converted to Euro amounts through the average Euro/TL.

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In November 2013 Turkey met with a new distribution model which was arranged for the sake of independent films that have struggled to find a theater to be released. BAŞKA SİNEMA (Alternative Cinema) became the new distribution model for well-liked national and international films. Since its foundation, BAŞKA SİNEMA screened more than 300 independent films in selected theaters.

Support

A considerable increase has been recorded in terms of production of Turkish films thanks the support provided by the Ministry of Culture and Tourism since 2005 and the increasing admission numbers of Turkish films. While only 9 Turkish films were released in 2002, this figure has increased to 146 in 2019. The support from the Ministry of Culture and Tourism was the only national support mechanism for local productions till 2015. Yeni Film Fonu (New Film Fund) which was founded four years ago by non-for-profit cultural institution Anadolu Kültür and If Istanbul Independent Film Festival, started to support films.

While the guilds and the trade unions for the audiovisual industry in Turkey are not yet as powerful as their counterparts in Europe or the U.S., there are ten active institutions in the industry. With the new regulations in intellectual property law, activity and effectiveness of these institutions will increase.

In 2019, 19 out of 146 newly released Turkish films have received support from the Turkish Ministry of Culture and Tourism's production funding. This table gathers the data on these supported films.

European Co-Productions

Among the films released in 2019, 5 of them were European co-productions: *Saf* (dir. Ali Vatanserver), *A Tale of Three Sisters* (*Kız Kardeşler*; dir. Emin Alper), *Sibel* (dir. Çağla Zencirci, Guillaume Giovanetti), *Brothers* (*Kardeşler*; dir. Ömür Atay) and *Passed by Censor* (*Görölmüştür*; dir. Serhat Karaaslan).

There is a significant increase in the number of Turkish productions, but the same increase can't be observed in the number of

Number of Films Received Support from Turkish Ministry of Culture and Tourism General Directorate of Cinema

Year	Feature	First Feature	Post Production	Total
2005	14	0	0	14
2006	10	8	1	19
2007	24	11	6	41
2008	16	14	2	32
2009	16	11	5	32
2010	15	17	7	39
2011	23	23	12	58
2012	25	11	5	41
2013	15	7	0	22
2014	39	15	0	54
2015	35	14	0	49
2016	27	9	4	40
2017	18	12	0	30
2018	26	12	2	40
2019	25	13	0	38

Average support received from Turkish Ministry of Culture and Tourism General Directorate of Cinema

Year	First Feature	Feature	Post Production
2005	52.976 €	0	0
2006	61.133 €	83.333 €	10.000 €
2007	91.319 €	70.757 €	16.225 €
2008	77.083 €	67.857 €	10.000 €
2009	93.229 €	66.666 €	19.000 €
2010	117.333 €	71.588 €	20.000 €
2011	84.057 €	73.913 €	24.166 €
2012	109.333 €	69.700 €	22.666 €
2013	129.636 €	90.476 €	0
2014	168.589 €	102.380 €	0
2015	161.607 €	92.634 €	0
2016	182.748 €	120.274 €	35.855 €
2017	223.492 €	108.521 €	0
2018	99.462 €	141.749 €	68.548 €
2019	101.648 €	132.000 €	0

co-productions. In January 2019, a new law was passed regarding the support from the Ministry of Culture and Tourism. Besides local productions, the Ministry will support Turkish co-producers contributing to the production of foreign films. The law also introduces % 30 tax incentive to foreign productions that are fully or partially shot in Turkey.

Television

Since the deregulation of the monopoly of the public broadcasting and establishment of private TV channels in 1990, TV productions and commercials have been important venues for developing the technological and human capital for the Turkish Cinema. Although TV networks do not commission TV films, there is a huge market for TV series. Recently, Turkish TV series have started to access the Middle Eastern, North African and Balkan markets, where they are followed with much interest. With the new law passed in January 2019, the Ministry of Tourism and Culture starts to support TV productions as well.

Besides conventional TV channels, Turkey's first digital streaming service BluTV has been producing high quality TV series since 2017. The service hires award-winning local directors like Emin Alper, Tolga Karaçelik and Seren Yüce. Meanwhile, Netflix has also started producing local original content. The Protector (Hakan: Muhafız) was the service's first Turkish content and it was a big hit not only in Turkey but in many different countries as well. Netflix also begins producing original local films this year. It seems the streaming services' focus on local production will support the industry on different levels in the near future.

Turkey - Film Industry Fact Sheet (2019)

Average price per ticket	16,46 TL / 2,35 €
Number of screens	2778
Total Number of Films Released	408
Local Films Released	146
Total Admissions	59.556.020
Box Office Gross of Local Films	532.711.165 TL / 76.101.595 €
Box Office Gross	980.410.567 TL / 14.005.865 €
Admissions for Local Films	33.790.600
Share of Local Films	%56

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INTERNATIONAL ACCLAIMS (2002-2019)

- 2019** *A Tale of Three Sisters (Kız Kardeşler)* by Emin Alper was in main competition at Berlinale, won Best Director at Sarajevo Film Festival; *Noah Land (Nuh Tepesi)* by Cenk Ertürk won Best Actor and Best Screenplay at Tribeca Film Festival - International Narrative Competition; Short film *Black Sun (Siyah Güneş)* by Arda Çiltepe won Best International Short Film at Locarno Film Festival.
- 2018** *The Wild Pear Tree (Ahlat Ağacı)* by Nuri Bilge Ceylan was in main competition at Cannes Film Festival; *The Pigeon (Güvercin)* by Banu Sivacı premiered at Berlin Film Festival's Generation 14plus section, won Best Youth Feature at Asia Pacific Screen Awards and Best Director at Sofia Film Festival; *The Announcement (Anons)* by Mahmut Fazıl Coşkun won Special Jury Prize at Venice Film Festival's Horizons section; *Dead Horse Nebula (Nebula)* by Tarık Aktaş won Best Emerging Director at Locarno Film Festival; *Sibel* by Guillaume Giovanetti & Çağla Zencirci won FIPRESCI Prize and Prize of the Ecumenical Jury at Locarno Film Festival; *Çınar* by Mustafa Karadeniz won Best Screenplay at Shaken Aimanov Film Festival; *Saf* by Ali Vatansver premiered at Toronto Film Festival; *The Pillar of Salt (Tuzdan Kaide)* premiered at Berlin Film Festival's Forum section; *The Pigeon Thieves (Güvercin Hırsızları)* was in main competition at Sarajevo Film Festival. *Kardeşler (Brothers)* by Ömür Atay was in main competition at Karlovy Vary Film Festival; *Yuva* by Emre Yeksan made its world premiere at Venice Film Festival Biennale College section.
- 2017** *Yellow Heat (Sarı Sıcak)* by Fikret Reyhan won Best Director at Moscow Film Festival; *Something Useful (İşe Yarar Bir Şey)* by Pelin Esmer won Best Screenplay at Tallinn Black Nights Film Festival; *Inflame (Kaygı)* by Ceylan Özgün Özçelik premiered Berlin Film Festival's Panorama section; *The Gulf (Körfez)* by Emre Yeksan) premiered at Venice Film Festival - Critics' Week; *More (Daha)* by Onur Saylak was in main competition of Karlovy Vary Film Festival; *Meteors (Meteorlar)* by Gürcan Keltek won Swatch Art Peace Hotel Award at Locarno Film Festival, Best Documentary at Bratislava International Film Festival, International Dox Award at Dokufest International Documentary and Short Film Festival, Best Feature at Milan Film Festival and Human Rights Award at Buenos Aires International Festival of Independent Cinema.
- 2016** *Albüm* by Mehmet Can Mertoğlu won France 4 Visionary Award at Cannes Film Festival - Critics Week, Best Film at Sarajevo Film Festival; *Big Big World (Koca Dünya)* by Reha Erdem won Jury Prize at Venice Film Festival's Horizons section; *Cold of Kalandar (Kalandar Soğuğu)* by Mustafa Kara won Best Film at Asia Pacific Screen Awards; *The Swaying Waterlily (Rüzgârda Salınan Niliüfer)* by Seren Yüce won Best Screenplay at Montreal Film Festival.
- 2015** *Mustang* by Deniz Gamze Ergüven was Foreign Language Film Oscar nominee; *Frenzy (Abluka)* by Emin Alper won Jury Prize at Venice Film Festival; *Until I Lose My Breath (Nefesim Kesilene Kadar)* by Emine Emel Balcı premiered at Berlin Film Festival's Forum section; *Snow Pirates (Kar Korsanları)* by Faruk Hacıhafızoğlu was in Generation Kplus Competition of Berlin Film Festival; *Tuesday (Salı)* by Ziya Demirel was in Cannes Film Festival's official short film competition.
- 2014** *Winter Sleep (Kış Uykusu)* by Nuri Bilge Ceylan won Golden Palm at Cannes Film Festival; *The Blue Wave (Mavi Dalga)* by Zeynep Dadak and Merve Kayan was in Generation Kplus Competition of Berlin Film Festival; *Come to My Voice (Sesime Gel)* by Hüseyin Karabey was in Generation 14plus Competition of Berlin Film Festival; *Seaburners (Kumun Tadı)* by Melisa Önel premiered Berlin Film Festival's Forum section; *The Lamb (Kuzu)* by Kutluğ Ataman was screened at the Panorama section of the Berlin Film Festival; short film *Ağrı and the Mountain (Ağrı ve Dağ)* by Hasan Serin was in Generation Kplus Competition of the Berlin Film Festival; *Sivas* by Kaan Müjdecı won Jury Prize at Venice Film Festival; *Song of My Mother (Annemin Şarkısı)* by Erol Mintaş won Best Film and Best Actor prizes at Sarajevo Film Festival.
- 2013** *Particle (Zerre)* by Erdem Tepegöz won Best Film and Best Actress at Moscow Film Festival
- 2012** *Beyond the Hill (Tepenin Ardı)* by Emin Alper won Caligari Film Prize at Berlin Film Festival, won Best Film at Asia Pacific Screen Awards; *Mold (Küf)* by Ali Aydın won Lion of the Future at Venice Film Festival
- 2011** *Once Upon a Time in Anatolia (Bir Zamanlar Anadolu'da)* by Nuri Bilge Ceylan won Grand Jury Prize at Cannes Film Festival
- 2011** *Our Grand Despair (Bizim Büyük Çaresizliğimiz)* by Seyfi Teoman was in main competition at Berlin Film Festival
- 2010** *Majority (Çoğunluk)* by Seren Yüce won Lion of the Future at Venice Film Festival
- 2010** *Honey (Bal)* by Semih Kaplanoğlu won Golden Bear at Berlin Film Festival
- 2009** *Pandora's Box (Pandora'nın Kutusu)*, Yeşim Ustaoğlu won Golden Shell - Best Film and Best Actress at San Sebastian Film Festival
- 2009** *Wrong Rosary (Uzak İhtimal)* by Mahmut Fazıl Coşkun won Tiger Award at Rotterdam Film Festival
- 2008** *Three Monkeys (Üç Maymun)* by Nuri Bilge Ceylan won Best Director at Cannes Film Festival
- 2008** *My Marlon and Brando (Gitmek)* by Hüseyin Karabey won Best New Narrative Filmmaker Award at Tribeca Film Festival
- 2006** *Climates (İklimler)* by Nuri Bilge Ceylan won FIPRESCI Prize at Cannes Film Festival
- 2002** *Distant (Uzak)* by Nuri Bilge Ceylan won Grand Prix and Best Actor Prize at Cannes Film Festival

Sources: Box Office Türkiye, Cinema General Directory, Turkish Statistical Institute