

Turkish Film Industry 2013-2014 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 288 films were released in 2011, of which 70 were Turkish, in 2012 a total of 281 films were released and 61 of them were local productions. In 2013 there was a leap forward and 321 films were released and 86 of them were Turkish. Thus, for the first time since 1983, more than 300 films have been theatrically released in Turkey. In the first 6 months of 2014, 51 Turkish films were released and it is projected that by the end of 2014 more than 86 films will have been released.

In 2012, the number of admissions for 61 Turkish films has been 20.487.442. In 2013, 28.990.793 tickets were sold for 86 Turkish films. When it is compared with 2012, there was a 41% increase in both total admissions and total number of theatrically released films. Market share for local films was 47% in 2012, the ratio increased to 58% in 2013. While the year 2013 witnessed the highest number of admissions among the last 23 years, it is 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 75 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. 14 distribution companies have been active in Turkey, among which UIP, WB, Tiglon and Pinema dominate more than 75% of the market.

Since October 2013 virtual print fee (VPF) application is operated. Due to the structure of Turkish film industry, producers pay VPF. However there isn't a consensus in the industry regarding the method of fee payment. In 2014 it is expected that VPF application will have been expanded in Turkey and industry will reach a consensus about the method.

At the end of 2013 50% of movie theaters have had DCPs. Films are still distributed with digital and analogue copies. Investment for digital distribution has been increasing and in March 2014 60% of the theaters had digital projectors.

Among the 321 new releases in 2013, *Düğün Dernek* became the most watched film with 4.072.898 admissions. In 2013 9 of top 10 films at box office were Turkish productions. In spite of the fact that nine of the top ten films were Turkish ones, the total number of admissions of these nine films represent 76% of total admissions of the 86 new Turkish releases. Looking at this picture, it goes without saying that increases 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.

In 2014, 4th instalment of Recep İvedik films had the record breaking number of admissions by 7.219.428. Recep İvedik 4, a mainstream comedy movie, is now the most watched film of the last 30 years. In the first half of 2014, 4 of the top 10 films at the box office were Turkish productions. When you look at the first half of 2014, it can be said that box office success of Turkish films will continue in 2014. And it might be another record breaking year in terms of admission sales.

In November 2013 Turkey met with a new distribution model which was arranged for the sake of independent films that had struggle to find a theater to be released. Başka Sinema (Alternative Cinema) became the new distribution model for well liked national and international films. From November 2013 till the end of 2013 Başka Sinema showed 9 films in 4 theaters. With the inclusion of new theaters in 2014, in the first half of 2014, 38 films were distributed in 12 theaters.

2005-2014 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 Admissions for Foreign Films
2014(first 6 months)	32.232.398	170	51	20.553.623	63%	119	11.678.775	37%
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%
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Support

A considerable increase has been recorded in terms of production of Turkish films thanks to 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 61 in 2012 and 86 in 2013. Currently, the support from the Ministry of Culture and Tourism is the only national support mechanism for local productions.

Besides supporting national productions, in order to increase international productions in Turkey and subsidize co-productions, an amendment was made to the VAT law in 2009. This has provided for the legal infrastructure that would allow companies based abroad to rebate the VAT's of their costs incurred in Turkey. Best Picture Oscar winner *Argo* and latest James Bond movie *Skyfall* had the scenes that were shot in Turkey. Apart from this, the General Directorate of Intellectual Property and Cinema is drafting a law to allow for foreign films to be shot in Turkey. For detailed information you can visit the website <http://www.sinema.gov.tr>

In June 25th 2012 a new declaration about the support for the service export which earns foreign exchange came into force by Ministry of Economy. With the regulations in the declaration, it was expected that film industry would have received support for distribution and marketing. However the demands of the industry and the content of the declaration didn't overlap, that's why industry can't benefit from these new regulations. It is expected that in 2014 the declaration will be revised.

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 10 active institutions in the industry. With the new regulations in intellectual property law, activity and effectivity of these institutions will increase. Besides these institutions, a movement named Young Turkish Cinema was initiated in 2010 by young Turkish directors and producers, which aims at increasing cooperation, communication and solidarity between young filmmakers and supporting the development of various production and distribution models.

In 2013, 28 out of 86 newly released Turkish films have received support from the Turkish Ministry of Culture and Tourism's production and post-production funding. This table gathers the data on these supported films.

Support from Turkish Ministry of Culture and Tourism General Directorate of Cinema for the Films Released in 2013						
	Film's Title	Support Year	Support Type	Support Amount (TL)	Support Amount (Euro)¹	2013 Seyirci Sayısı
1	Kelebeğin Rüyası (The Butterfly's Dream)	2012	Feature	500.000	172.413	2.158.938
2	Çanakkale: Yolun Sonu	2011	First Feature	400.000	137.931	669.725
3	Taş Mektep	2010	Feature	350.000	120.689	196.095
4	Mahmut ile Meryem (Mahmut and Meryem)	2010	Feature	400.000	137.931	65.584
5	Günce	2012	Feature	350.000	120.689	53.264
6	Benimle Oynar Mısın?	2012	Feature	300.000	103.448	47.858
7	Aşk Ağlatır	2013	First Feature	300.000	103.448	40.650
8	Sev Beni (Love Me)	2012	Post Production	70.000	24.137	26.446
9	Umut Üzümleri	2009	Feature	400.000	137.931	18.628
10	Meryem	2012	Feature	280.000	96.551	20.444
11	Yozgat Blues	2011	Feature	300.000	103.448	11.642
12	Bir Gevrek, Bir Boyoz, İki de Kumru	2009	First Feature	200.000	68.965	6.129
13	Yabancı (The Stranger)	2010	First Feature	250.000	83.333	5.470
14	Zerre (Particle)	2012	Feature	340.000	113.333	5.069
15	Rüzgârlar (Winds)	2011	Post Production	75.000	25.000	3.231

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

16	Üç Yol (Crossroads)	2011	First Feature	250.000	83.333	3.597
17	Hayatboyu (Lifelong)	2011	Feature	250.000	83.333	3.179
18	Şimdiki Zaman (Present Tense)	2011	Post Production	75.000	25.862	2.595
19	Karnaval	2011	First Feature	200.000	68.965	2.326
20	Kral Yolu	2011	First Feature	300.000	103.448	2.524
21	Bahar İsyancıdır	2012	Post Production	70.000	24.137	1.899
22	Yük (Load)	2011	Feature	200.000	68.965	1.887
23	Gözümün Nûru (Eye Am)	2012	Feature	350.000	120.689	1.736
24	Yarım Kalan Mucize (Unfulfilled Miracle)	2011	Feature	200.000	68.965	1.466
25	Özür Dilerim (Forgive Me)	2012	Feature	380.000	131.034	1.047
26	Evdeki Yabancılar (Strangers in the House)	2011	First Feature	200.000	68.965	604
27	Küf (Mold)	2010	First Feature	250.000	86.206	439
28	Arkadaşlar Arasında	2011	First Feature	200.000	68.965	383

In the first 6 months of 2014, 15 out of 51 newly released Turkish films have received support from the Turkish Ministry of Culture and Tourism's production and post-production funding. This table gathers the data on these supported films.

Support from Turkish Ministry of Culture and Tourism General Directorate of Cinema for the Films Released in the first six months of 2014						
	Film's Title	Support Year	Support Type	Support Amount (TL)	Support Amount (Euro)²	2014 (first 6 months) Admissions
1	Kış Uykusu (Winter Sleep)	2013	Feature	750.000	258.620	190.074
2	Mandıra Filozofu	2013	Feature	250.000	86.206	930.087
3	Peri Masalı (Fairy Tale)	2012	Feature	300.000	103.448	40.231
4	İksir	2012	Feature	300.000	103.448	94.747
5	Yunus Emre Aşkın Sesi (Yunus Emre: Voice of Love)	2012	Feature	300.000	103.448	83.487
6	Kusursuzlar (Impeccables)	2011	Feature	250.000	86.206	7.711
7	Şarkı Söyleyen Kadınlar (Singing Women)	2011	Feature	300.000	103.448	6.822
8	Mavi Dalga (The Blue Wave)	2011	First Feature	200.000	68.965	4.418
9	Mavi Ring (The Blue Van)	2011	First Feature	200.000	68.965	1.582
10	Lal	2011	Feature	250.000	86.206	8.454
12	Cennetten Kovulmak (The Fall From Eden)	2011	First Feature	250.000	86.206	7.244
13	Köksüz (Nobody's Home)	2011	First Feature	250.000	86.206	6.995
14	Daire (Circle)	2010	Feature	300.000	103.448	1.838
15	Ferahfeza (Ships)	2010	First Feature	200.000	68.965	703

² The TL amounts were converted to Euro amounts through the average Euro/TL.

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 (first 6 months)	24	8	0	32

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 (first 6	103.448 €	187.500 €	0

months)			
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European Co-Productions

Among the films released in 2013, 7 of them were co-productions: *Love Me* (Mehmet Bahadır Er, Maryna Gorbach), *Strangers in the House* (Ulaş Güneş Kaçargil, Dilek Keser), *Jin* (Reha Erdem), *Winds* (Selim Evcı), *Yozgat Blues* (Mahmut Fazıl Coşkun), *Eye Am* (Hakkı Kurtuluş, Melik Saraçoğlu), *Lifelong* (Aslı Özge). Among the films released in the first half of 2014, *Winter Sleep* (Nuri Bilge Ceylan) and *Blue Wave* (Zeynep Dadak, Merve Kayan) were co-productions.

There is a significant increase in the number of Turkish productions, but the same increase can't be observed in the number of co-productions. Because there is no direct support system for co-productions and the existing support systems are not operated with the participation of producers. Therefore a portfolio of producers who are willing to make international productions can't be created. Due to regulations, support system of Ministry of Culture and Tourism is only open to co-productions if the film's main producer is Turkish. Besides that Turkey can't benefit from Creative Europe programme which supports audiovisual industries in EU countries because Turkey is still trying to become a EU member. New regulations about cinema law which is expected to come into force in 2014 have several provisions to support co-productions. An increase in the number of co-productions is expected after these new regulations.

Television

Since the deregulation of the monopoly of the public broadcasting and establishment of private TV channels in 1990, TV productions and advertising films industry 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.

Turkey – Film Industry Fact Sheet (2013)

Average price per ticket	10,02 TL / 3,66 €
Price for a loaf of bread	1,00 TL / 0,36 €
Number of screens / Digital screens	2170 / 1042

Total Number of Films Released	321
Local Films Released	86
Total Admissions (2013)	50.405.020
Box Office Gross of Local Films	270.598.813 TL
Box Office Gross	505.260.067 TL
Admissions for Local Films	28.990.793
Share of Local Films (2013)	%58
INTERNATIONAL ACCLAIMS (2002-2014)	
<p>2014: Kış Uykusu (Winter Sleep) by Nuri Bilge Ceylan wins Golden Palm at Cannes Film Festival, Mavi Dalga (Blue Wave) by Zeynep Dadak and Merve Kayan was in Generation Kplus Competition of the Berlin Film Festival, Sesime Gel (Come to my Voice) by Hüseyin Karabey was in Generation 14plus Competition of the Berlin Film Festival, Seaburners (Kumun Tadı) by Melisa Önel was screened at the Forum section of the Berlin Film Festival, Kuzu (The Lamb) by Kutluğ Ataman was screened at the Panorama section of the Berlin Film Festival, short film Ağrı ve Dağ (Ağrı and the Mountain) by Hasan Serin was in Generation Kplus Competition of the Berlin Film Festival</p>	
<p>2013: Zerre (Particle) by Erdem Tepegöz wins Best Film and Best Actress at Moscow Film Festival</p>	
<p>2012: Tepenin Ardı (Beyond the Hill) by Emin Alper wins Caligari Film Prize at Berlin Film Festival, wins Best Film at Asia Pacific Film Awards; Küf (Mold) by Ali Aydın wins Lion of the Future at Venice Film Festival</p>	
<p>2011: Bir Zamanlar Anadolu'da (Once Upon a Time in Anatolia) by Nuri Bilge Ceylan wins Grand Jury Prize at Cannes Film Festival</p>	
<p>2011: Bizim Büyük Çaresizliğimiz (Our Grand Despair) by Seyfi Teoman was in competition at Berlin Film Festival</p>	
<p>2010: Çoğunluk (Majority) by Seren Yüce wins Lion of the Future at Venice Film Festival,</p>	
<p>2010: Bal (Honey) by Semih Kaplanoğlu wins Golden Bear in Berlin Film Festival</p>	
<p>2009: Pandora'nın Kutusu (Pandora's Box), Yeşim Ustaoglu wins Golden Shell - Best Film and Best Actress Awards at San Sebastian Film Festival</p>	
<p>2009: Uzak İhtimal (Wrong Rosary) by Mahmut Fazıl Coşkun wins Tiger Award at Rotterdam Film Festival</p>	
<p>2008: Üç Maymun (Three Monkeys) by Nuri Bilge Ceylan wins Best Director at Cannes Film Festival</p>	
<p>2008: Gitmek (My Marlon and Brando) by Hüseyin Karabey wins Best New Narrative Filmmaker Award at Tribeca Film Festival</p>	

2006: İklimler (Climates) by Nuri Bilge Ceylan wins FIPRESCI Prize at Cannes Film Festival

2002: Uzak (Distant) by Nuri Bilge Ceylan wins Grand Prix and Best Actor Prize at Cannes Film Festival

Sources: Antrakt Sinema Gazetesi, Box Office Türkiye, Altyazı Monthly Cinema Magazine