

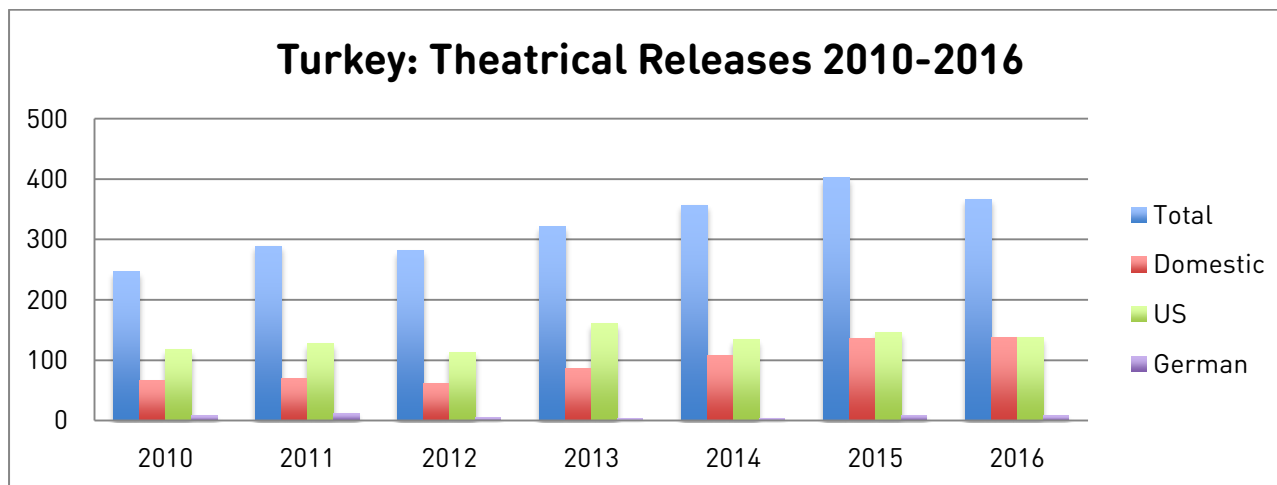
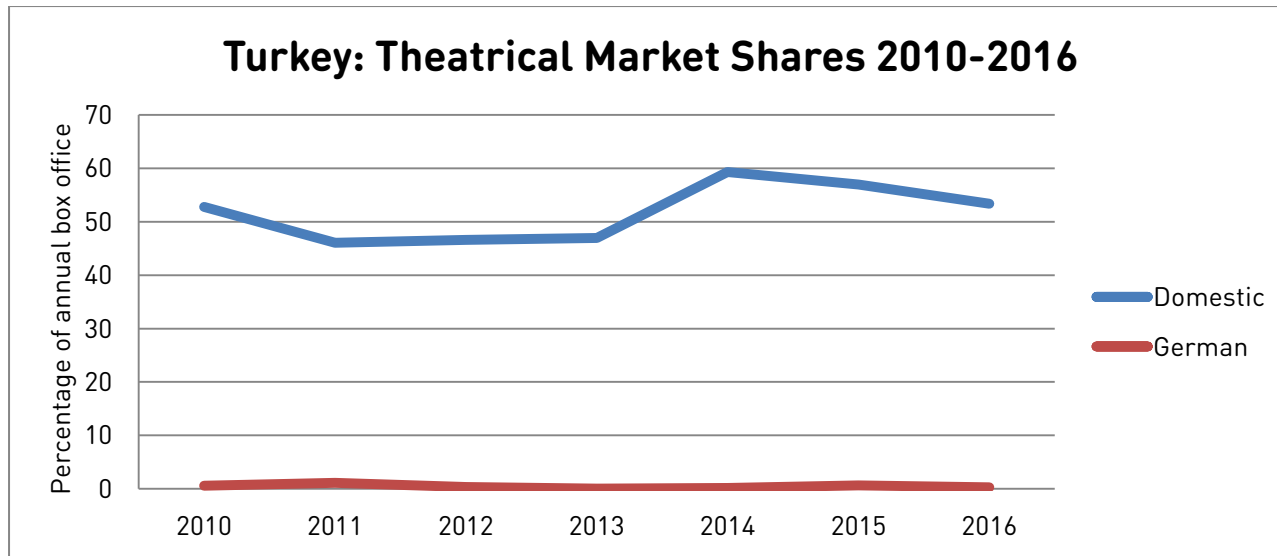
# TURKEY

(Pop: 80.8 million)

## (1) TURKEY: THEATRICAL MARKET OVERVIEW, 2010-2016

	2010	2011	2012	2013	2014	2015	2016
Screens	1,874	1,968	2,093	2,243	2,483	2,648	2,826
Theatrical admissions (millions)	41.1	42.2	43.9	50.4	61.4	60.5	58.3
Per capita attendance	0.6	0.6	0.6	0.7	0.8	0.8	0.7
Box office (EUR millions*)	146.4	165.6	177.5	193.0	275.1	212.0	218.6
Average ticket price (EUR*)	3.89	4.14	4.13	4.15	4.05	3.52	3.71
Releases	247	289	281	321	357	402	367
Domestic releases	66	69	62	86	108	136	138
US releases	117	127	113	160	134	145	137
German releases	10	12	5	3	4	9	8
Domestic market share	52.8%	46.1%	46.6%	47.0%	59.3%	57.0%	53.4%
German market share	0.57%	1.11%	0.35%	0.02%	0.14%	0.64%	0.28%

\*EUR equivalents are calculated throughout at the exchange rate for December 31 of the year in question.



## (2) THEATRICAL RELEASES IN TURKEY

TITLE	DISTRIBUTOR	RELEASE DATE	BOX OFFICE US\$
<b>2010 German films (100% or majority co-productions in red)</b>			
SOUL KITCHEN (Ger/Fr/It)	Tiglon	01.01.10	509,421
THE LAST STATION (Ger/Rus/UK)	Tiglon	07.05.10	196,652
DIE TÜR (Ger)	Özen Film	22.08.10	108,804
DIE FREMDE (Ger)	Özen Film	21.05.10	103,347
MIN DIT: THE CHILDREN OF DIYARBAKIR (Ger/Tur)	Nar Film	02.04.10	101,327
NORDWAND (Ger/Aut/Swz)	Tiglon	08.01.10	30,268
DAS WEISSE BAND (Ger/Aut/It/Sp)	Wega Film Istanbul	30.04.10	27,169
JOHN RABE (Ger/Cn/Fr/It/Sp)	Tiglon	03.09.10	18,265
KÖPRÜDEKILER (Ger/Tur/NL)	Özen Film	19.03.10	13,243
AYLA (Ger)	Medyavizyon (Turkey)	15.10.10	7,592
<b>2011 German minority co-productions</b>			
RESIDENT EVIL: AFTERLIFE (UK/Ger/US)	Pinema Filmcilik	10.09.10	2,388,597
MÄN SOM HATAR KVINNOR (Swe/Ger/Nor)	Tiglon	17.09.10	330,566
ANTICHRIST (Den/Fr/Ger/It/Swe)	Özen Film	11.06.10	227,720
BAL (Tur/Ger)	Cinefilm	09.04.10	185,674
NINJA ASSASSIN (US/Ger)	Warner Bros. Turkey	08.01.10	171,934
CHÉRI (UK/Ger/US)	Tiglon	01.01.10	74,757
FLICKAN SOM LEKTE MED ELDEN (Swe/Fr/Ger)	Tiglon	17.12.10	66,596
TENGRI, LE BLEU DU CIEL (Fr/Ger)	Tiglon	21.05.10	8,441
UNCLE BOONMEE WHO CAN RECALL HIS PAST LIVES (Thai/Ger/Fr/Sp/UK)	Tiglon	22.10.10	7,797

## 2011 German films (100% or majority co-productions)

KONFERENZ DER TIERE (Ger)	Medyavizyon (Turkey)	11.03.11	868,711
THE THREE MUSKETEERS (Ger/Fr/UK/US)	Tiglon	14.10.11	673,933
PINA (Ger/Fr)	Pinema Filmcilik	06.05.11	268,205
A DANGEROUS METHOD (Ger/Can/UK/Swz)	Tiglon	25.11.11	227,183
HENRI IV (Ger/Fr/Sp/Aut)	Pinema Filmcilik	12.08.11	77,960
ASK VE DEVRIM (Ger/Tur)	Tiglon	16.12.11	73,621
WIR SIND DIE NACHT (Ger)	Özen Film	10.06.11	62,237
ALMANYA - WILLKOMMEN IN DEUTSCHLAND (Ger)	Medyavizyon (Turkey)	04.11.11	50,709
GOETHE! (Ger)	M3 Film	16.09.11	37,837
DREI (Ger)	Tiglon	22.07.11	23,254
IRON DOORS (Ger)	Erkul Medya	17.06.11	9,851
THE FUTURE (Ger/US)	M3 Film	30.12.11	3,555

## 2011 German minority co-productions

LABIRENT (Tur/Ger)	Tiglon	23.12.11	1,362,435
UNKNOWN (US/Ger/UK/Fr)	Warner Bros. Turkey	22.04.11	730,735
YANGIN VAR (Tur/Ger)	UIP Turkey	09.12.11	499,397
HANNA (US/UK/Ger)	Warner Bros. Turkey	10.06.11	317,197
PERFECT SENSE (UK/Swe/Den/Ger)	Tiglon	26.08.11	276,726
GELECEK UZUN SÜRER (Tur/Ger)	Tiglon	11.11.11	148,545
CARNAGE (Fr/Ger/Pol)	Özen Film	16.12.11	144,209
BIZAM BUYUK CARESIZLIGIMIZ (Tur/Ger/NL)	Tiglon	15.04.11	86,315
LUFTSLOTTET SOM SPRÄNGDES (Swe/Den/Ger)	Tiglon	01.04.11	25,750
7 AVLU (Tur/Ger)	Özen Film	18.02.11	11,721
CIRKUS COLUMBIA (Bos/Fr/Ger/UK/Slvn/Bel)	Tiglon	07.01.11	10,836
HJEM TIL JUL (Nor/Ger)	M3 Film	30.12.11	1,875

## 2012 German films (100% or majority co-productions in red)

CLOUD ATLAS (Ger/US)	Chantier Films (Turkey)	26.10.12	1,803,417
RESIDENT EVIL: RETRIBUTION (Ger/Can)	Sony Films (Turkey)	14.09.12	977,180
ZIMMER 205 – TRAUST DU DICH REIN? (Ger)	M3 Film	20.07.12	190,779
BARBARA (Ger)	Tiglon	20.07.12	11,928
MÜLL IM GARTEN EDEN (Ger)	M3 Film	05.10.12	6,324

## 2012 German minority co-productions

THE VOW (US/Brz/Fr/Aus/UK/Ger)	Warner Bros. Turkey	13.04.12	531,688
FLYPAPER (US/Ger)	Pinema Filmcilik	27.04.12	178,243
TINKER TAILOR SOLDIER SPY (UK/Fr/Ger)	Chantier Films (Turkey)	10.02.12	177,253
AMOUR (Fr/Ger/Aut)	M3 Film	28.12.12	147,746
MELANCHOLIA (Den/Swe/Fr/Ger)	M3 Film	13.01.12	87,517
BABYCALL (Nor/Ger/Swe)	Tiglon	27.04.12	81,239
BABAMIN SESI (Tur/Ger)	Tiglon	02.11.12	76,967
GÖZETLEME KULESI (Tur/Fr/Ger)	Tiglon	16.11.12	57,187
HYSTERIA (UK/Fr/Ger/Lux)	M3 Film	19.10.12	44,499
EKÜMENOPOLIS: UCU OLMAYAN SEHIR (Tur/Ger)	M3 Film	04.05.12	28,897
EN KONGELIG AFFÆRE (Den/Cz/Swe/Ger)	Tiglon	20.07.12	26,902
UN AMOUR DE JEUNESSE (Fr/Ger)	M3 Film	09.03.12	26,799
POULET AUX PRUNES (Fr/Ger/Bel)	Tiglon	15.06.12	19,671
FAUST (Rus/Ger)	Tiglon	29.06.12	8,682
ELENA (Rus/Ger)	M3 Film	07.09.12	6,796
BURNT BY THE SUN 2: CITADEL (Rus/Ger/Fr)	Umut Sanat	05.10.12	5,461

### 2013 German films (100% or majority co-productions in red)

HEXE LILLI: DIE REISE NACH MANDOLAN (Ger/Aut/Sp)	UIP Turkey	12.07.13	63,975
DIE VAMPIRSCHWESTERN (Ger)	UIP Turkey	20.09.13	35,421
MR. MORGAN'S LAST LOVE (Ger/Bel/Fr/US)	Medyavizyon (Turkey)	18.10.13	29,572

### 2013 German minority co-productions

HANSEL & GRETEL: WITCH HUNTERS (US/Ger)	UIP Turkey	01.02.13	1,871,980
THE MORTAL INSTRUMENTS: CITY OF BONES (US/Ger/Can)	Tiglon	30.08.13	494,237
NIKO 2 – LENTÄJÄVELJEKSET (Fin/Den/Ire/Ger)	Tiglon	29.11.13	311,272
RUSH (US/UK/Ger)	Pinema Filmcilik	20.09.13	234,363
PASSION (Fr/Ger)	M3 Film	05.04.13	76,915
YOZGAT BLUES (Tur/Ger)	M3 Film	06.12.13	48,867
DEN SKALDEDE FRISØR (Den/Swe/It/Fr/Ger)	Medyavizyon (Turkey)	24.05.13	47,946
JIN (Tur/Ger)	Pinema Filmcilik	15.03.13	44,007
2 DAYS IN NEW YORK (Fr/Ger/Bel)	M3 Film	05.07.13	24,587
ELLES (Fr/Pol/Ger)	M3 Film	08.03.13	19,107
HOLY MOTORS (Fr/Ger)	Pinema Filmcilik	02.08.13	16,488
HAYATBOYU (Tur/Ger/NL)	M3 Film	15.11.13	15,930
THE LONELIEST PLANET (US/Ger)	M3 Film	15.03.13	9,384
KRUGOVI (Ser/Slvn/Cro/Fr/Ger)	M3 Film	18.10.13	2,579

### 2014 German films (100% or majority co-productions)

DIE BIENE MAJA – DER KINOFILM (Ger/Aus)	UIP Turkey	31.10.14	1,356,311
DAS KLEINE GESPENST (Ger/Swz)	Bir Film	18.04.14	128,030
TARZAN 3D (Ger)	Chantier Films (Turkey)	07.11.14	81,659
CLOUDS OF SILS MARIA (Ger/Fr/Swz)	Bir Film	19.12.14	21,237

### 2014 German minority co-productions

KIS UYKUSU (Tur/Ger/Fr)	Pinema Filmcilik	13.06.14	1,673,152
THE GRAND BUDAPEST HOTEL (US/Ger)	Tiglon	11.04.14	609,659
THE MONUMENTS MEN (US/Ger)	Tiglon	21.03.14	549,316
LA BELLE ET LA BÊTE (Fr/Ger)	Bir Film	28.03.14	138,158
A MOST WANTED MAN (UK/US/Ger)	Pinema Filmcilik	05.09.14	94,158
SIVAS (Tur/Ger)	M3 Film	31.10.14	71,413
POMPEII (Can/Ger)	Chantier Films (Turkey)	31.10.14	64,042
SARKI SÖYLEYEN KADINLAR (Tur/Ger/Fr)	M3 Film	21.02.14	35,133
ONLY LOVERS LEFT ALIVE (UK/Ger/Fr/Cyp)	M3 Film	14.02.14	28,906
BEN O DEGILIM (Tur/Fr/Ger/Gr)	M3 Film	26.09.14	18,042
THE LUNCHBOX (Ind/Fr/Ger)	Filmarti Film	25.04.14	16,423
ANNEMIN SARKISI (Tur/Fr/Ger)	M3 Film	14.11.14	10,254
MAVI DALGA (Tur/Ger/NL/Gr)	M3 Film	07.03.14	6,925
MICHAEL KOHLHAAS (Fr/Ger)	M3 Film	28.03.14	5,919
WADJDA (Saudi/Ger)	M3 Film	25.07.14	5,782
THE CONGRESS (Isr/Ger/Pol/Fr/Bel)	M3 Film	30.05.14	2,566

### 2015 German films (100% or majority productions)

DER 7BTE ZWERG (Ger)	Mars Dagitim	30.01.15	679,237
DER KLEINE DRACHE KOKOSNUSS (Ger)	Bir Film	13.03.15	278,197
DER KLEINE RABE SOCKE 2 - DAS GROSSE RENNEN (Ger)	Bir Film	30.10.15	73,453
WHO AM I – KEIN SYSTEM IST SICHER (Ger)	M3 Film	04.09.15	57,375

CITIZENFOUR (Ger/US)	M3 Film	24.04.15	46,158
VICTORIA (Ger)	M3 Film	18.09.15	21,793
DER KLEINE MEDICUS – GEHEIMNISVOLLE MISSION IM KÖRPER (Ger)	Özen Film	11.09.15	13,655
EVERY THING WILL BE FINE (Ger/Can/Swe/Nor)	M3 Film	11.09.15	11,895
PHOENIX (Ger)	M3 Film	10.07.15	8,474

### 2015 German minority co-productions

HITMAN: AGENT 47 (US/Ger)	The Moments Entertainment	21.08.15	755,501
POINT BREAK (US/Ger)	The Moments Entertainment	25.12.15	279,576
RÜZGÂRIN HATIRALARI (Tur/Geo/Ger/Fr)	Bir Film	11.12.15	103,975
MUSTANG (Fr/Tur/Ger)	M3 Film	23.10.15	89,837
SHE'S FUNNY THAT WAY (US/Ger)	Pinema Filmcilik	11.09.15	84,744
SARMASIK (Tur/Ger)	M3 Film	04.12.15	78,862
BIG GAME (Fin/Ger/UK)	Moviebox	03.07.15	70,918
MAPS TO THE STARS (Can/US/Fr/Ger)	M3 Film	09.01.15	43,582
LIFE (UK/Ger)	Pinema Filmcilik	04.12.15	21,608
POSTHUMOUS (US/Ger)	Bir Film	01.05.15	18,091
SIMINDIS KUNDZULI (Geo/Ger/Fr/Cz/Kaz)	M3 Film	02.01.15	12,494
NEFESIM KESILENE KADAR (Tur/Ger/Fr)	M3 Film	30.10.15	4,631
JAUJA (Arg/Fr/Mex/Ger/NL)	M3 Film	13.11.15	273

### 2016 German films (100% or majority productions)

HEIDI (Ger/Swz)	Digitim	15.04.16	397,273
TSCHICK (Ger)	Bir Film	30.09.16	75,577
DER KLEINE RITTER TRENK (Ger/Aut)	Digitim	01.07.16	64,542
UNFRIEND (Ger)	Bir Film	09.09.16	44,755
ELSER – ER HÄTTE DIE WELT VERÄNDERT (Ger)	M3 Film	01.07.16	42,906



DER KLEINE KÖNIG MACIUS – DER FILM (Ger/Pol/Fr)  
 IM LABYRINTH DES SCHWEIGENS (Ger)  
 AUF EINMAL (Ger/NL/Fr)

Özen Film 22.04.16 10,424  
 M3 Film 29.01.16 9,721  
 Bir Film 14.10.16 9,093

**2016 German minority co-productions**

THE DANISH GIRL (UK/Bel/Ger/Den/US)  
 A HOLOGRAM FOR THE KING (US/Ger)  
 TEREDDÜT (Tur/Fr/Ger/Pol)  
 EDDIE THE EAGLE (UK/US/Ger)  
 FRANTZ (Fr/Ger)  
 REMEMBER (Can/Ger)  
 RÜZGARDA SALINAN NILÜFER (Tur/Ger)  
 ELLE (Fr/Ger/Bel)  
 RACE (Fr/Ger/Can)  
 MAVI BISIKLET (Tur/Ger)  
 HASRET: SEHNSUCHT (Tur/Ger)

UIP Turkey 12.02.16 172,099  
 Chantier Films (Turkey) 22.04.16 140,188  
 Bir Film 16.12.16 49,667  
 TME Films 01.04.16 32,816  
 M3 Film 25.11.16 29,727  
 M3 Film 22.07.16 23,146  
 M3 Film 23.09.16 20,983  
 Özen Film 04.11.16 20,278  
 Pinema Filmcilik 27.05.16 13,419  
 M3 Film 16.02.16 13,147  
 M3 Film 11.03.16 9,105

### **(3) TURKEY: TOP 10 GERMAN FILMS (THEATRICAL), 2010-2016**

	<b>ADMISSIONS</b>	<b>BOX OFFICE (EUR)</b>
DIE BIENE MAJA - DER KINOFILM (2014)	327,878	1,120,313
RESIDENT EVIL: RETRIBUTION (2012)	297,089	740,702
CLOUD ATLAS (2012)	267,043	1,336,990
DER 7BTE ZWERG (2015)	157,686	624,898
THE THREE MUSKETEERS (2011)	122,368	520,276
KONFERENZ DER TIERE (2011)	119,691	670,645
HEIDI (2016)	99,743	378,355
SOUL KITCHEN (2010)	76,509	380,165
DER KLEINE DRACHE KOKOSNUSS (2015)	80,212	255,941
PINA (2011)	47,894	207,054
ZIMMER 205 - TRAUST DU DICH REIN? (2012)	40,195	144,610

**(4) TURKEY: DISTRIBUTORS OF GERMAN FILMS, 2010-2016**

	2010	2011	2012	2013	2014	2015	2016	TOTAL
M3 Film	-	2	2	-	-	5	2	11
Tiglon	4	4	1	-	-	-	-	9
Bir Film	-	-	-	-	2	2	3	7
Özen Film	3	1	-	-	-	1	1	6
Medyavizyon (Turkey)	1	2	-	1	-	-	-	4
Mars Dagitim	-	-	-	-	-	1	2	3
UIP Turkey	-	-	-	2	1	-	-	3
Chantier Films (Turkey)	-	-	1	-	1	-	-	2
Pinema Filmcilik	-	2	-	-	-	-	-	2
Erkul Medya	-	1	-	-	-	-	-	1
Nar Film	1	-	-	-	-	-	-	1
Sony Films (Turkey)	-	-	1	-	-	-	-	1
Wega Film Istanbul	1	-	-	-	-	-	-	1

## (5) TURKEY: THEATRICAL MARKET OVERVIEW

The major social and political changes that have taken place in Turkey during the period covered by this survey (2010-2016) are reflected in many of the developments in the Turkish theatrical market, particularly in the 50%-plus market share enjoyed by local titles (the seven-year average is 52%). This has happened partly due to a number of local hits, but mainly because of the number of Turkish films on offer. These have doubled over the period surveyed, with the sharpest increase occurring in the last couple of years. We do not have reliable data on the number of European films released over that same period, but since the number of US titles has remained broadly the same, it is reasonable to assume that the strength in local titles has been at the expense of European movies. The number of German films has certainly declined more or less year on year, with the exception of a slight revival in 2015-2016.

The market has not, however, grown weaker: indeed, the number of screens has increased by 50%, with box office increasing at a slightly faster rate (72% over the period surveyed) than admissions (up 42%). But the climate has changed and continues to do so. With its population of 80 million, huge land area and increasing prosperity, Turkey's cinema industry behaves more like an Asian market than a European country, with local films – mainly in genres such as comedy, horror and action – dominating the screens and the national box office. This has intensified over the course of this survey. In 2010, the question of Turkish membership of the EU was still under serious discussion. In 2016, the country is realigning itself eastwards.

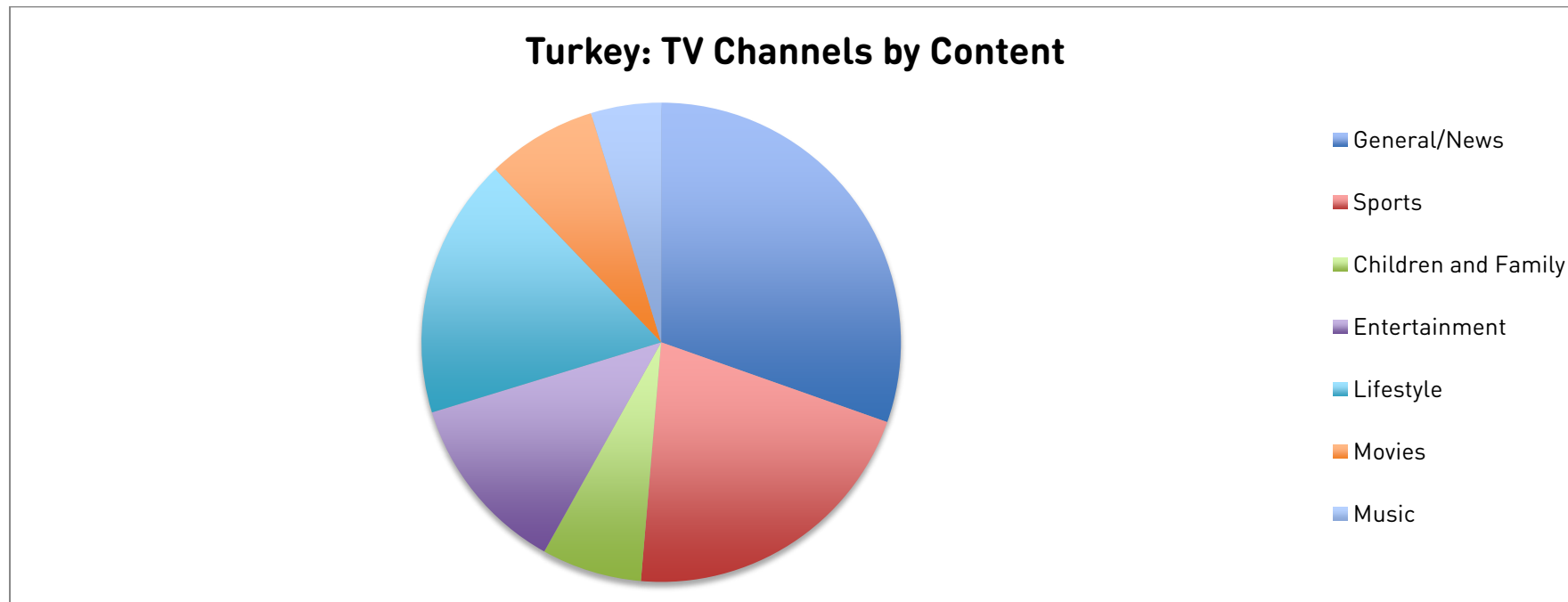
One thing is certain: the strong foothold that Turkish films have on the German market, where they currently account for between 3% and 4% of all releases, is not reciprocated by the welcome shown to German films in Turkey, where they account for just 2% of titles released between 2010 and 2016, and a box-office share so low that it barely registers on the chart in Section (1). Even this figure is skewed by a very healthy 2011, when 12 German films were released.

Above all, serious German films do not make much of an impact on Turkish audiences. In the last four years, two thirds of the German presence on Turkish screens (13 of the 21 films released) has consisted of animation and children's films. Only in 2015 did more serious movies make something of a return, with the release of CITIZENFOUR and WHO AM I - KEIN SYSTEM IST SICHER, which between them sold almost 25,000 tickets). The other five German arthouse films of recent years – titles such as PHOENIX, VICTORIA, EVERY THING WILL BE FINE, ELSER - ER HÄTTE DIE WELT VERÄNDERT and IM LABYRINTH DES SCHWEIGENS – sold pretty much the same number of tickets (24,743) in total between the five of them.

The distribution of European films in Turkey has also been hit in the 2010s by the financial problems encountered by Tiglon, once a mainstay of the crossover market and a regular supporter of higher-profile arthouse. The company last opened a German film in 2011 and now trades mainly as a licensee for Fox theatrically and a number of other US studios on DVD. To some extent the gap has been filled by M3 Films, launched in 2010, which specialises in European films and has links with a number of Turkish arthouse cinemas. But, in the absence of more detailed data, it is hard to draw any substantial conclusions. What seems clear is that, with total box-office revenue for German films of just over EUR 8 million over seven years (and half of that from just three films: DIE BIENE MAJA - DER KINOFILM; RESIDENT EVIL: RETRIBUTION; and CLOUD ATLAS), Turkey is basically a secondary market for German films.

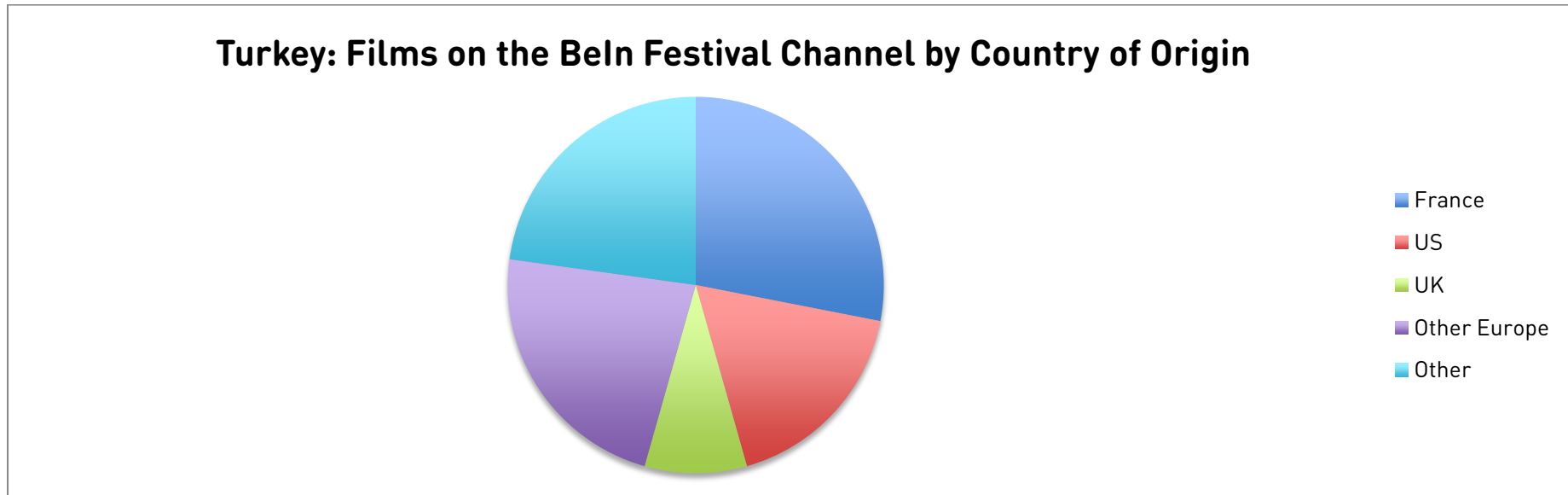
## (6) TURKEY: GERMAN FILMS ON TELEVISION OVERVIEW

When it comes to television, Turkey's modern face is very much to the fore, with some 400 channels (including a wide range of HD ones) available on Digiturk, the country's leading satellite which has been in operation since 2000. The line-up is equivalent in range and depth to anything in Western Europe with (as the chart below indicates) movie channels very much part of the mix.



Carried on the Digiturk platform, the cosmopolitan Beln Festival is one of seven movie channels branded under the name. The Festival channel draws on the resources of the MovieMax Festival channel and does pretty much what it says on the tin: programmes selections from major festivals, noting in the process the festival at which a film first screened. The period surveyed – the last week of September 2017 –

revealed an eclectic line-up, with films from 25 countries. French titles are very much in the lead, with US titles in second place. Two German films were programmed: THE LAST STATION and 24 WOCHEN, which premiered at Telluride and Berlin respectively.



For details of on-line DVD and VOD platforms available in Turkey, see separate survey, Home Entertainment Market

## **(7) TURKEY: SOURCES AND ACKNOWLEDGMENTS**

CIA World Factbook, XE.com, European Audiovisual Observatory, Lumière, Rentrak, Box Office Mojo, Focus on Turkish Film Industry (Meetings on the Bridge), Antrak Sinema Gazetesi, www.sinema.gov.tr, channellists.com, Digiturk, Eurostat, Cinando.