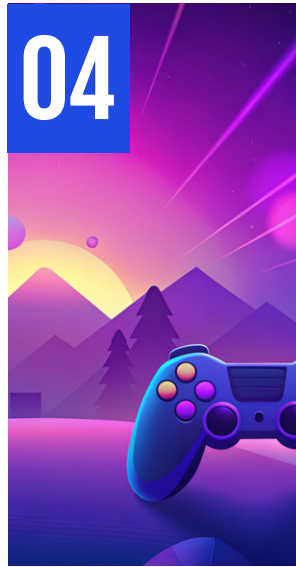


2025 Africa Games Industry Report

January 2025

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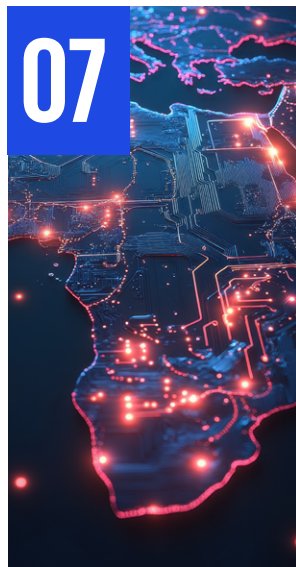
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The 2025 Africa Games Industry Report offers an in-depth analysis of the rapidly evolving gaming sector in Africa, covering the latest trends, challenges, and opportunities. With mobile gaming leading the charge, Africa's gaming ecosystem has experienced substantial growth, fueled by an expanding, young, and tech-savvy population and enhanced digital infrastructure. This year's report shines a spotlight on the key markets, studios, talent initiatives, and emerging trends that are shaping the future of the African games industry. Data-driven insights from across the continent highlight the dynamic changes taking place, providing valuable perspectives for developers, investors, and policy makers.

This year's Africa Games Report Covers:

1

The Global Games Industry:

Examining trends, growth drivers, and regional breakdowns.

2

Overview of the African Games Industry:

Insights into growth, revenue, and Africa's global momentum.

3

Spotlight on Emerging African Markets:

South Africa, Egypt, Nigeria, and Kenya's gaming economies.

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African Game Studios, Communities, and Talent Initiatives

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Key events and milestones shaping the African and global gaming landscape.

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Africa Game Studio Directory:

A resource for networking and investment opportunities.

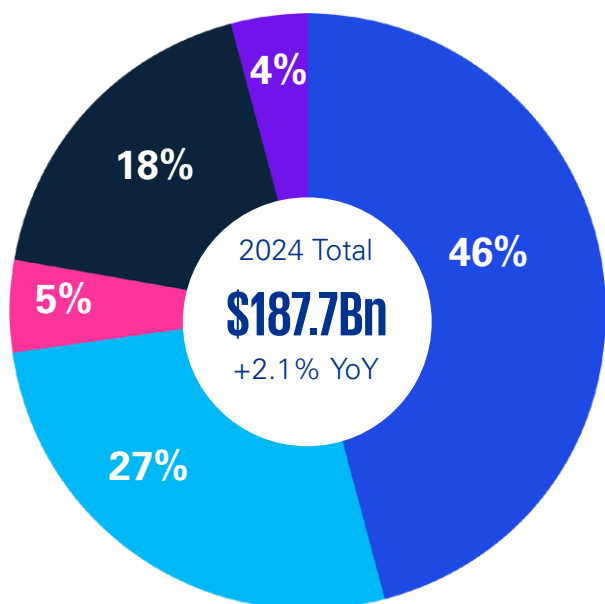







The Global Games Industry

The global gaming industry continues to break records, with revenues projected to surpass \$187 billion in 2024 and a player base exceeding 3.42 billion globally.

Global games market revenues in 2024

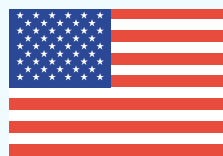
Per region with year - on - year growth rates



	Middle East & Africa	\$7.7Bn	+8.9%YoY
	Latin America	\$9.1Bn	+6.2%YoY
	Europe	\$34.8Bn	+3.2%YoY
	North America	\$50.2Bn	+0.6%YoY
	Asia - Pacific	\$85.9Bn	+1.5%YoY

49%

49% of all consumer spending on games in 2024 will come from the US and China



US Total

\$47.0 Bn



China Total

\$45.0 Bn

Our revenues encompass consumer spending on games: physical and digital full-game copies, in-game spending, and subscription services like Xbox Game Pass, Mobile revenues excluding advertising. Our estimates excludes taxes, second-hand trades or secondary markets advertising revenues earned in and around games, console and peripheral hardware, B2B services and the online gambling and betting industry.



Asia-Pacific leads the global market, with China contributing \$45 billion in revenues, while North America follows closely with \$47 billion, led by the U.S.



Mobile gaming remains the largest contributor, generating \$92 billion in 2024. Its dominance is fueled by smartphone accessibility in emerging markets like Latin America, Africa, and India.

Spotlight on Emerging Games Market

The global gaming industry has seen tremendous growth across emerging markets, each showcasing unique strengths and opportunities:

Brazil

As Latin America's largest gaming market, Brazil generated approximately \$3.3 billion in 2023. Mobile gaming leads at 51.7%, but console gaming is gaining traction, now accounting for 20.5% of the market. Brazil's dynamic industry is supported by initiatives like the Brazil Indie Games Festival (BiG) now called Gamescom LATAM.

India

India's gaming sector is one of the fastest-growing globally, with 78% of its \$830 million revenue in 2023 coming from mobile gaming. The market boasts three gaming unicorns—Dream11, MPL, and Games24x7—and is projected to surpass \$1 billion in revenue by 2025, reflecting an 11.1% CAGR over five years.

Turkey

Generating \$580 million in 2023, Turkey's gaming industry is anchored by its mobile-first market of 47 million gamers. It stands out for producing two gaming unicorns, Peak Games and Dream Games, demonstrating Turkey's capability to influence global gaming trends.

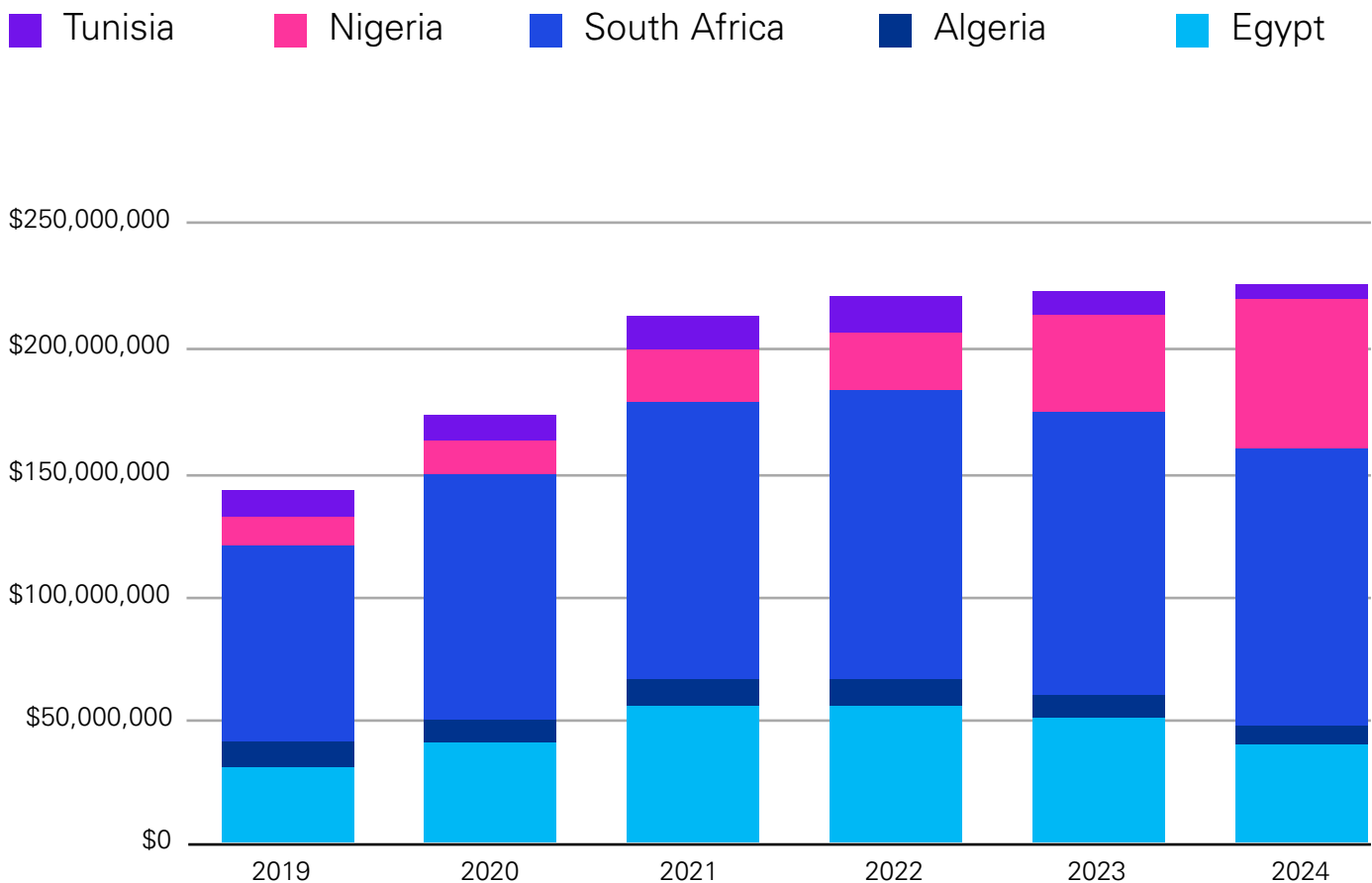
Africa

With gaming revenues projected to surpass \$1 billion by 2024, mobile remains the dominant platform, representing nearly 90% of the market. This growth is driven by smartphone accessibility and affordability, with local studios such as Maliyo Games and Kiro'o Games creating culturally resonant content.

The African Games Industry

The African games industry has witnessed impressive growth in recent years, especially in mobile gaming. In 2024, mobile game revenues from the top five African markets—South Africa, Egypt, Nigeria, Algeria, and Tunisia—exceeded \$200 million, showing Africa’s capacity to innovate while appealing to a global audience.

Africa Top Mobile Markets



Source: AppTweak

Spotlight on Emerging African Market

The report highlights key African markets that are shaping the continent's gaming landscape:

South Africa

South Africa remains Africa's largest gaming market, with revenues projected to grow from \$266 million in 2023 to \$333 million by 2026. It boasts a player base of approximately 26 million, driven primarily by mobile gaming, alongside robust console and PC gaming communities.

Egypt

Egypt is a major contributor to the MENA gaming market, accounting for 10.5% of the region's \$1.92 billion revenue in 2023. With over 35 million mobile gamers, the region is expected to grow further. This implies the MENA region will grow to \$2.65 billion and not Egypt as a country would grow to that number.

Nigeria

Nigeria is Africa's fastest-growing gaming market, with revenue of \$185 million in 2022. This growth is driven by a large youth population, improving digital infrastructure, and widespread smartphone adoption, solidifying its position as a key player in the continent's gaming ecosystem.

Kenya

Kenya is an emerging market in East Africa, with gaming revenue contributing \$46 million in 2021. Mobile gaming dominates, supported by urban gamers and increasing in-app purchases, as the country continues to leverage its status as a regional tech hub.



African Games Studios, Community Events, and Talent Initiatives

Africa's gaming landscape is shaped by the diversity and ingenuity of its game development studios. These studios, spread across the continent, represent a broad spectrum of talent and storytelling that drives the industry forward. The report celebrates their contributions by highlighting key players from various regions:

South Africa

Sea Monster Entertainment excels in crafting impactful educational and entrepreneurial games like *Chow Town*, which introduces players to South African culinary culture while promoting business skills. Pineapple on Pizza Studios shines in the indie space, creating engaging games like *Moya* that explore fantastical narratives.



Image Credit: Sea Monster Entertainment

Nigeria

Studios like Maliyo Games develop culturally infused mobile games that reflect everyday African life, blending entertainment with local flavor. Dimension 11 Studios focuses on storytelling, with titles like *Legends of Orisha* showcasing Nigeria's rich heritage while creating narratives that resonate with global audiences.



Kenya

Kunta Content celebrates African culture through interactive storytelling, with *Bankush: An African Experience* offering a rich exploration of Kenyan heritage on the Minecraft Marketplace. Indie developer Daniel Macharia portrays urban Kenyan life through *Nairobi*, an engaging depiction of Nairobi's vibrant streets.



Image Credit: Kunta Content

Ghana

Leti Arts is renowned for fusing African history and mythology into interactive experiences like *African Legends*, while Bawala Studios highlights social themes through their projects, showcasing the depth of Ghanaian creativity.

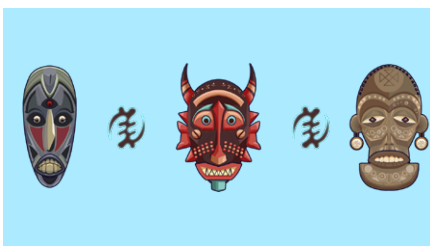


Image Credit: Leti Arts

Senegal

Studios like Kayfo Games and Masseka Games Studio focus on casual and folklore-inspired titles. Games like *The Chronicles of Djoulia* reflect Senegal's rich traditions and storytelling.



Image credit: Kayfo Games

Cameroon

Kiro'o Games creates immersive experiences rooted in African mythology, as seen in *Aurion: Legacy of the Kori-Odan*. Meanwhile, Noohkema Interactive contributes dynamic action-adventure titles like *Afro Warriors*.



Image credit: Kiro'o Games

Community Events

Africa's gaming ecosystem is supported by events that foster collaboration and industry growth:

Africa Games Week:

Africa's premier gaming convention in Cape Town, focusing on, development, and investment opportunities.

Playtopia:

Celebrates indie games and digital creativity in South Africa, featuring interactive installations and workshops.

Lagos Games Week:

A central gathering for Nigerian gamers and developers, emphasizing local talent and community building.

Talent Development and Acceleration

The African games industry is increasingly supported by initiatives designed to nurture talent and accelerate growth across the continent.

GameUp Africa

Programs like GameUp Africa, which has trained hundreds of entry-level developers since its inception, continue to play a pivotal role in

equipping young Africans with the skills needed to succeed in game development.

ITTHYNK & ARK

Similarly, initiatives such as the ARK Fellowship and ITThynk's mentoring programs provide valuable mentorship, funding, and opportunities for budding developers.

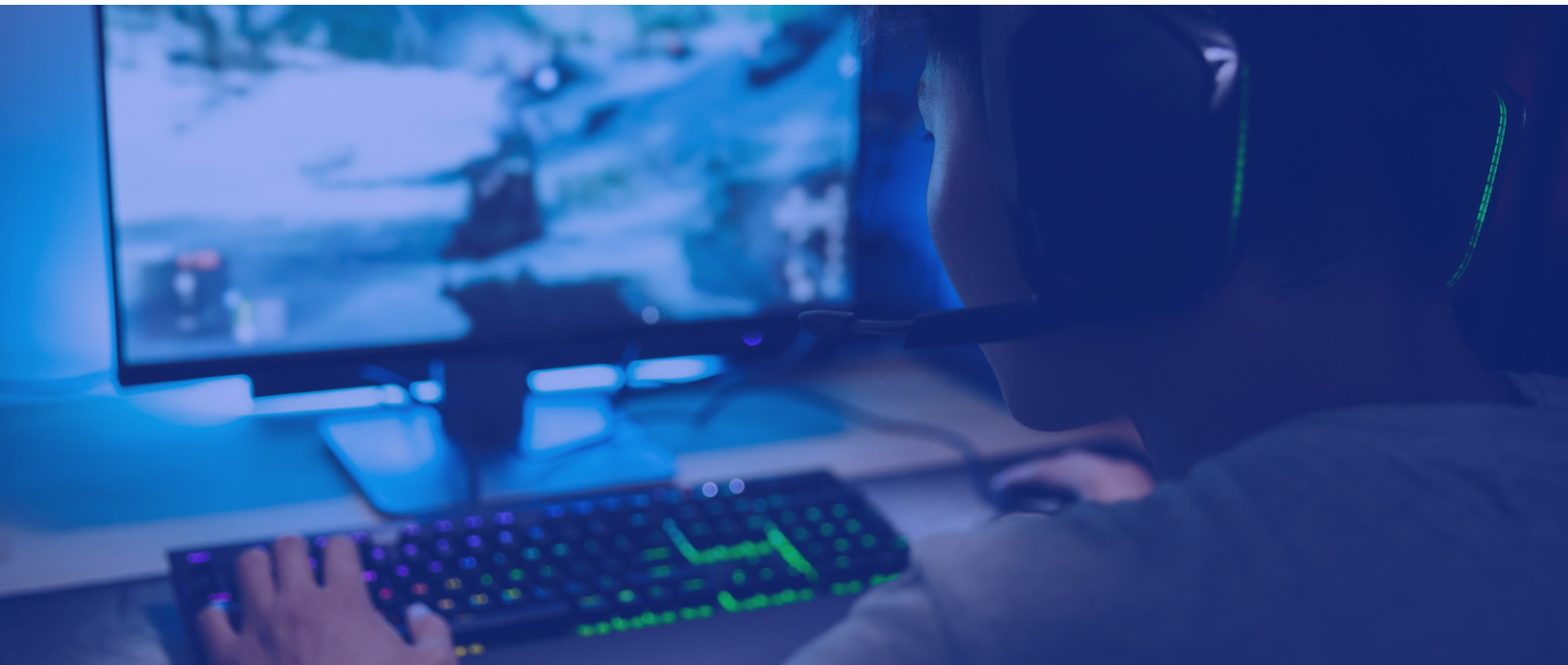
Ashesi University

Education institutions are also stepping in, with programs like Ashesi University's game design courses introducing a new generation to the intricacies of game development.

Senegal Game Hub

Meanwhile, serves as a critical incubator for local talent, offering resources and networking opportunities to early-stage developers. These efforts show a commitment to creating a strong pipeline of talent to sustain the rapid growth of Africa's gaming ecosystem.

By fostering collaboration and supporting innovation, talent development initiatives are shaping the future of game development in Africa.



2024 African Game Developer Survey

The African Game Developer Survey provides a comprehensive overview of the current state of game development in Africa, offering insights into key trends, opportunities, and challenges.

Key findings from the Survey include:

Access to support

The survey shows limited support for African game companies, with only 3% receiving government funding and only 36% have applied or participated in accelerator programs.

Infrastructure

Power supply is deemed critical by 82% of respondents, but its quality is low at 60%. Affordable and high-speed internet are also seen as essential (76%), with slightly better quality but still requiring improvement.

Revenue Sources

52% of developers depend entirely on income generated within their country, underscoring the need to expand reach and market access.

Increased Number of Studios

The number of game development studios across the continent has grown, reflecting rising interest and talent in the sector.

Platform Preferences

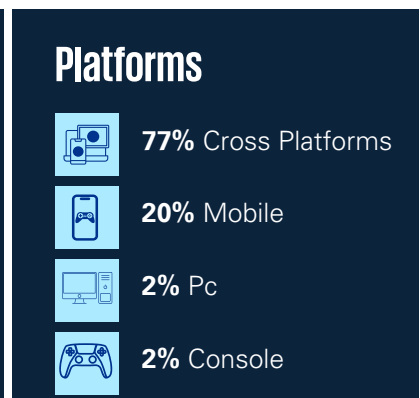
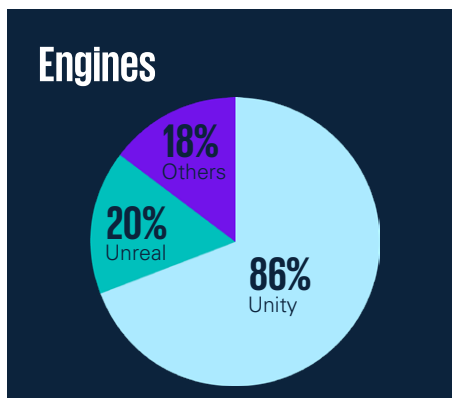
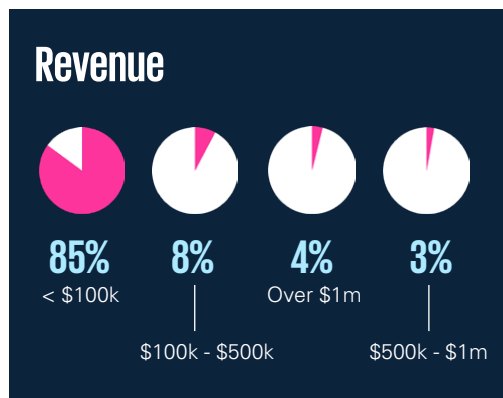
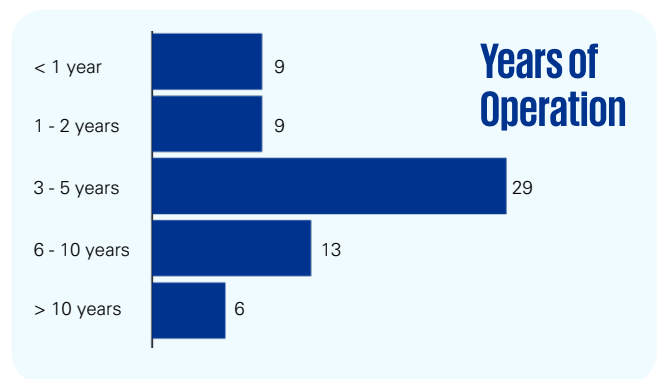
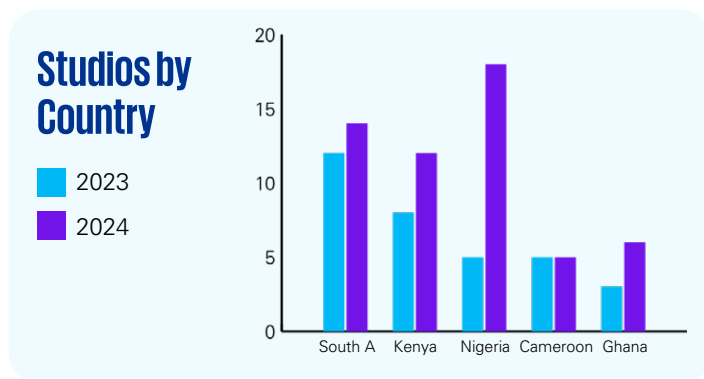
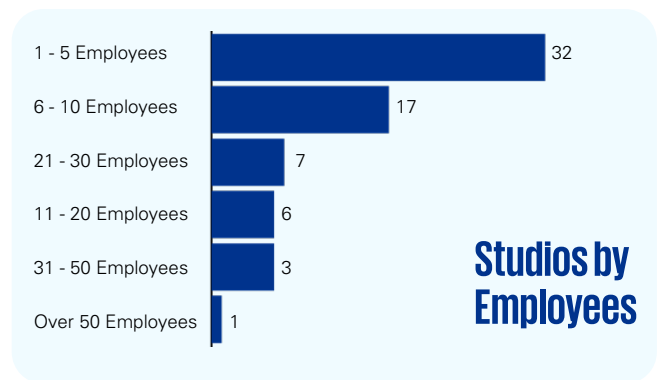
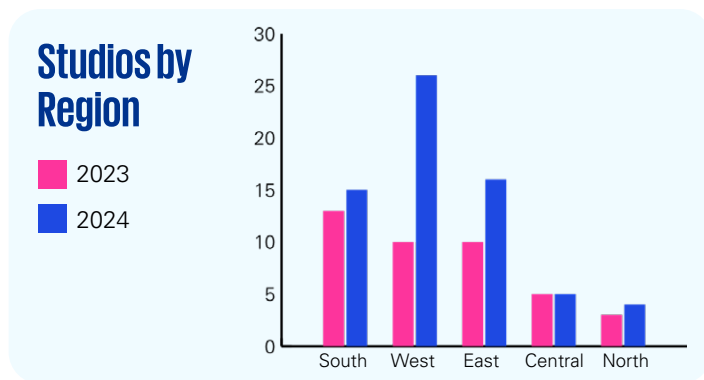
The survey reveals that 78% of respondents build mobile games, 70% focus on PC, 17% on game consoles, and less than 5% on VR.



Africa Game Developer Survey

Explore who is making games, the technologies they use, their levels of experience, and the financial landscape of the industry.

66 Active Studios	23 Countries with Active Studios	8 Games Focused Events
6 Accelerators/Incubators	4 Training Initiatives	0 Game Focused Funds



Disclaimer: Data is based on participants from the 2024 Annual Games Industry Survey

This data was collected from an annual survey of game developers across the continent and might not be fully representative as not every game developer participated in the survey

Africa Game Studio Directory

The Africa Game Studio Directory features an extensive list of studios across the continent, providing essential resources for networking, collaboration, and investment opportunities. This directory highlights the diversity of talent and innovation fueling Africa's gaming industry, from Nigeria and South Africa to Ghana, Senegal, and Cameroon.

Recommendations

To unlock the full potential of Africa's games industry, collaborative efforts from developers, investors, policymakers, and community leaders are essential. Below are targeted recommendations to address key challenges and capitalize on emerging opportunities:

- Foster collaboration among game studios to create more expansive and competitive titles.
- Promote culturally relevant content to highlight Africa's unique narratives in global markets.
- Support participation in global gaming events like Gamescom to amplify African innovation and voices.
- Invest in reliable digital infrastructure in high-growth markets such as Nigeria and Kenya.
- Introduce tax incentives, creative hubs, and targeted policies to stimulate industry growth.
- Expand educational initiatives to build talent pipelines across the continent.
- Enhance accessibility and mentorship in talent development programs to empower emerging developers.
- Spotlight African creators on international platforms to increase visibility and drive global interest.
- Engage in community feedback loops to refine local games and ensure alignment with player needs.



Collaboration Authors



Lawrence Amadi
Partner
Tech Assurance
KPMG West Africa
E: lawrence.amadi@ng.kpmg.com



Hugo Obi
Founder and CEO
Maliyo Games
E: hugo.obi@maliyo.com

KPMG Nigeria is a leading multinational professional services firm specializing in Advisory, Tax, and Audit services across various industries. Leveraging its extensive knowledge and innovative technology, KPMG helps clients address complex business challenges and achieve sustainable, long-term value.

Maliyo Games is a Nigerian mobile gaming company dedicated to creating mobile games inspired by African culture and experiences, bringing unique regional narratives to the global gaming landscape. Beyond entertainment, Maliyo Games is committed to fostering innovation and skill development in the African tech and gaming ecosystem.

