

State of the African Games Industry 2025 – PC Edition

A fragmented but spirited continent on the rise

Table of Contents

State of the Indie Games Market

3-5

African Games on Steam

6-11

Unit Sales Performance

12-14

Player Insights

15-18

State of the Indie Market

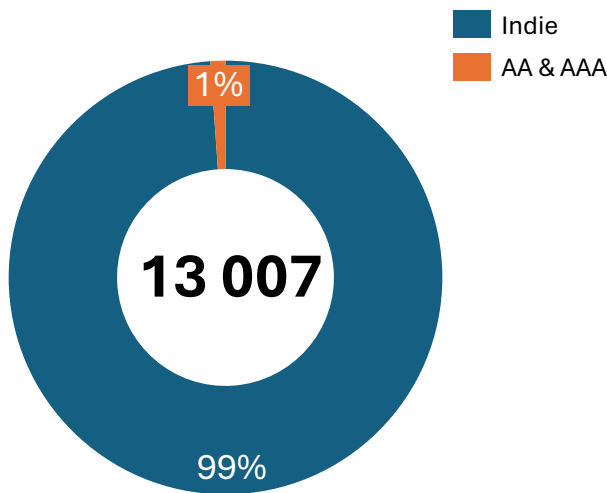
VGI



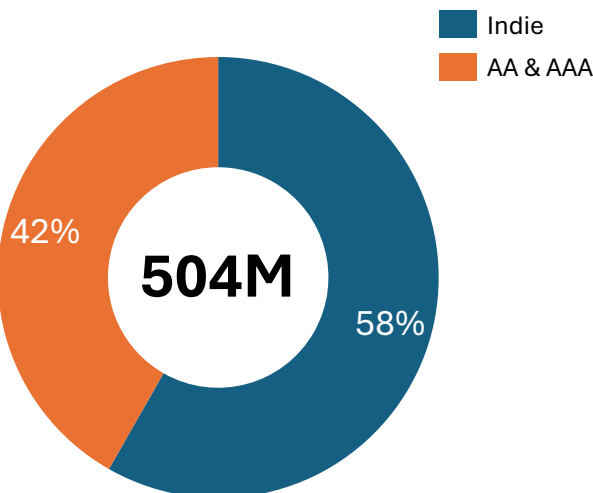
Indie games making as much money on Steam as AAA and AA games for the first time ever; indie revenue share has doubled since 2018

State of Indie on Steam in 2024, as of 30th Sep 2024

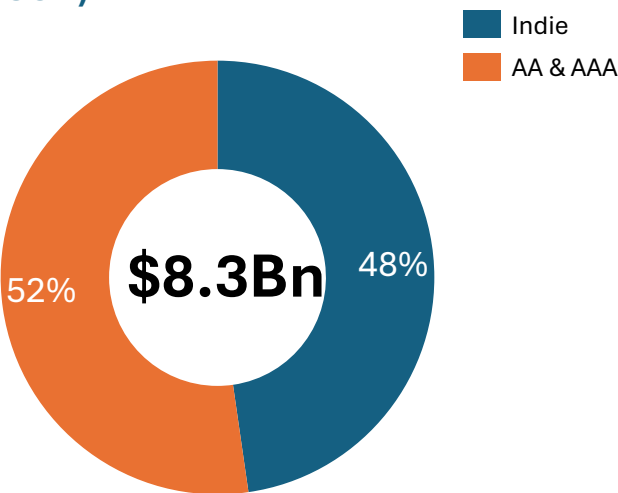
Number of Games Released



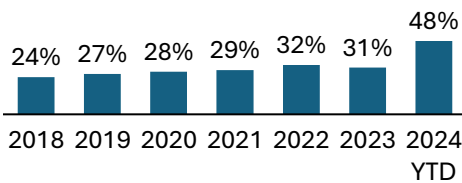
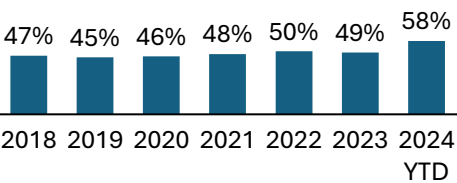
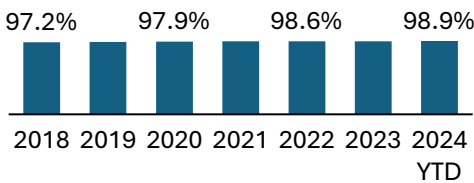
Units Sold (Millions)



Full Game Revenue (Millions USD)



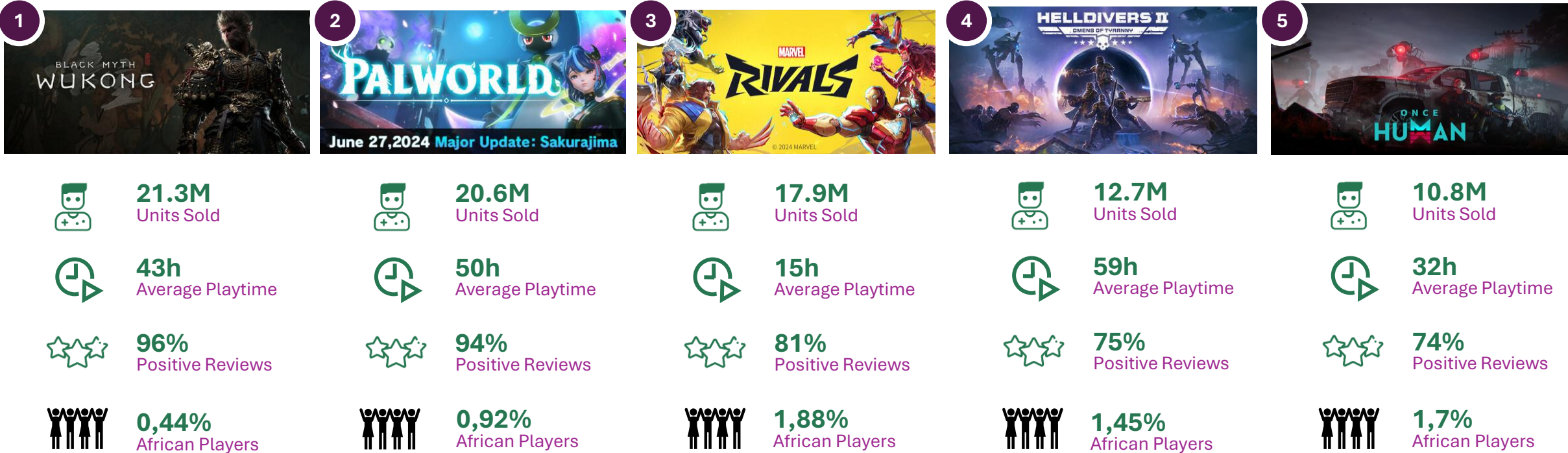
Indie Mix Over Time



Notes: Data as of 30th Sep 2024
Full game revenue on this and other slides includes only revenue from copies sold. It does not include in-game spend

2024 saw some of the most successful indie game launches, but Black Myth and Palworld stand out as exceptional

Top Indie Game Launches of 2024, by Units Sold on Steam



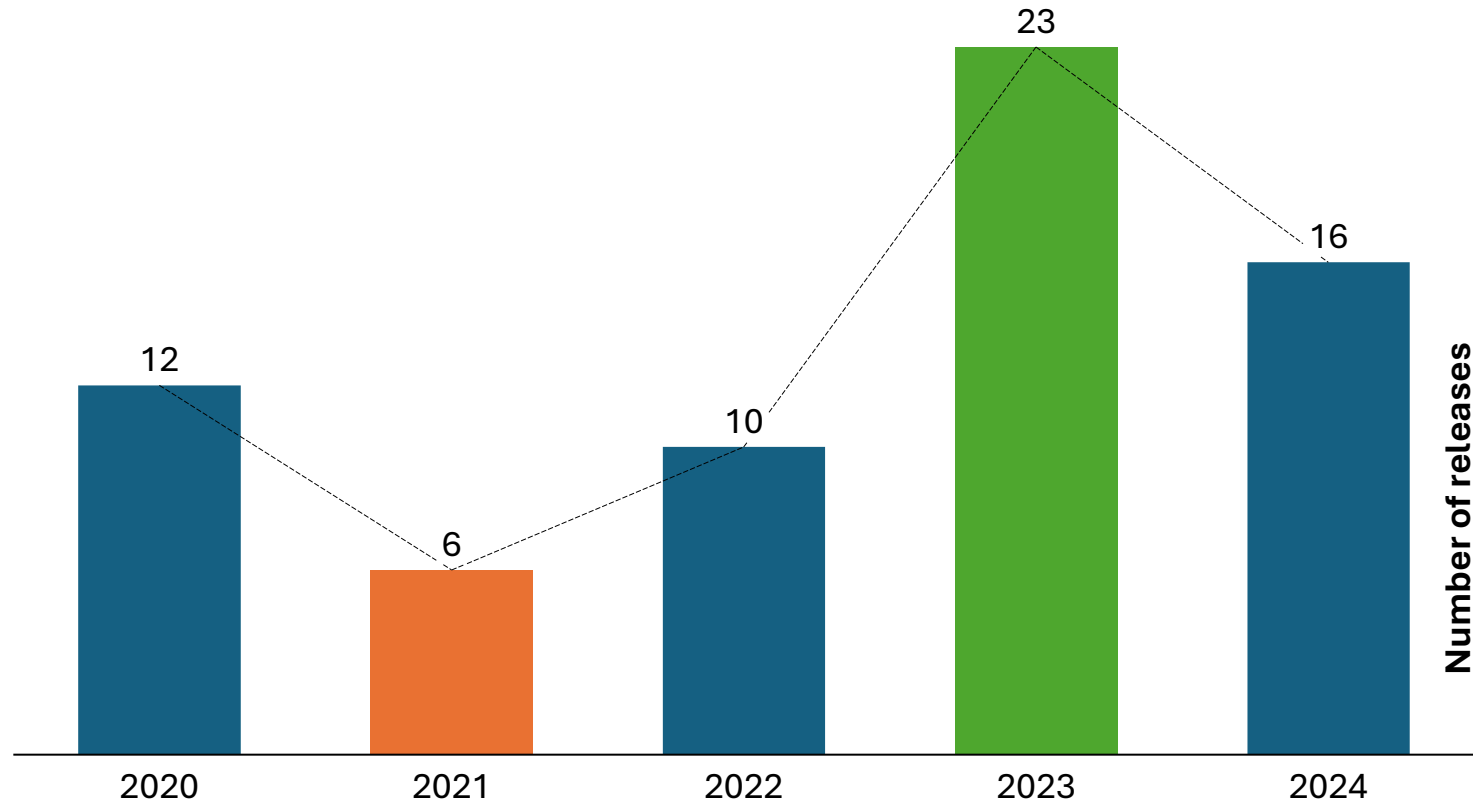
African Games on Steam

VGI



2023 saw the largest number of releases from African game developers, with the trend pointing to that number likely to be surpassed

Total number of Steam releases from African developers between 2020 - 2024



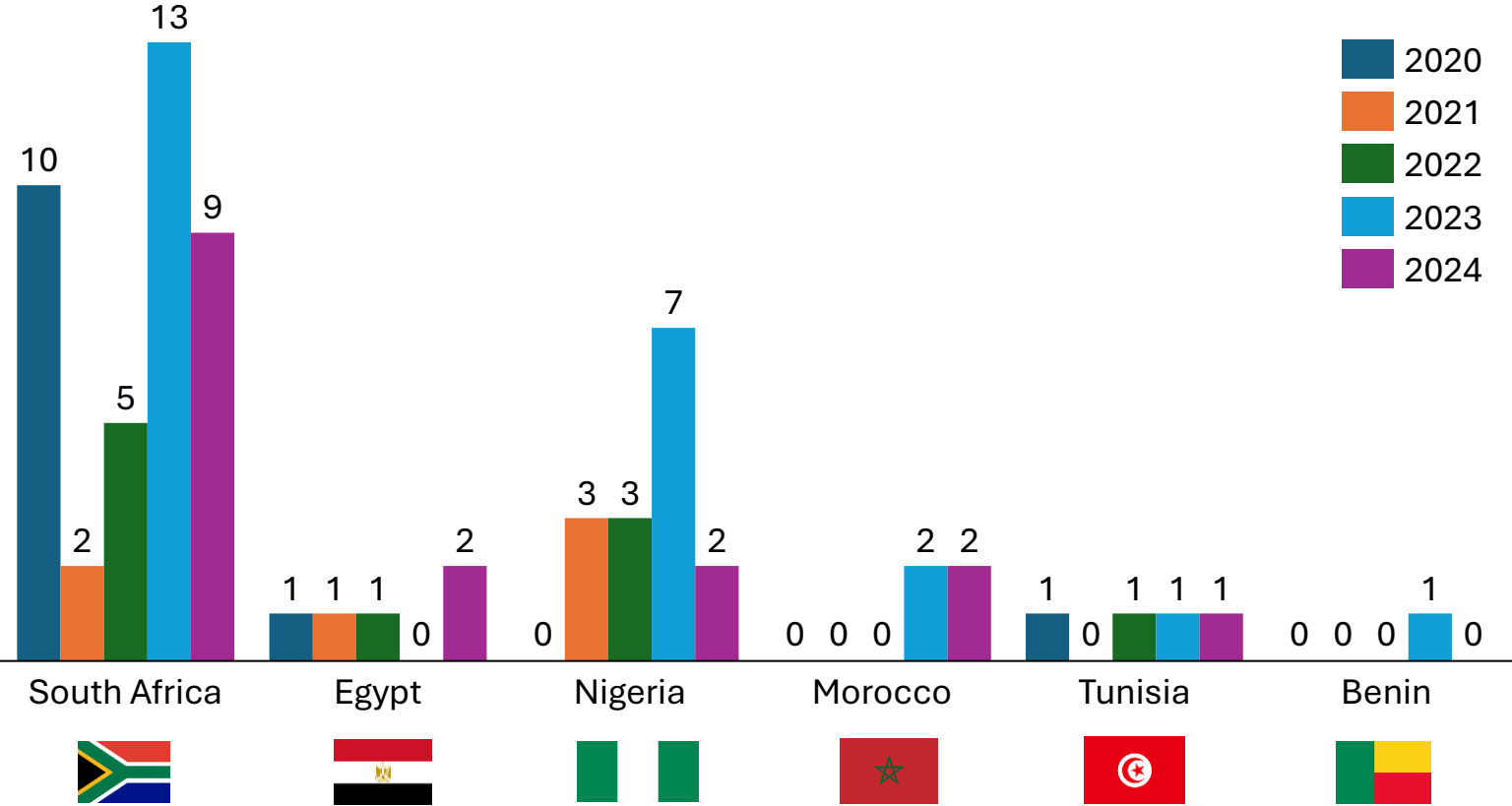
Commentary:

Whilst 2023 boasted a huge uptick in releases, it's worth noting that six of those releases came from a single solo developer.

Once a rarity, the frequency of releases from African game developers has seen a significant uptick

South Africa is home to the largest concentration of PC focused game developers

Frequency and total releases on Steam from African developers between 2020 - 2024

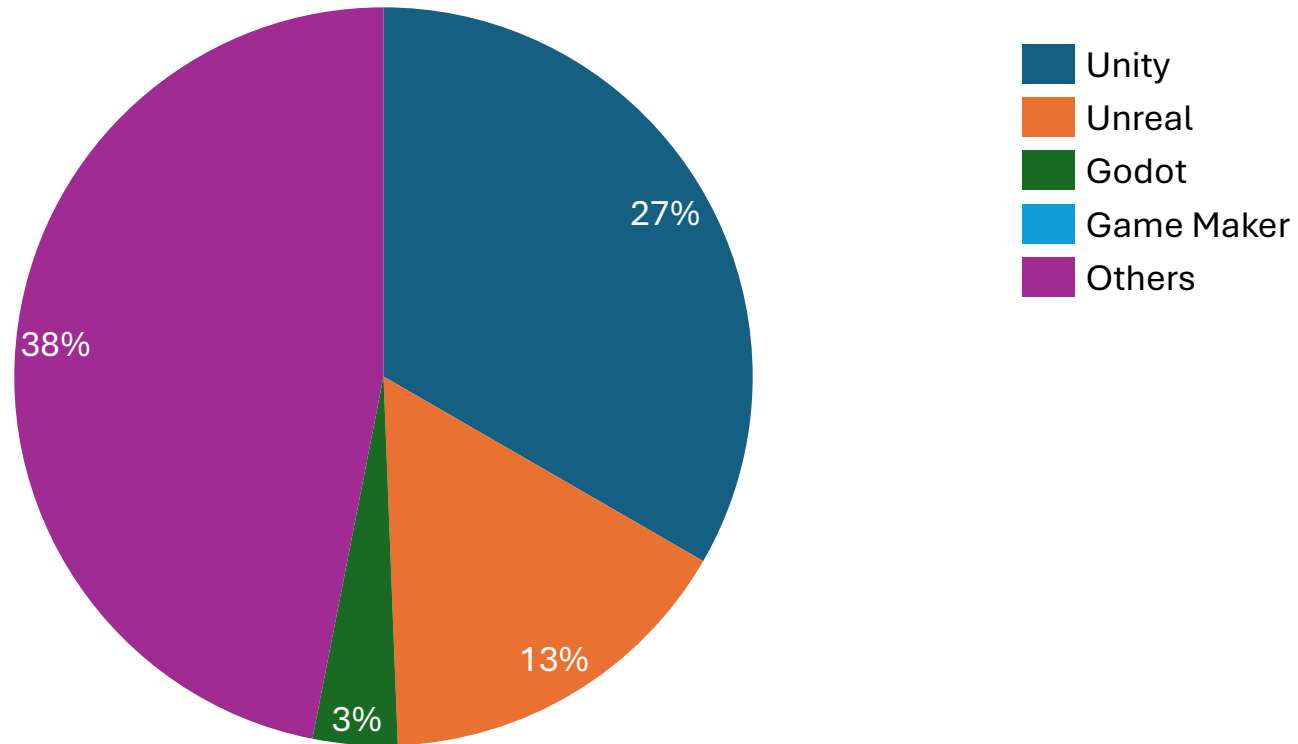


Commentary:

Nigeria is increasingly gaining a presence with PC releases with the North African developers having consistently developed and released games for the platform.

Unity is the engine of choice for most African developers and has remained the case since 2014.

Game Engines used by African developers between 2014 - 2024



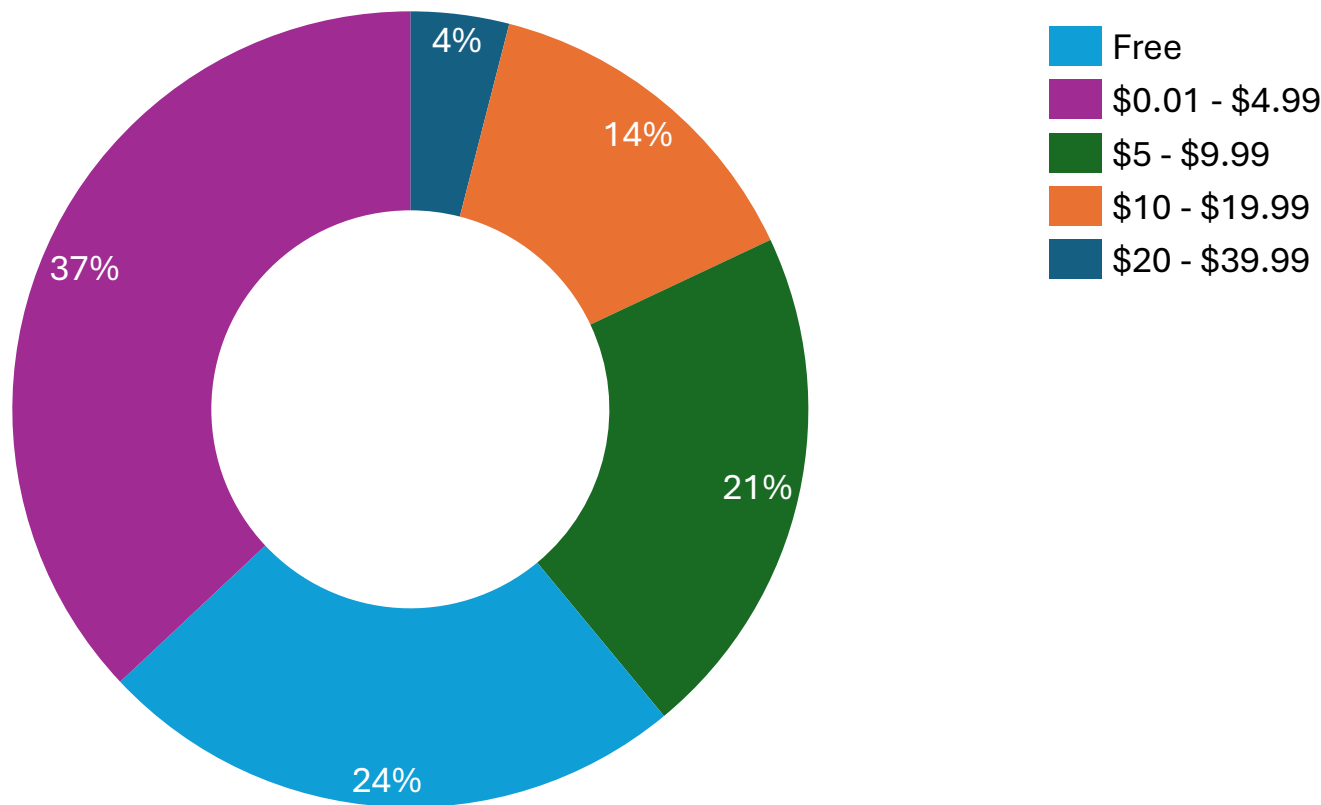
Commentary:

Godot gained some relative traction following Unity's decision to introduce Runtime Fees in 2023.

However, it hasn't made too much of a dent in Unity's dominance across the continent.

Most African developed games have gone for a modest pricing strategy. Reflective of markets expectations and player perception

Price distribution of African developed games between 2014 - 2024



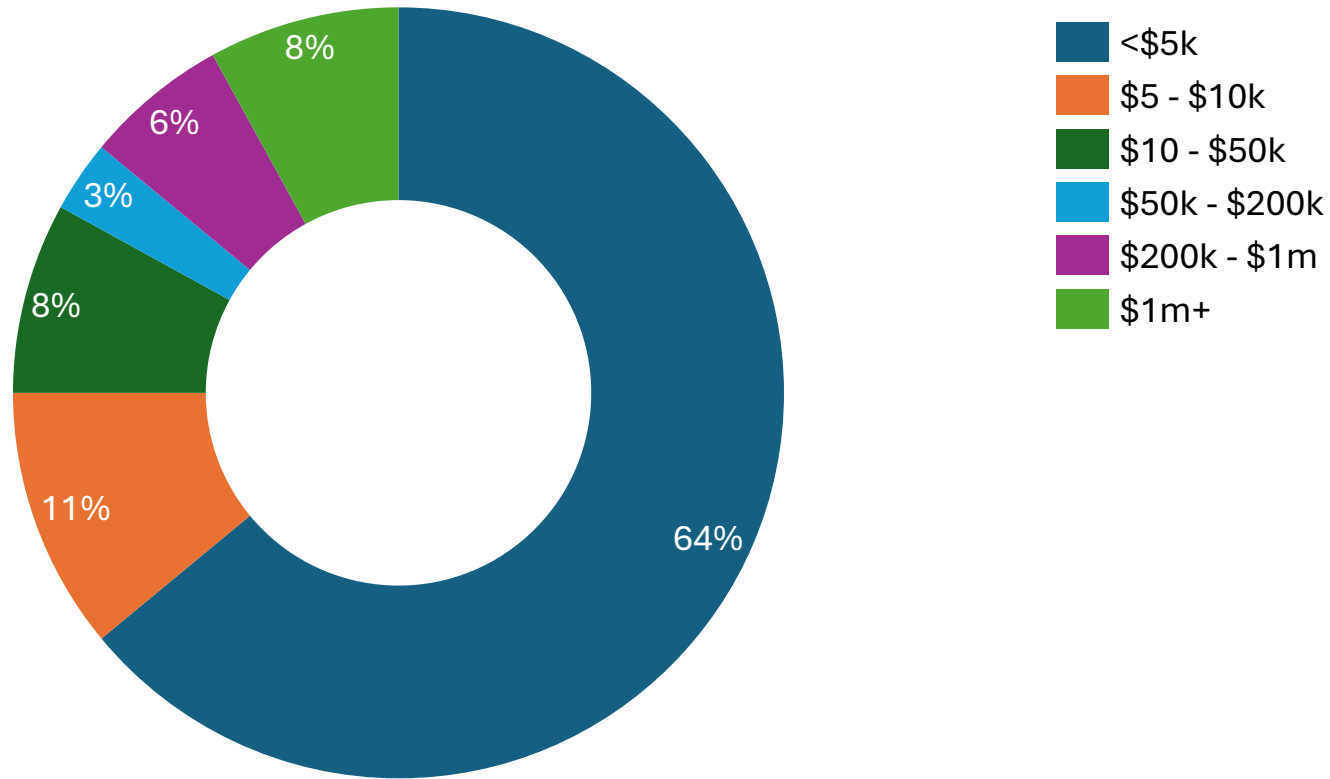
Commentary:

Almost a quarter of games (24%) released by African developers have opted to offer their games for free. What the data doesn't show is that a lot of these free titles have been first forays into the PC space and an opportunity to garner a fanbase.

Only 4% of games from the continent have priced their games at the upper tier of most indie games at \$20 - \$39.99.

Two thirds of African developed games generate less than \$5k. However recent releases have tended to fall into the mid revenue tier

Revenue distribution of African developed games between 2014 - 2024



Commentary:

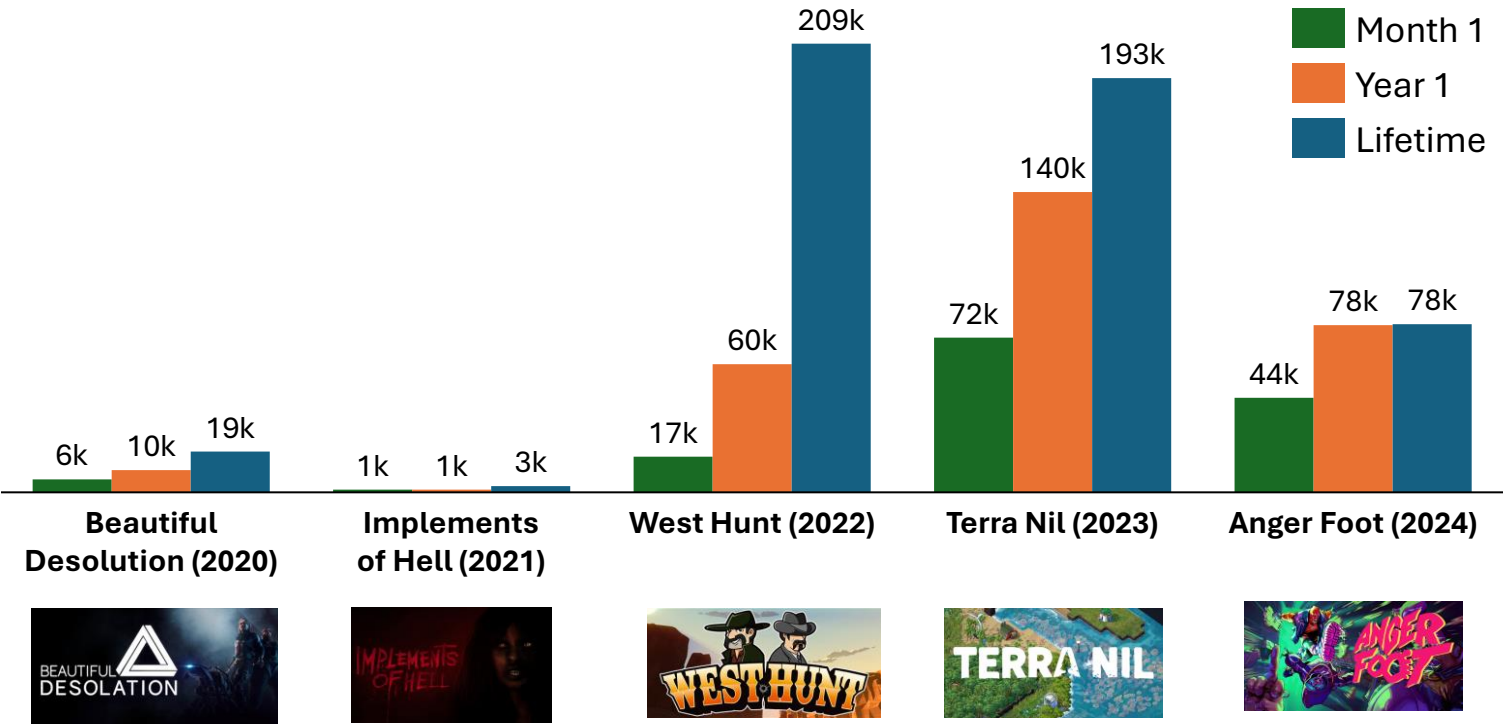
Most games published by African developers have generated less than \$5000 in lifetime revenue – 64%.

8% of games released by African game developers have generated over a \$1 million dollars in revenue with another 6.7% accounting for games to have generated between \$200k - \$1 million.

Unit Sales Performance

The top selling games from 2020 to 2024 shows the unit sales of games from the continent

Month 1, Year 1, Lifetime Sales for top African developed games between 2020 - 2024



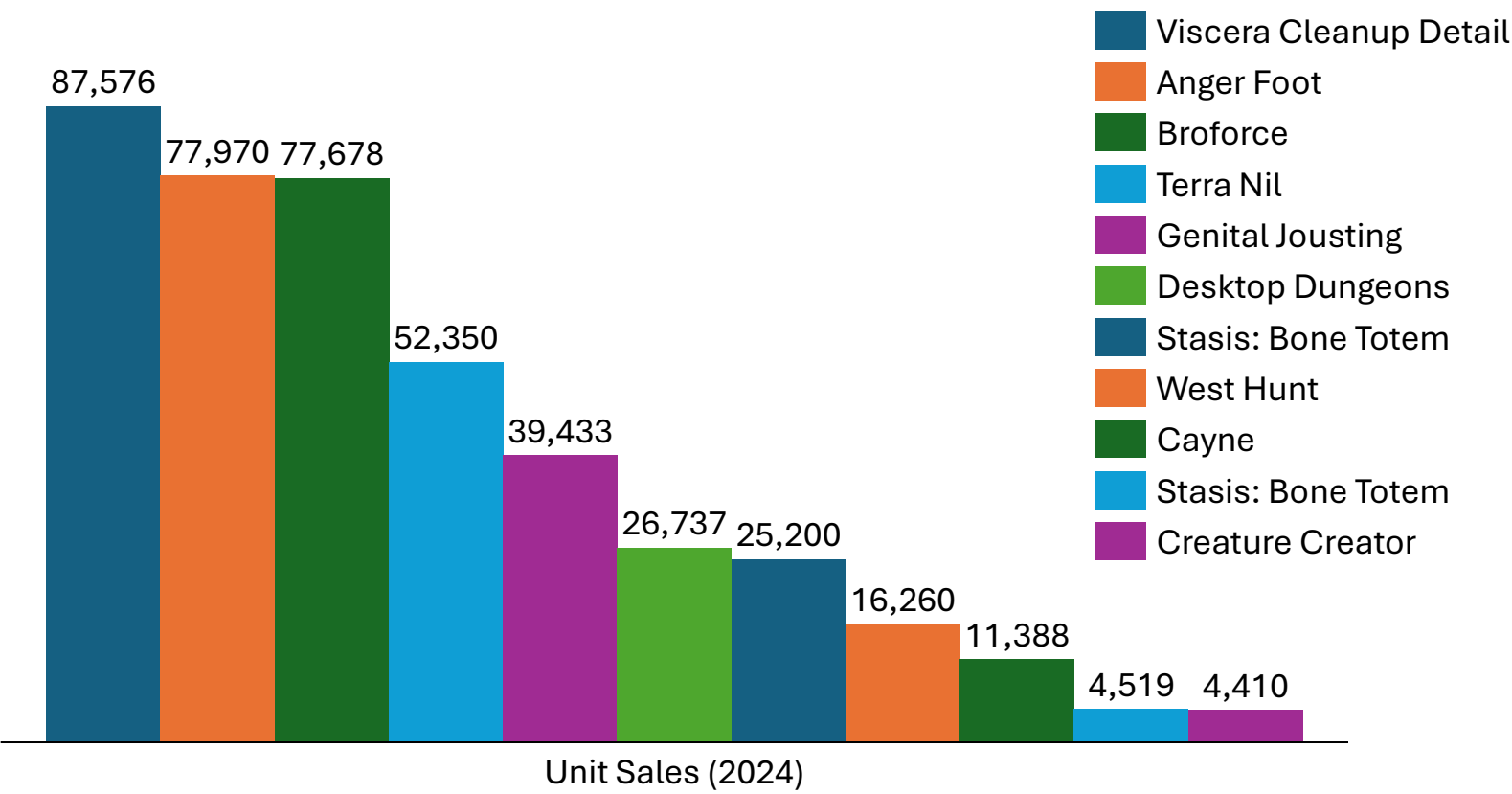
Commentary:

Tunisian, NewGen have shifted the most units for their social deduction title – West Hunt. A flurry of deep discounts have helped the game boost its unit sales.

However, the dominance of South Africa is highlighted with games from The Brotherhood and Free Lives taking the continental top spot in recent years.

South African developed games dominate commercially in 2024 with sales helping keep titles on the charts

Top African developed games of 2024, by Units Sold on Steam



Commentary:

Nine of the top selling games of 2024 all originate from South Africa with *West Hunt* making a strong showing despite two years into its sales cycle.

Viscera Cleanup Detail is the oldest title on the charts having been developed and launched by South African *Runestorm* almost a decade ago.

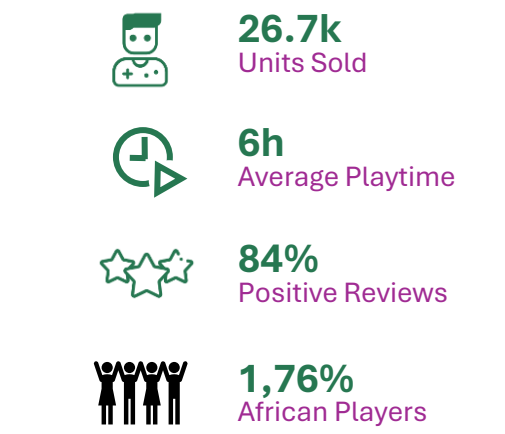
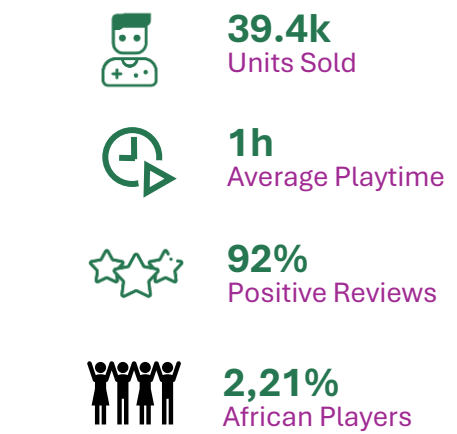
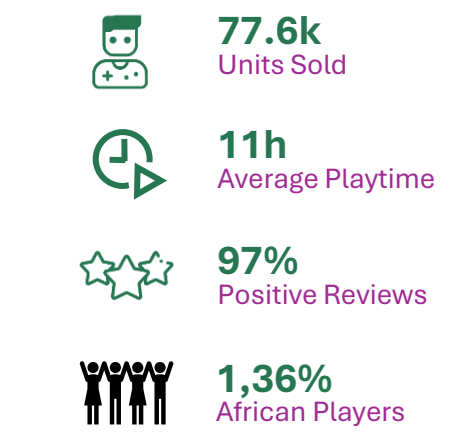
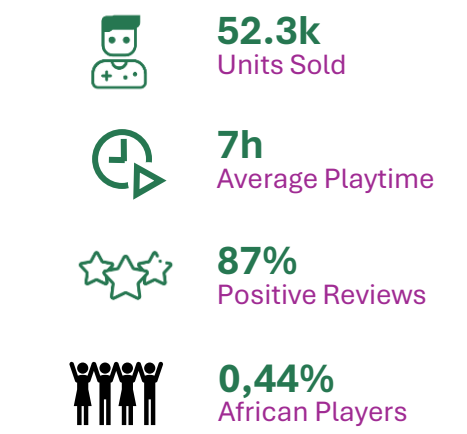
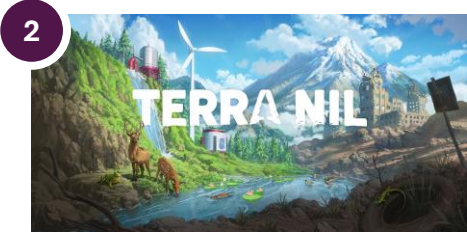
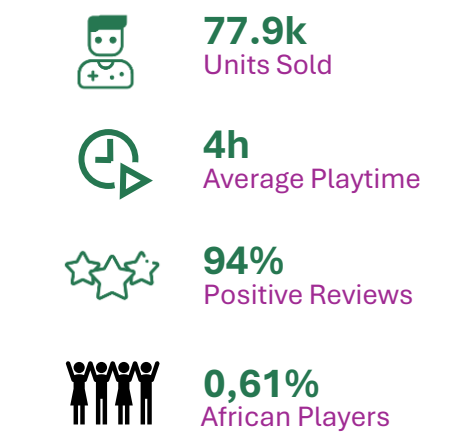
Player Insights

VGI



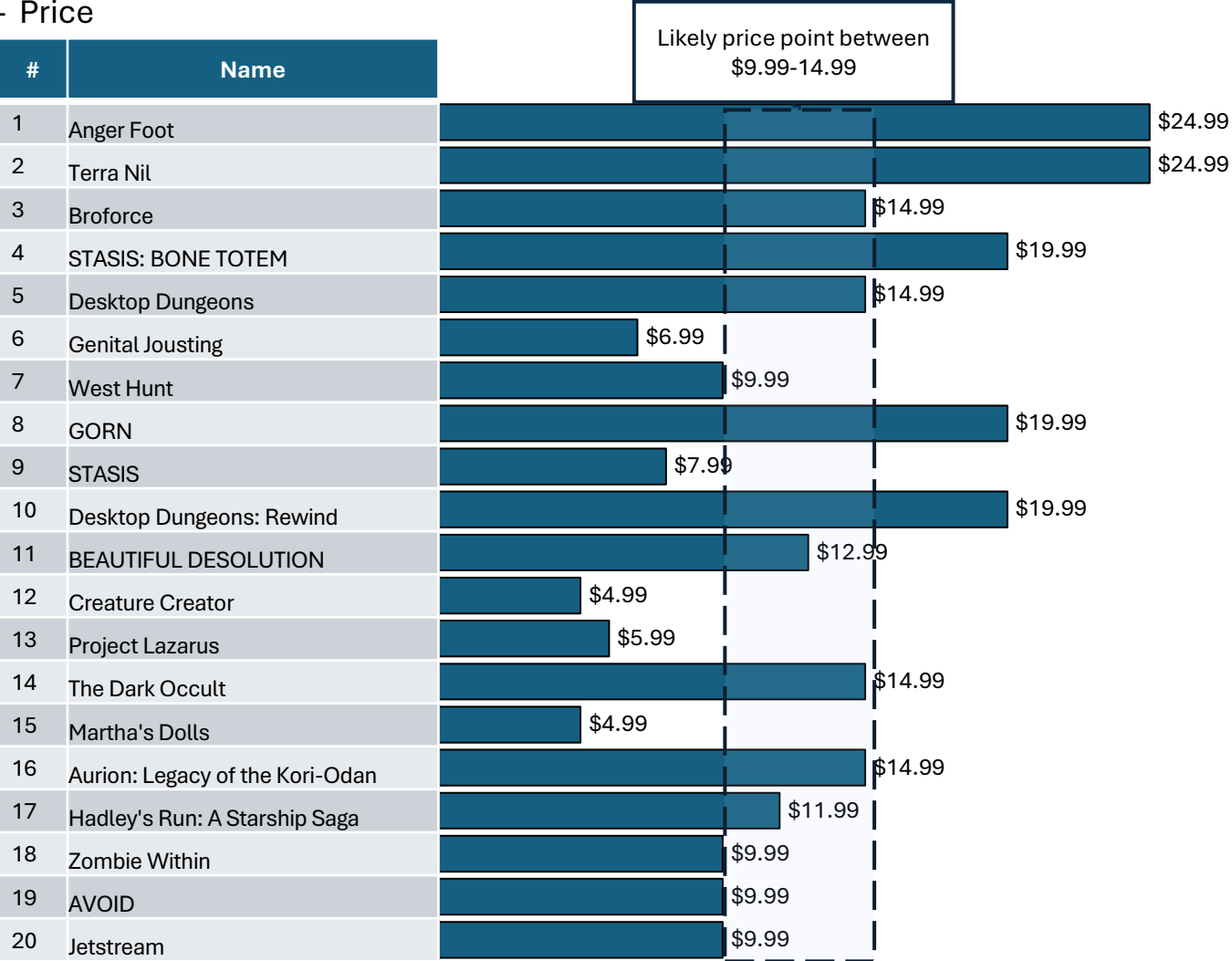
South African developed games dominate commercially and critically when it comes to PC game releases

Top African developed games of 2024, by Units Sold on Steam



Games from the continent rarely reach the pricing heights of their Western contemporaries and tend to follow the Indie pricing standard

Competitive Analysis – Price



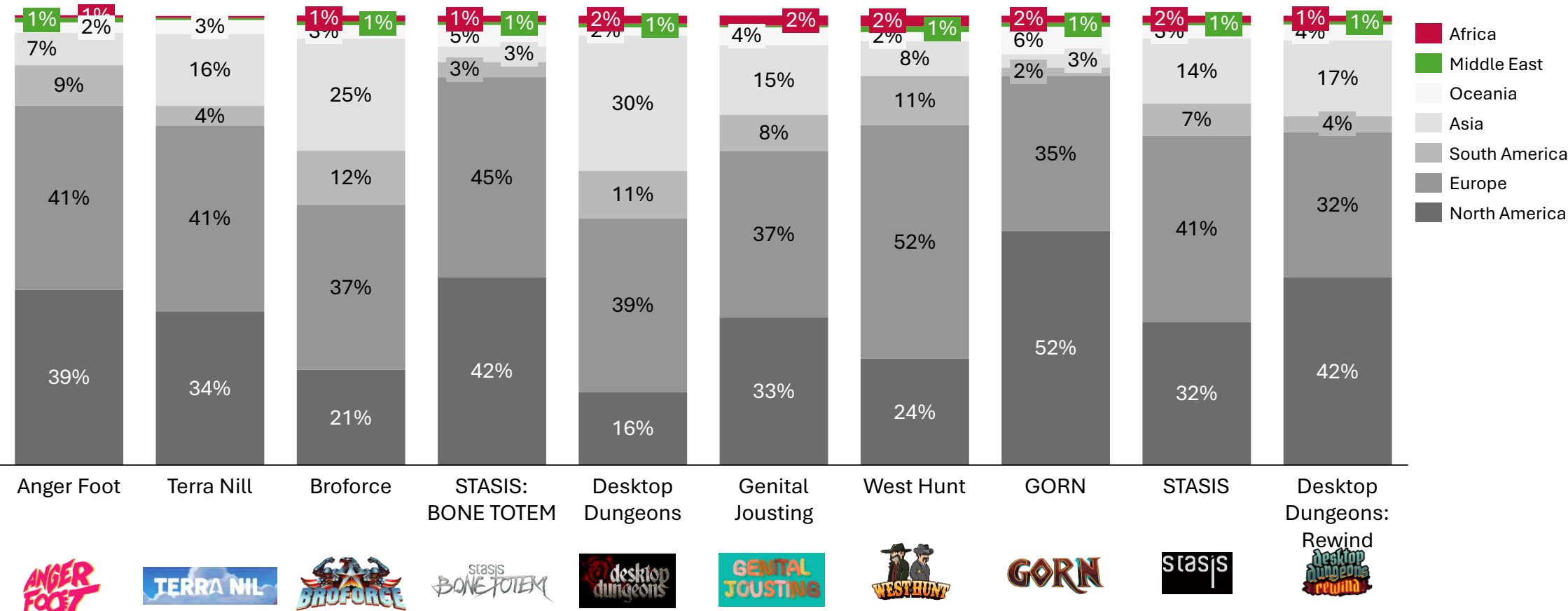
Commentary:

The sweet spot for games not from AAA publishers or saddled with an established IP or brand revolves around \$19.99 to \$24.99.

The top selling African developed games have followed the trend employed by a lot of their budding indie counterparts by sticking to an SRP of between \$9.99 and \$14.99.

North America, Europe and Asia remain important markets. However, South America as well as Africa is starting to flex its spending power

Player Insights– Regional Breakdown (%)



Thank You

Video game industry market data, competitive intelligence and player insights at your fingertips



Join over 29,000 registered users –
large developers and publishers,
consulting firms and investment firms

sales@vginsights.com



Specialized platform that is the primary
source of news, editorials and insights on
the African games industry.

vic@gamesindustryafrica.com