

**Video Game Insights**  
by  Sensor Tower



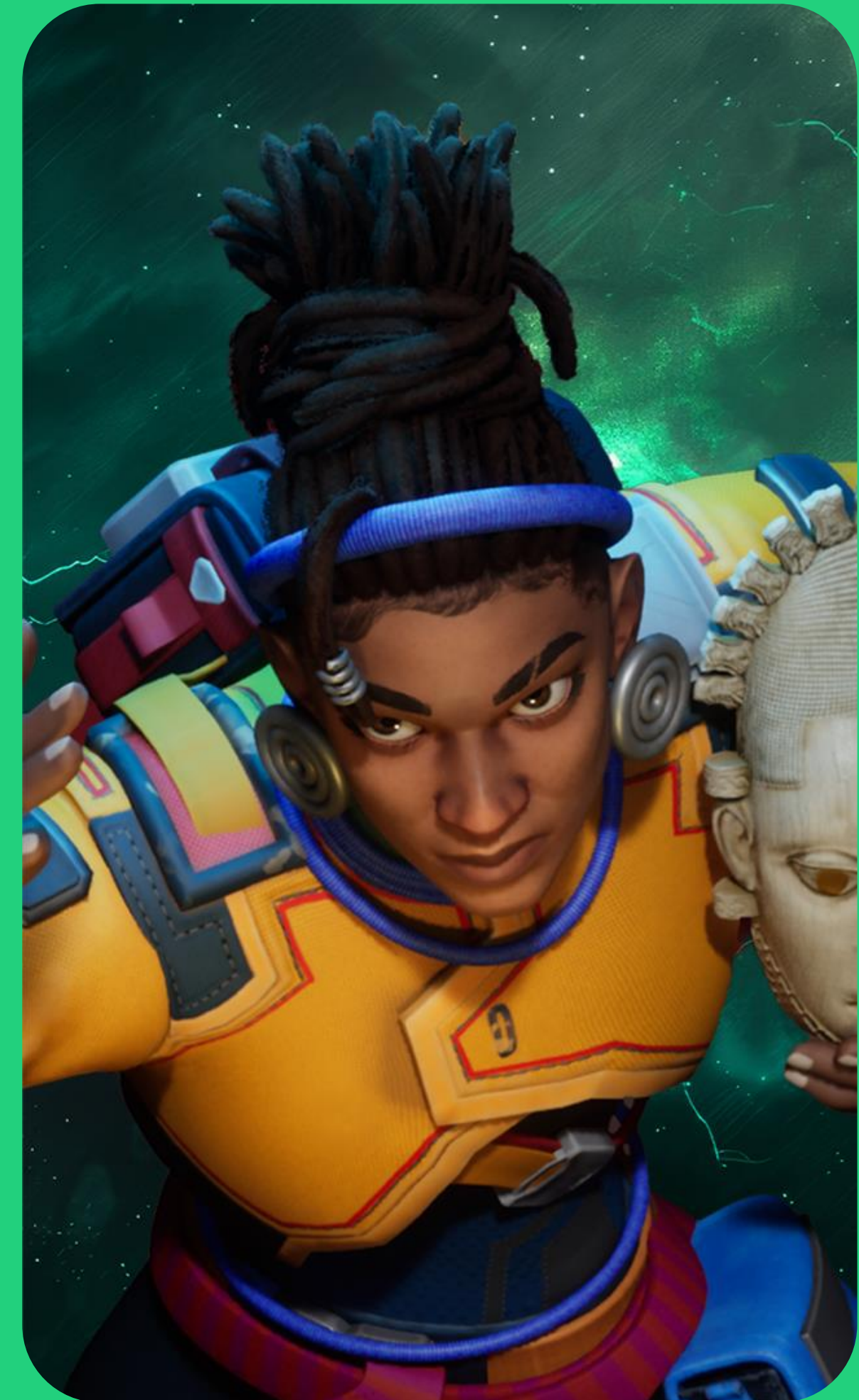
# State of African Games 2026

What trends are shaping a rapidly emerging ecosystem?

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# South Africa remains the dominant country when it comes to number of developers and unit sales. The continent favours development on PC with console a secondary

## Overview of the Report

### Overview:

The 2025 State of Africa Report provides a data-driven snapshot of how African-developed games are performing on global platforms, with a particular focus on Steam. It examines regional sales share, release trends, genre segmentation, pricing, engines, and top-performing titles to understand the current structure and trajectory of the continent's game development ecosystem.

### Summary:

- Genre analysis reveals a structural mismatch between what African studios are producing and where the strongest median sales exist. Simulation games have the highest median units sold, followed by adventure and RPGs, yet action titles dominate in terms of the number of releases.
- Commercial performance is also highly concentrated geographically. Across major platforms, the top-selling African games are overwhelmingly developed in South Africa, reinforcing the country's position as the continent's primary commercial hub for game development.
- The report further explores pricing and engine trends. African-developed games generally follow global pricing structures, with many releases aligning with standard indie tiers. On the technical side, Unity emerges as the dominant engine choice, reflecting its accessibility and suitability for small to mid-sized teams.

### Methodology:

The methodology relies on VGI's estimations and looks at games launched from January 2015.

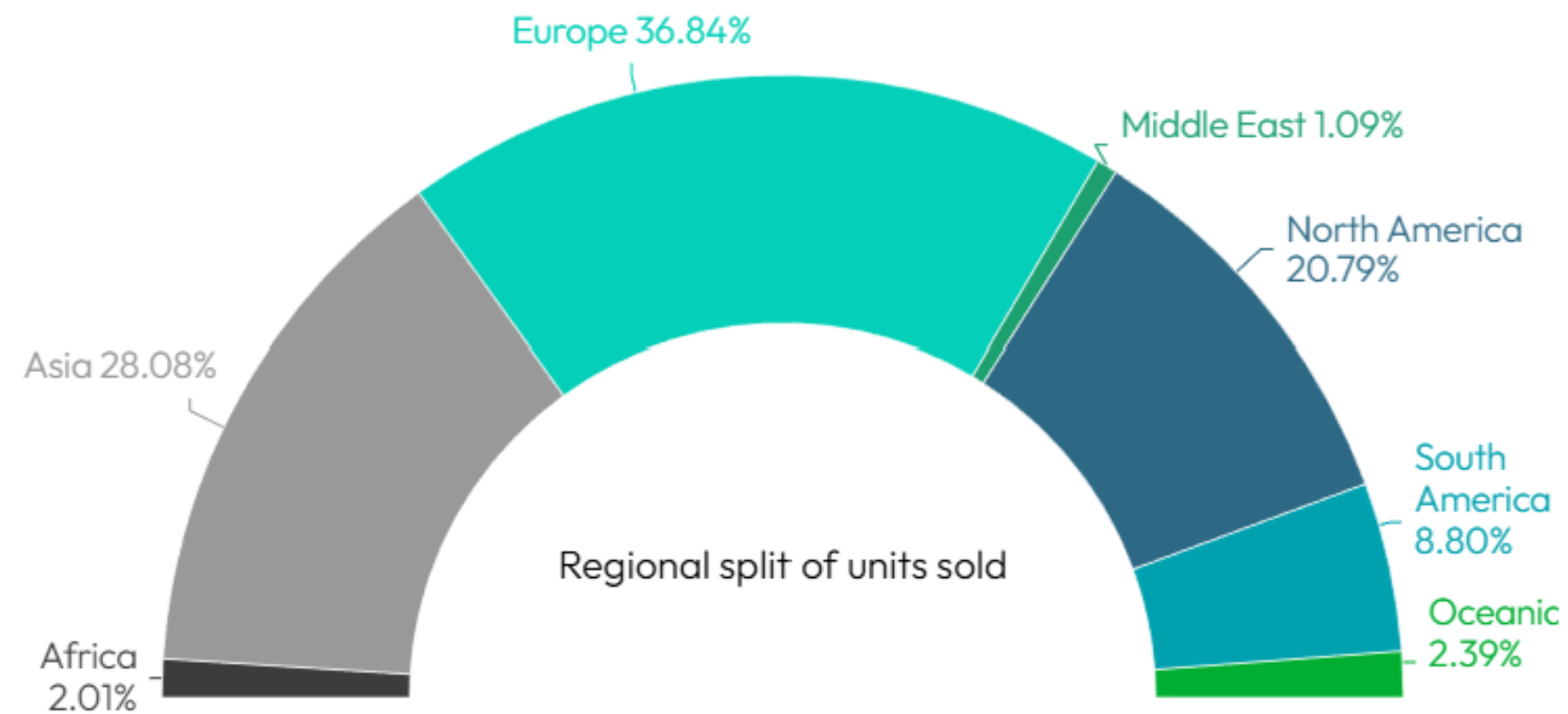
01

# What is the state of African developed games on Steam?

# Players from Africa constituted just over 2% of unit sales on Steam in 2025, which is more than the Middle East.

## Player Region Split of Units Sold on Steam

### Top 100 selling Steam games per country in 2025 on Steam



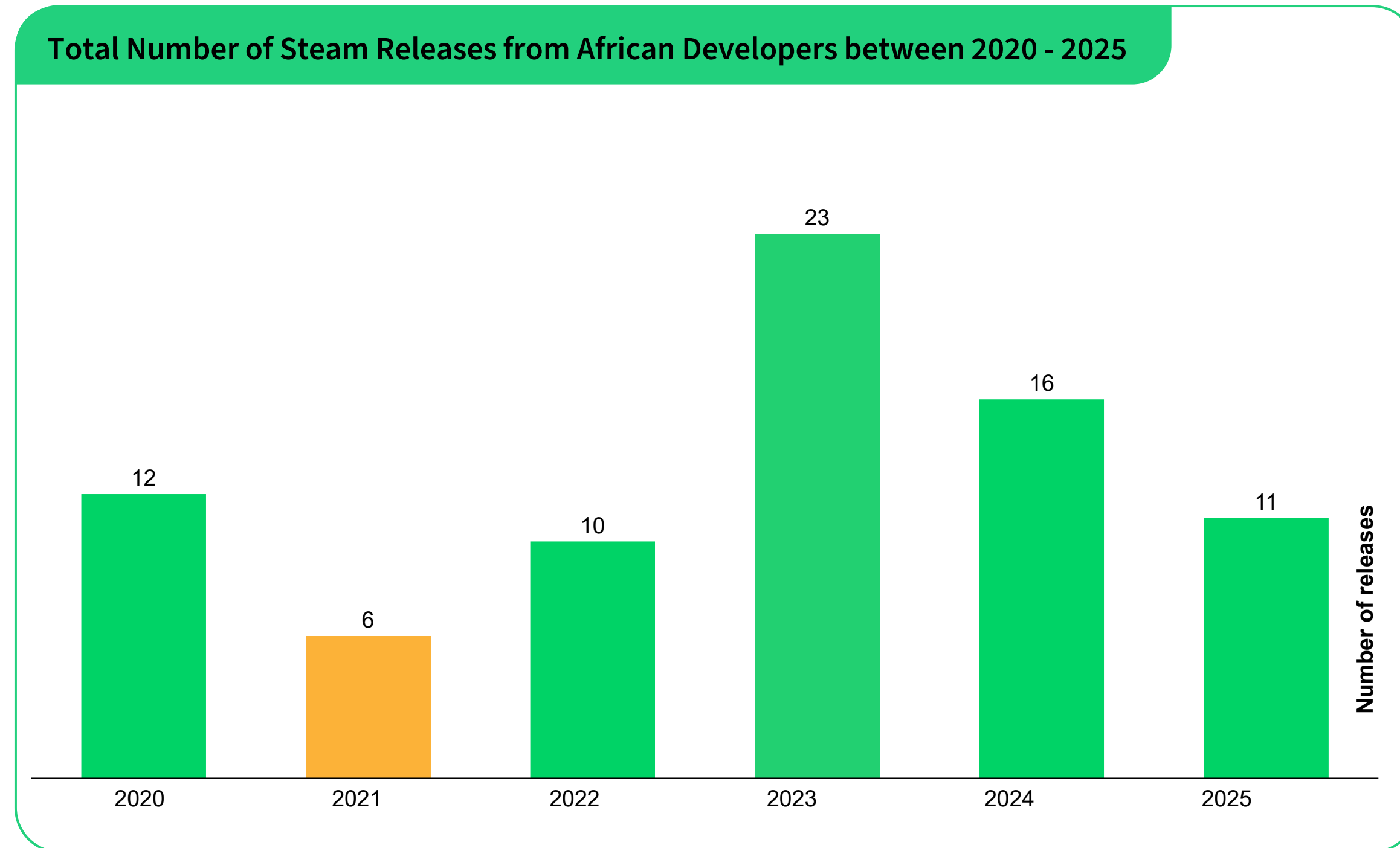
In another record year on Steam, Europe accounted for the largest percentage of total units sold (36.84%) in 2025. However, Africa made strong strides with 2.01% of games coming from the continent, which was more than the Middle East (1.09%) and just below Oceania (2.39%) when looking at the top 100 selling games on Steam based on units sold.

In terms of pure units, Africa accounted for over 60 million units in 2025. A lot of those sales can be attributed to the success of games from South Africa.

**Notes:** Games launched after 01/01/2015  
**Sources:** VGI data, Team Analysis

# 2023 saw the largest number of releases from African game developers, with Steam releases slowing in 2025

Annual number of releases from African developers on Steam



In 2020, African developers released 12 titles on Steam, establishing a baseline for the early part of the decade. The following year saw a drop to six releases, which may reflect disruptions caused by global factors such as the pandemic, funding constraints, or delays in development pipelines. The most significant moment in the timeline comes in 2023, when African developers reached a peak of 23 releases.

After this peak, the number of releases declines to 16 in 2024 and then further to 11 in 2025. While this appears to be a slowdown, it does not necessarily indicate a downturn in the industry. Instead, it may reflect a shift from rapid, volume-driven growth toward more selective or higher-quality projects that require longer development cycles.

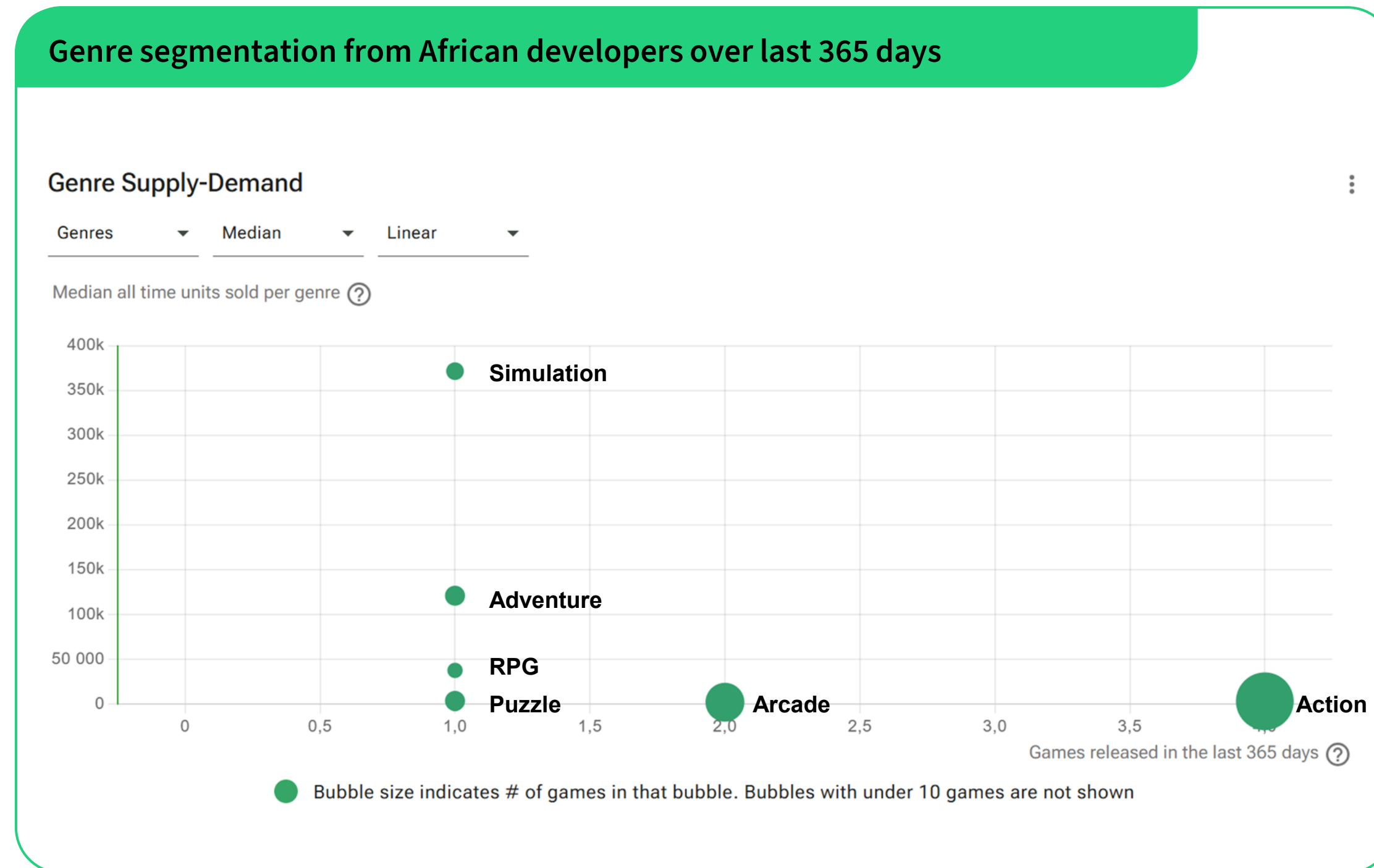
In the context of the African games industry, this kind of trajectory is common in emerging creative industries, where an initial surge of activity is followed by a period of consolidation and professionalization.

**Notes:** Games launched after 01/01/2015

**Sources:** VGI data, Team Analysis

# Simulation is the top genre in terms of units sold on Steam; however, Action dominates in terms of releases from African developers

Median all time units sold per genre on Steam



The bubble chart indicates how many games are being released in each genre versus how well the typical title performs. At the top of the performance spectrum, simulation stands out, with a median of roughly 372,000 units. This is far above every other category and suggests that when games in this space are produced, they tend to find substantial audiences. Adventure follows at around 123,000 median units, indicating a genre where narrative, exploration, or culturally grounded storytelling can resonate strongly with players. RPGs sit in a middle tier, with a median just over 38,000 units.

This suggests African studios may be clustering around genres that are easiest to produce rather than those with the strongest typical commercial outcomes.

**Notes:** Games launched after 01/01/2013

**Sources:** VGI data, Team Analysis

02

# Top selling African Developed Games

# Across all platforms, the entire top 10 games list by units sold have been developed by South African based developers

Top 10 African developed Games Released after January 1, 2013 on Steam, PlayStation and Xbox combined

Top 10 African developed games based on units sold (games released after 01/01/2013)



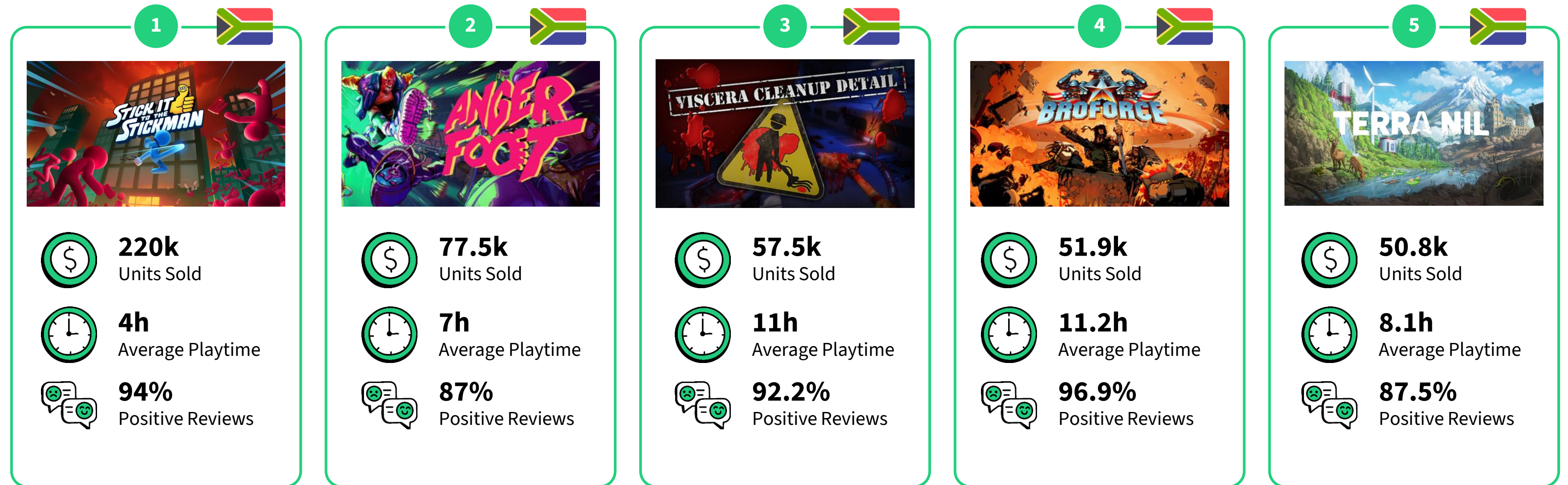
<b>Price</b>	\$14,99	\$34,99	\$12,99	\$6,99	Free	\$2,95	\$19,99	\$14,99	\$24,99	\$5,99
<b>Release Year</b>	2014	2013	2014	2016	2014	2013	2017	2013	2023	2025
<b>Publisher</b>	Devolver Digital	Devolver Digital	Runestorm	Devolver Digital	Devolver Digital	Runestorm	Devolver Digital	QCF Design	Devolver Digital	Devolver Digital
<b>Publisher Tier</b>	AA	AA	Indie	AA	AA	Indie	AA	Indie	AA	AA

**Notes:** Units sold estimates are based on VGI data

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



Top African developed games of 2025, by Units Sold on Steam



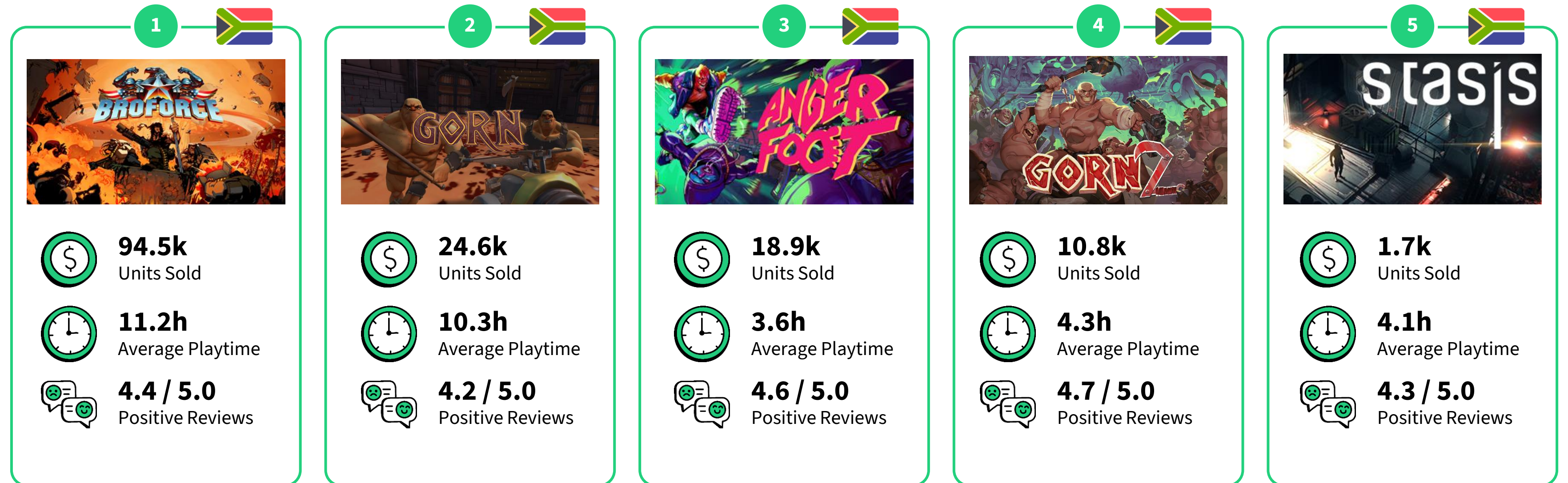
**Notes:** Data as of 31st Dec 2025. Units sold include free giveaways. However, Viscera Cleanup Detail has been excluded since it is primarily dominated by giveaways having been released in 2014



# The top four games have benefitted from being published by Devolver Digital, resulting in their relative success on PlayStation



Top African developed games of 2025, by Units Sold on PlayStation



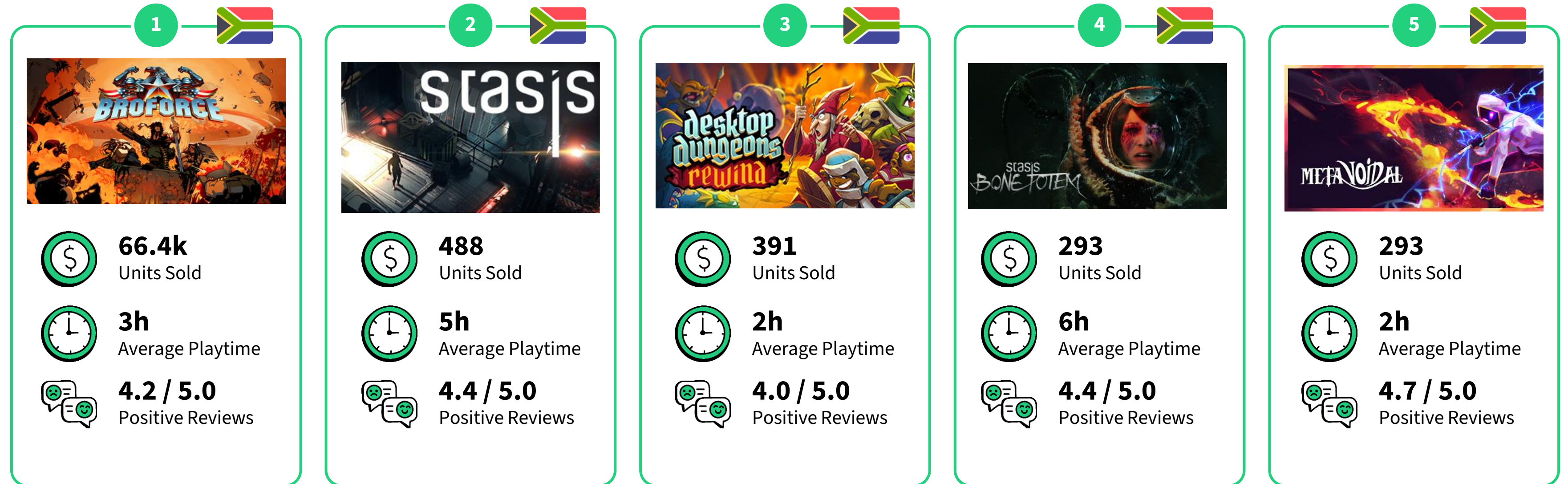
**Notes:** Data as of 31st Dec 2025. Units sold include free giveaways. However, Viscera Cleanup Detail has been excluded since it is primarily dominated by giveaways having been released in 2014



# Apart from Broforce which has benefitted from inclusion on GamePass, most Xbox games are commercially lacklustre



Top African developed games of 2025, by Units Sold on Xbox



**Notes:** Data as of 31st Dec 2025. Units sold include free giveaways. However, Viscera Cleanup Detail has been excluded since it is primarily dominated by giveaways having been released in 2014



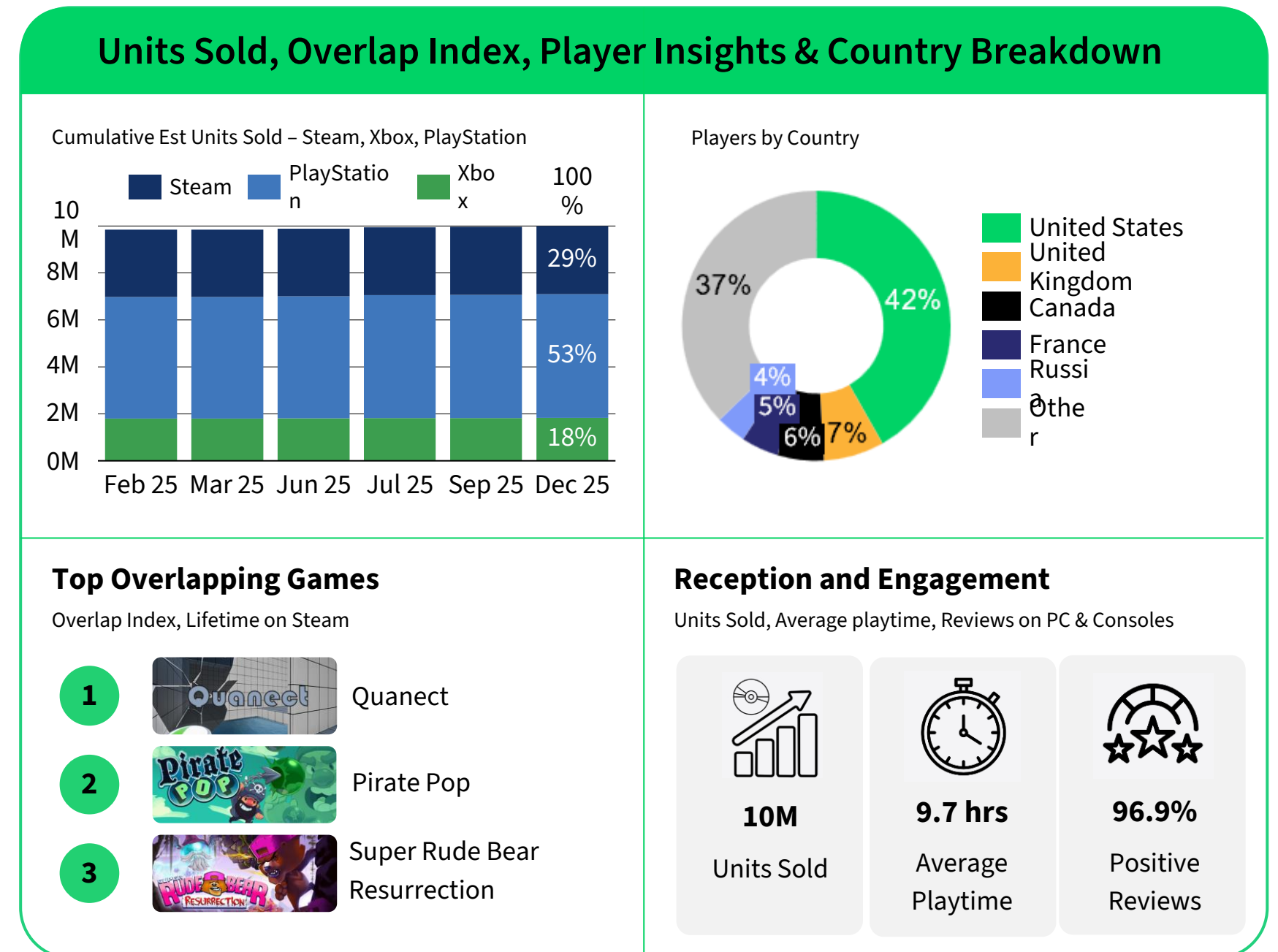
03

# Case Study – A closer Look at Broforce

# Case Study: Broforce



## Broforce – Player and Country Insights on Steam, PlayStation & Xbox



**Notes:** Country breakdown and overlapping Games based on VGI data

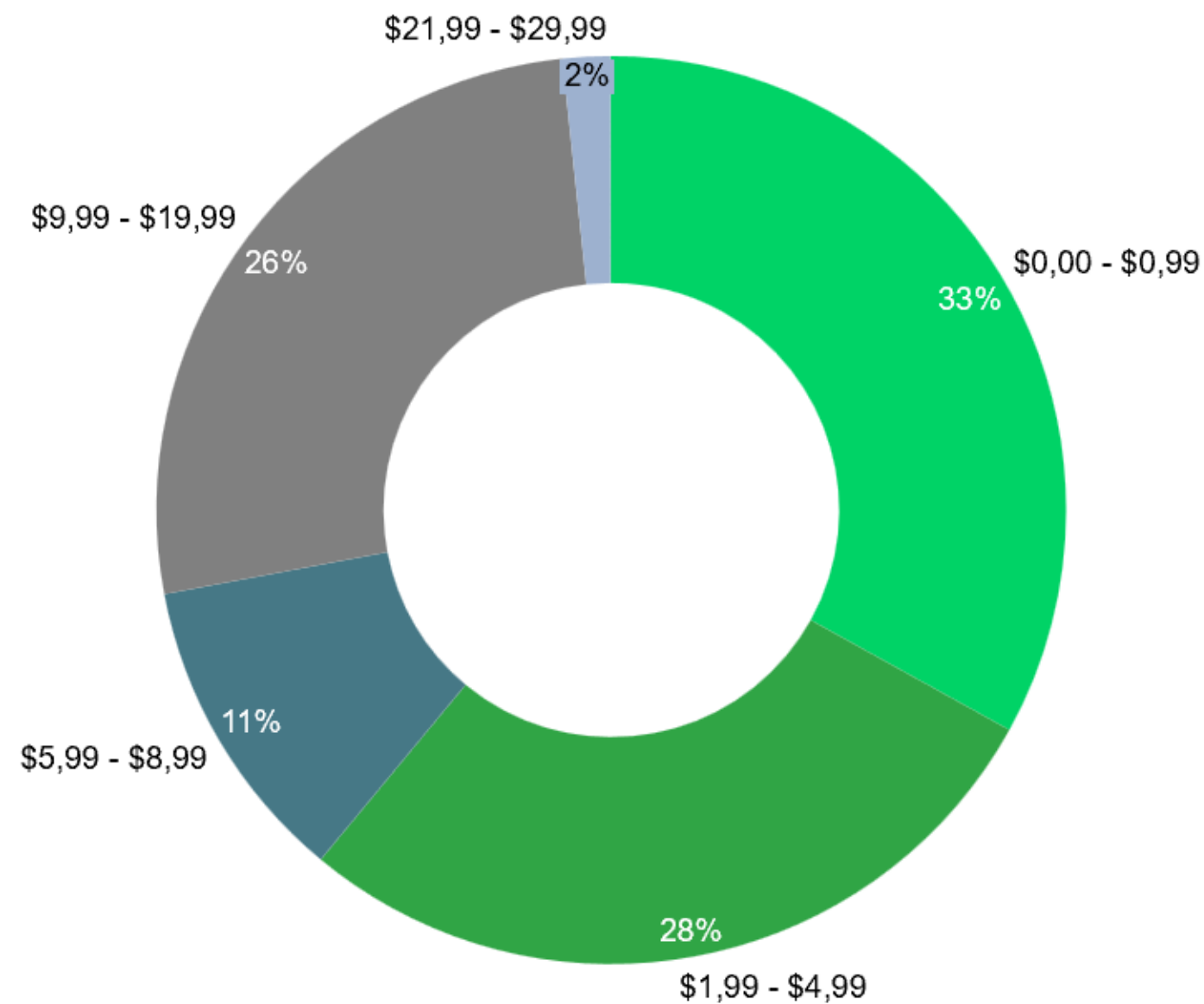
04

# Pricing & Engine Approach

# Launch in standard AAA launch prices from budget to premium tiers on Steam

African developed game pricing distribution on Steam (2013-2025)

## Price Distribution of African Developed Games on Steam



The chart shows that African-developed games on Steam are heavily concentrated at the lower end of the price spectrum. Most titles are priced in budget or very low-cost tiers, reflecting a focus on accessibility rather than premium positioning.

Only a small share of games reach higher price points: about 11% fall between \$5.99 and \$8.99, and just 2% are priced between \$21.99 and \$29.99. This scarcity of premium titles suggests limited high-budget production.

Overall, the pricing distribution indicates an indie-driven, cost-sensitive industry that favors lower prices to maximize reach and reduce purchasing barriers for both local and global audiences.

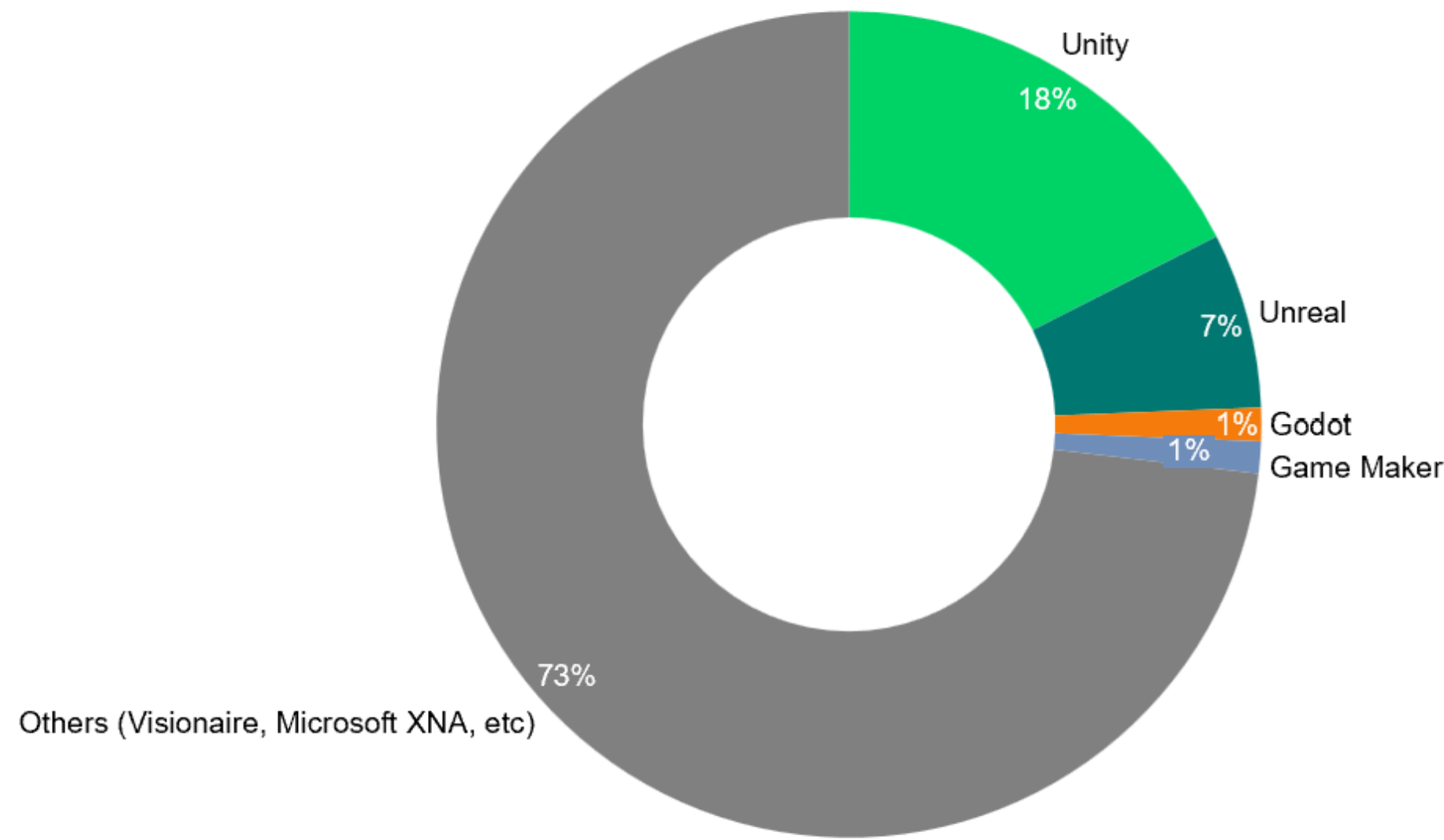
**Notes:** Games launched after 01/01/2015

**Sources:** VGI data, Team Analysis

# Unity is the primary engine of choice for most developers, however the data points to an ecosystem still to align with global engine trends

African developed games engine distribution on Steam (2013-2025)

## Engine Segmentation of African Developed Games on Steam



The most notable feature is that “Other” engines make up about 73% of releases, encompassing tools like Visionaire, Microsoft XNA, and various smaller engines. This highlights a highly decentralized and tool-diverse ecosystem, driven by accessibility, affordability, and project-specific needs.

Among major engines, Unity leads with around 18% of titles, reflecting its low barriers to entry and strong support ecosystem. Unreal Engine accounts for about 7%, pointing to a smaller but significant group using more technically demanding tools.

Overall, the chart suggests an industry still in a formative stage, with developers favoring flexibility and accessibility over convergence on a single dominant engine.

**Notes:** Games launched after 01/01/2015

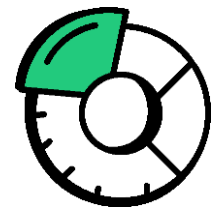
**Sources:** VGI data, Team Analysis

05

# Final Thoughts

# Final Thoughts

## African developed games driven by South and Northern domination



The African game development ecosystem is entering a transitional phase. On one hand, the continent has achieved measurable global presence, contributed millions of unit sales and demonstrated that African-developed games can succeed internationally. On the other hand, the industry remains highly concentrated, with South Africa accounting for a significant share of both developers and commercial performance.



Genre segmentation suggests that many studios are gravitating toward familiar or low-barrier genres, even when data indicates stronger median performance in less crowded categories. This points to an opportunity for strategic genre diversification, particularly in areas where fewer titles are being produced but the typical game performs better.



The slowdown in releases after the 2023 peak may signal a shift from rapid experimentation toward more focused, higher-quality projects. As the ecosystem matures, success is likely to depend less on volume and more on distinctiveness, production values, and international positioning. Pricing and engine trends show that African developers are broadly aligned with global industry practices, suggesting increasing professionalization and technical maturity. However, the geographic concentration of success highlights the need for stronger support structures across more countries to ensure that growth is distributed more evenly across the continent.



Looking ahead, the next phase of African game development will likely be shaped by studios that combine global genre appeal with distinctive cultural identity, while also targeting under-served segments of the market. If current trends continue, the continent has the potential to transition from an emerging participant to a recognized creative force within the global games industry.

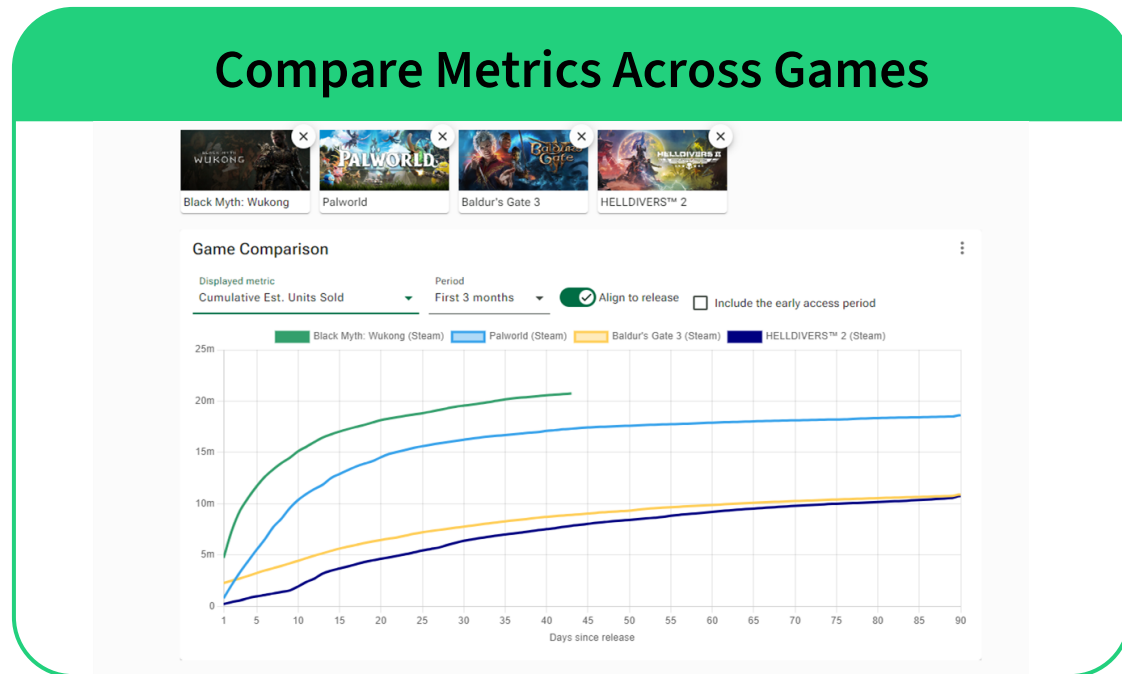
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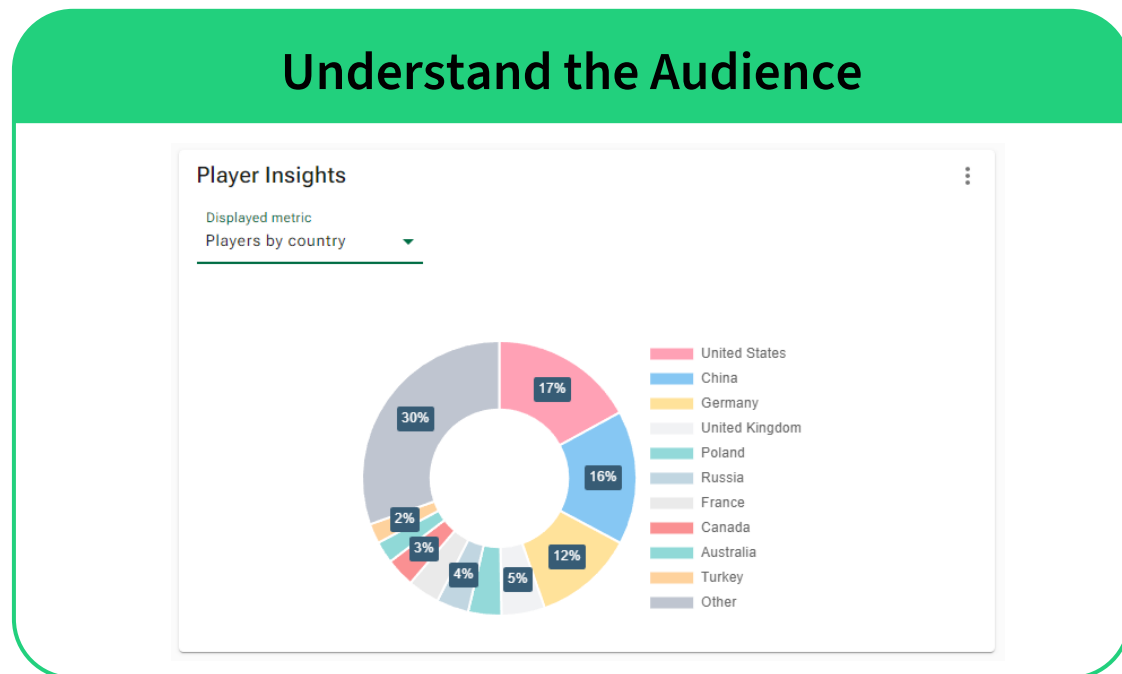


### Look at Overlapping Players

#### Player Overlap

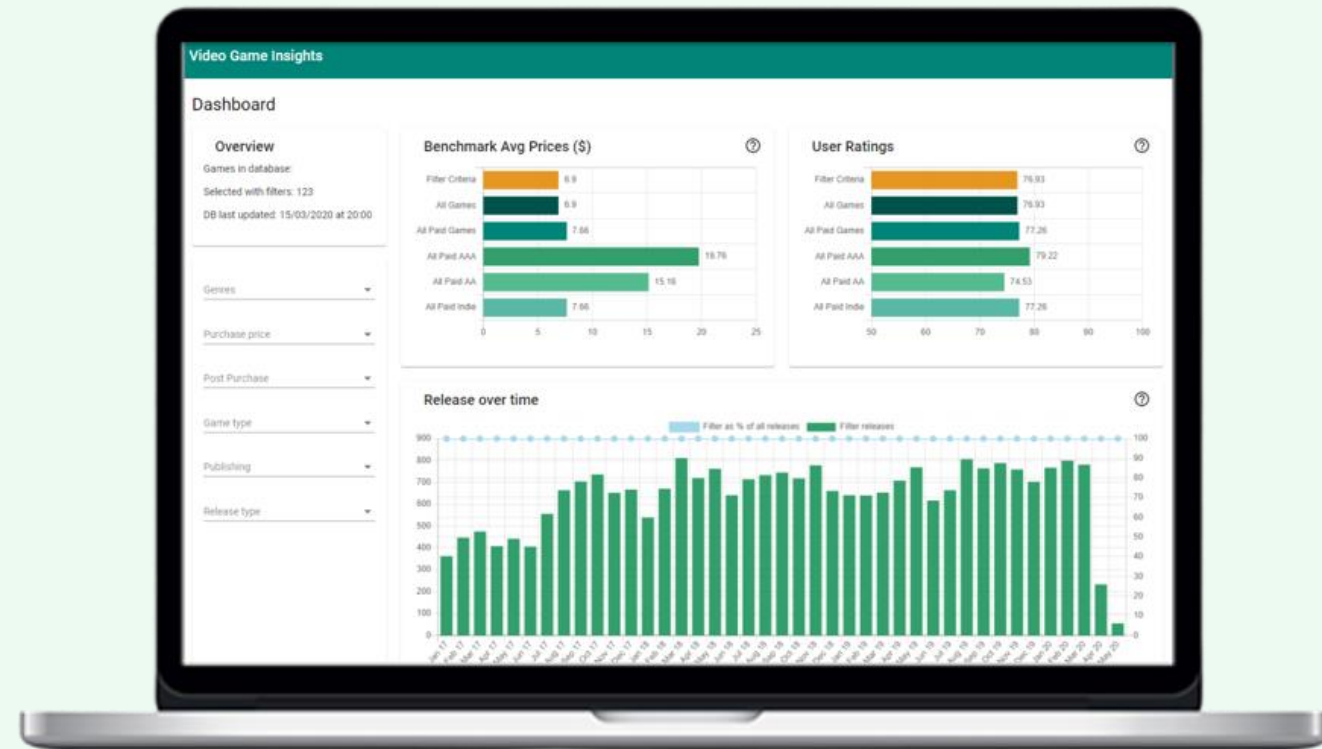
Search by name

#	Logo	Name	First released	Genres	LTD Units Sold Overlap			Median Playtime
					Overlap	Overlap %	Overlap Index	
1		Lords of the Fallen	Oct 13, 2023	Action, Adventure, RPG	436k	3.1%	9.8	200h
2		Lies of P	Sep 18, 2023	Action, Adventure, RPG	694k	5%	9.7	185.2h
3		Thymesia	Aug 18, 2022	Action	225k	1.6%	9.2	206.8h
4		Wo Long: Fallen Dynasty	Mar 3, 2023	Action, Adventure, RPG	430k	3.1%	9.2	169.6h
5		Returnal™	Feb 15, 2023	Action	193k	1.4%	8.6	133.4h
6		ARMORED CORE™ VI FINE	Aug 24, 2023	Action	910k	6.5%	8.6	167.9h
7		FINAL FANTASY XVI	Sep 17, 2024	Action, RPG	179k	1.3%	8.4	107h
8		Lunacid	Mar 15, 2022	Indie, RPG	146k	1%	8.3	176.6h
9		Another Crab's Treasure	Apr 25, 2024	Action, Adventure, Indie	227k	1.6%	8.2	147.2h



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# Appendix

# Definitions and methodology

## Glossary

Terms	Definitions
AA/AAA games	Large budget games developed by massive teams and companies. AAA game budgets are typically over \$100M to develop
CAGR	Compound annual growth rate
CCU	Concurrent users – active players in-game
FtP	Free to play games
Full Game Revenue	Revenue from the direct sale of a game, excluding any DLC and MTX revenues
IAP	In-app purchases
Indie games	Games developed by independent studios. This covers a large range of studios from 1 person hobby projects to larger studios of a few hundred employees, but budgets still fall far short of the AAA game levels
MTX	Microtransactions
Unit Sales Estimate	Using different estimation methods, including an algorithm based on our internal database of actual sales and the Boxleiter method to get from Steam review numbers to estimated sales. Detailed overview of the method is highlighted in the section below
Revenue Estimate	Estimated units sold multiplied by the price at the time. This is gross revenue, including the Steam cut, but adjusted for local currencies, returned products and discounts

### More information:

Definitions: <https://sensortower.com/product-video-game-insights>

Email: [Support@sensortower.com](mailto:Support@sensortower.com)

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