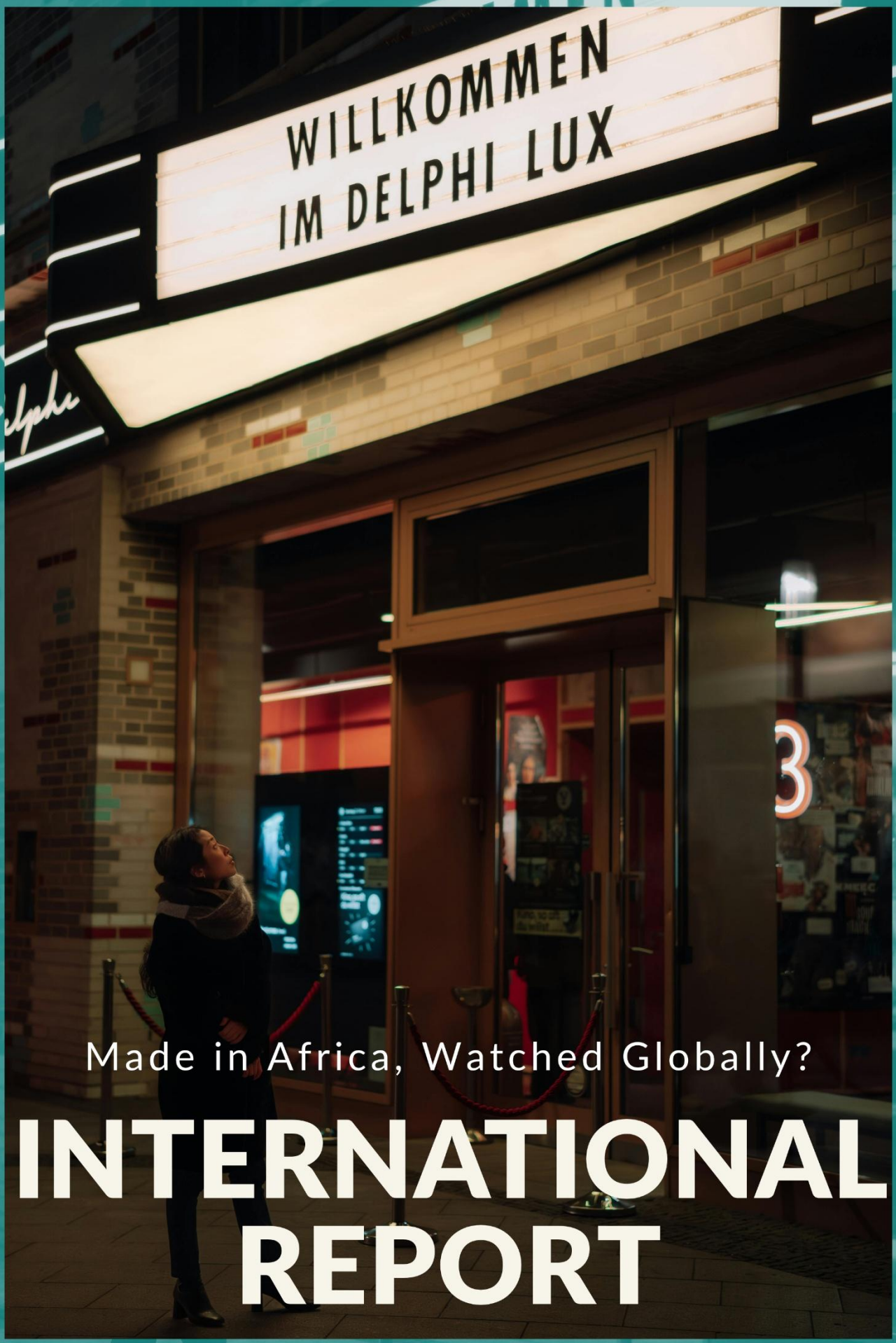


Made in Africa, Watched Globally?

INTERNATIONAL REPORT

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Dalberg

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Executive Summary

Africa's film industry is at a critical turning point. With rapid population growth, urbanisation, and increasing digital access, the continent's screen sector is gaining momentum as a global creative force. Key markets such as Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa are leading this growth. According to UNESCO, the industry already supports nearly 5 million jobs and generates about USD 5 billion annually. With the right conditions in place, it could contribute up to USD 20 billion to GDP and create more than 20 million jobs. It is within this context that GIZ and Afreximbank through CANEX commissioned this study to better understand international distribution, audience development, and social impact in African film.

Global demand for African content is clearly increasing, but not evenly across countries. Between 2024 and 2026, African films gained strong visibility at major festivals such as Cannes, Berlinale, Venice, and Sundance. A notable milestone was Nigeria's My Father's Shadow, which became the country's first film in Cannes' main competition. Data from the LUMIERE database shows that 83 African films generated over 700,000 cinema admissions across Europe between 2020 and 2024, with South Africa and Egypt leading. However, countries like Rwanda and Kenya still have very limited commercial presence in European cinemas. Even in Germany, which plays an important role as a festival hub, African films account for a very small share of screenings.

Digital platforms expanded access for African storytelling but remained unstable. After early investment from Netflix and Amazon, the market contracted, with Amazon exiting Sub-Saharan originals, Netflix narrowing its focus, and Showmax shutting down in 2026. Public broadcasters like ARTE became more important, with Country Queen achieving strong online performance, highlighting the value of digital-first strategies. However, growth remained constrained by weak distribution systems, production quality gaps, poor rights management, limited access to international funding, and persistent perceptions of African films as niche or educational which affects how they are marketed and limits their reach to broader audiences.

When it comes to audiences, diaspora communities in places like North America and the UK continue to be important, especially for commercial success abroad. However, they are not enough to sustain large scale growth on their own. There is growing interest from non diaspora audiences, particularly younger viewers who care less about where a film comes from and more about how engaging and accessible it is. In terms of social impact, African films are already influencing conversations and even policy discussions internationally together with shaping perceptions and drive advocacy. However, systems for measuring this kind of impact are still limited, which makes it harder to attract funding from impact focused investors.

Looking ahead, the industry will need a more coordinated and strategic approach. This includes strengthening distribution systems, improving rights management, and encouraging financing models that involve distributors from the beginning. Audience development will also require a stronger focus on diverse genres and digital engagement. At the same time, better tools for measuring social impact will be essential to unlock new funding opportunities. Supporting systems such as data infrastructure, skills development, and international partnerships will play a key role in helping the African film industry reach its full economic and cultural potential.

1. Introduction

1.1 Background and context

Africa's film industries are experiencing rapid growth, driven by demographic expansion, urbanisation, and increased digital connectivity. Key industries in Africa - Kenya, Rwanda, Nigeria, South Africa, Senegal, and Egypt - are emerging as important production hubs, each with distinct national structures but shared challenges in financing, infrastructure, and market integration. At the same time, global demand for African stories is increasing, with streaming platforms, broadcasters, and international partners expanding their engagement with the continent's content.

Despite this momentum, the Africa's film industry remains constrained by fragmented distribution systems, limited audience data, weak intra-African circulation, and underdeveloped mechanisms for measuring social and economic impact. These challenges limit the scalability and sustainability of the industry, particularly in reaching diverse audiences both within Africa and globally. Without efficient marketing and distribution, African films struggle to reach audiences. Without clear audience insights, investment decisions carry higher risk. Without measurable impact, it becomes harder to position film as a priority sector for policy and financing.

Understanding how these challenges manifest across different markets is critical to identifying where targeted interventions can unlock growth, strengthen sustainability, and expand the reach of African film. It is against this background that the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and the African Export–Import Bank (Afreximbank) commissioned this study to deepen understanding of the African film ecosystem and identify pathways to unlock its full potential through improvements around the distribution system.

The partnership leverages the unique strengths of the two institutions. Afreximbank provides the critical USD1 billion financial facility via CANEX to scale production and infrastructure. GIZ, on the other hand, acts as a catalyst for the ecosystem through investing in the generation of industry knowledge, strategic capacity development, and cross-sector partnerships to position African film for sustainable growth across the continent. Together, they bridge the gap between high-level capital and grassroots impact, transforming the industry's financial potential into improved livelihoods for creative professionals.

1.2 Objectives and research questions

The primary objective of this study was to generate actionable insights to inform strategy, policy, and investment decisions across Africa's film sector. It aims to support governments, financiers, industry stakeholders, and development partners in strengthening distribution systems, expanding audiences, and enhancing the (social) impact of film.

Specifically, the study sought to:

1. Map the current landscape of film distribution across the six focus countries (Egypt, Kenya, Nigeria, Rwanda, Senegal, and South Africa) and at the global level, identifying key channels, emerging models, and bottlenecks.
2. Analyse how audience of African films are developed and sustained, including patterns of access, platform use, and engagement.

3. Assess the specifics around social impact films, including financing, marketing campaigns and audience preferences.
4. Map the film financing ecosystem and successful investment models.
5. Identify scalable practices, business models, and partnerships that can strengthen the ecosystem.

1.3 Methodology and scope

The study focused on six countries selected to reflect diversity in geography, language, market size, and industry maturity: Kenya and Rwanda (East Africa), Nigeria and Senegal (West Africa), South Africa (Southern Africa), and Egypt (North Africa). Together, they represent Anglophone, Francophone, and Arabophone North Africa contexts and capture a range of policy environments and production capacities. They also represent a sizable share of films produced in Africa and was therefore used as a proxy to understand the African film topography in this study.

The study adopts a mixed-methods approach, combining:

- Secondary research & media analysis: Literature review and media analysis is used to map how African filmmakers can monetize their work and identify critical challenges facing distribution such as limited financing, weak infrastructure, regulatory hurdles and market access barriers. This helps pinpoint information gaps and structural obstacles, supporting recommendations to strengthen monetization and attract distributors across the continent.
- Primary Research: These interviews focused on understanding the barriers, challenges and experiences of different distribution platforms on airing African films. Also understanding, what drives decision making when interacting with African filmmakers and how can this be improved. The primary research was executed through a three-pronged approach:
    - Key Stakeholder/Informant Interviews with filmmakers and distributors, marketing platforms and policy actors
    - Audience survey, targeting the African film audience/viewers, to capture their perception and drivers of watching films and form a good foundation for audience development.
    - Case studies across the continent in different areas to illustrate innovative approaches to distribution, audience development, and impact.

Analysis

The analytical process employed a triangulation framework to ensure high internal validity across the six study markets. Quantitative data from the audience surveys was cross-referenced with stakeholders' insights from stakeholder interviews and secondary industry reports to identify recurring structural patterns. This mixed-methods approach allowed the study to ground its findings in both empirical market data and lived industry experience, strengthening the relevance and credibility of the resulting insights and recommendations.

A central component of this phase was the Audience Segmentation Analysis. Rather than treating African viewers as a monolith, the study utilised cluster analysis to categorise audiences into four distinct segments based on their viewing habits, content preferences, motivations, platform and device usage and willingness to pay. Multiple segmentation

models were tested, with the final segments selected for statistical robustness and practical relevance. Each segment was then profiled across key dimensions such as demographics, viewing behaviour, and content preferences enabling a nuanced understanding of who audiences are, how they consume content, and what drives their choices. This segmentation allows the report to move beyond broad market averages and provide granular strategies for targeted audience development. Finally, thematic coding was used to synthesize stakeholder narratives, mapping them against the identified economic and distribution barriers to ensure that all recommendations are grounded in both market data and lived industry experience.

1.5 Limitations

This study provides a comprehensive synthesis of the African film ecosystem across six diverse markets. However, the following limitations should be considered when interpreting the findings:

- Data on film production, distribution, and audience behaviour in many African countries are patchy, fragmented, or entirely absent for recent years (2022-2026). In several markets, official statistics on box office, streaming consumption, or informal distribution are either not collected or not publicly available. This forced the analysis to rely on proxies such as revenue estimates from industry associations, box office aggregates compiled by private analytics firms, cinema- ticket- sale trends, film- commission survey data, festival participation and sales- market catalogues, and social- media- engagement metrics. These proxies provide indicative patterns rather than precise, audited indicators.
- The reliance on secondary sources means that some claims about impact, financing, and audience behaviour rest on qualitative narratives and grey-literature evidence rather than systematic impact evaluations or large-scale surveys. Future primary research, including more granular audience data and structured impact assessments, will be needed to refine and test the hypotheses put forward here.

2. Findings

2.1 Overview of international demand for African film

Over the past decade, international interest in African film and screen content has grown in festivals, markets, public-broadcaster schedules, and on global streaming platforms. UNESCO's continent-wide mapping remains the most authoritative macro-baseline: the report estimates Africa's film and audiovisual sectors employ close to 5 million people and generate roughly USD5 billion annually, with potential—if policy and market constraints are addressed—to create over 20 million jobs and contribute USD20 billion to GDP. These figures do not measure international demand directly, but they frame why distributors, festivals, and streamers increasingly scout African titles. Existing evidence also indicates structural undersupply in theatrical exhibitions inside Africa, one screen for over 787,000 people compared to one screen per about 8,700 people in the USA[1]. This pushes producers to seek festival discovery and international buyers earlier in their release strategies.

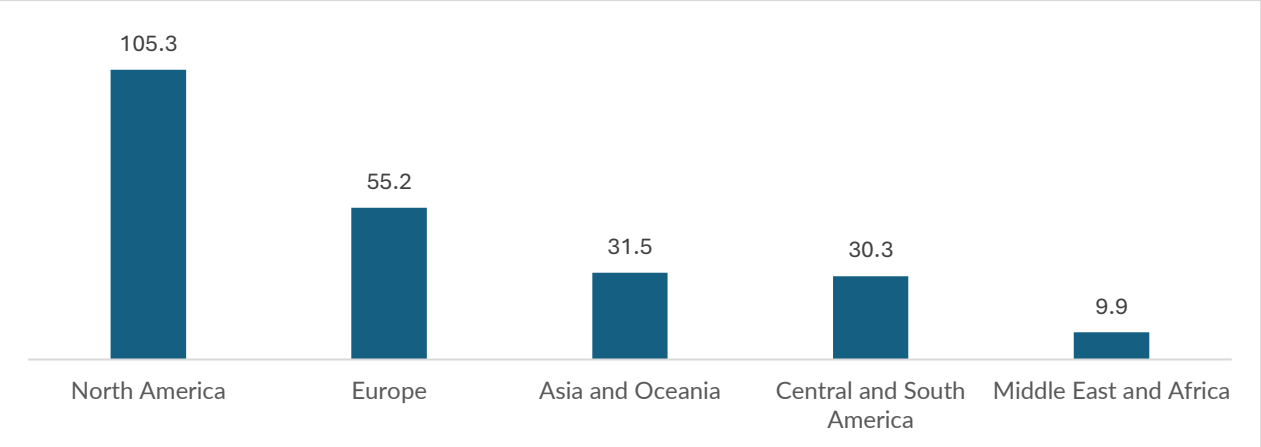


Figure 1: Global comparative screen density by region, 2023 (per mn inhabitants) |Source: UNIC Europa Cinemas[2]

According to the qualitative findings, international demand for African film and television content has been evolving, shaped by a combination of growing global curiosity, diaspora engagement and emerging commercial interest. While the film sector has seen periods of heightened momentum, it remains characterized by uneven market access, shifting platform strategies and increasing competition within a saturated global content landscape. Demand for African content was noted to be largely driven by two forces: individual interest from international distributors and the perception of Africa and its diaspora as untapped markets.

"So personal interest combined with, you know, a business opportunity made me go this way into the African markets" Distributor, Germany.

Initially passion-led, distribution became more commercially viable with the entry of global platforms like Netflix and Amazon. The entry of global streamers signalled a shift toward formal commercialization, increasing both visibility and expectations for African content worldwide.

"I would say up to 2023, it's probably fair to say that working with African films was more like a hobby, if you take a look at the commercial side of things". Distributor, Germany

A consistent finding across international audiences indicated that demand was strongly contingent on production quality as mentioned by one of the international filmmakers *"the production quality, I have to stress it again, the production quality is key."* While African markets were recognized for creative talent, distributors emphasized that production value was the decisive factor for global acquisition. Films meeting international technical and storytelling standards were noted to be far more likely to secure distribution. In an oversaturated global market, a

[1] UNESCO (2021). The African Film Industry: trends, challenges and opportunities
[2] UNIC_Europa_Cinemas_CICAE_Report.pdf

"content tsunami" African films faced intense competition for visibility, requiring strong marketing hooks or unique positioning to capture audience attention.

"Because of that content inflation, or you can call it a content tsunami if you want, compared to the global marketplace, the number of avenues for African films is still somewhat limited, right? So not every platform, not every player is interested in African films." Distributor, Germany

Key markets

Europe remains a primary destination for African films, both culturally and commercially, due to a dense festival ecosystem and Europe's public-broadcast and arthouse circuits. Industry analyses note that European broadcasters and distributors regularly acquire African titles, with dedicated funds and coproduction avenues anchoring the pipeline. Within Europe, Germany has become a structurally important reference market because of its federal and regional film funds, the Berlinale's World Cinema Fund (WCF)[3] and WCF Africa line, and the presence of ARTE/ZDF[4] acquiring non-European arthouse and documentary works. North America (U.S./Canada) continues to offer breakout potential for -festival laureled titles via Sundance/Toronto and specialty distributors, although market access is highly selective. Interest is also rising in the Middle East (Saudi Arabia's Red Sea and Gulf initiatives) and selected Asian territories (Japan, to a lesser extent China), driven by both festival curation and cultural-exchange programming[5].

The key informants revealed regional market dynamic uncovered clear geographic disparities in the demand for African films. North America, particularly the United States and Canada, was consistently identified as the most significant international market, offering strong monetization potential and access to platforms such as Tubi, which effectively reached both diaspora and mainstream audiences through ad-supported models.

"*In terms of reach, it's almost needless to say that there is YouTube, where we have a massive reach. But monetization is, yeah, it's an issue. Again, there used to be Netflix and Amazon. These days, in the US market, there is one, actually, our most important platform is a platform called Tubi, which is an ad-supported platform" Distributor, Germany.*

Beyond this, the United Kingdom and other English-speaking territories emerged as key consumer bases, with language accessibility playing a central role in shaping demand. Emerging interest was also observed in India and Nordic countries. This limited data constrained deeper understanding of these markets. For Francophone African content, France and Belgium remained the primary distribution hubs due to linguistic and historical ties.

"We can't really analyze it. Because we don't have enough data, except that there is growing interest outside of India, which is, to some extent surprising for us". Distributor, Germany

Germany case highlighted significant market limitations. Despite its large economy, Germany was widely perceived as commercially insignificant for African films, with stakeholders reporting negligible revenues and extremely low market penetration often below 1% of cinema screenings, This was attributed to a combination of low audience interest, limited broadcaster engagement, and structural barriers within the industry. Additionally, while a diaspora population existed, it was not considered sufficiently large or active to sustain theatrical releases and did not consistently translate into meaningful box office returns.

"That is the biggest problem. In Germany, for instance, it's less than 1%. You would say less than 0.1% of African films are in cinemas. And I don't think it's any better for streaming either." Distributor, Germany.

[3] World Cinema Fund | Berlinale
[4] ARTE stands for Association relative aux télévisions européennes (Association for European Television), a French-German public cultural channel. ZDF stands for Zweites Deutsches Fernsehen (Second German Television), a major German public broadcaster that provides half of the ARTE programming.
[5] The International and Intra-African Market for African Films - #AkorokoInsight

"Other German distributors which distribute in Germany, rarely have any interest in African films. I think we can say it simply does not happen" Distributor, Germany

Role of festivals, markets, and funds

Recent- program notes and market announcements document African projects' presence and initiatives connecting African festivals (e.g., AFRIFF/Lagos) to Cannes "Goes to Cannes"[6] showcases. On the funding side, the WCF has become a central production/postproduction lever for African films seeking European partners, complemented by national/federal German funds and the Goethe--Institut's[7] mobility/grant programs that underwrite Euro--African cocreation and circulation. At a continental policy level, the African Union's launch of the (temporary Secretariat of the) African Audiovisual and Cinema Commission in 2024 signalled renewed intent to coordinate intra- African- distribution and research potentially reinforcing the sector's international readiness though the statute still awaits sufficient ratifications.

Film festivals were indicated very crucial in the film industry and remained critical entry points for African films, providing visibility, validation and networking opportunities. However, festival success rarely translated into commercial distribution without a complementary strategy across digital or theatrical channels.

"But German Cinema is not very strong internationally. But what I can say is African cinema is very strong at film festivals. This is what I saw all over the world. But how to enter the market and how to adapt, that's a tough question." Filmmaker, Germany

"*Let's say in Finland, it's more or less the festivals. It could be more, let's say after our program where we take… at the Hamburg Film Festival. There is a group we were guests there and, yes, there was [name of a person mentioned]. The boss came and said, 'Oh my God, I was so ashamed because I've not seen one African film in the program this year, and they are showing 200 films." Distributor, Germany*

International co-productions were increasingly viewed as viable pathways to global markets. Collaborations such as partnerships between African and European producers which enabled filmmakers to navigate foreign business cultures and access established distribution networks.

"The biggest difference is the culture of business culture. So, in Germany and in Kenya, the roles of a distributor and the role of a producer are very different. And I think that is the biggest cultural aspect to navigate-to understand how business is being done in the respective territory." Filmmaker, Germany.

2.2 Distribution into International Markets

2.2.1 Festivals

African films have demonstrated a powerful and escalating presence on the global festival circuit gaining recognition for both artistic innovation and the depth of the stories being told. Coverage from Cannes, TIFF, Venice, Locarno, and other major platforms showed that African filmmakers are increasingly breaking into competitive sections, securing coveted slots such as Un Certain Regard, Directors' Fortnight, and Critics' Week at Cannes. In 2024, standout works including *Ernest Cole: Lost and Found*, *The Village Next to Paradise*[8], and *On Becoming a Guinea Fowl* earned significant festival visibility, winning awards and generating discussion on themes like migration, identity, and social justice. Industry reports highlight that 2024 marked a remarkable year in which African cinema evolved from a rising presence to a recognized global force, driven by bold narratives and increasing confidence in storytelling[9].

[6] AFRIFF to Represent Lagos at "Goes To Cannes" 2026
[7] Goethe-Institut: Mobility Grants for Artists and Culture Professionals in Sub-Saharan Africa and Europe | On the Move
[8] The village next to paradise takes Vienna by storm, winning 5 awards - EgyptToday
[9] African Representation At The Cannes Film Festival 2024 — iMullar

By 2025, African cinema continued to expand its international footprint, with a notable surge in representation at Cannes and the Berlinale. Film Africa 2025[10], for example, returned to London from 14–23 November 2025, continuing its legacy as the UK and Europe's premier festival for African and diaspora cinema. Presented by the Royal African Society, the event showcased over 50 films and special events including features, documentaries, and shorts from more than 20 countries, highlighting the incredible diversity of the continent's storytelling.

Industry reports highlight how African films were not only screening but entering prestigious competitions[11]. Nigeria's *My Father's Shadow*, for example, made history as the country's first entry in Cannes' main competition. Coverage also showed African projects tackling urgent global themes such as migration, memory, nationhood, and justice resonating strongly with international audiences and juries. Market-oriented analysis revealed that African films at major early -2025 festivals such as Sundance, International Festival of Rotterdam (IFFR), and the Berlinale saw improved access to distribution deals and industry visibility, though challenges remained around financing and representation at film markets like the European Film Market (EFM). Critics viewed 2025 as a year when Africa's cinematic voice became increasingly impossible to overlook.

The festival ecosystem itself also demonstrated a growing institutional commitment to African cinema. Venice's 2024 and 2025 editions featured African films across multiple categories from *Orizzonti* to *Immersive to Critics' Week*. On the other hand, Locarno made a landmark announcement that its Open Doors program would focus exclusively on African filmmaking for four consecutive years, signalling long-term strategic investment in the continent's creative industries[12]. The festival is dedicating its 2025–2028 cycle exclusively to supporting and showcasing filmmaking from 42 African countries. This four-year focus (2025–2028) aims to boost emerging African talent through co-production, training, and screenings, with the inaugural year already spotlighting six projects, including works from DR Congo, Côte d'Ivoire, and Nigeria. The 2025 selection highlighted projects like "*Les Bilokos*" (DR Congo) and "*Kachifo*" (Nigeria), with a strong emphasis on first and second-time filmmakers, focusing on independent and creative storytelling.

Articles across festival events consistently described African cinema as innovative, urgent, and increasingly central to global conversations on culture and politics. The combination of rising festival selections, award recognitions, dedicated showcases like Pavillon Afronova, and structural initiatives like Locarno Open Doors underscored a sustained upward trajectory for African films on the world stage.

Table 1: Sample of African Films in International Festivals (2025–2026)

Year	Film Title	Country	Festival (Continent)
2025	Akher Youm (The Last Day)	Egypt	Berlinale (Europe)
2025	Ne réveillez pas l'enfant qui dort	Senegal/Morocco/France	Berlinale (Europe)
2025	Mikuba (Cobalt)	DRC/USA	Berlinale (Europe)
2025	Daye: Seret Ahl El Daye	Egypt/Saudi Arabia	Berlinale (Europe)
2025	Khartoum	Sudan/UK/Germany/Qatar	Berlinale (Europe)

[10] Ten days of African cinema, culture, and conversations at the BFI Southbank and venues across London | Royal African Society
[11] Film Africa 2025: Celebrating African cinema, voices and stories
[12] Locarno Film Festival. Open Doors 2025-2028

2025	Le Mystère de Waza	Cameroon	FIFP Cannes (Europe)
2025	Matares	Algeria	FIFP Cannes (Europe)
2025	Les Divorcées de Casablanca	Morocco	FIFP Cannes (Europe)
2026	Lady	Nigeria/UK	Sundance (Americas)
2026	Kikuyu Land	Kenya	Sundance (Americas)
2026	Troublemaker	South Africa	Sundance (Americas)

2.2.2 Cinema and Admissions

The European theatrical landscape for African cinema between 2020 and 2026 has transitioned from a period of pandemic-induced volatility to a structured era of commercial viability. Data from the LUMIERE[13] database reveals that films from Egypt, South Africa, Nigeria, Senegal, Kenya, and Rwanda have collectively generated over 700,000 admissions from a total of 83 films during this window. This performance indicates a significant shift in market dynamics, where African content is increasingly moving beyond the festival circuit and into sustained commercial distribution, driven by co-production strategies and the rise of genre-specific exports.

Table 2: Admissions of films released in Europe | Source: Lumiere database

Country of Origin	2020	2021	2022	2023	2024	Total number of films	Total Admissions [14]
Egypt	1	7	11	10	10	39	192,773
Kenya	3	1	2	-	2	8	4,232
Nigeria	1	2	3	5	6	17	41,456
Rwanda	-	1	-	1	-	2	46
Senegal	1	2	1	2	-	6	30,346
South Africa	3	6	-	2	-	11	432,429
Overall	**9**	**19**	**17**	**20**	**18**	**83**	**701,282**

Market Segmentation and Admission Drivers

South Africa emerges as the volume leader in the European market, accounting for over 432,000 admissions. This success is primarily attributed to high-yield animation and genre-fluid titles like *Headspace* and *Seal Team*, which demonstrate that technical parity and universal storytelling are key to broad European appeal. Egypt follows as a dominant force in commercial fiction with 39 released titles, leveraging strong diaspora markets in France and the UK to secure nearly 193,000 admissions. Conversely, Nigeria has showcased a burgeoning growth model, with 17 titles reaching European screens, signalling a professionalisation of "Nollywood" exports from digital-only formats to tracked theatrical events.

Institutional Influence and Policy Implications

[13] European Audiovisual Observatory database on admissions to films released in Europe

[14] For each country, the admission is filtered from 2020-2026 although the record of titles is upto 2024

The data underscores a critical correlation between European co-production and commercial reach. Senegal and Kenya, while representing lower absolute admission volumes, maintain a high prestige-to-market ratio. Senegalese titles like *Toubab (2021)* and *Demba (2024)* benefit from historical co-production treaties with France and Germany, which unlock vital distribution subsidies and "European Work" status. For policymakers and funding bodies, this highlights a need to pivot from purely production-focused grants to distribution-led incentives. Ensuring that "Festival Darlings" from countries like Rwanda and Kenya have the P&A (Print and Advertising) support to reach commercial screens is essential for converting cultural capital into economic sustainability.

Investment Outlook and Distribution Strategy

For private investors, the 2020–2026 period proves that the highest ROI is currently found in "Crossover Genre" films as evidenced by data from Lumiere and 2025 Nigeria Box Office Yearbook by FilmOne. While social realism remains the hallmark of African prestige, animation and thrillers have demonstrated far greater territorial elasticity across the EU and the UK. Distributors should focus on territorial clusters rather than fragmented releases, noting that France remains the primary gateway for Francophone Africa, while the US, UK and Germany are becoming essential hubs for Anglophone and East African content respectively.

The African film industry is no longer a peripheral player but a growing exporter to Europe. The path toward 1 million annual admissions lies in strengthening co-production frameworks and professionalising the distribution pipeline. Stakeholders must capitalise on this momentum by fostering long-term theatrical windows that allow African narratives to compete directly with global mid-budget cinema, ensuring a robust future for African intellectual property on the global stage.

2.2.3 Digital Platforms as a Global Distribution Gateway

The digital transformation of the film industry has fundamentally altered the trajectory for African content entering international markets. While traditional theatrical and linear television models often relegated African cinema to niche "World Cinema" slots, Digital Video on Demand (VOD) has democratised access, allowing films and series to bypass traditional gatekeepers and reach global audiences directly. However, the landscape in 2026 is defined by a significant "market correction" that has shifted the power dynamics between African producers and global platforms.

This was in support with the qualitative findings which indicated that the international distribution landscape for African film was increasingly dominated by digital platforms, with traditional theatrical releases becoming less viable. Global streaming platforms such as Netflix and Amazon had initially driven a “golden period” of high-value acquisitions, although their engagement in African markets had since declined. As a result, North America emerged as the most critical region for monetization, supported by platforms such as Tubi, which leveraged ad-supported models and YouTube, which offered broad reach but limited revenue potential. Distributors also engaged with niche and specialized platforms, including aggregators and region-specific services.

A notable shift was observed toward FAST (Free Ad-Supported Streaming TV) channels, where distributors curated 24/7 linear streaming channels.

“So, we are not only distributing because of the market circumstances of the business world; obviously, we have to be a little, let's say, like a mini broadcaster in the meantime. And if you think that - we must deliver a 24/7 linear channel.” Distributor, Germany

This model required extensive content libraries often hundreds of hours to remain competitive and secure partnerships with global device manufacturers and platforms. In parallel, international film festivals such as Cannes, Berlinale and Toronto continued to serve as key

entry points for visibility and prestige. However, festival success did not consistently translate into commercial distribution, as films that performed well in these spaces often catered to niche “festival audiences” rather than mainstream viewers.

The Great Retraction: Strategic Shifts by Global and Regional Giants

The period between 2024 and 2026 has been marked by a radical restructuring of the streaming sector in Africa. This restructuring is characterized by a "flight to quality" and financial consolidation. The initial "Gold Rush," where global platforms competed aggressively for African talent, has transitioned into a more cautious, consolidated phase.

- **Amazon Prime Video’s Pivot:** In a major strategic shift, Amazon Prime Video decommissioned its local original content teams in Sub-Saharan Africa in January 2024. While the platform continues to operate as a licensing service, it has largely ceased the high-budget "Original" commissions that characterized its 2022 expansion. This move has forced many production houses in Nigeria and South Africa to seek alternative co-production partners or return to licensing models.
- **Netflix’s Consolidation:** Netflix remains the most influential global player but has narrowed its focus. Current evidence suggests a "flight to quality" and established markets, with a heavy concentration of investment in South Africa and Nigeria. This leaves emerging film industries, such as those in Kenya and Rwanda, facing higher barriers to entry for original commissions.
- **The Exit of Showmax:** Perhaps the most significant disruption was the official closure of Showmax in early March 2026. Following the $2 billion acquisition of MultiChoice by **Canal+**, the service was phased out after reporting trading losses of approximately R4.9 billion (approx. $260 million) for the 2025 fiscal year. Canal+ has shifted focus toward a unified global streaming app and its traditional pay-TV business, ending a decade-long run for one of Africa's most significant commissioners of local drama. This has removed a major regional champion for African content, leaving a gap that global SVODs (Subscription Video on Demand) have yet to fully fill.

The Opportunity in Public Service VOD and Cultural Bridges

As commercial giants retract, the role of public service VODs, specifically European broadcasters like ARTE (Germany/France), has become increasingly vital. Unlike commercial platforms driven by subscriber churn, these services prioritize cultural exchange and social impact. They act as a critical "cultural bridge," providing African creators with high-prestige visibility in the European market through licensing deals that often allow producers to retain more intellectual property than "Original" commissions.

To maximize potential, future strategies must focus on securing equitable licensing deals across a diverse portfolio of platforms, including public service VODs, to mitigate the volatility of the global commercial sector.

Case Study: Digital Performance of “Country Queen” on ARTE

The performance data for the Kenyan series *Country Queen* on ARTE provides an empirical look at how digital platforms outperform traditional linear television for African content in Europe, even amidst a volatile market.

1. Linear vs. Digital Reach: The "Digital-First" Reality

On linear TV, the series achieved a modest average of 45,000 viewers per episode with a market share of ~0.6%, audience share of ~ 1.2% and a total reach per episode of ~39,000. This was largely due to "scheduling artifacts", late-night slots and a split broadcast schedule across two Thursdays in late June 2023, which are known to diminish traditional viewership.

Table 3: Summary of audience reach for Country Queen on ARTE Linear TV | Source: ARTE

Episode	Start time		Duration	Market Share (%)	Avg Viewers (k)	Audience Share (%)	Total Reach (k)
	German	French					
Episode 1	22:57	23:41	0:58	0.6	69	1.7	94
Episode 2	23:57	0:40	0:57	0.5	39	1.2	33
Episode 3	0:55	1:39	1:00	0.7	32	1.5	24
Episode 4	22:58	23:42	0:56	0.6	78	1	57
Episode 5	23:56	0:41	0:57	0.4	30	0.7	19
Episode 6	0:55	1:39	0:58	0.5	20	0.7	11
Average				**0.6**	**45**	**1.2**	**39**

In contrast, the ARTE.tv (VOD) platform served as the primary engine of reach. The series was available on arte.tv between 13 June 2023 and 25 January 2026, with rights restricted to Germany and France.The series accumulated over 531,000 cumulative views across Germany and France. This confirms that for African narratives, the true impact and audience resonance occur digitally, where viewers can engage with the content on their own terms.

Table 4: Summary of audience reach for Country Queen on arte.tv (video-on-demand) | Source: ARTE

Title	Video Views by Language			Video Views by Country	
	German Views	French Views	Total Views	Germany	France
Country Queen (1/6)	85,735	90,961	**176,696**	85,856	90,515
Country Queen (2/6)	37,899	48,952	**86,851**	38,017	48,692
Country Queen (3/6)	31,123	42,970	**74,093**	31,234	42,747
Country Queen (4/6)	30,378	40,374	**70,752**	30,437	40,193
Country Queen (5/6)	26,323	36,040	**62,363**	26,424	35,832
Country Queen (6/6)	25,965	34,681	**60,646**	26,032	34,522
Total	**237,423**	**293,978**	**531,401**	**238,000**	**292,501**
% share				**45%**	**55%**

2. Regional Resonance and the "Long Tail" Effect

The data highlights critical strategic insights:

- **Francophone Receptivity:** French-language views (~294,000) slightly outperformed German-language views (~237,000), suggesting a robust appetite for African stories within the French cultural ecosystem, or ARTE's editorial positioning in France may have been stronger.
- **High Initial Episode Reach with Expected Drop-Off**: Episode 1 significantly outperformed later episodes (176k views), with a decline across subsequent episodes. This pattern is normal for serialized content, especially in VOD environments where casual viewers sample the first episode without completing the series. It is important to note that drop-off does not necessarily indicate negative reception. It reflects typical audience funnel behavior.
- **Sustained Impact:** Because the series remained available online for over two years, it achieved a "long-tail" effect. For impact-oriented storytelling, this digital longevity is far more valuable than a high-rated single broadcast, as it allows themes of land rights and social justice to permeate the target market over time.

3. Strategic Implications for African Producers

The *Country Queen* case study demonstrates that while global SVODs are retracting, audience demand remains high. The primary lesson for distributors is that VOD is not a secondary channel but the primary gateway. Success in the international market is increasingly measured by digital accumulation rather than overnight linear ratings.

The key strategic takeaways from *Country Queen* include:

- Digital platforms are the primary driver of reach for African series in Europe.
- The series achieved substantial cumulative reach (>530k) despite limited territorial rights.
- Audience drop-off across episodes is structurally normal and not a proxy for quality or impact.
- Francophone markets may offer particularly strong entry points for African narratives.
- Long-term availability on VOD significantly increases impact compared to one-off linear broadcasts.

4. Barriers

Weak domestic distribution system

A key structural barrier identified was the lack of organized and sustainable distribution infrastructure within African countries. Audiences noted that without strong domestic markets where audiences consistently paid for cinema it was difficult to generate the organic traction required for successful international export. This limited both revenue generation and proof of concept for global distributors.

"The big part of this problem is the missing distribution system and structures in the African countries. They are totally missing. Even in their own market it is not working in a way to get an audience. You see in Kenya, you have only two distributors. In Rwanda, we have one distributor. In Ethiopia, you have not even one distributor, but Ethiopia is the only country where people really go to domestic films and watch it in cinemas." Distributor, Germany

Financial constraints and subsidy inequities

In European markets, funding structures such as the Creative Europe MEDIA programme were designed to support intra-European film distribution, excluding African content. This created a structural disadvantage, as European distributors faced higher financial risks when acquiring African films compared to films from within Europe.

"I can get later reference more than a hundred thousand EUR for a French film, let's say 50,000 EUR , that is the best later. Sometimes these subsidies from the media program can change the film from minus to plus, you know, and this is not per year. This support does not exist for African films for sure" Distributor, Germany

Technical gaps and limited resources

Production quality emerged as a critical determinant of international success. Distributors consistently emphasized that technical elements such as sound design, editing and cinematography were key to meeting global platform requirements. While creative talent was widely acknowledged, gaps in technical capacity and resources often limited the competitiveness of African films.

Fragmented rights management practices

Challenges in rights management further constrained distribution opportunities. Audiences highlighted instances where filmmakers, due to limited familiarity with international industry practices, prematurely released content on free platforms such as YouTube. Such actions undermined the film's commercial value and deterred potential distributors.

Shift to performance-based revenue models

The industry has increasingly transitioned from upfront payments such as flat fees or minimum guarantees to performance-based revenue-sharing models. While this reduced risk for distributors, it delayed financial returns for filmmakers, who often had to wait extended periods sometimes over a year before receiving income.

"But in reality, 95% of the deals we do are so-called revenue share deals, meaning they are performance-based" Distributor, Germany

Perceptual barriers and market positioning

In several international markets, African films were frequently positioned as educational or of special interest rather than mainstream entertainment. This framing limited audience expectations and demand, often reinforcing a narrow focus on specific narratives such as hardship or social struggle at the expense of genre diversity.

"In Germany, African films or in Europe or in the West in general, African films are still treated as educational or special interest in course of the demarks" Distributor, Germany

Language and accessibility constraints

Language emerged as an additional barrier, particularly for films produced in local African languages such as Swahili. Audiences noted that some international audiences demonstrated a preference for English-language content, reducing willingness to engage with subtitled films and limiting their reach.

2.3 Audience Development Abroad

Diaspora vs. non-diaspora audiences

Industry reports suggest two overlapping, but distinct, international audiences. Diaspora viewers, e.g., Nigerian, Ghanaian, Kenyan communities in the UK, U.S., Germany, France show higher baseline interest. They also respond to community anchored marketing such as church/mosque outreach, influencers, and community cinemas. Festival organisations like Film Africa explicitly "celebrating African cinema" in London bridge diaspora and broader cinephile publics and act as repeat touchpoints for discovery and debate. The qualitative findings indicated that diaspora emerged as the most immediate and commercially viable segment, although its impact varied significantly by region. North America particularly the United States and Canada was identified as the leading market, driven by a larger and more established diaspora base alongside stronger monetization opportunities. In contrast, the diaspora in Germany was considered insufficient to sustain a commercial theatrical market. Even in contexts with relatively large diaspora populations, cinema attendance did not consistently translate into significant box office performance, with only a small fraction of potential audiences engaging in theatrical viewing.

Non-diaspora audiences in Europe/North America more often encounter African films via festivals, public broadcasters such as ARTE's thematic strands, specialty exhibitors, and university programmes. German buyer profiles indicate ARTE/3sat curate "contemporary arthouse and festival attached movies," consistent with how African films enter German cultural television schedules. In addition, the key informants revealed among non-diaspora audiences, engagement remained limited. Where engagement did occur, it was often framed through a "touristic" or "exotic" lens, with audiences seeking cultural insight rather than consuming the films as mainstream entertainment. However, this pattern showed signs of generational variation. Younger audiences particularly those under 15 were described as more platform-driven and less concerned with a film's country of origin, instead prioritizing content accessibility and entertainment value.

Positioning and reception

The positioning of African works affects reception abroad. Arthouse dramas and creative documentaries with festival pedigrees typically reach critics and cinephiles. Genres such as thriller, romance, comedy, horror tend to travel best on streamers and diaspora cinemas. Trade reporting and streamer disclosures highlight African series/films that break out internationally (e.g., *The Black Book* reached Netflix global Top 10) but also note recalibration in commissioning and budgets that narrows the pipeline for mid-tier projects. European audiovisual data from Lumiere database indicates non-English originals have increased their share on major platforms, implying a broader consumer openness to subtitled/dubbed content, a context that arguably benefits African titles if discoverability is solved.

In reference to the key informants, there is a growing push to reposition content toward commercially viable genres such as thrillers, sci-fi and historical dramas, alongside a shift toward digital-first formats and series. However, regardless of positioning, production value remained the key determinant of success, with high technical standards serving as a prerequisite for accessing international markets.

2.4 Social Impact in International Context

Shaping perceptions of Africa

The international circulation of African films arguably contributes to a more diverse representation of the continent, countering monolithic or deficit narratives. UNESCO's policy framing positions films as "public goods" warranting public support because of their role in cultural diversity and social dialogue. At major European festivals, curatorial statements and programming trends highlight African cinema's political and social textures—an emphasis visible in recent Berlinale coverage positioning African works as vehicles for messages of peace, tolerance, and post-conflict reflection. While this language comes from festival adjacent media commentary rather than a single dataset, it indicates- how gatekeepers frame the social stakes of African cinema for European audiences[15].

According to the qualitative interviews African cinema faced significant perceptual barriers, with international audiences often viewing it through a narrow lens. While some filmmakers attempted to "westernize" content to expand reach, experts emphasized that authentic, locally grounded stories such as *Nairobi Half Life* were often more impactful and relatable regardless of their background. At the same time, gaps in production infrastructure contributed to lower technical quality, reinforcing misconceptions about African filmmaking, with high production value remaining the key gatekeeper for global recognition and distribution.

"*So, there is a certain standard that you should not, where your film should not go below, you know, so you have to meet a certain production standard. And I think this is key to have an easy entry into the film market" Filmmaker, Germany*

Partnerships and advocacy

International funds and broadcasters often connect African films to advocacy circuits (e.g., parliamentary screenings, NGO campaigns). The WCF's stated mission explicitly couples artistic support with democratizing international film production, and its Africa line—supported by Germany's Federal Foreign Office—institutionalizes partnerships that can translate into policy dialogues around co-production and cultural exchange. DW Akademie's Film Development Fund operates one step earlier in the chain—development and mentorship—but its logic is similar: enabling films from Ethiopia, Tanzania, and Uganda[16] to reach a quality threshold that makes festival selection, international financing, and impact campaigns more likely[17].

[15] African Cinema Illuminates Berlinale with Powerful Messages of Peace and Tolerance
[16] DW Akademie Film Development Fund - A growing community
[17] Start - Film Fund - DW Akademie Film Development Fund

African films relied heavily on partnerships, though these often-presented structural challenges. Funding largely came from NGOs, embassies and cultural institutes, providing vital subsidies in the absence of local film funds but requiring alignment with social impact or educational themes.

"What we have to understand is that social impact is a code and reality in many African countries because there does not exist a film funding system, so at least a social impact film is the only way, at this level, to get any funding—to get funding from NGOs, to get funding from embassies, to get funding from GIZ, to get funding from whatever, yeah. It's a little bit of a subsidy compared with the normal funding system that we have, for instance, in France and Europe, which is far away from the amount." Distributor, Germany

This dependency sometimes limited creative independence, with filmmakers pressured to include inauthentic narrative elements. Sustainable international growth depended on stronger advocacy and trade agreements to support co-production and distribution. While institutions like Goethe-Institut and Alliance Française offered screening spaces, these interventions are not aimed at building a self-sustaining, market-driven industry.

Impact narratives and examples

While rigorous counterfactual evaluation is scarce, case led reporting shows patterns. WCF's funded slates over multiple jury rounds include projects from Sudan, Cameroon, Egypt, Lesotho, Senegal, Rwanda, and DRC, many of which subsequently appear at major festivals; this exposure often generates media coverage and invitations to policy forums on topics ranging from migration to resource governance—indicative of soft power and advocacy spillovers. Public broadcasters also commission or acquire high visibility factual series with African perspectives—e.g., ZDF/ARTE's *Africa from Above*—that blend environmental, urban, and cultural storytelling for mainstream European audiences, potentially normalizing African locales as sites of innovation rather than crisis. Primary research would be needed to quantify attitude change; however, existing program rationales and festival media show a consistent belief among European cultural institutions that African cinema contributes to intercultural understanding[18].

Several films and models from the qualitative interviews illustrated how African cinema could drive advocacy and policy dialogue. The film *Impure* (2024, Kenya/Germany) for instance addresses period stigma and was successfully used as an educational tool, including school campaigns and post-screening discussions that reportedly transformed teachers' mindsets in Uganda. *The Legend of the Vagabond Queen of Lagos* (2024, Nigeria/South Africa/USA/Germany), a co-production that premiered at the Toronto International Film Festival, achieved high social impact visibility through coverage in outlets such as The Guardian and The Washington Post, even though commercial returns were limited. The German initiative Vision Kino was highlighted as a successful model for integrating impact-driven films into education, facilitating millions of student admissions annually and providing teachers with materials to discuss political and social issues raised in the films. At the same time, the analysis noted a contrast between festival-style arthouse films, which appealed to Western critics but could feel "a little boring," and Nollywood-style productions, which retained authentic energy and resonated more organically with African audiences.

2.5.3 Lessons and opportunities for distribution, audience, and impact

Lesson for distribution

A key lesson was that weak domestic distribution systems remained the primary bottleneck to international success. In the absence of a functional "machine" for local cinema release and circulation, which typically fed into streaming visibility and global discoverability, films often failed to meet the structural requirements of international markets. At the same time, the

[18] Shooting finalized of ZDF Enterprises' major new Factual series Africa from Above | ZDF Studios

traditional model of upfront “flat license fees” or “minimum guarantees” had largely disappeared, with approximately 95% of distribution agreements shifting to revenue-share models that made returns strictly performance-dependent and often delayed by at least a year due to complex reporting and payment cycles.

In parallel, global platforms such as Tubi, LG Channels, and Samsung TV Plus increasingly prioritized high-volume content over single-film acquisitions, requiring distributors to supply hundreds of hours of programming and pushing the industry toward catalogue and slate-based strategies. Weak rights management systems further constrained international potential, as filmmakers frequently undermined commercial value by uploading content to platforms like YouTube shortly after festival runs, thereby violating exclusivity windows. While African markets showed growing potential, North America remained the most critical region for monetization due to its advanced digital infrastructure, established distribution ecosystems, and higher consumer spending power.

Lessons for audience development

The need to move beyond “trauma-heavy” or conflict-centered narratives and position African cinema across a full range of genres; including thrillers, dramas, science fiction, and comedies, to achieve broader international reach. Successful films consistently emphasized universal human experiences, with relatability grounded in shared emotions, relationships, and life struggles emerging as the strongest driver of cross-cultural audience engagement. While the use of local languages such as Swahili strengthened cultural authenticity, it also created accessibility barriers for international audiences who preferred dubbed or audio-led content over subtitles. However, experts cautioned against “westernizing” narratives, emphasizing that maintaining cultural specificity was critical for authenticity and for positioning films as representative “lighthouses” of national cinema. At the same time, younger global audiences were increasingly indifferent to a film’s country of origin, prioritizing content quality and ease of access, with platform availability and algorithmic visibility playing a more decisive role than geographic or cultural context.

Lessons for social impact

There was a clear need to move beyond trauma-heavy narratives and position African cinema across diverse genres to expand international reach. Successful films consistently emphasized universal human experiences, with relatability grounded in shared emotions, relationships, and life struggles, emerging as the strongest driver of cross-cultural audience engagement. While the use of local languages such as Swahili strengthened cultural authenticity, it also created accessibility barriers for international audiences who preferred dubbed or audio-led content over subtitles. However, experts cautioned against “westernizing” narratives, emphasizing that maintaining cultural specificity was critical for authenticity and for positioning films as representative “lighthouses” of national cinema. At the same time, younger global audiences were increasingly indifferent to a film’s country of origin, prioritizing content quality and ease of access, with platform availability and algorithmic visibility playing a more decisive role than geographic or cultural context.

3. Conclusion

This study highlights a film sector that is rich in creativity but still facing structural and financial limitations. African cinema is gaining clear visibility on the global stage, from strong performances at international festivals to impressive digital viewership figures such as a single Kenyan series surpassing half a million views. These achievements show that there is real and growing demand for African content worldwide. However, the findings also make it clear that demand on its own is not enough to sustain long term industry growth without intentional investment in distribution systems, audience development, and mechanisms for measuring impact.

The recent pullback by major streaming platforms, alongside the shutdown of Showmax in early 2026, represents a turning point for the industry. African film sectors can no longer depend on inconsistent external investments to drive global reach. Instead, there is a need to build stronger and more reliable systems from within. This includes developing professional distribution channels, improving how rights are managed, strengthening co production partnerships, and building data systems that can reduce risk for investors and improve access to markets. Initiatives such as those supported by GIZ and Afreximbank through CANEX are important in this shift. The USD 1 billion CANEX facility has the potential to be transformative, especially if it is aligned with the broader structural reforms identified in this study.

Reaching a USD 20 billion audiovisual economy in Africa is possible, but it will require coordinated effort across the entire ecosystem. Governments, investors, producers, distributors, and development partners all have a role to play. What is needed is a shared commitment to building an industry where African stories can be told authentically, distributed widely, and monetized fairly. With the right systems in place, the sector can move beyond its current constraints and grow into a sustainable and globally competitive industry.

4. Recommendations

Opportunities for distribution, audience, and impact

The stakeholders' insights suggest that the African film industry is at a turning point, with opportunities to move beyond festival-based exposure toward more structured, market-driven growth. There is strong potential for international partnerships, particularly through formal trade agreements and better alignment in business practices between African and European stakeholders. Expanding into commercial markets such as Germany supported by a growing Afro-German audience and increasing interest in African culture offers new pathways, especially through specialized distribution models that bypass traditional gatekeepers. At the same time, the shift to digital-first, performance-driven distribution, including FAST channels, requires high content volumes and adaptability to new commercial realities.

Audience development opportunities is seen to lie in universal storytelling, youth-focused content, and strategic use of diaspora markets, although diaspora audiences alone are insufficient to sustain large-scale theatrical success. Language also remains a key barrier, with English-language content being more exportable. Additionally, social impact films present alternative distribution and engagement models, particularly through educational screenings, but often struggle to compete in mainstream entertainment markets. Overall, growth will depend on leveraging technology, targeting high-monetization markets, addressing data gaps, and balancing social impact with commercial viability.

2.5.4. Opportunities for further international (including Germany)–Africa partnerships

The stakeholders' insights pointed to strong growth potential for African film industries, with experts highlighting the need to shift from fragmented, philanthropic support toward structured, commercially driven, and technologically enabled partnerships.

A critical opportunity lay in moving beyond project-based collaboration toward formal political trade agreements. Such agreements were seen as essential for creating a sustainable infrastructure for co-production and distribution, strengthening institutional cooperation between African and European partners, and enabling more predictable market access. In this context, there was also a growing need for government-level advocacy, including stronger support for national films in global platforms such as the Oscars, alongside policy reforms that could create more balanced incentives for African content distribution internationally.

Audience development emerged as another key area of opportunity, particularly through the creation of a paying audience culture. The German Vision Kino model where schools paid to screen socially relevant films as part of structured educational programs, offered a transferable blueprint for building long-term cinematic culture beyond dependency on free NGO or donor-led screenings. This approach highlighted the potential for integrating film into education systems as a sustainable demand driver while also strengthening local appreciation for cinema.

Technological and data collaboration presented additional opportunities, particularly through the combination of Kenyan strengths in digital innovation, AI, and platform usage with German production expertise and industry standards. Such partnerships could help reduce production costs, improve efficiency, and strengthen the analysis of fragmented global audience data, enabling more targeted distribution strategies. At the same time, there was significant potential to leverage AI-driven tools for content creation and visual effects, further enhancing competitiveness in global markets.

A parallel opportunity lay in the professionalization and standardization of distribution systems, particularly in rights management. Weak enforcement and inconsistent practices such as premature uploading of films to platforms like YouTube after festival runs were identified as

major risks that undermined commercial value and restricted international licensing potential. Strengthening rights management frameworks was therefore seen as essential to preserving exclusivity windows and improving access to revenue-sharing models with global platforms.