



Creative Economy Sector Report

This is where Africa's stories become the world's entertainment.



South Africa



EXECUTIVE SUMMARY

Where Africa's Culture Becomes Global Commerce

SOUTH AFRICA'S CREATIVE INDUSTRIES GENERATE R161 BILLION ANNUALLY—rivaling agriculture's GDP contribution—and employ over 680,000 people formally, with roughly 1 million when informal roles are counted.

THIS IS AFRICA'S CULTURAL POWERHOUSE: Netflix, Amazon, and Disney+ have invested R5.2 billion in film and TV production by 2025. Gaming revenues exceed R15 billion, with significant exports. Music streaming surpassed R1.5 billion, driven by Amapiano's 5 billion global streams in 2024.

THE SECTOR SPANS SCREENS TO STAGES: 30-50 animation studios handle a major share of Africa's outsourced contracts. Fashion exports jumped 25% between 2022-24, accelerating in 2025. Cape Town Film Studios anchors global co-productions. Over 150 gaming studios lead Africa's mobile-first revolution. Artists like Tyla and Black Coffee scale globally while designers like Rich Mnisi export South African aesthetics.

WITH THE AFRICAN CONTINENTAL FREE TRADE AREA UNLOCKING 1.4 BILLION CONSUMERS, film rebates up to 35%, and International Finance Corporation backing of US\$20M+ in 2025, South Africa offers investors youth-driven content creation, cost-competitive production, and proven global reach.



EXECUTIVE SUMMARY

Sector Highlights

R161B

GDP CONTRIBUTION (~3%),
PROJECTED 4.3% BY 2028

680,000

FOREIGN FILM INVESTMENT
(2025)

R5.2 B

FOREIGN FILM INVESTMENT
(2025)

R15 B+

GAMING REVENUES (2024)

R1.5 B+

MUSIC STREAMING
(19.9% YOY GROWTH)

25%

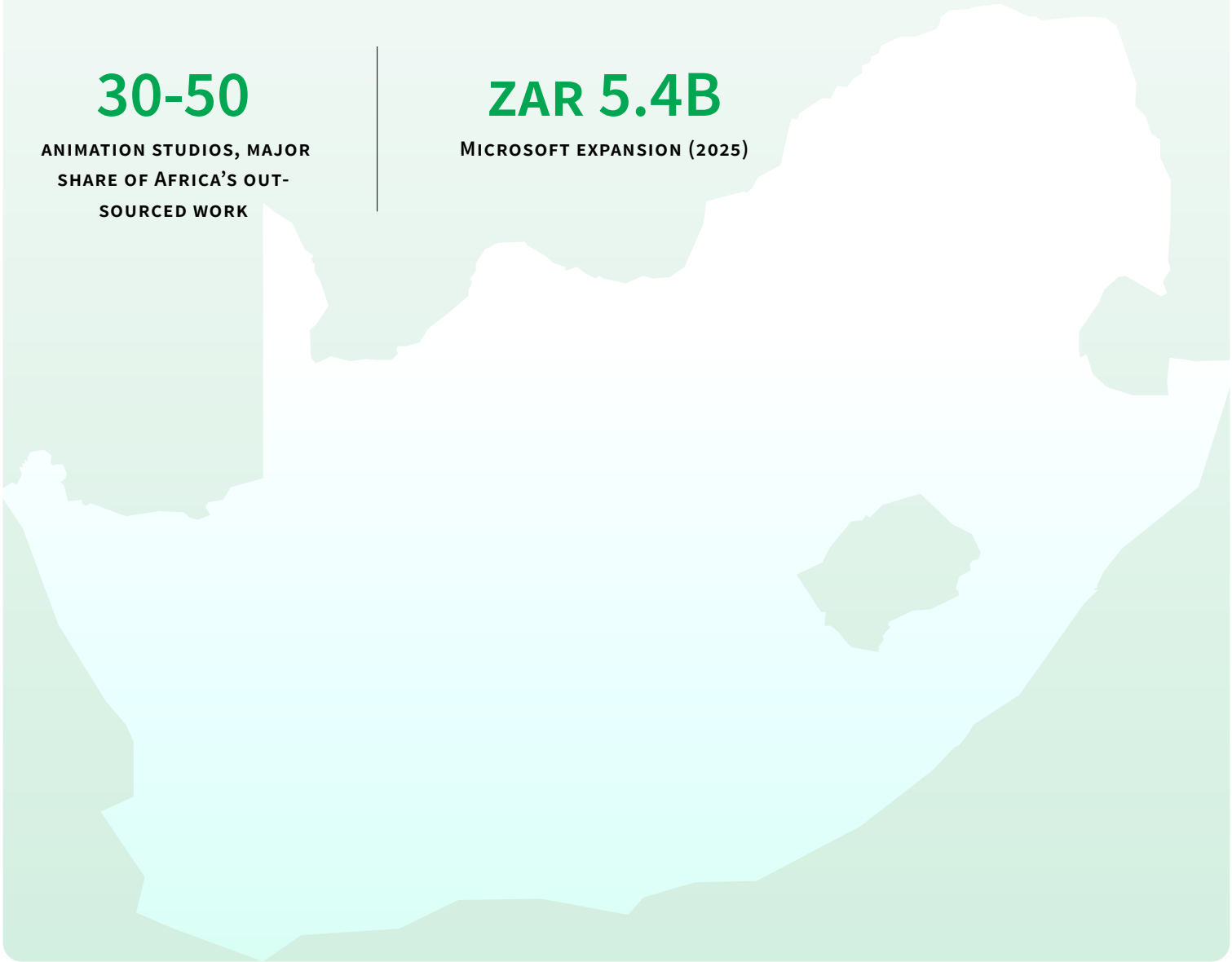
FASHION EXPORTS UP (2022-
24), ACCELERATING IN 2025

30-50

ANIMATION STUDIOS, MAJOR
SHARE OF AFRICA'S OUT-
SOURCED WORK

ZAR 5.4B

MICROSOFT EXPANSION (2025)





FULL SECTOR BRIEF

The Big Picture

South Africa’s cultural and creative industries contribute over R161 billion to GDP (~3%), rivaling agriculture, and employ more than 680,000 people formally—roughly 1 million including informal roles. This youth-driven sector (59% of the population under 35) is experiencing explosive digital growth across film, gaming, music, fashion, animation, and design.

International streaming platforms have invested R5.2 billion in film and TV production by 2025, commissioning 40+ Originals since 2021. Gaming revenues exceed R15 billion, with significant exports and projected 6% annual growth through 2028. Music streaming surpassed R1.5 billion in revenues (19.9% year-on-year growth), with Amapiano driving over 5 billion streams globally in 2024. Fashion and design exports rose 25% between 2022-24, accelerating in 2025, with the market projected to reach R30 billion+ by 2029.

The African Continental Free Trade Area provides access to 1.4 billion consumers, while government incentives (National Film and Video Foundation rebates up to 35%) and International Finance Corporation investments (US\$20M+ in 2025) demonstrate both policy support and international confidence in South Africa’s creative industries.



~3%

SECTOR CONTRIBUTION
TO GDP

59%

POPULATION UNDER
THE AGE OF 35

R30+ B

PROJECT SIZE OF
FASHION & DESIGN
MARKET BY 2028



FULL SECTOR BRIEF

Film & Television Production Hub

Cape Town Film Studios anchors global co-productions, attracting R5.2 billion in foreign investment by 2025. The National Film and Video Foundation offers rebates of 20-35% on qualifying productions, making South Africa cost-competitive with global production centers while maintaining world-class facilities and crews.

Netflix, Amazon Prime Video, and Disney+ have commissioned 40+ Originals in South Africa since 2021, generating over R4 billion in local economic impact. Cape Town's infrastructure, diverse locations, favorable exchange rates, and skilled talent pool position it as a preferred destination for international productions targeting both African and global audiences.

INVESTMENT OPPORTUNITY

Take equity stakes in productions accessing 20-35% NFVF rebates. Netflix, Amazon, Disney+ partnerships provide distribution. R5.2B investment pipeline validates demand.





FULL SECTOR BRIEF

Gaming & Esports Leadership

With R15 billion+ in revenues and significant exports, South Africa leads Africa's gaming industry. Over 150 studios drive mobile-first growth, capturing Africa's 500 million+ gamers. Esports tournaments generated US\$66 million in 2024, with organized competitive gaming gaining mainstream traction.

South African studios develop for global markets while creating locally relevant content. PwC projects continued strong growth through 2026, with the sector expanding at 6% annually. Mobile gaming dominates given smartphone penetration, while PC and console segments expand with improving connectivity and disposable income.

INVESTMENT OPPORTUNITY

Back mobile-first studios and competitive gaming infrastructure. R15B revenues, 6% CAGR through 2028. Africa's 500M+ gamers provide scale.





FULL SECTOR BRIEF

Animation Outsourcing Excellence

South Africa's 30-50 animation studios handle a major share of Africa's outsourced animation contracts. Disney's 'Kizazi Moto' anthology showcases the country's creative and technical capabilities. Studios adopted AI tools in 2025, accelerating production timelines and boosting competitiveness for international contracts.

Cost advantages, English proficiency, compatible time zones with European clients, and strong technical skills make South Africa a preferred outsourcing destination. Studios service global entertainment, advertising, and educational content markets

INVESTMENT OPPORTUNITY

Fund studios capturing a major share of Africa's contracts. AI integration boosts efficiency. Disney collaborations demonstrate export capability.





FULL SECTOR BRIEF

Music Streaming & Global Genres

Music streaming revenues exceeded R1.5 billion in 2024, growing 19.9% year-on-year. Amapiano—a South African house music genre—surpassed 5 billion global streams in 2024, driving international recognition. Artists like Tyla (Grammy winner) and Black Coffee (global DJ/producer) demonstrate South Africa’s ability to export music globally.

The International Federation of the Phonographic Industry’s 2025 Global Music Report highlights South Africa’s 20% year-on-year streaming growth, among the highest globally. Opportunities span artist development, rights management

INVESTMENT OPPORTUNITY

Invest in rights management, streaming platforms, and live events.

R1.5B streaming revenues, 5B+ Amapiano streams, 20% YoY growth





FULL SECTOR BRIEF

Fashion & Design Exports

The fashion sector, valued at R8.9 billion, saw exports grow 25% between 2022-24, accelerating in 2025. The market is projected to reach R30 billion+ by 2029. Designers like Rich Mnisi gain international recognition, while Cape Town's UNESCO City of Design status elevates global visibility.

E-commerce platforms enable direct-to-consumer exports. African Continental Free Trade Area protocols reduce barriers for regional expansion. Cost-competitive manufacturing combined with unique design aesthetics positions South African fashion for continued export growth.

INVESTMENT OPPORTUNITY

Support platforms and production scaling. 25% export growth (2022-24), accelerating in 2025, R30B+ market by 2029.





FULL SECTOR BRIEF

Digital Content & Advertising

Digital agencies generate over R3.5 billion, serving 35+ African markets. Strong English proficiency, creative talent, and cost advantages versus European or North American agencies make South Africa competitive for global campaigns.

Agencies handle branding, social media, video production, and integrated campaigns for multinational and regional clients.





ON THE GROUND

Policy & Support Ecosystem

The National Film and Video Foundation provides film rebates up to 35%. The Department of Trade, Industry and Competition funds creative transformation initiatives. The South African Cultural Observatory measures sector impact and informs policy. UNESCO's Creative Cities network (Cape Town for Design, Durban for multiple categories) amplifies international visibility.

International Finance Corporation investments (US\$20M+ in 2025) in creative platforms demonstrate global confidence. The African Continental Free Trade Area's cultural protocols enable cross-border content licensing and distribution, reducing barriers for South African creative exports.



LOOKING AHEAD

Investment Opportunities

1

GAMING STUDIOS & ESPORTS

Back mobile-first studios and competitive gaming infrastructure.
R15B revenues, 6% CAGR through 2028.
Africa's 500M+ gamers provide scale.

2

FILM & STREAMING CO-PRODUCTIONS

Take equity stakes in productions accessing 20-35% NFVF rebates.
Netflix, Amazon, Disney+ partnerships provide distribution.
R5.2B investment pipeline validates demand.

3

ANIMATION OUTSOURCING

Fund studios capturing a major share of Africa's contracts.
AI integration boosts efficiency.
Disney collaborations demonstrate export capability.

4

MUSIC RIGHTS & PLATFORMS

Invest in rights management, streaming platforms, and live events.
R1.5B streaming revenues, 5B+ Amapiano streams,
20% YoY growth.

5

FASHION E-COMMERCE & MANUFACTURING

Support platforms and production scaling.
25% export growth (2022-24), accelerating in 2025,
R30B+ market by 2029.



LOOKING AHEAD

Challenges & Fixes

- ✓ **INFORMALITY LIMITS SCALE** (35% of activity) — addressed through formalization programs and IP protections.
- ✓ **FUNDING GAPS FOR SMES** are closing via International Finance Corporation and Development Bank of Southern Africa blended finance.
- ✓ **DIGITAL PIRACY THREATENS REVENUES** — stronger enforcement and African Continental Free Trade Area licensing frameworks improve protection.
- ✓ **TALENT RETENTION RISKS** are mitigated by remote contracting models and incentives.
- ✓ **LOAD-SHEDDING DISRUPTIONS** are addressed through embedded generation at studios and venues.



IN SUMMARY

The Bottom Line

South Africa combines scale (R161B GDP, 680,000+ jobs), youth demographics (59% under 35), global platforms (Netflix, Amazon, Disney+), and continental access (1.4B AfCFTA consumers).

For investors, it's Africa's only creative hub offering proven export capability, cost-competitive production, policy support, and youth-driven content creation across film, gaming, music, fashion, and animation—all exporting intellectual property and cultural soft power globally.

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