

Kuza Africa

 **SIGHT**
for GROWTH

UNITED MARKETS

**AfCFTA Powering
Regional Growth**

August | 2025



Introduction

Africa is moving differently now. For decades, different trade rules, underdeveloped infrastructure, and protectionist policies kept African markets fragmented. That is changing. The African Continental Free Trade Area (AfCFTA) is quietly **laying the groundwork** for something bigger - **integrated markets, easier cross-border flows**, and homegrown **brands scaling beyond their own borders**.

This shift isn't just about tariffs and trade. It's **reshaping consumer access, product choice, pricing, and expectations**. For brands, the message is clear: **the next big growth move isn't just within a country—it's across them**. Urban consumers want wider variety and competitive prices. Rural consumers want access. Everyone wants reliability. And brands that can **deliver consistently across borders** will earn not just market share, but loyalty.

Despite the slow rollout, consumer behaviour is already adapting to a more regional Africa. Businesses that respond early by **understanding shared needs, developing multi-country propositions, and rooting their operations in cross-border efficiency** will be best positioned to lead in the next wave of African growth.



54

AU member states signed the afcfta agreement as of january 2025

48

state parties as of January. 2025

30M

million people will potentially be lifted out of extreme poverty

\$450B

income boost in Africa by 2035: a 7% gain



How AfCFTA Is Reshaping Consumer & Brand Behaviour

AfCFTA isn't just a policy shift, it's starting to **reshape what people buy, how brands grow, and what cross-border trade looks like**. The idea of a borderless Africa is already moving from paper to pavement.

Products are getting more regional, from West African snacks in Kenyan stores to mobile banking tools that work across borders.

Prices are flattening as competition rises. Imported goods from within Africa are sometimes cheaper than those from outside.


There's growing **pride in African-made brands**. Consumers are noticing what's local, what's regional, and what's worth supporting.

For brands:


Growth doesn't stop at the country border anymore. Scaling means **tapping into new cities, languages, and consumer mindsets**.

Local manufacturing is making a comeback, especially with incentives tied to AfCFTA.

Startups are moving fast to plug the gaps in payments, logistics, and compliance.

A large yellow puzzle piece graphic containing text.

As of 2023, 46 of 54 member states have ratified the AfCFTA agreement, signalling strong political and economic commitment (UNECA, 2023).

A large blue puzzle piece graphic containing text.

Consumers are becoming pan-African buyers. Brands should position themselves not just as "local champions" but as regional players with scale, speed, and relevance.

So, what do these
changes mean to
consumers?

How is it impacting
and **influencing the**
choices they make?

How can companies
stay relevant in this
new context?



The Key Trends Shaping United Markets

1

Pan-African Brand Building –

African-first brands are winning hearts by tapping into shared identity, culture, and aspirations across borders.



2

Scalable Logistics and Infrastructure Innovation –

Smart logistics platforms are turning distribution from a bottleneck into a competitive edge across African markets.



3

Fintech Enablers of Regional Trade –

Fintechs are unlocking low-cost, instant cross-border payments, making trade frictionless for MSMEs and consumers.



4

Cross-Border E-commerce Acceleration –

Online retail is breaking national barriers as logistics, payments, and regulation align for seamless regional shopping.



5

Regional Influencer Ecosystems –

Pan-African creators are shaping trends and trust, helping brands scale with culturally fluent storytelling.



6

Youth-Led Pan-African Entrepreneurship –

A new generation of founders is building borderless businesses, driving innovation with a continent-wide mindset.



Harmonization of Product Standards –

Unified standards are lowering regulatory hurdles, fast-tracking regional expansion for CPG, pharma, and food brands.

7



Pan-African Brand Building

Brands are no longer thinking country-first. Instead, they're **positioning themselves as African-first**, speaking to a continental identity. Consumers are responding to products that **feel familiar yet aspirational across borders**. Music, fashion, food, and media are leading the charge.

The rise of pan-African brand consciousness is being **driven by a digitally-connected generation** that consumes content across borders daily. Young consumers in Lagos relate to the same Afrobeats artists as their peers in Accra or Kampala, creating **shared cultural touchpoints that transcend national boundaries**. This **digital diaspora effect** means consumers increasingly see themselves as part of a broader African story rather than just their local market. Brands that successfully tap into this pan-African pride find consumers willing to pay for products that represent their **expanded identity**.

What Brands Can Do:

Create **messaging that resonates beyond borders** by using shared cultural references (Afrobeats, fashion, sport).

Build flexible brand systems that **allow local adaptation with a unifying brand voice**.

Leverage regional celebrities, creators, and sports figures to scale influence fast.

Invest in cross-border market research to identify shared values, aspirations, and cultural codes that resonate across target markets

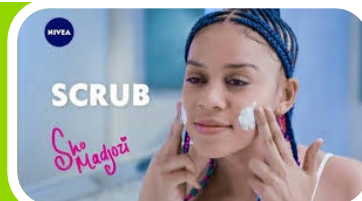
Design packaging and visual identity systems that incorporate pan-African symbols, colors, and languages while allowing for local customization

Create pan-African brand ambassadors programs that rotate influential figures across different markets to build regional recognition

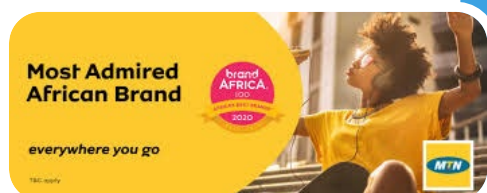
Castle Lite sponsors pan-African music events and uses shared urban culture to build cross-border appeal.



Nivea Africa has created a continental identity in skincare, with product lines and influencers localized by climate and skin needs.



MTN positions itself as an "African digital life brand," operating in over 17 countries with regionally adapted campaigns.



Scalable Logistics and Infrastructure Innovation

To make regional trade work, infrastructure must scale with it. We're seeing a rise in **digital freight matching**, **regional warehousing**, and **real-time tracking solutions** that enable faster movement of goods, essential for FMCG and retail brands going regional. These tech-enabled platforms provide visibility, reliability, and cost efficiency. The transformation is most advanced in corridors like Lagos-Accra, Nairobi-Kampala, and Johannesburg-Harare, where **cross-border trade volumes justify investment in sophisticated logistics infrastructure**. Consumer expectations are also evolving rapidly – **urban shoppers now expect delivery speeds comparable to global standards**, while rural consumers are experiencing modern logistics for the first time through e-commerce platforms. This creates a dual opportunity: serving sophisticated urban demand while building entirely new distribution networks in underserved areas. The most successful logistics platforms are those that **combine local market knowledge with global technology standards**, creating hybrid solutions that work across Africa's diverse infrastructure landscape.

What Brands Can Do:

Integrate with logistics platforms offering regional delivery networks.

Use **regional fulfilment centers** to reduce cost and improve time-to-market.

Partner with infrastructure startups to **pilot new last-mile models**.

Create **logistics partnerships** with complementary brands to share distribution costs and increase delivery frequency

Offer real-time tracking systems that provide customers with transparency across complex cross-border journeys

TradeDepot supports B2B commerce with warehousing across Nigeria, Kenya, and South Africa.



Member Brief
Transforming Africa's logistics



Lori Systems enables cross-border logistics across East Africa.



Kobo360 moves freight across West Africa, helping brands like Dangote move goods.



Fintech Enablers of Regional Trade

Cross-border payments have historically been a friction point in Africa. Fintechs are stepping in to offer **instant, low-cost regional payment** and **FX solutions** for MSMEs and online buyers. The fintech payment revolution **addresses Africa's most persistent trade barrier**: the complexity and cost of moving money across borders. Today's fintech solutions are built **mobile-first** for a continent where smartphone penetration far exceeds traditional banking access. The impact is most visible in corridors like Nigeria-Ghana, Kenya-Uganda, and South Africa-Botswana, where established **trade relationships are being supercharged by instant payment capabilities**. Consumers and small businesses that previously dealt only in cash or local mobile money can now participate in regional commerce. This democratization of cross-border payments is creating new consumer behaviors, from cross-border shopping to remittances to investment, that brands can tap into. The psychological shift is equally important: **when payments become seamless, consumers start thinking regionally** rather than nationally about their purchasing options.

What Brands Can Do:

Integrate with **cross-border payment** APIs and wallets.

Develop regional pricing strategies that account for currency fluctuations while maintaining affordability across markets

Offer pricing in **local currencies** with live FX rates.

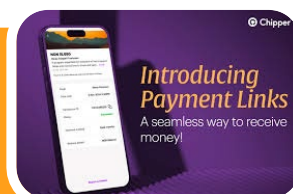
Design payment experiences that work seamlessly across different mobile money ecosystems and banking infrastructures

Provide **trade finance** or credit scoring tools to cross-border merchants.

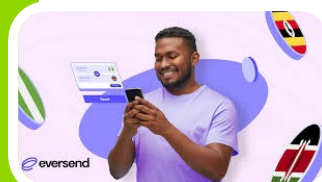
Build **B2B loyalty programs** across markets.

Create cross-border loyalty and rewards programs that allow customers to earn and redeem points across multiple countries

Chipper Cash enables low-cost P2P transfers across multiple African countries.



Eversend allows multi-currency wallets and FX across Uganda, Kenya, Nigeria, and beyond.



Onafriq connects mobile money wallets across 35+ countries.



Cross-Border E-commerce Acceleration

E-commerce is growing beyond national borders. Logistics players, fintechs, and retailers are aligning to break the cross-border delivery and payment barriers. The AfCFTA promises smoother customs and tax rules, **unlocking new online consumer flows**. The trend is most pronounced in urban centers across West and East Africa, where consumers actively seek products not available in their local markets. **Social media plays a crucial role**, with consumers discovering products through influencers and peers in other countries, then seeking ways to purchase them. The **rise of "social commerce"**, buying products directly through Instagram and WhatsApp, is particularly relevant for cross-border trade, as these platforms naturally connect consumers across borders. Small and medium businesses are leading this charge, often starting as individual entrepreneurs selling unique products (from Ghanaian shea butter to Kenyan coffee) across the continent before scaling into larger operations. The **customer experience expectations are evolving rapidly**, with consumers expecting the **same level of service, return policies, and customer support for cross-border purchases** as they would receive domestically.

What Brands Can Do:

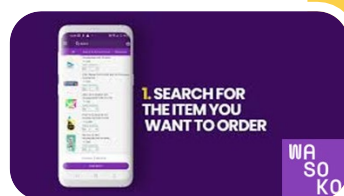
Partner with **e-commerce platforms** that are expanding regionally.

Harmonize **SKUs, pricing, and packaging** for multi-country markets.

Invest in **cross-border payment options** (mobile wallets, multi-currency).

Use data to **identify demand in under-served regional markets**.

Build **marketplace presence strategies** that optimize for discoverability across different e-commerce platforms in various countries



Wasoko enables digital B2B e-commerce across East Africa, moving goods across borders.

Flutterwave Store allows SMEs to sell cross-border with payments in multiple currencies.



Sendy helps businesses manage cross-border deliveries across Kenya, Uganda, and Nigeria.

INTRODUCING

Flutterwave Market



Regional Influencer Ecosystems

Influencer marketing is scaling past national borders. Pan-African creators on TikTok and Instagram are building loyal audiences across multiple countries. Brands tapping into this are getting **unmatched scale with cultural fluency**. Social media algorithms have created **organic cultural bridges** where a creator in one country can build significant followings in multiple markets simultaneously. The most successful pan-African influencers are those who **understand the nuances of different markets while tapping into shared experiences**, from the universal challenges of young entrepreneurship to the common love for Afrobeats music. **Consumers trust these influencers** because they feel authentic to the African experience rather than imported from Western markets. The economic impact is significant: brands working with pan-African influencers can achieve the **reach of multiple country-specific campaigns** while maintaining message consistency and cultural authenticity. The trend is creating new career paths for creative professionals who can now build continental personal brands from their home markets.

What Brands Can Do:

Work with creators who have **reach across Anglophone or Francophone markets**.

Localize content per market while maintaining shared creative direction.

Collaborate on regional campaigns that use **music, slang, and trends that cross borders**.

Develop long-term partnership strategies with emerging pan-African creators rather than one-off campaign collaborations

Build creator exchange programs that bring influencers from different markets together to cross-pollinate audiences

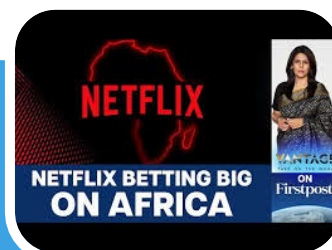
Ariel (P&G) used a mix of Nigerian and Ghanaian influencers for a detergent challenge campaign.



Tecno Mobile regularly runs regional campaigns using cross-border influencers.



Netflix Africa taps cross-border creators to promote shows in Nigeria, Kenya, and South Africa.



Youth-Led Pan-African Entrepreneurship

Young Africans are **building businesses for the continent**, not just their country. These founders think regionally from day one, creating tech platforms, fashion lines, and services that work **across borders and cultural nuances**. The rise of pan-African entrepreneurship reflects a generational shift in how young Africans view opportunity and identity. Unlike previous generations who focused primarily on local markets, today's entrepreneurs are **digital natives who see the entire continent as their addressable market**. This mindset is shaped by global connectivity, they follow the same tech blogs, watch the same startup success stories, and use the same digital tools as entrepreneurs worldwide, but apply these insights to uniquely African challenges. The trend is **most visible in fintech, e-commerce, and creative industries**, where digital distribution makes regional scaling more feasible. These entrepreneurs often start by solving problems they personally experience, then discover similar pain points exist across borders. They're also more likely to **think in terms of networks rather than hierarchies, building partnerships and collaborations across countries from the outset**. This creates opportunities for brands to work with innovative partners who understand regional markets at a granular level while thinking at continental scale. The cultural impact extends beyond business, these entrepreneurs are **creating new narratives about African capability and ambition** that resonate with consumers across the continent.

What Brands Can Do:

Support or **incubate youth-led regional startups** startup accelerator programs focused on solving cross-border challenges that align with brand objectives

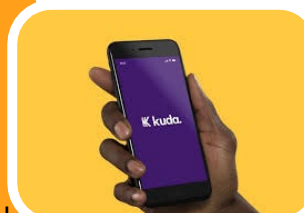
Co-brand or co-market with youth founders.

Use brand investment to **drive inclusion into the broader African startup economy**.

Develop **innovation partnerships** that give brands early access to emerging solutions while supporting young entrepreneurs

Build mentorship networks that connect youth entrepreneurs with brand executives and industry expertise

Kuda (Nigeria) is moving into Ghana and beyond with a pan-African digital bank play.



ThriveAgric (Nigeria) uses tech to connect farmers to buyers regionally.



Wowzi (Kenya) connects brands with micro-influencers across East Africa.

Harmonization of Product Standards

The harmonization of product standards represents one of the most significant but under-appreciated drivers of regional trade growth. This matters most for CPG, food, cosmetics, and pharma, where regulatory differences slow product entry. The AfCFTA's push toward **common standards is leveling this playing field**, but the transition is creating both opportunities and challenges. Brands that **plan for compliance across multiple markets** will win first. Early movers who align with emerging pan-African standards can gain significant first-mover advantages, while those who wait risk being locked out of fast-growing regional markets. The impact is most pronounced in categories like food and beverages, cosmetics, and pharmaceuticals, where regulatory barriers have historically been highest. **Consumer awareness of standards is also growing**, particularly around food safety and cosmetic ingredients, creating demand for products that **meet international standards while being locally relevant**. The trend is creating new competitive dynamics where regulatory compliance becomes a marketing advantage – brands that can credibly communicate their adherence to high standards gain trust and premium positioning across multiple markets.

What Brands Can Do:

Align packaging and labeling with pan-African standards early.

Streamline SKUs and product formats for easier cross-border scaling.

Participate in **trade association lobbying** for simpler regulations.

Invest in **regulatory intelligence** to stay ahead of emerging pan-African standards and requirements

Create **standardized quality assurance processes** that work across multiple regulatory environments

Design **product development processes that consider multi-market compliance requirements** from the outset rather than retrofitting for new markets



Bio Oil sells with packaging aligned to multiple regional regulatory boards.

Unilever has begun standardizing product claims across African markets.



Coca-Cola uses harmonized packaging SKUs for West and Central Africa.

Mind-the-Gap

Africa's digital boom touches every generation—but how they engage, what influences them, and how they respond to brands varies significantly. A tailored approach is essential. Here's how each generation connects to digital platforms, brand themes, and engagement styles:



GEN ALPHA (2013 onwards)

Behaviors : Digital-first and screen-native; exposed to sustainability narratives through YouTube Kids.

Themes that Connect : Shared African identity, language diversity, digital-first learning, early exposure to regional content.

Channels : YouTube Kids, TikTok (via older siblings/parents), educational apps, gaming platforms and gamified apps.

Brand Aspects : Shared African identity, language diversity, digital-first learning, early exposure to regional content.

Engagement Style : Story-based, visually engaging, gamified. Interactive experiences (AR, play-based learning) and child-led campaigns with parental involvement.



GEN Z (1997 - 2012)

Behaviors : Always-on and digitally native, activist mindset, values-based purchasing, cancel culture.

Themes that Connect : Digital hustle, creator culture, borderless music, mobility, Pan-Africanism.

Channels TikTok, YouTube, Instagram. Prefer user-generated content and short-form video.

Brand Aspects : Radical transparency, bold purpose, inclusivity, peer influence, regional cool.

Engagement Style : Memes, challenges, value co-creation.



MILLENNIALS (1981 - 1996)

Behaviors: Digitally savvy, but slower adopters of new platforms. Compare products based on ethics and convenience .

Themes : Impact, legacy, work mobility, financial freedom, ownership.

Channels : Instagram, Facebook, podcasts.

Brand Aspects : Accessibility, borderless utility, speed.

Engagement Style : Informative, everyday problem-solving, lifestyle integration.



GEN X (1965 - 1980)

Behaviors: Budget-aware eco-choices, family-focused.

Themes : Business continuity, cost-efficiency, trade efficiency, pan-African strategy.

Channels : Facebook, email newsletters, YouTube.

Brand Aspects : Compliance, reliability, cross-border support.

Engagement Style : Thought leadership, use cases, expert backing.



BABY BOOMERS (1946 - 1964)

Behaviors: Limited digital adoption, mostly via WhatsApp and radio/TV.

Themes : Trust, stability, regional legacy, intergenerational support.

Channels : Radio, local newspapers, church groups, community markets.

Brand Aspects : Trust, simplicity, integrity, security, intergenerational value.

Engagement Style : Personal, slow-paced, story-rich, community-led storytelling.



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COMMUNITIES

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Enables clients to make consumer relevant decisions by testing on the go

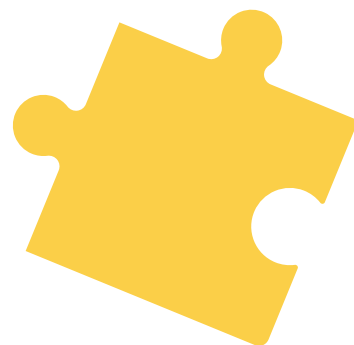


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4SiGHT's solution to curate and build a customized calendar of immersive interviews for client teams to get the pulse of the consumer

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OUR

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AASMA | CHATBOT

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SPRINT+

Provides an innovative boost to your iterative process by making it more AGILE through co-creation workshops, giving wings to potential ideas/improvements



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OUR Calendar 2025

JANUARY

**KUZA AFRICA:
UNVEILING
OPPORTUNITIES,
EMPOWERING
CHANGE**

FEBRUARY

**KUZA AFRICA:
CULTURAL
RENAISSANCE**

MARCH

**ROOTS REVIVAL:
EMBRACING, LOCAL
AND TRADITIONAL,
FAVORITES**

APRIL

**DIGITAL BOOM:
AFRICA'S LEAP INTO
THE FUTURE
ECONOMY**

MAY

**THE SOCIAL PULSE:
INFLUENCING
TRENDS, SHAPING
NARRATIVES**

JUNE

**GREEN CHALLENGES:
TACKLING CLIMATE
CHANGE AND ECO-
PRESSURES**

JULY

**CONSCIOUS
CHOICES:
SUSTAINABILITY
MEETS ETHICAL
LIVING.**

AUGUST

**UNITED MARKETS:
AFCFTA POWERING
REGIONAL GROWTH**

SEPTEMBER

**RIISING STARS:
YOUTH AND
WOMEN LEADING
CHANGE**

OCTOBER

**PLAY TO WIN: E-
SPORTS AND
GAMING ON THE
RISE**

NOVEMBER

**UNWINDING
AFRICA:
ENTERTAINMENT
AND LEISURE
REDEFINED**

DECEMBER

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REVOLUTION:
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