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Nollywood as the Centre of African Cinema and the Reach of its Film Diplomacy: A Comparative Reading Against Hollywood, Bollywood, and the Korean Wave

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Abstract

Nollywood, the Nigerian film industry, releases close to 2,500 titles a year and ranks second in the world by output, behind India and ahead of the United States in some years. How far has Nollywood become the center of filmmaking in Africa, and how does the film diplomacy it carries travel to global audiences? The study draws on Joseph Nye on soft power, Daya Kishan Thussu on media contra-flow, and Simon Anholt on nation branding, and it uses Michael Porter's value chain and diamond model as business tools to read Nollywood as a commercial system and a diplomatic instrument at once. The design is mixed methods. A qualitative comparative case study sets Nollywood against Hollywood, Bollywood, and the Korean Wave, and a quantitative layer reads industry indicators and the Brand Finance Global Soft Power Index across the four countries. The finding is twofold. Nollywood already anchors African cinema by volume, distribution reach, and continental cultural pull, so the first answer is clear. Its diplomacy, by contrast, works mostly through market-driven diffusion rather than a coordinated state programme. The quantitative reading sharpens this: Nigeria produces the most films of the four yet sits 77th on the 2025 Soft Power Index, while Korea, producing far fewer titles, sits 12th, which shows that raw output does not convert into measured influence without orchestration. That organic character gives Nollywood standing as a Global South voice, yet it leaves the diplomatic value under-used next to Korea's governed model.

INTRODUCTION

A Lagos family drama uploaded to YouTube on a Monday can be playing on phones in Nairobi, Accra, London, and Toronto by Tuesday. That speed, more than any festival prize, captures what Nollywood has become. Nigeria's film industry grew out of a market trick in the early 1990s, when traders in Lagos and Onitsha started selling stories shot straight to video, and it now stands as the most productive cinema on the African continent and one of the most prolific anywhere. The U.S. International Trade Administration (2025) reports that Nollywood puts out around 2,500 films a year and counts as the second-largest film industry in the world by volume. Output in 2020 reached 2,599 titles according to the Nigerian National Bureau of Statistics, a figure that in raw count rivals or passes India in particular years (Ayivor, 2020; Baek, 2025; Hand, 2023; Odebola, 2019).

The urgency of this research is underscored by several converging factors. Nigeria's film and music sector added approximately 1.97 trillion naira (close to 1.4 billion US dollars) to GDP in 2023, a gain of 27.5 percent over three years, with Nollywood alone estimated near 1.1 percent of real GDP (U.S. International Trade Administration, 2025). The Nigerian government has begun to recognize this potential through the Creative Industry Financing Initiative and the Nigerian Film Corporation, which in late 2025 framed its Zuma Film Festival around the theme of film as soft power and economic force (AllAfrica, 2025). However, policy remains ad hoc rather than strategic. Meanwhile, South Korea's cultural exports passed 12.4 billion US dollars in 2023, and Brand Finance recorded Korea climbing from twenty-first to fifteenth in its Global Soft Power Index in 2024, a rise explicitly tied to cultural diplomacy (Brand Finance, 2025). Without systematic comparative analysis, Nigeria risks having one of the world's largest cultural exports with one of the weakest diplomatic conversion rates. The window for strategic intervention is open but may not remain so indefinitely as global attention shifts among competing cultural producers (Kloosterman et al., 2019; Teece, 2022; Vlassis, 2016).

The novelty of this research lies in several key contributions. First, this study provides the first systematic comparative analysis of Nollywood against Hollywood, Bollywood, and the Korean Wave within a unified analytical framework integrating soft power theory (Nye, 2004, 2008), media contra-flow (Thussu, 2007), nation branding (Anholt, 2007), and business strategy tools (Porter, 1985, 1990). Second, the research introduces a mixed-method design combining qualitative comparative case study analysis with quantitative descriptive reading of industry indicators and the Brand Finance Global Soft Power Index across four countries, allowing empirical anchoring of theoretical claims. Third, the study identifies and measures the "conversion gap" the disconnect between film output volume and soft power standing through a positioning matrix that plots each industry's approximate annual output against its soft power rank. Fourth, the research develops the concept of "organic diplomacy" versus "governed diplomacy" as analytical distinctions for understanding different models of cultural diffusion. Fifth, the Lionheart episode is analyzed not merely as an isolated incident but as diagnostic of broader structural constraints facing market-driven cultural industries within Western-dominated recognition systems (Ding, 2025; Kashif et al., 2026; Malook et al., 2025).

Scale alone does not settle the matter. A research question for international relations has to ask what that scale does in the world. This paper takes Nollywood as a case where commerce, culture, and foreign policy meet. The guiding question has two parts. First, how far has Nollywood become the centre of filmmaking in Africa? Second, how does the film diplomacy carried by Nollywood reach global audiences, and how does this compare with the film industries that occupy similar or contrasting positions in world cultural trade?

The choice of comparison matters. Hollywood is the obvious global benchmark and the system against which every other industry is measured. Bollywood is the closest peer in raw volume and a fellow industry of the Global South with a large diaspora. The Korean Wave, or Hallyu, is the sharpest contrast, because Korea turned cultural export into a planned arm of statecraft. Reading Nollywood against these three lets the paper separate what Nollywood does well on its own terms from what it has not yet built.

The argument runs as follows. On the first question, the evidence is one-sided. Nollywood is the centre of African cinema by output, by distribution reach across the continent, and by the cultural pull of its stars and storylines. On the second question, the picture is mixed. Nollywood

projects Nigeria and a broader African image abroad, but it does so through the market rather than through a state that plans for it. This makes Nollywood an unusual diplomatic asset, powerful in its authenticity and weak in its coordination. Korea shows what the governed version looks like. Nigeria has the raw material for the same outcome and has only recently started to organise around it.

METHOD

The study used a mixed-methods comparative case study design. The qualitative core is an interpretive reading of one main case, Nollywood, against three comparison cases: Hollywood, Bollywood, and the Korean Wave. The cases were selected because each marks a distinct point on two axes that matter for the research question, the scale of output and the degree of state orchestration. The qualitative work relies on document analysis and secondary data. Sources include scholarship on Nollywood by Jonathan Haynes, Brian Larkin, and the contributors to the Global Nollywood volume edited by Matthias Krings and Onookome Okome; industry data from the U.S. International Trade Administration and the Nigerian National Bureau of Statistics; the 2021 UNESCO report on the African film industry; and reporting on landmark episodes such as the 2019 disqualification of Lionheart from the Academy Awards. Theory and the two Porter tools structure the reading of this material.

The quantitative layer is descriptive and comparative rather than inferential. It works with three kinds of figures. The first is a time series of Nollywood production and economic indicators, used to describe growth, scale, and market share. The second is a cross-national comparison of the four countries on the Brand Finance Global Soft Power Index for 2025, with the 2026 update added where available, including the overall rank and score and the culture and arts pillar. The third is a positioning matrix that plots each industry's approximate annual output against its measured soft-power rank, which turns the qualitative argument into a single readable figure. One caution applies throughout. With four cases the quantitative reading is illustrative, not statistical, so the paper reports patterns and ratios rather than tests of significance, and it treats the Soft Power Index as a proxy for diplomatic conversion rather than a direct measure of film influence. Used with that caveat, the numbers give the qualitative claim an empirical anchor.

RESULTS AND DISCUSSIONS

Nollywood as the Centre of African Cinema

The first research question asks how far Nollywood has become the centre of African filmmaking. Three measures answer it: output, reach, and pull.

1. **Output**

   By volume Nollywood has no rival on the continent and few in the world. The National Bureau of Statistics recorded 450 films in 2017, rising to 700 in 2019 and 2,599 in 2020, an increase of roughly 478 percent across that short span. Industry estimates put steady-state output near 2,500 a year, with some weeks producing close to 50 titles in English and Nigerian languages. Lagos, Onitsha, and Abuja host most production. No African film industry comes close to these figures, and the gap is not narrow but categorical. South Africa, Egypt, and Kenya produce respected work, yet none operates at Nigeria's scale or speed.

2. **Reach**

   Volume would mean little if the films stayed home. They do not. Nollywood titles circulate across Anglophone and increasingly Francophone Africa, carried first by informal video markets and satellite channels, then by Netflix and Amazon Prime, and now most of all by YouTube. The shift to YouTube has widened reach further, since a smartphone and a data bundle replace a cinema ticket or a pay-television subscription. UNESCO's 2021 study of the African film industry treated Nigeria as the continent's production hub and the reference point for the sector's growth. A Nigerian story shot in Enugu can reach viewers across several countries within hours of upload, a distribution pattern that Brian Larkin (2008) traced back to the informal infrastructures of piracy and street trade that built the industry in the first place.

3. **Pull**

   Reach becomes centrality when audiences elsewhere start to orient themselves toward the centre. Here Straubhaar's cultural proximity does the work. Across much of Africa, Nigerian films, slang, fashion, weddings, and humour set a shared reference for an urban, aspirational, recognisably African modern life. Moradewun Adejunmobi (2007) read early Nollywood circulation as a minor transnational practice, a south-to-south flow that built audiences without passing through Western gatekeepers. Jonathan Haynes (2016) documented how Nollywood invented its own genres rather than importing them. The result is a cinema that other African industries and audiences look toward, not away from. On output, reach, and pull together, the verdict on the first question is firm. Nollywood is the centre of African cinema, and it is not a close contest.

The Business Architecture Behind Nollywood's Rise

Why did this particular industry become central, and what does its structure reveal about its diplomatic potential? Porter's tools answer the first part and set up the second.

1. **The value chain**

   Nollywood's value chain is lopsided. Its production end is fast, cheap, and prolific, which is the engine of the volume described above. Low budgets and quick shoots let many independent producers enter, a point the African Association of Entrepreneurs (2025) and earlier industry writers have made repeatedly. The weakness sits downstream. Rights protection has long been poor, with piracy eating revenue that should return to producers, and the move to streaming has only partly fixed this. Box-office figures show the upside when the chain holds together: FilmOne data cited by industry trackers put local films at about 56 percent of Nigerian box-office revenue in the first quarter of 2024, with Hollywood at 44 percent, even as ticket prices jumped. The lesson is that Nollywood generates enormous value at the front of the chain and captures too little of it at the back. A diplomatic strategy that wants to ride on Nollywood must first help the industry monetise its own reach.

2. **The diamond**

   Porter's diamond explains the accident. Nigeria's demand conditions are extraordinary: a home market above 200 million people and a continental audience that shares enough cultural ground to consume the same stories. Related and supporting industries grew in step, with Afrobeats giving Nigerian content a second global channel and a fast-growing

telecoms sector putting the films on phones. Firm rivalry is intense, since thousands of small producers compete on speed and story. What the diamond lacked was strong factor conditions, meaning studio infrastructure, formal finance, and trained crews at scale, and a supportive government role. For most of Nollywood's life the state was absent. Only recently has Abuja begun to act, through the Creative Industry Financing Initiative and the Nigerian Film Corporation, which in late 2025 framed its Zuma Film Festival around the theme of film as soft power and economic force. That framing is new. It signals a government starting to see what it has.

Film Diplomacy and Nation Branding

The second research question asks how Nollywood's film diplomacy reaches the world. The honest answer is that it reaches the world without being sent. Diffusion does the diplomacy.

Consider what foreign audiences absorb. Through Nigerian films they learn slang, see wedding customs, pick up the rhythms of family conflict and ambition, and grow familiar with Nigerian food, dress, and faith. This is Nye's soft power working at street level and Anholt's culture channel editing a national image one viewer at a time. Several recent studies, including work surveyed on Nigerian cultural diplomacy between 2015 and 2023, argue that Nollywood has countered negative stereotypes and positioned Nigeria as a cultural reference point in Africa and beyond. The 2024 policy paper from the Policy Center for the New South made a parallel case, reading Nollywood and Afrobeats as Global South soft power that converts creative capital into influence.

The diffusion has produced real milestones. Netflix acquired Lionheart in 2018 as its first Nigerian original. In 2025, My Father's Shadow by Akinola Davies Jr. became the first Nigerian film to compete in the Un Certain Regard section at Cannes, drawing distribution interest before the festival even opened. These are markers of arrival in the spaces that confer global prestige.

1. **The Lionheart episode and the limits of organic diplomacy**

   One event exposes the gap between reach and recognition. In 2019 Nigeria submitted Lionheart, directed by and starring Genevieve Nnaji, as its first-ever entry for the Academy Award for Best International Feature Film. The Academy disqualified it because only about eleven minutes of the ninety-five-minute film were in a language other than English, and the category required a predominantly non-English dialogue track (Variety 2019; Al Jazeera 2019). English is Nigeria's official language, a direct inheritance of British colonial rule, and it functions as the bridge among more than five hundred local tongues. The director Ava DuVernay publicly questioned whether the rule barred Nigeria from ever competing in its own official language.

   The episode is more than a curiosity. It shows that the very feature giving Nollywood its global reach, the English language, runs into a gatekeeping system designed around a different idea of national cinema. An organic, market-built industry had no diplomatic apparatus to anticipate or contest the rule in advance. The Nigerian selection committee responded by promising to submit non-English films in future, which solves the eligibility problem but tugs against the commercial logic that built the industry. A coordinated film-diplomacy strategy would have engaged the Academy's rules as a site of negotiation rather than absorbing the rejection after the fact.

2. **The missing state**

This is the heart of the second answer. Nollywood's diplomacy is bottom-up. It is carried by producers chasing audiences and by platforms chasing subscribers, not by a foreign ministry pursuing influence. The strength of this model is credibility. Nobody can dismiss Nollywood as propaganda, because no government wrote its scripts. Thussu's contra-flow gains its legitimacy precisely from being unplanned. The weakness is that the diplomatic value spills out untapped. There is no treaty network built around co-productions, no systematic festival diplomacy, no integration of Nollywood into Nigeria's public diplomacy in the way Korea folded Hallyu into its diplomatic white papers. Nigeria has the attraction. It has not built the machine that turns attraction into leverage at the official level.

Comparative Analysis

Placing Nollywood beside Hollywood, Bollywood, and the Korean Wave clarifies its position. The table below summarizes the four cases across the dimensions that matter for the research question.

Table 1. Four film industries compared across origin, scale, distribution, state role, recognition, diplomacy, and weakness.

Dimension	Hollywood (US)	Bollywood (India)	Nollywood (Nigeria)	Korean Wave (South Korea)
Origin	Studio system, early 1900s	Mumbai cinema, 1910s to 1930s	Video boom, Living in Bondage 1992	Post-liberalization, late 1990s
Annual output	About 500 to 700 features	About 1,500 to 2,000 features	About 2,500 titles	Modest in film, content-led across drama and music
Distribution model	Studios and theatrical majors	Theatrical plus diaspora circuits	Informal marketers, now YouTube and Netflix	State-backed export, global streaming
State role	Light, market-led	Limited, formalizing recently	Minimal historically, catching up through CIFI and the Film Corporation	Central and institutionalized, Basic Law 1999, KOCCA
Recognition path	Owns the global awards system	Festivals and diaspora demand	Streaming scale, Cannes 2025, Oscar friction in 2019	Parasite, Squid Game, BTS at the United Nations
Diplomatic logic	Hegemonic projection of American life	Diaspora bonding and regional pull	Contra-flow, pan-African identity, organic branding	Deliberate, governed nation branding
Main weakness	Market saturation	Heavy domestic dependence	Weak copyright, funding gaps, gatekeeping	Overreliance on platforms and burnout

3. **Against Hollywood**

   Hollywood is the system, not merely a participant in it. It writes the rules of global recognition, owns the dominant awards, and projects American life as a default global culture. Nollywood cannot match Hollywood's budgets, infrastructure, or institutional power, and it does not try to. The comparison is instructive in reverse. Where Hollywood projects from a position of structural dominance, Nollywood projects from below, as a contra-flow. The Lionheart case is a small collision between the two logics, the global gatekeeper and the upstart that does not fit the gate.

4. **Against Bollywood**

   Bollywood is the natural peer. Both are Global South industries of high volume that built large audiences without Western validation, and both lean on a diaspora and on cultural proximity within their regions. The difference is reach pattern. Bollywood's pull is strongest among Indian and South Asian diaspora communities and in markets with historical ties to India. Nollywood's pull is continental first, spreading across African states that share little except a recognisable modern African condition, then diasporic. Nollywood is, in this sense, more pan-regional than Bollywood, since it knits together many nations rather than serving one large nation and its scattered children.

5. **Against the Korean Wave**

   This is the comparison that teaches the most. Korea did deliberately what Nigeria did by accident. After the 1997 financial crisis the Korean government treated cultural industries as strategic assets. The Basic Law for the Promotion of Cultural Industries passed in 1999, and the body that became the Korea Creative Content Agency was set up to push exports. Successive governments protected the domestic film market with screen quotas, subsidised exports, and built dedicated Hallyu units inside the culture ministry. By the 2010s the policy had shifted from an economic logic to a branding logic, and the 2010 diplomatic white paper named soft power as a goal. The payoff is measurable. Korean cultural exports passed 12.4 billion US dollars in 2023, and Brand Finance recorded Korea climbing from twenty-first to fifteenth in its Global Soft Power Index in 2024, a rise the agency tied to cultural diplomacy. Parasite winning Best Picture in 2020, Squid Game on Netflix, and BTS speaking at the United Nations are the visible peaks of a planned ascent.

   Set Nigeria beside this. Nollywood reaches comparable or larger audiences by volume, yet the state arrived late and light. There is no Nigerian equivalent of the Basic Law, no funded export agency on Korea's scale, no integration of film into a published soft-power doctrine until the recent stirrings around the Film Corporation and the Creative Industry Financing Initiative. The Korean case is not a template to copy wholesale, since Korea's centralised, well-financed state differs sharply from Nigeria's. It is, instead, a demonstration of the ceiling. Nigeria has the cultural product and the audience. What it lacks is the orchestration that converts a popular export into durable diplomatic capital.

A Quantitative Reading

Numbers do not replace the interpretive argument, but they discipline it. This section reads three sets of figures: the growth and scale of Nollywood, the standing of the four countries on the Brand Finance Global Soft Power Index, and the relationship between the two once they are plotted together.

1. **Growth and scale**

   Nollywood's output climbed steeply across the late 2010s. The National Bureau of Statistics recorded 450 films in 2017, 565 in 2018, 700 in 2019, and 2,599 in 2020, a rise of about 478 percent across four years. The 2020 count carried a pandemic backlog, so the steady-state estimate near 2,500 titles a year is the fairer benchmark, and even that places Nollywood at or near the top of world output by volume. The economic figures move in the same direction. The U.S. International Trade Administration (2025) reports that Nigeria's film and music sector added around 1.97 trillion naira, close to 1.4 billion US dollars, to GDP in 2023, a gain of 27.5 percent over three years, with Nollywood alone estimated near 1.1 percent of real GDP. Local films took about 56 percent of Nigerian box-office revenue in the first quarter of 2024, ahead of Hollywood's 44 percent, and projections for the wider entertainment sector run toward 10.8 billion US dollars. On scale and growth, the industry is not a promise. It is already large.

2. **Standing on the Soft Power Index**

   Scale is one axis. International standing is another, and the two do not move together. The Brand Finance Global Soft Power Index surveys more than 150,000 respondents across over 100 markets and scores all 193 UN member states on perceived attraction and influence. Table 2 sets the four countries side by side.

Table 2. Annual film output and Global Soft Power Index standing, 2025 and 2026 (Brand Finance). Output figures are approximate industry estimates; n/a marks scores not disclosed for that year.

Country (industry)	Approx. annual output	SPI 2025 rank	SPI 2025 score	SPI 2026 rank (score)
United States (Hollywood)	About 600 features	1	n/a	1 (74.9)
India (Bollywood)	About 1,750 films	30	49.8	32 (48.0)
South Korea (Korean Wave)	About 150 features	12	n/a	11 (59.2)
Nigeria (Nollywood)	About 2,500 titles	77	36.4	lower third

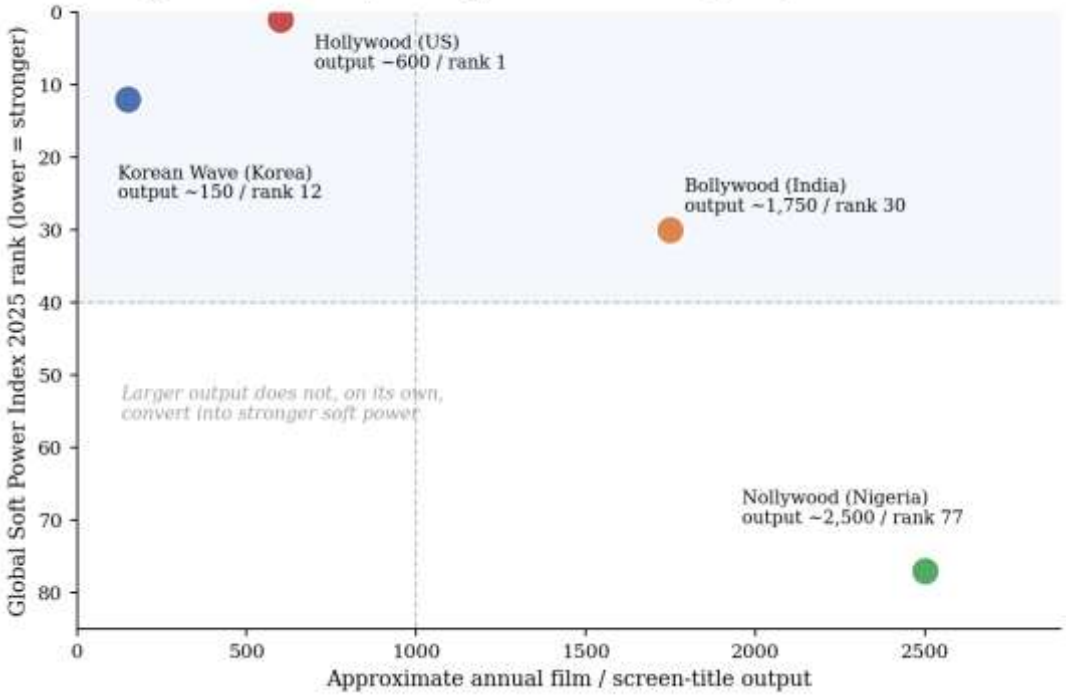
The contrast is sharp. In 2025 the United States ranked first, South Korea twelfth, India thirtieth with a score of 49.8, and Nigeria seventy-seventh with 36.4, the lowest of the four by a wide margin. The 2026 iteration, published in late January 2026, kept the pattern even as scores fell worldwide. The United States held first at 74.9 despite the steepest annual drop in the whole index, South Korea rose to eleventh at 59.2, India

slipped to thirty-second at 48.0, and Nigeria stayed in the lower third. The culture measures point the same way. India ranked sixth for arts and entertainment and the United States first, both far above Nigeria, even though Nollywood out-produces both by film count.

3. **Output set against influence**

Plotting output against standing makes the gap visible. Figure 1 places each industry on two axes, approximate annual output along the horizontal and 2025 soft-power rank up the vertical, with stronger ranks toward the top.

Figure 1. Cultural output set against measured soft power, four film industries



Source: output figures from industry estimates and national statistics; ranks from Brand Finance Global Soft Power Index 2025.

The four cases scatter into a telling shape. Korea sits high on standing with modest output. Nigeria sits at the far right on output and near the bottom on standing. The United States holds the strong position on both. India falls in between. Read together, the figure states the paper's central quantitative result in a single line: across these cases, larger film output does not predict stronger soft power. Nigeria produces the most and converts the least. Korea produces relatively little in pure film count yet converts the most, because its output travels inside a governed national programmed. This is the conversion gap, and closing it is exactly what a Nigerian film-diplomacy strategy would exist to do.

Two limits keep the reading honest. Four cases cannot carry a statistical claim, so the figure is a description rather than a regression, and no significance is asserted. The Soft Power Index also measures overall national perception, not film influence on its own, so it marks the destination of cultural diplomacy rather than its single cause. Within those limits the direction holds, and it holds the same way across both the 2025 and the 2026 surveys.

Two findings sit at the centre of this paper. The first is settled. Nollywood is the centre of African cinema by any reasonable measure of output, reach, and cultural pull. The second is more interesting because it is incomplete. Nollywood is a working instrument of soft power and nation branding, but it operates almost entirely in the unofficial register, as a contra-flow carried by markets rather than ministries.

That combination creates a specific kind of opportunity and a specific kind of risk. The opportunity is that Nollywood already holds the asset that Korea spent two decades building, namely a body of attractive content with genuine global demand. The credibility of that content is higher than a state-built product could ever claim, because audiences came to it freely. The risk is that an unmanaged asset stays under-monetised and diplomatically idle. The value chain leaks at the rights end. The diplomacy leaks at the policy end. The Lionheart disqualification showed how an industry without diplomatic infrastructure absorbs an avoidable loss.

A modest agenda follows from the analysis rather than from wishful thinking. Nigeria could strengthen the downstream value chain through enforceable copyright and formal finance, which would let producers capture more of the value their reach generates. It could treat co-production agreements and festival presence as instruments of foreign policy rather than as private commercial accidents. It could engage international recognition systems, including award eligibility rules, as negotiable terrain. And it could fold Nollywood into a stated public-diplomacy posture without scripting its content, preserving the authenticity that makes the contra-flow work. The Korean lesson is about coordination, not control.

CONCLUSION

Nollywood answers the first research question on its own. It is the centre of African filmmaking, with output near 2,500 titles a year, distribution that now runs on YouTube and global streaming, and a cultural pull that makes Nigerian stories a shared reference across the continent. On the second question, Nollywood carries Nigeria and a wider African image to the world through diffusion. People abroad meet Nigeria through its films before they meet it through its diplomats. This is soft power and nation branding in the terms Nye and Anholt set out, and it is a clear case of Thussu's contra-flow. The comparison sharpens the point. Hollywood projects from dominance, Bollywood from a diaspora, Korea from a plan. Nollywood projects from the market. Each model has a cost. Nollywood's cost is coordination. Nigeria has built, without intending to, one of the strongest cultural exports of the Global South, and it has yet to learn to steer it. The task ahead is not to manufacture attraction, which already exists in abundance, but to govern it with enough care to keep it credible and enough strategy to make it count. A country that exports its stories this widely is already speaking to the world. The open question is whether Nigeria will decide what it wants to say.

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