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Mandarin Oriental Shepheard, Cairo (opening 2025)

Hotel development booms in Africa, boosted by Egypt and Marriott

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This year's Hotel Development Pipeline Report, the definitive study of international hospitality development projects in Africa, reveals record activity. There are 577 hotels

and resorts, with 104,444 rooms, in the development pipeline, up by 13.3% on 2024, way ahead of the single digit pipeline growth reported globally by the leading international chains.

The report, compiled by Lagos-based W Hospitality Group, with data from 50 international and regional hotel chains, shows that development activity has been growing impressively in North Africa, which saw a 23% year-on-year increase, compared to a 6% increase in sub-Saharan Africa. Over the past five years, the hotel development pipeline has grown at an annualised rate of 4% in sub-Saharan Africa, 12% in North Africa and 7% overall.

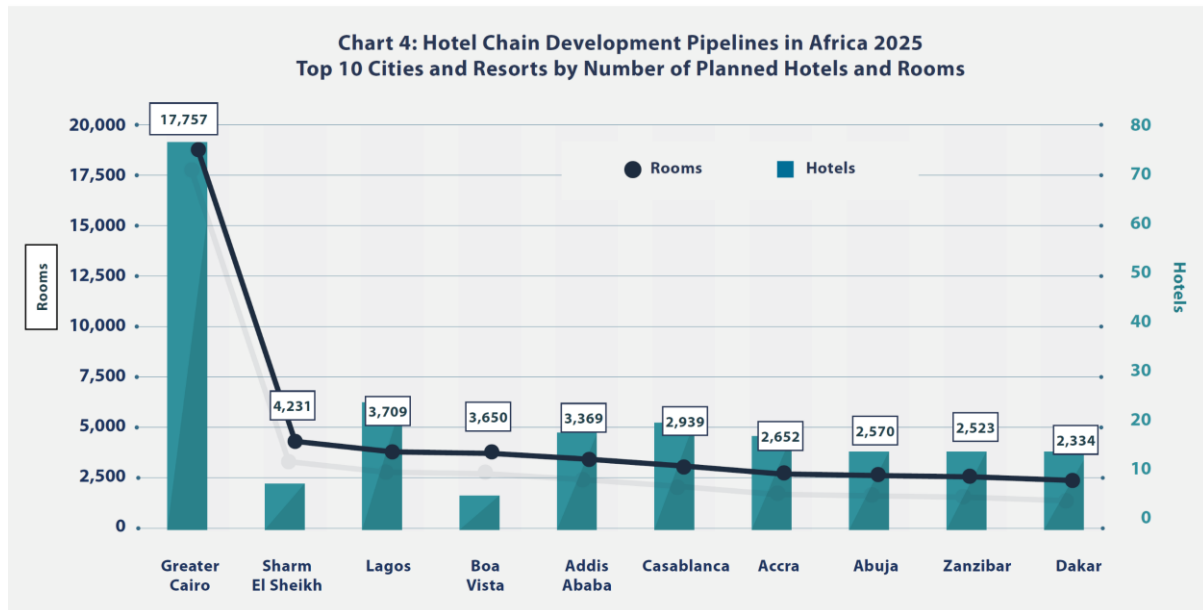
Hotel Chain Development Pipelines in Africa 2025 Regional Summary										
	2021		2022		2023		2024		2025	
	Hotels	Rooms	Hotels	Rooms	Hotel	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	134	31,547	166	35,280	175	36,677	192	40,134	230	49,260
Sub-Saharan Africa	289	47,855	281	45,011	307	47,750	332	52,059	347	55,184
TOTAL	423	79,402	447	80,291	482	84,427	524	92,193	577	104,444

Egypt continues to lead the way in terms of development, with 143 hotels and 33,926 rooms in the pipeline there. This is almost four times the number of rooms in second-placed Morocco, which has 8,579 rooms in 58 hotels. The following eight countries, ranked by number of rooms, comprise Nigeria, 7,320; Ethiopia, 5,648; Cape Verde, 5,565; Kenya, 4,344; Tunisia, 4,336; South Africa, 4,076; Tanzania, 3,432; and Ghana, 3,125. International hotel chains have deals signed in 42 of Africa's 54 countries.

Hotel Chain Development Pipelines in Africa 2025 Top 10 Countries by Number of Rooms				
		Hotels	Rooms	Average Size
1	Egypt	143	33,926	237
2	Morocco	58	8,579	148
3	Nigeria	48	7,320	153
4	Ethiopia	33	5,648	171
5	Cape Verde	16	5,565	348
6	Kenya	26	4,344	167
7	Tunisia	17	4,336	255
8	South Africa	28	4,076	146
9	Tanzania	29	3,432	118
10	Ghana	22	3,125	142
	TOTAL	420	80,351	191

Despite its clear leadership in the absolute pipeline numbers, Egypt has fewer than 50% of rooms under construction, a significantly lower proportion than second-placed Morocco, with over 72%. Of the top 10 countries, Ethiopia has the highest ratio of rooms “on site”, followed by Morocco and Ghana. Cape Verde, Nigeria and Tanzania have some of the lowest percentages. However, “under construction” does not necessarily mean that there is activity and progress towards completion and opening – many of the sites in Nigeria and Ghana, for example, have been closed for several years, with hardly a hard hat in sight!

A more granular analysis, looking at the location of planned properties, reveals an extraordinary boom in Cairo, with 17,757 new rooms projected in over 70 hotels. The contrast with the second-placed location, Sharm El Sheikh, is dramatic, where 4,231 rooms are planned in fewer than 10 properties. The cities and resorts with the next largest pipelines by number of rooms, are Lagos, 3,709; Boa Vista, 3,650; Addis Ababa, 3,369; Casablanca, 2,939; Accra, 2,652; Abuja, 2,570; Zanzibar, 2,523 and Dakar, 2,334.



The growth is being driven strongly by the major international hotel chains, with Marriott International leading the way, 165 hotels with 29,639 rooms. It is followed by Hilton, 93 hotels with 17,040 rooms; Accor, 73 hotels with 15,013 rooms; IHG, 40 hotels with 7,951 rooms; Radisson Hotel Group, 32 hotels with 6,346 rooms; TUI Hotels & Resorts, 11 hotels with 2,954 rooms; Barceló Hotels & Resorts, 7 hotels with 2,193 rooms; The Ascott, 15 hotels with 1,897 rooms; Kerten Hospitality, 13 hotels with 1,881 rooms and Wyndham Hotels & Resorts, 7 hotels with 1,706 rooms.

Hotel Chain Development Pipelines in Africa 2025 Top 10 Hotel Chains by Number of Planned Hotels and Resorts						
		Hotels	Rooms	Change on 2024	Average Size	Share of Total
1	Marriott International	165	29,639	+3,274	180	28.4%
2	Hilton	93	17,040	+3,456	183	16.3%
3	Accor	73	15,013	+1,638	206	14.4%
4	IHG	40	7,951	+2,838	199	7.6%
5	Radisson Hotel Group	32	6,346	+1,233	198	6.1%
6	TUI Hotels & Resorts	11	2,954	-274	269	2.8%
7	Barceló Hotels & Resorts	7	2,193	+1,127	313	2.1%
8	The Ascott	15	1,897	+382	126	1.8%
9	Kerten Hospitality	13	1,881	-8	145	1.8%
10	Wyndham Hotels & Resorts	7	1,706	+73	244	1.6%
	TOTAL	456	86,620	+11,715	190	82.9%

In the race for dominance, Hilton added slightly more rooms to its African pipeline last year than Marriott International and achieved a higher percentage growth. Barceló

Hotels & Resorts recorded the largest percentage growth, more than doubling its pipeline to 2,193 rooms, with three large resort signings in North Africa.

Below the headline numbers, there are three notable trends. First, the actualisation rate (actual openings vs. expected openings), which has nearly doubled from 21% in 2023 to 38% in 2024. While it's substantially less than the 75% actualisation rate achieved in 2019, it shows a continuing recovery from the economic devastation of COVID-19. Of the total 104,444 rooms in the pipeline, over 50,000 rooms (nearly 50%) in 304 hotels are expected to open in 2025 and 2026.

Second, resort projects are increasing much faster than city or airport hotels, both in percentage terms and in absolute numbers, driven by the number of signings and by the larger average size of the developments, 210 keys vs. 170. Also, almost half of the rooms that opened last year were in resorts.

Third, there is a definite movement by the chains towards the franchise model, with 108 projects representing almost 19% of the total, compared to less than 10% in 2020. A major factor is the emergence of quality, international, white-label operators such as Aleph Hospitality and Valor Hospitality, and some indigenous operators in Nigeria, Kenya and elsewhere, that are increasing confidence that brand standards will be met.

The full report will be discussed at FHS Africa (formerly AHIF) 17-19 June in Cape Town. It is the leading hospitality investment conference in the region, which brings together senior decision-makers to shape the future of the industry. Matthew Weihs, Managing Director of the Bench, which organises FHS Africa, said: "The growth in hotel development across Africa is a testament to the continent's economic and tourism potential. Furthermore, the commitment from the international hotel chains makes it clear that global players see Africa as a strategic opportunity."

Trevor Ward, Managing Director of W Hospitality Group, concluded: "Despite the various trials that the continent faces, the fact that hotel chains signed 125 new deals last year, with 21,000 rooms, is evidence that opportunities for further development abound. According to the Global Cities Institute, by the year 2100, 10 of the world's

16 largest cities will be in Africa, with all but one of them (Cairo) in sub-Saharan Africa. So, one might say that development activity in Africa has barely scratched the surface.”

Ends

About W Hospitality Group

The W Hospitality Group, a member of Hotel Partners Africa, specialises in the provision of advisory services to the hotel, tourism and leisure industries, providing a full range of services to clients who have investments in the sector, or who are looking to enter them through development, acquisition or other means. In sub-Saharan Africa W Hospitality Group is regarded as the market leader due to the market and financial expertise of its staff, its worldwide knowledge, and its commitment to its clients. In Africa, W Hospitality Group has to date worked in 40 countries on the continent, from its Lagos and Addis Ababa offices.

www.w-hospitalitygroup.com

About FHS Africa (Formerly AHIF)

For over a decade, the Future Hospitality Summit Africa (FHS Africa) has been the launchpad for hospitality investment in Africa, driving growth, connecting visionaries, and transforming the continent's tourism and hospitality landscape. As a beacon of opportunity, FHS Africa brings together global investors, developers, operators, and industry leaders committed to turning potential into reality.

www.ahif.com.

Strategic Partners: Accor, BWH Hotels, Hilton, IHG Hotels & Resorts, Marriott International, Radisson Hotel Group

Headline Sponsors: CHIC, Hansgrohe, TUI Hotels & Resorts

Sponsors: Aleph Hospitality, CityBlue Hotels, Equate, JLL, Knight Frank, St Helena Island, STR, TIME Hotels, TV5 Monde, Valor Hospitality Partners

Official Carriers: Discover Airlines, Kenya Airways

Supporter: South Africa Tourism

About The Bench

The Bench has a legacy of delivering world-leading investment forums and conferences in Europe, Africa, the Middle East, and Latin America. The key principle behind these events is 'dealmaking'. Transforming the way businesses connect; the Bench has developed a reputation for creating innovative and high-impact industry meetings.

For over two decades, government leaders, tourism ministries, global travel & tourism associations, the world's most influential hospitality brands, hotel owners & investors, renowned restaurant groups, airlines & aviation authorities, destination developers, asset managers, financial groups, and consultants have been participating in the Bench's events. These include FHS Africa, FHS World, FHS Saudi Arabia and AviaDev, where industry players showcase their brands, position themselves as thought leaders and innovators, and connect with the right individuals, opportunities and knowledge. Learn more at thebench.com

Further Information

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