



North African Tourism Overview.

Keynote Topics

- 01 Context
- 02 Morocco
- 03 Egypt
- 04 Tunisia
- 05 Algeria

Introduction.

Africa Tourism Overview



Sub-saharan Africa International Tourists



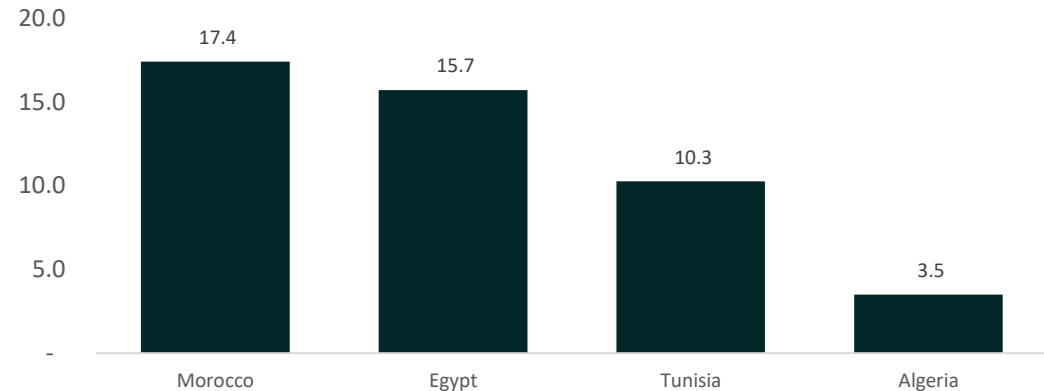
North Africa International Tourists



Sub-saharan Africa Most Visited Countries 2024



North Africa Most Visited Countries 2024



Introduction.

Africa Travel & Tourism Direct Contributions 2024



24 Million Jobs supported by tourism sector in Africa (direct + indirect)

8.5% Contribution of tourism sector to North Africa's GDP.

5.3 Million Jobs supported by tourism sector in North Africa (1 in 11 Jobs)

Travel & Tourism's Direct Contribution to GDP		
Rank	Economy	2023 (USD Billion)
1	North America	911.5
2	European Union	710.2
3	Northeast Asia	482.6
4	Other Europe	226.1
5	Middle East	178.3
6	Southeast Asia	151.2
7	Central and South America	131.7
8	South Asia	93.9
9	Oceania	58.8
10	Sub Saharan Africa	46.0
11	North Africa	35.3
12	Caribbean	29.3
13	Central Asia	4.5

Travel & Tourism Investment		
Rank	Economy	2023 (USD Billion)
1	North America	264.8
2	Northeast Asia	211.4
3	European Union	183.3
4	Middle East	85.8
5	Southeast Asia	55.5
6	Other Europe	50.6
7	South Asia	49.7
8	Central and South America	43.6
9	Oceania	20.0
10	Sub Saharan Africa	19.3
11	Caribbean	13.2
12	North Africa	13.1
13	Central Asia	3.0

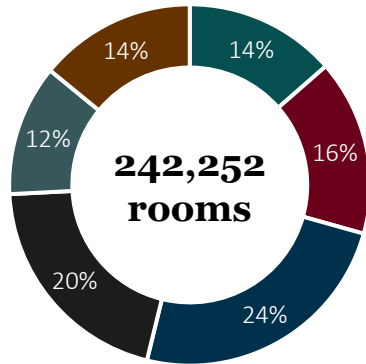
Introduction.

Quality Supply



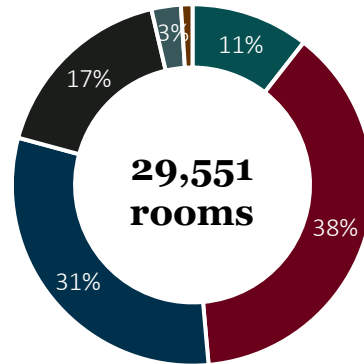
Sub-Saharan Africa

Existing Supply



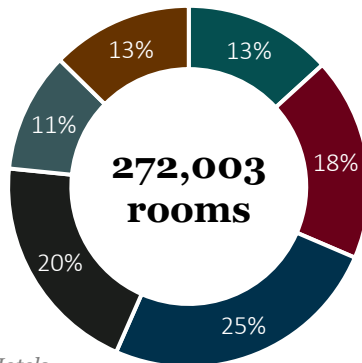
3,390 Hotels

Upcoming Supply



196 Hotels

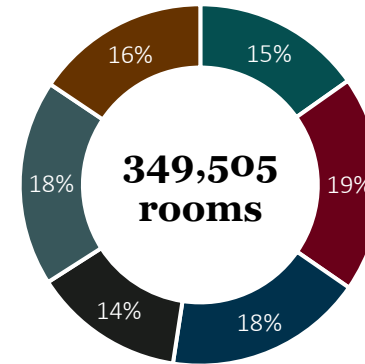
Total Supply by 2030



3,586 Hotels

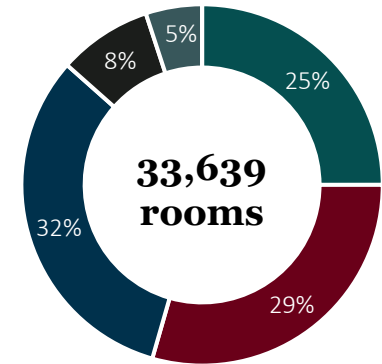
North Africa

Existing Supply



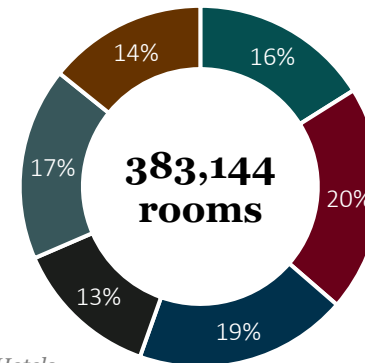
1,828 Hotels

Upcoming Supply



163 Hotels

Total Supply by 2030



1,991 Hotels

Segments



MOROCCO

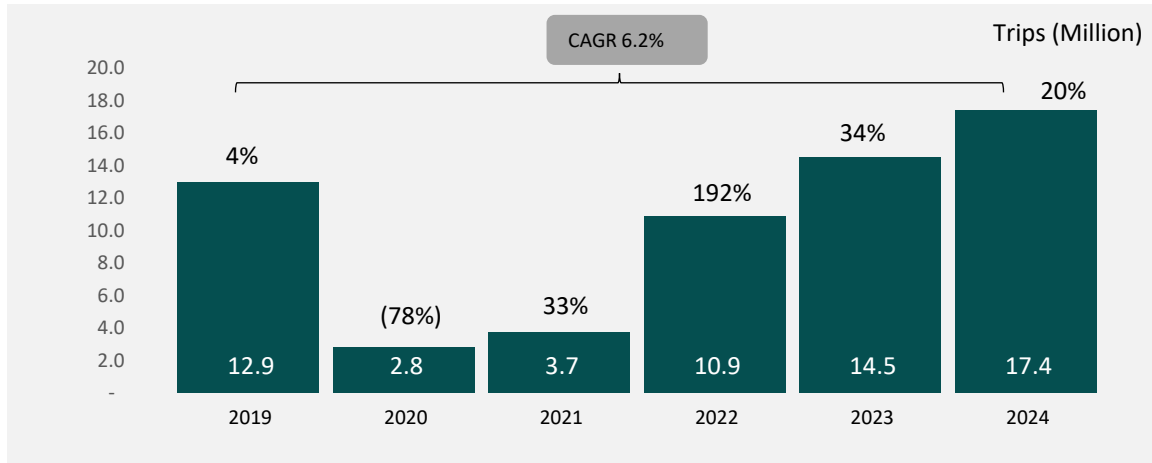


Morocco.

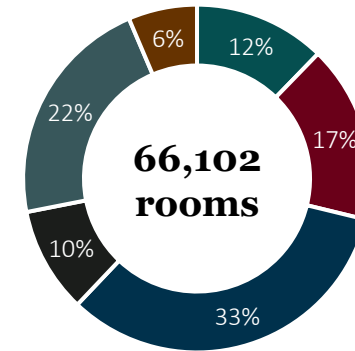
Snapshot



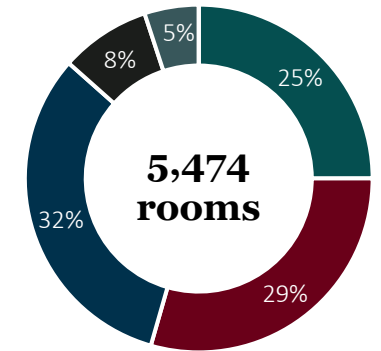
Tourists



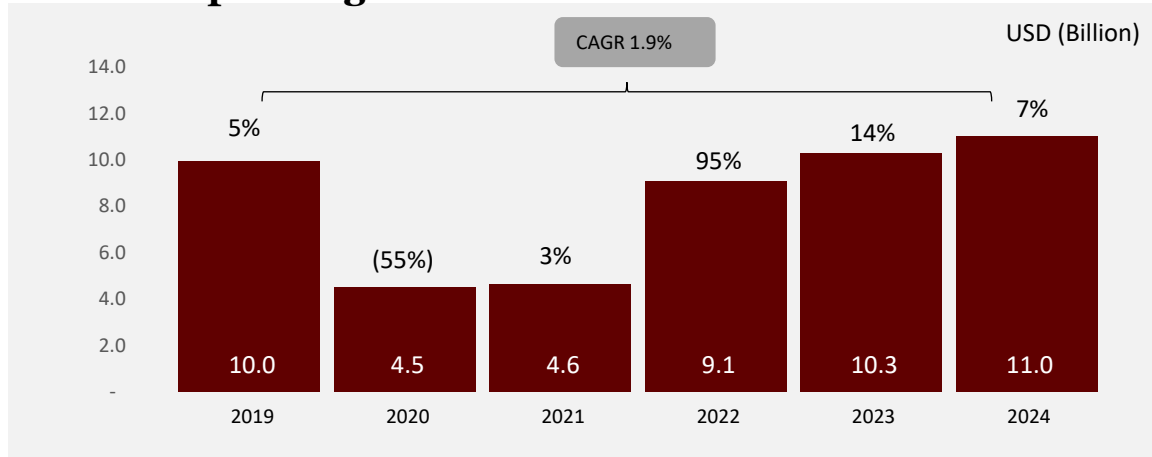
Existing Supply



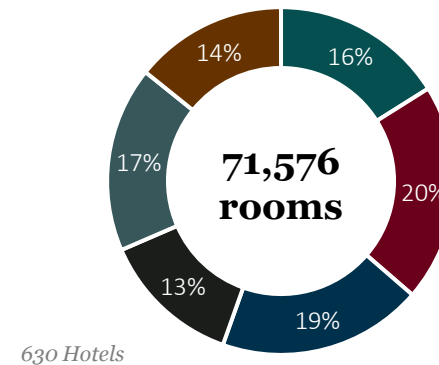
Upcoming Supply



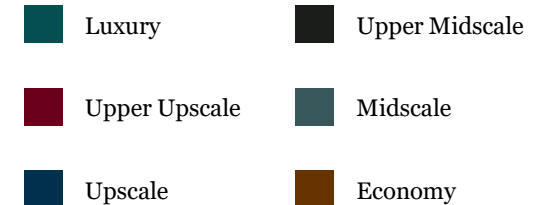
Tourists Spending



Total Supply by 2030



Segments



Morocco.

Key Destinations/Demand Generators



FHS
AFRICA

AHIF
AFRICA
HOSPITALITY
INVESTMENT
FORUM



Key Drivers



Cultural and Historical Depth



Coastline and Desert Diversity



Adventure and Eco-Tourism



Infrastructure & Events



Government Strategy & Marketing



Agadir & Essaouira (Coastal Resorts)



Imperial Cities (Fes, Meknes, Rabat)



Marrakech Medina & Jemaa el-Fna



Atlas Mountains & Oasis



Sahara Desert (Merzouga, Erg Chebbi)



Essaouira (Coastal Heritage City)

Morocco.

Developments in the Pipeline



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Grand Stade Hassan II

Set to be the world's largest football stadium.



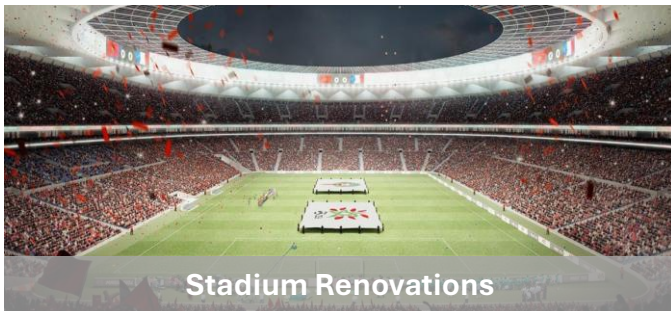
High-Speed Rail Expansion

€430 million (between Kenitra and Marrakech)



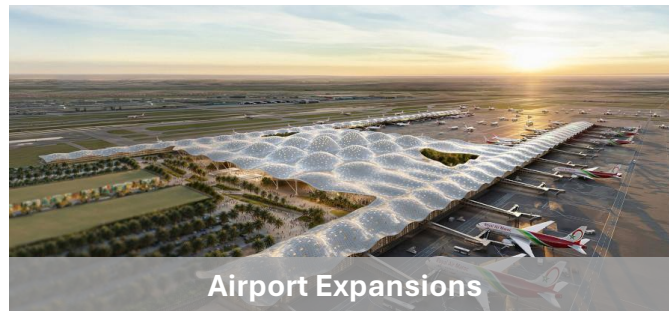
Highway Overhaul

A \$1.3 billion investment focusing on key routes like the Rabat-Casablanca Highway.



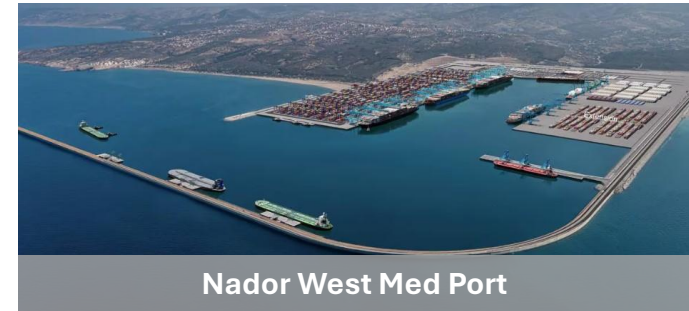
Stadium Renovations

Upgrade of existing stadiums in cities like Rabat, Fez, Tangier, and Agadir.



Airport Expansions

MAD42 billion (\$4.1 billion) investment to double airport capacity to 80 million passengers by 2030.



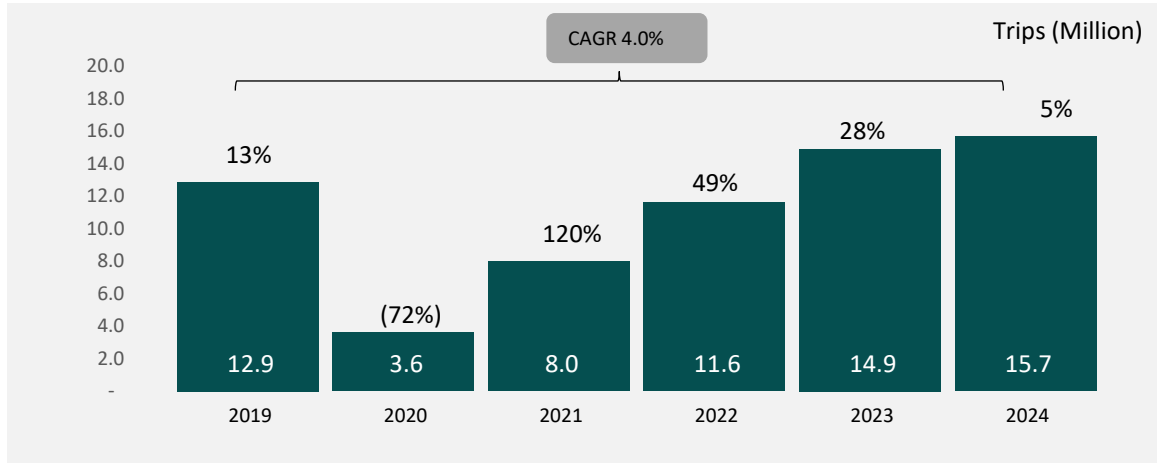
Nador West Med Port

This new port facility will feature a container terminal with a capacity of 3 million TEUs.

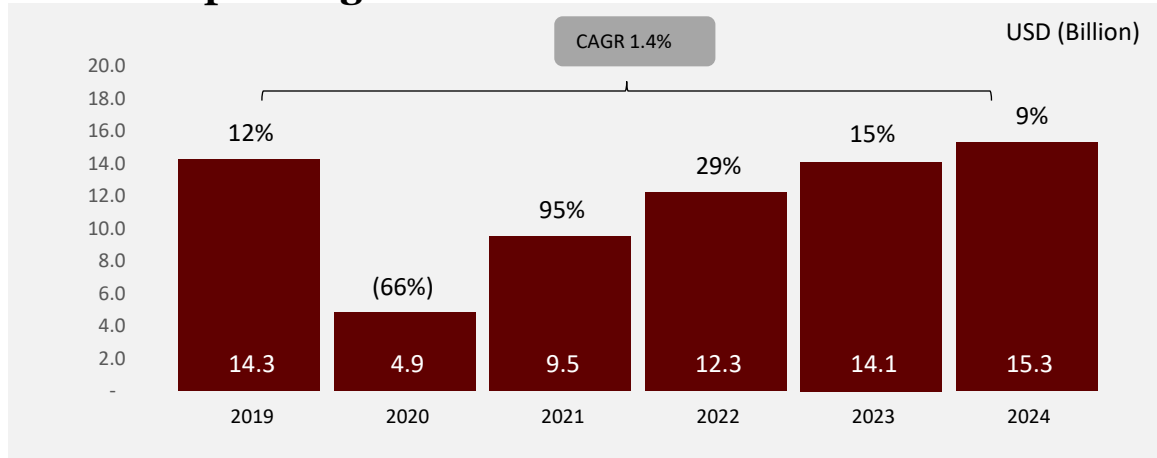
EGYPT



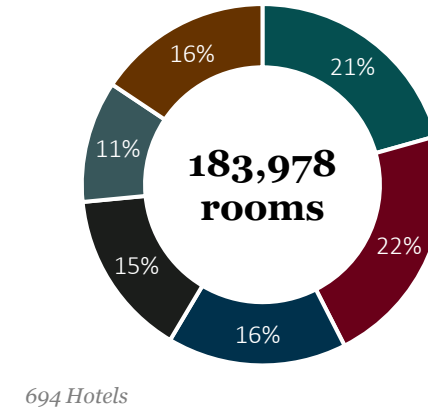
Tourists



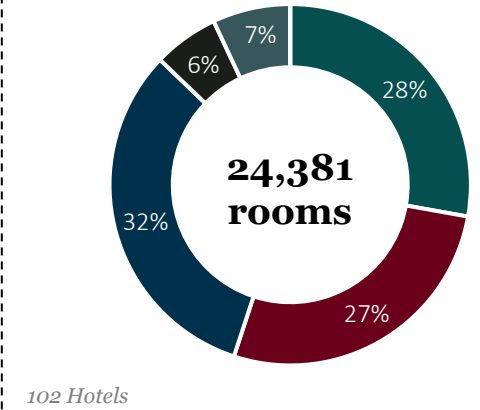
Tourists Spending



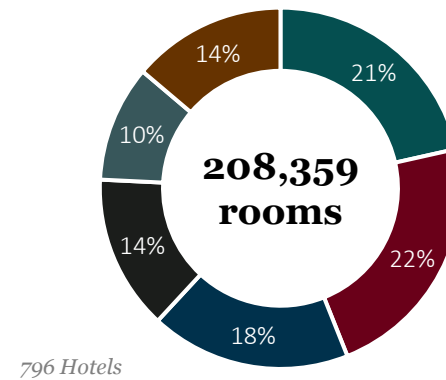
Existing Supply



Upcoming Supply



Total Supply by 2030



Segments



Egypt.

Key Destinations/Demand Generators



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Key Drivers



Iconic Historical and Cultural Heritage



Red Sea and Mediterranean Sun & Sand Tourism



Nile River Cruises and Desert Adventures



Strategic Infrastructure and Investment Initiatives



Pyramids of Giza



Luxor



Red Sea Destinations



Museums



North Coast



Nile Cruises

Egypt.

Upcoming Developments



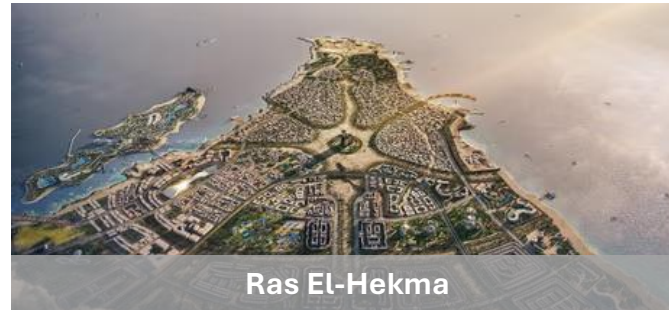
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Grand Egyptian Museum (GEM)

Set to become the world's largest archaeological museum.



Ras El-Hekma

In a landmark \$35 billion agreement transforming Ras El Hekma into a luxury tourist destination.



Investment Opportunities Bank

Announced by the Prime Minister to facilitate FDI



Revamp of Giza Plateau

\$30 million revamp of the Giza Plateau to elevate the visitor experience.



Airport Expansions

Airport infrastructure expansions to cover over 80 million passengers annually by 2030.



New Administrative Capital

New Capital east of Cairo featuring smart infrastructure and expansive green spaces.

TUNISIA

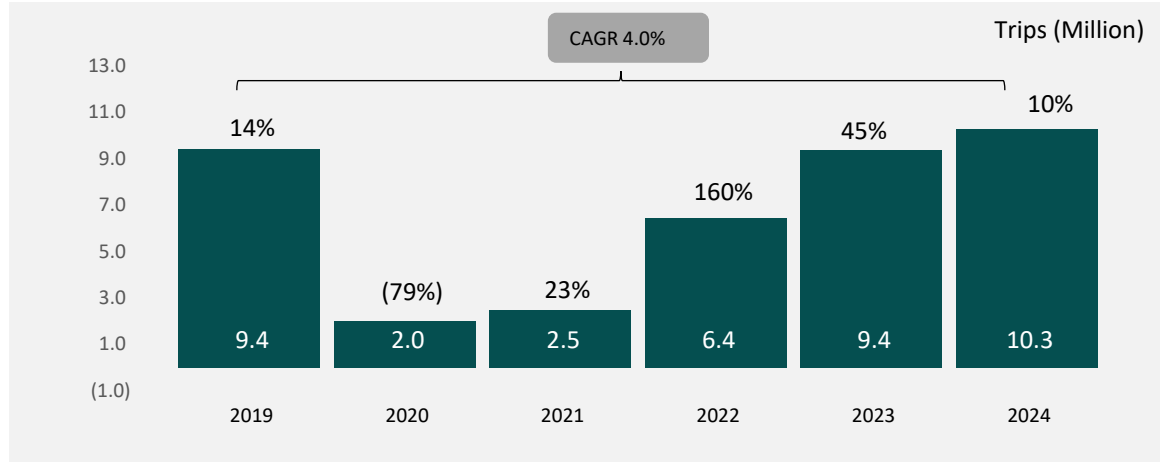


Tunisia.

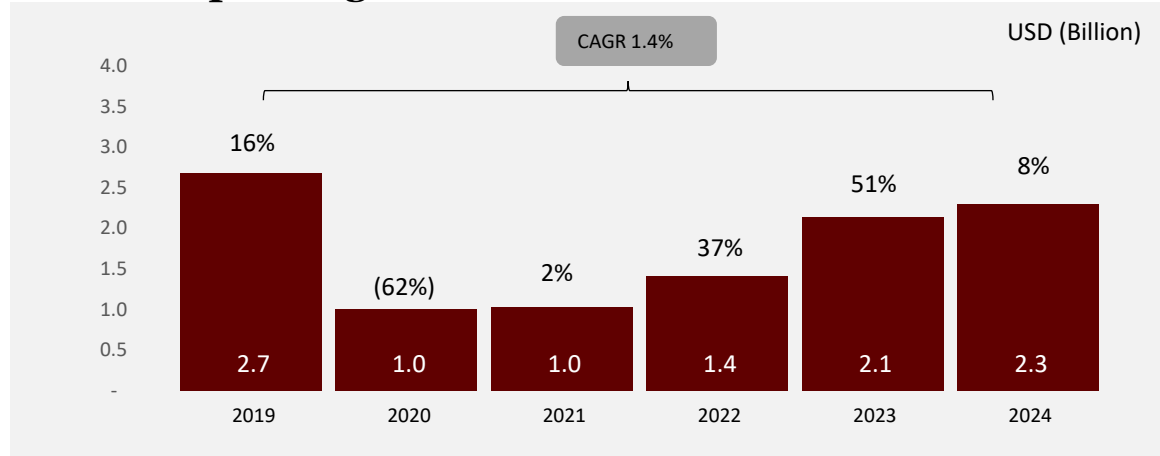
Snapshot



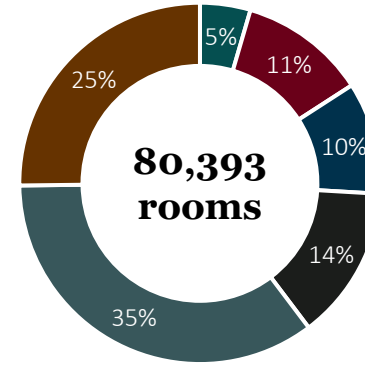
Tourists



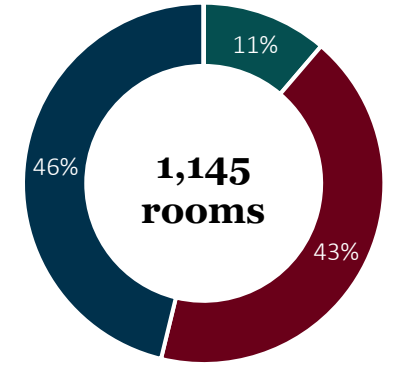
Tourists Spending



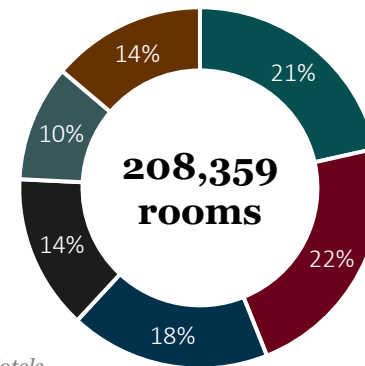
Existing Supply



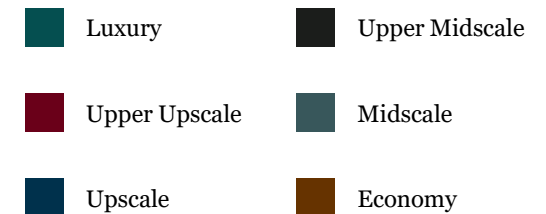
Upcoming Supply



Total Supply by 2030



Segments



Tunisia.

Key Destinations/Demand Generators



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Key Drivers



Coastal Resorts & All-Inclusive Packages



Cultural and Heritage Tourism



Desert and Adventure Tourism



Healthcare and Wellness Tourism



Medina of Tunis



El Jem Amphitheatre



Carthage Archaeological Site



Djerba Island



Ichkeul National Park



Kairouan

Tunisia.

Upcoming Developments



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Tunis Bay Project

Featuring residential units, a golf course, and a 100,000 sqm shopping center.



Tunis Sports City

A \$5 billion mixed-use project with phases completing between 2026 and 2031.



A1 Motorway Extension

Completion of the Gabès–Medenine–Ben Guerdane segment.



Visit Tunisia Roadmap

A \$50 million initiative on infrastructure upgrades and sustainable tourism products



The Enfidha Airport Project

The project aims to ensure the competitiveness of the Tunisian tourism sector.



New Air Routes

Agreements with other countries to establish direct flights, diversifying source markets.

ALGERIA



Algeria.

Snapshot



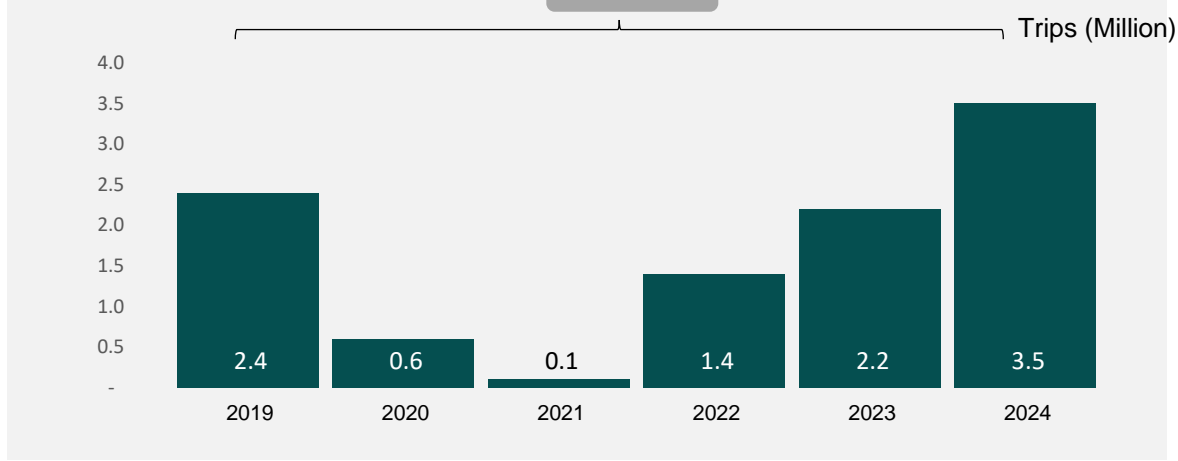
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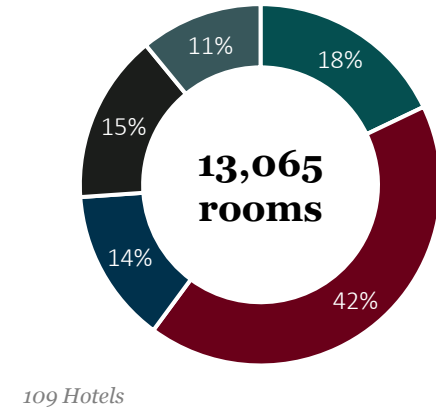


Tourists

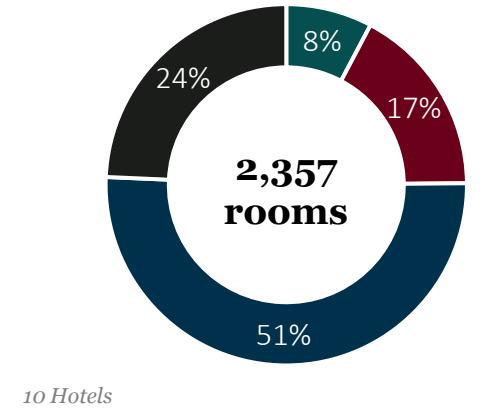
CAGR 7.83%



Existing Supply

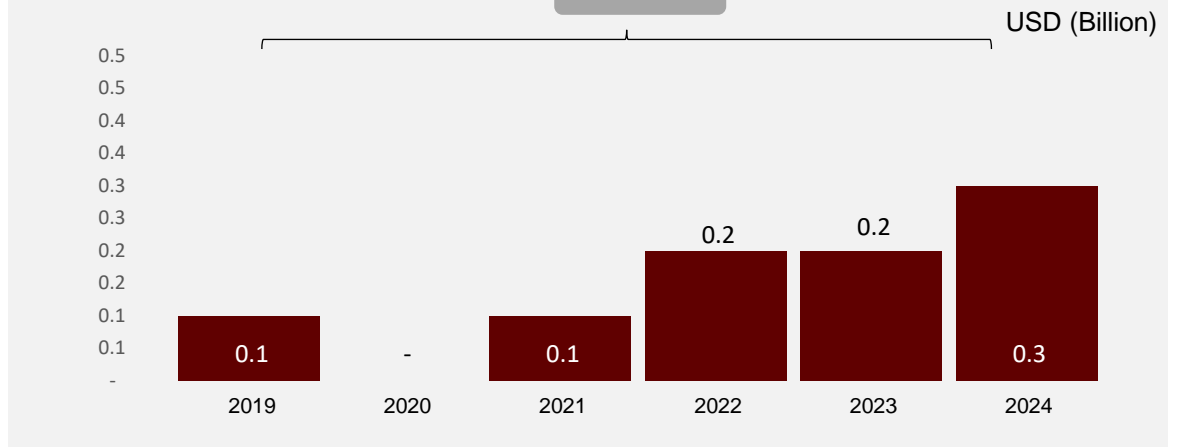


Upcoming Supply

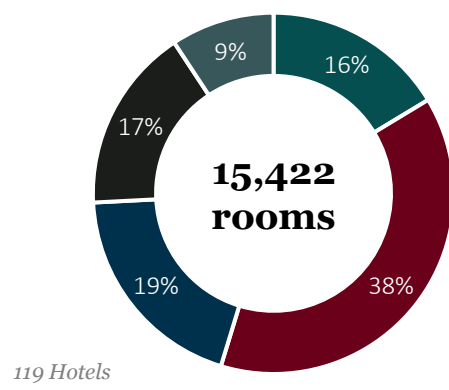


Tourists Spending

CAGR 24.6%



Total Supply by 2030



Segments

- Luxury
- Upper Upscale
- Upscale
- Upper Midscale
- Midscale
- Economy

Algeria

Key Destinations/Demand Generators



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Key Drivers



Historical and Cultural Attractions



Diverse Natural Landscapes



Adventure and Desert Tourism



Strategic Location and Connectivity



Government Policy and Tourism Development



Kasbah of Algiers (UNESCO Heritage)



Sahara Desert



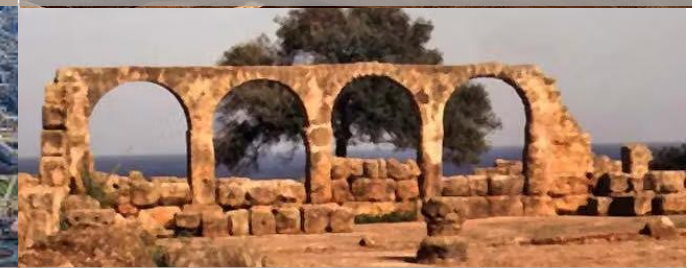
Timgad (Roman Ruins)



Hoggar Mountains (Ahaggar National Park)



Oran & Algiers (Urban Hubs)



Tipasa Archaeological Park

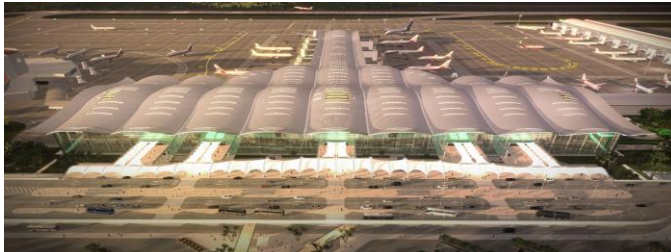
Algeria

Upcoming and Ongoing Developments



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Algiers International Airport Expansion

This expansion supports the goal of doubling annual capacity to 20 million passengers



Metro Extension to Airport

Expected to improve access and integration within the city's regional air hub strategy



Zeghamra International Airport Development

A 3,430-hectare airport under construction in southwestern Algeria.



Hotel Expansion in Oran

Fourteen new hotels adding total capacity to 24,000 beds in 2024



East-West Highway and Trans-Saharan Corridor Upgrades

With USD 8.2 billion allocated budget to boost connectivity between coastal hubs and desert regions.



Tourism Investment Promotion Law (2024)

The new law offers tax breaks and land access, supporting nearly 2,000 tourism projects.

Thank you.



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