From Paper to Progress: Africa's Hotel Pipeline Insights

FHS AFRICA

Presented By:

Trevor Ward

W Hospitality Group

and

Hotel Partners Africa

OUR RESEARCH INCLUDES

53
chains

42
countries

123,846
rooms

W HOSPITALITY GROUP

W Hospitality Group Hotel Chain Development Pipelines in Africa 2026

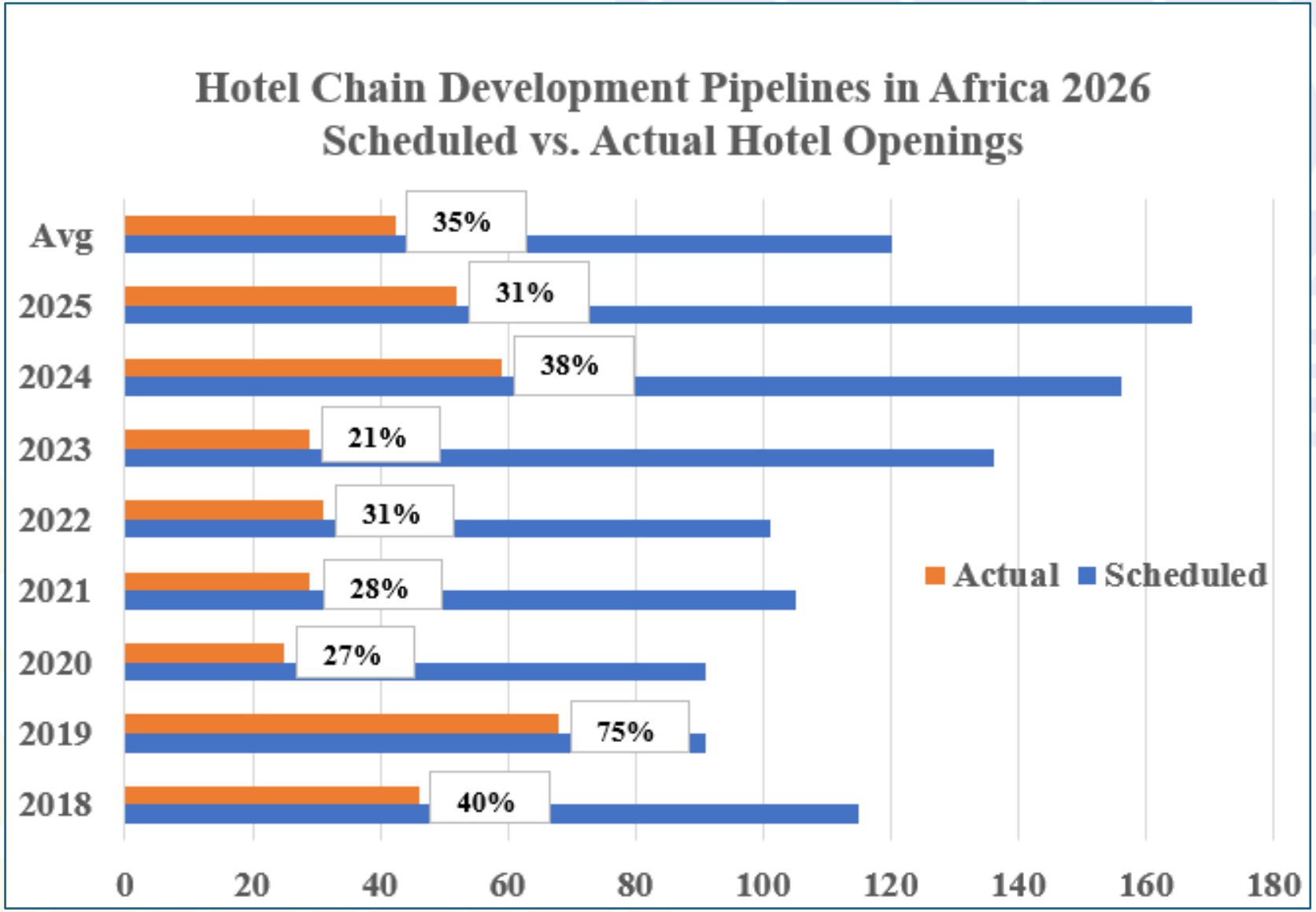
168
brands

675
hotels

12.2%
growth

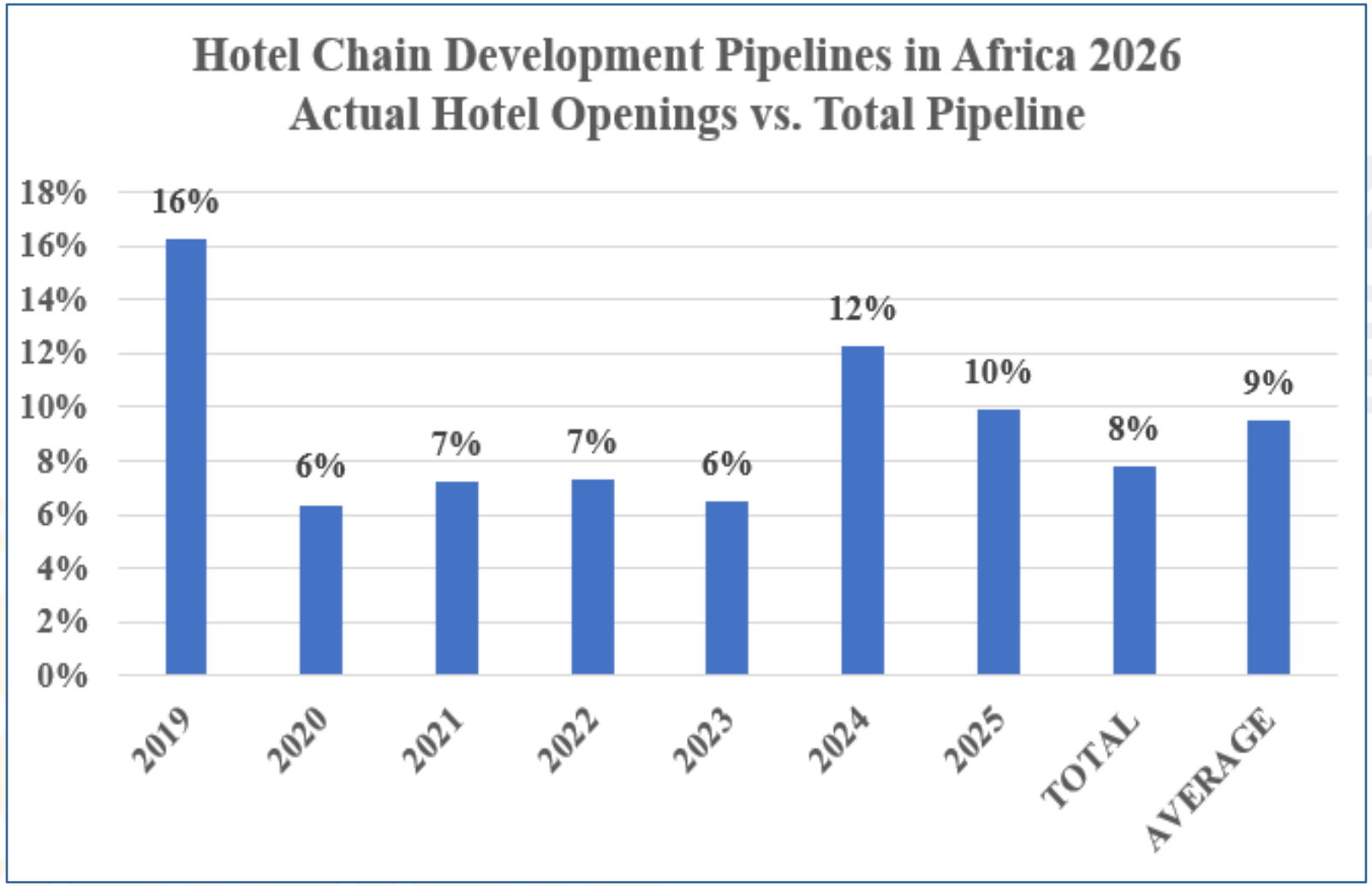
THE HISTORY

The number of hotels and resorts that the chains **opened** each year as a percentage of what they **said they would open** when they submitted the data in January.



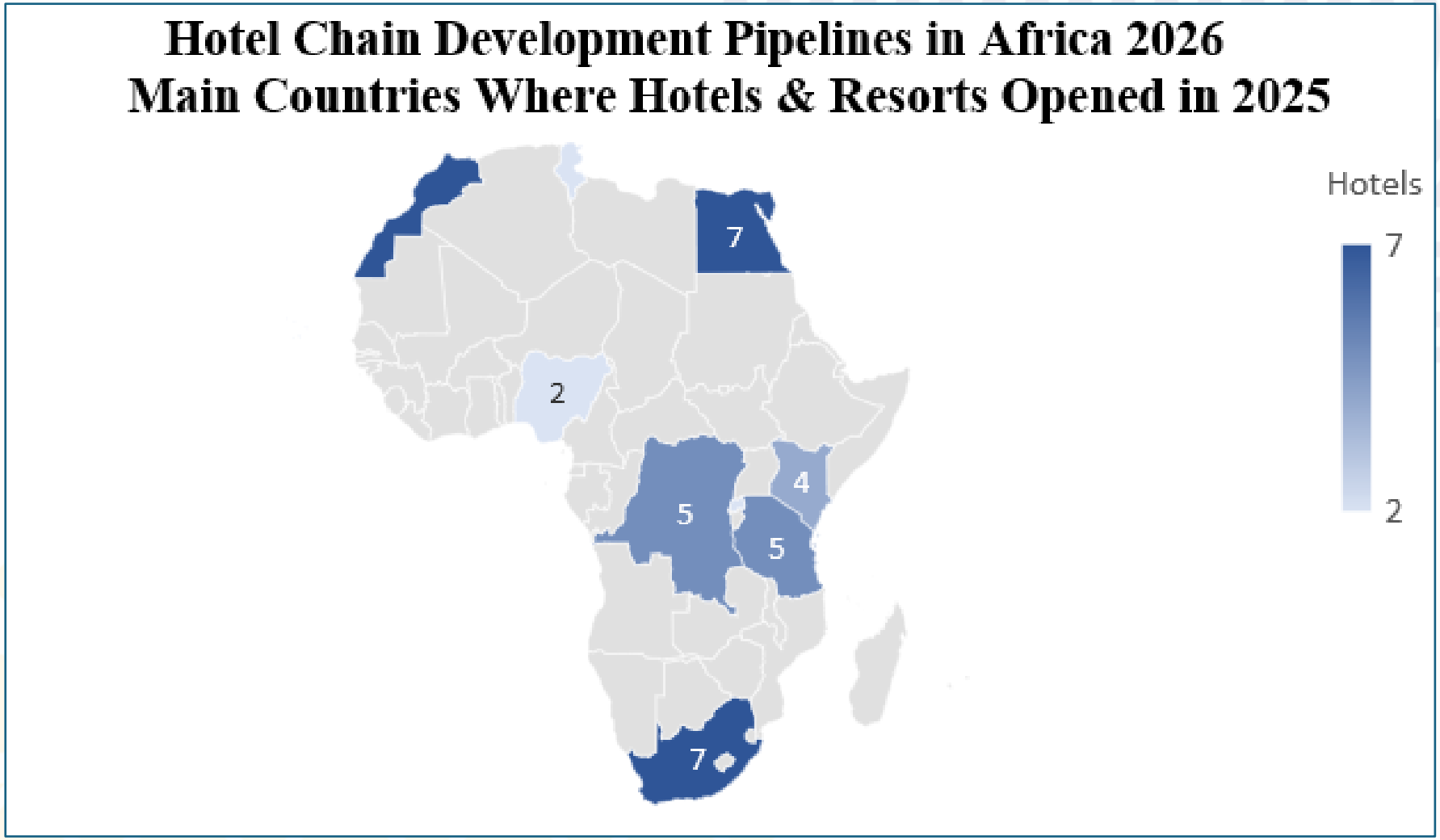
THE HISTORY

The number of hotels and resorts that the chains **opened** each year as a percentage of **their pipeline**.



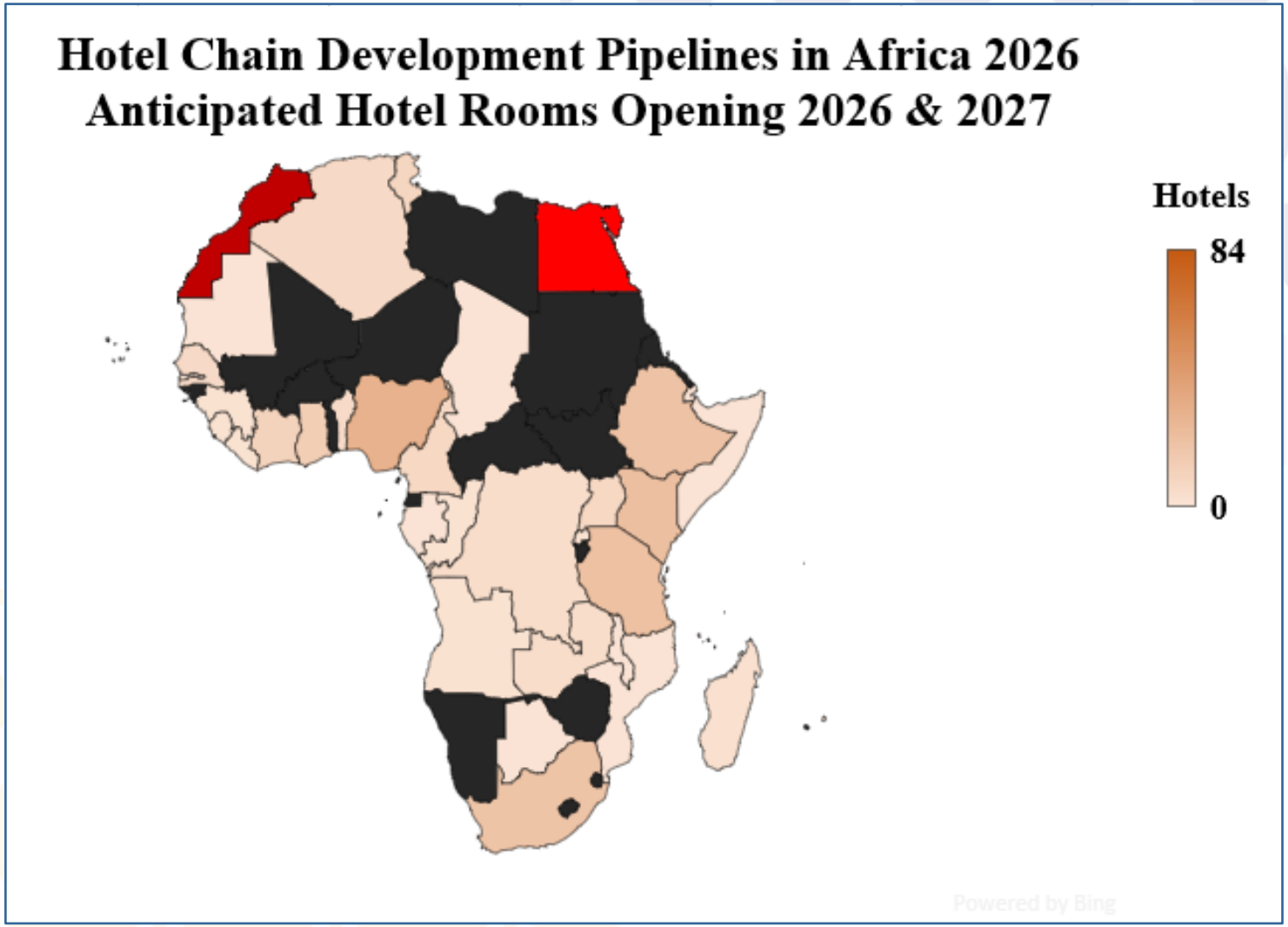
OPENINGS IN 2025

Countries with 2 or more hotels & resorts that opened in 2025



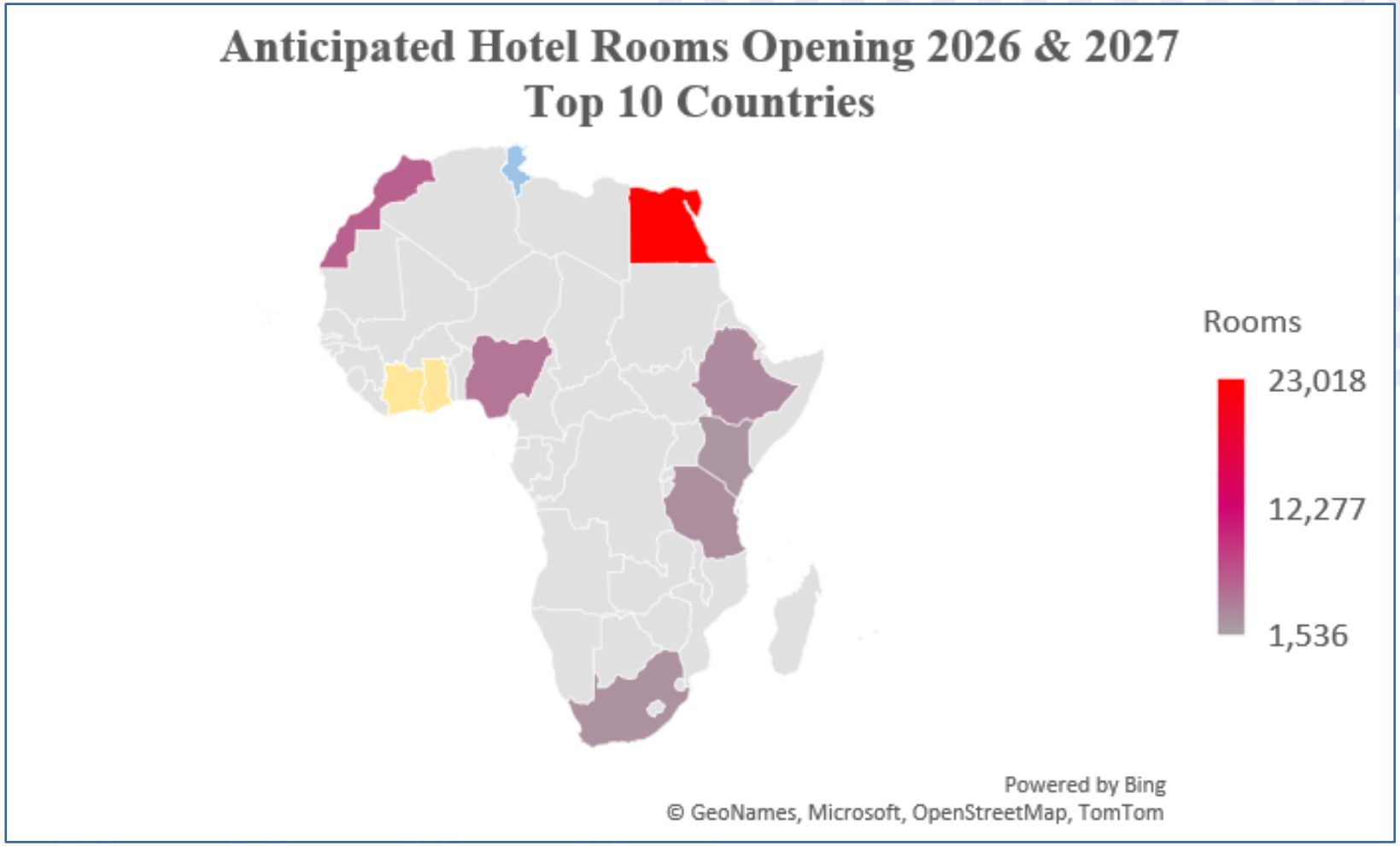
THE FUTURE

The number of hotels and resorts that the chains say they will open **this year and next,** by country (all Africa)



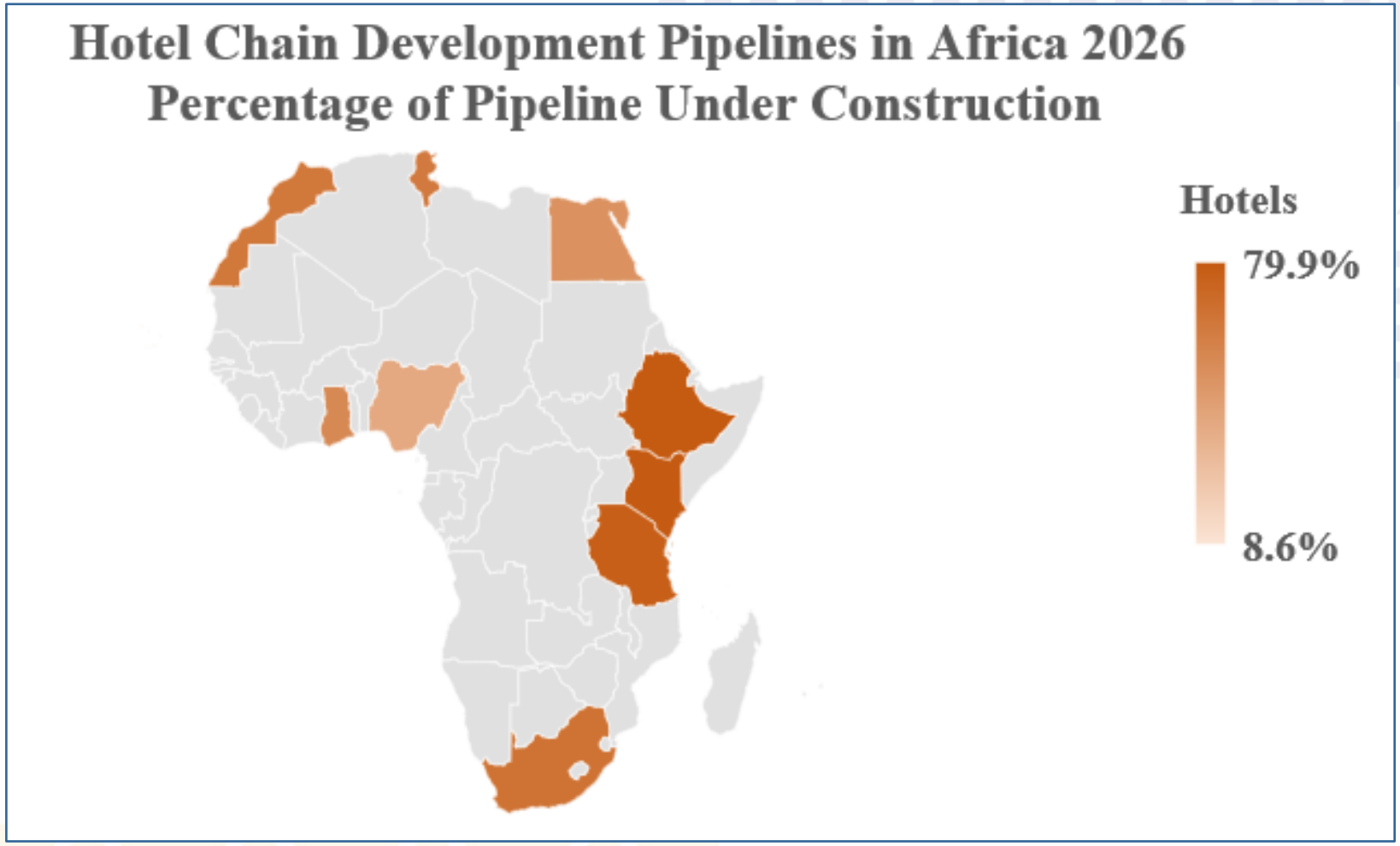
THE FUTURE

The number of rooms in hotels and resorts that the chains say they will open **this year and next** in the Top 10 countries



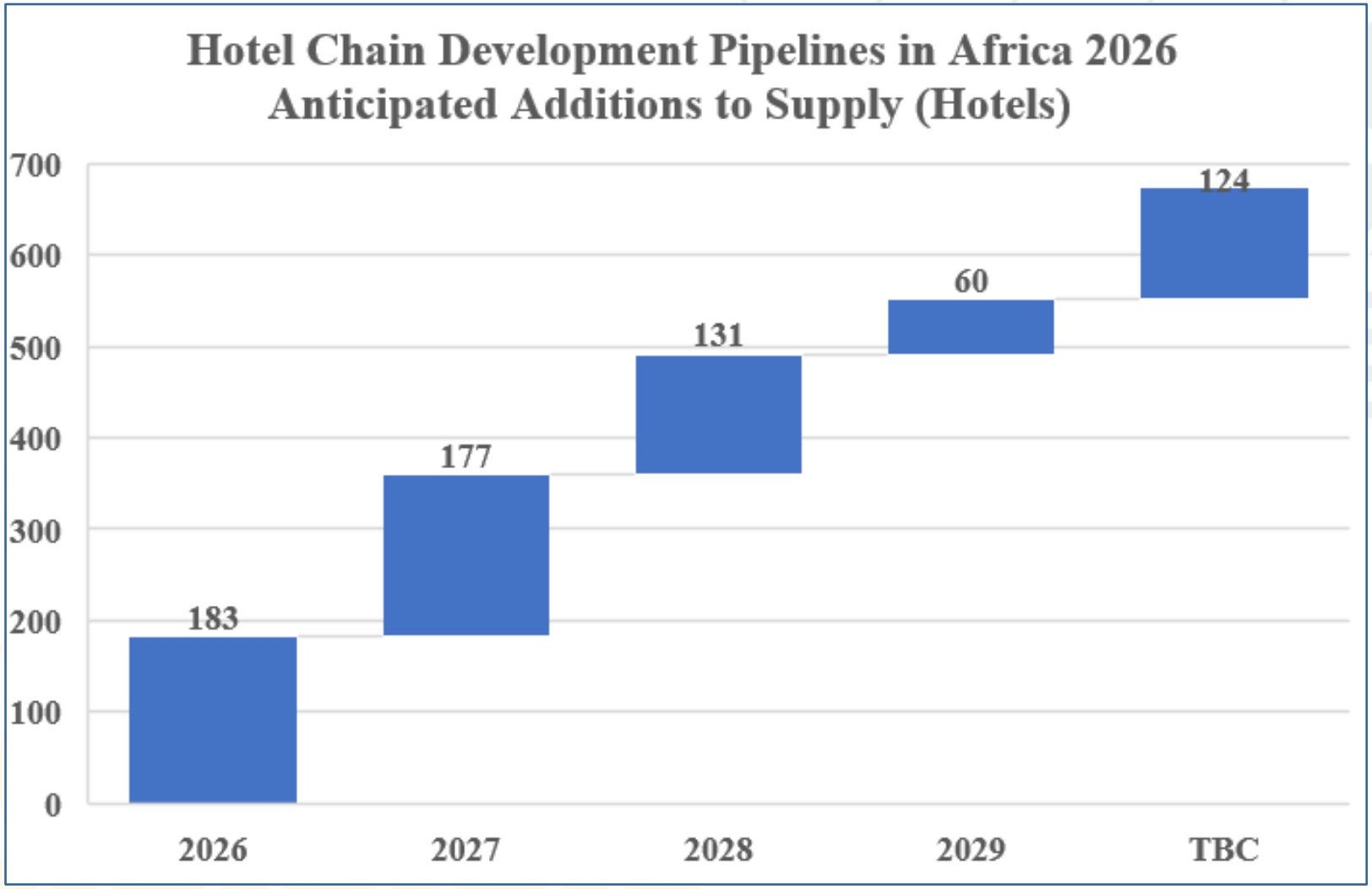
THE FUTURE

The percentage of the chains development pipeline that is under construction in the Top 10 countries



THE FUTURE

The number of hotels and resorts that the chains say they will open, by year

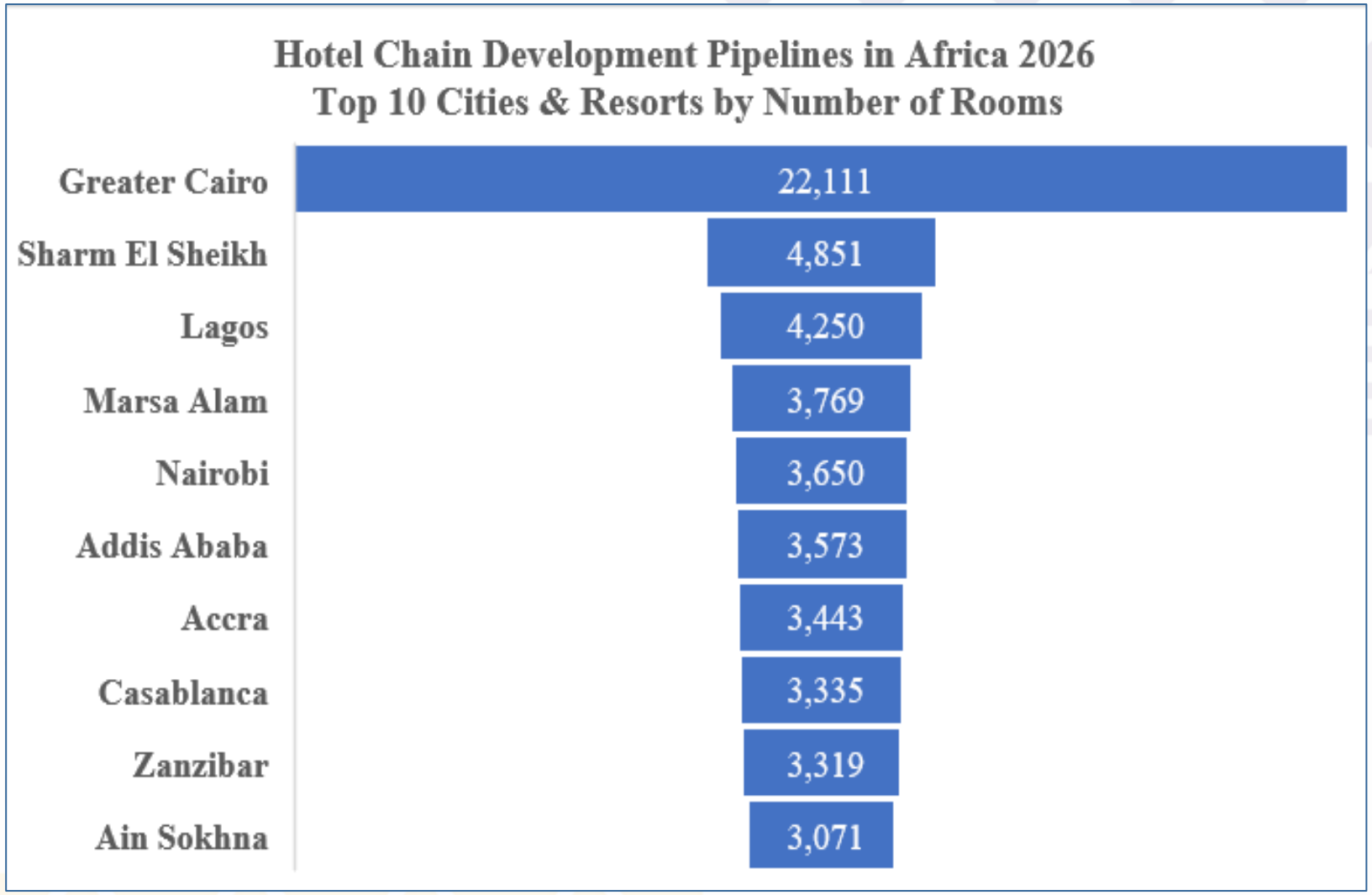


HERE COME THE PIPELINE DATA!

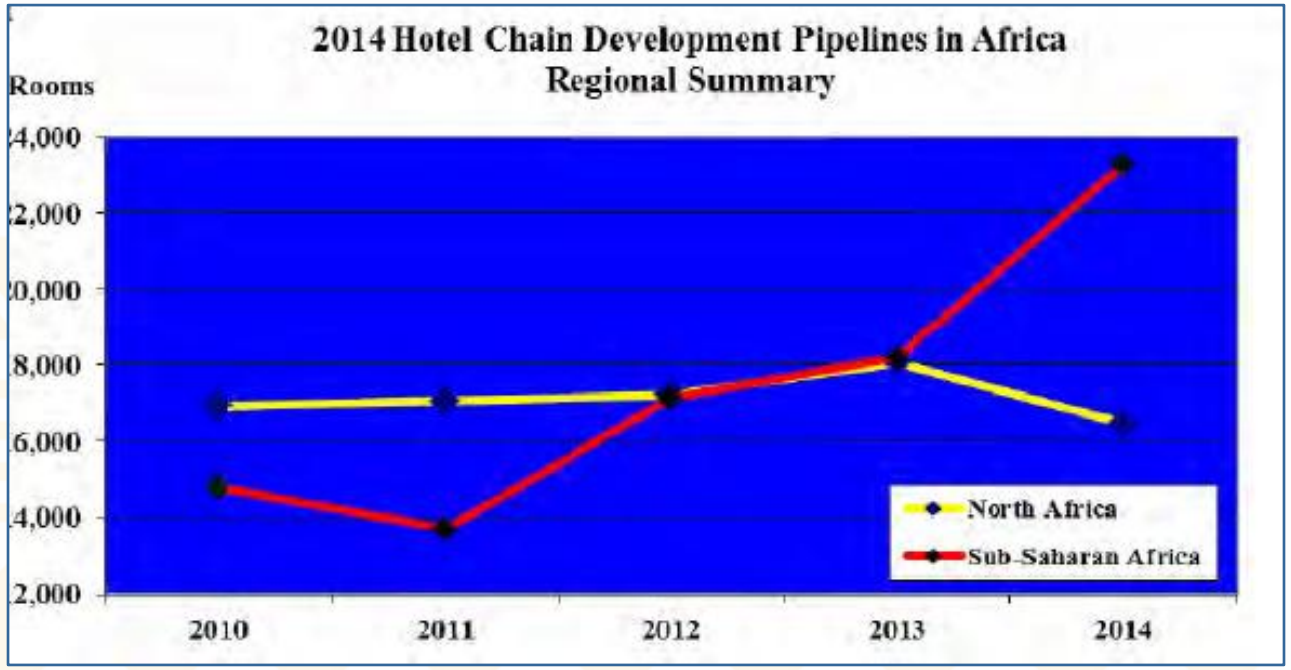
Hotel Chain Development Pipelines in Africa 2026 Top 10 Countries by Number of Rooms				
		Hotels	Rooms	Average Size
1	Egypt	185	45,984	249
2	Morocco	75	10,606	141
3	Nigeria	57	8,480	149
4	Kenya	35	6,190	177
5	Ethiopia	34	5,964	175
6	Cape Verde	17	4,328	255
7	Tunisia	15	4,189	279
8	Tanzania	29	4,159	143
9	South Africa	31	4,136	133
10	Ghana	26	3,942	152

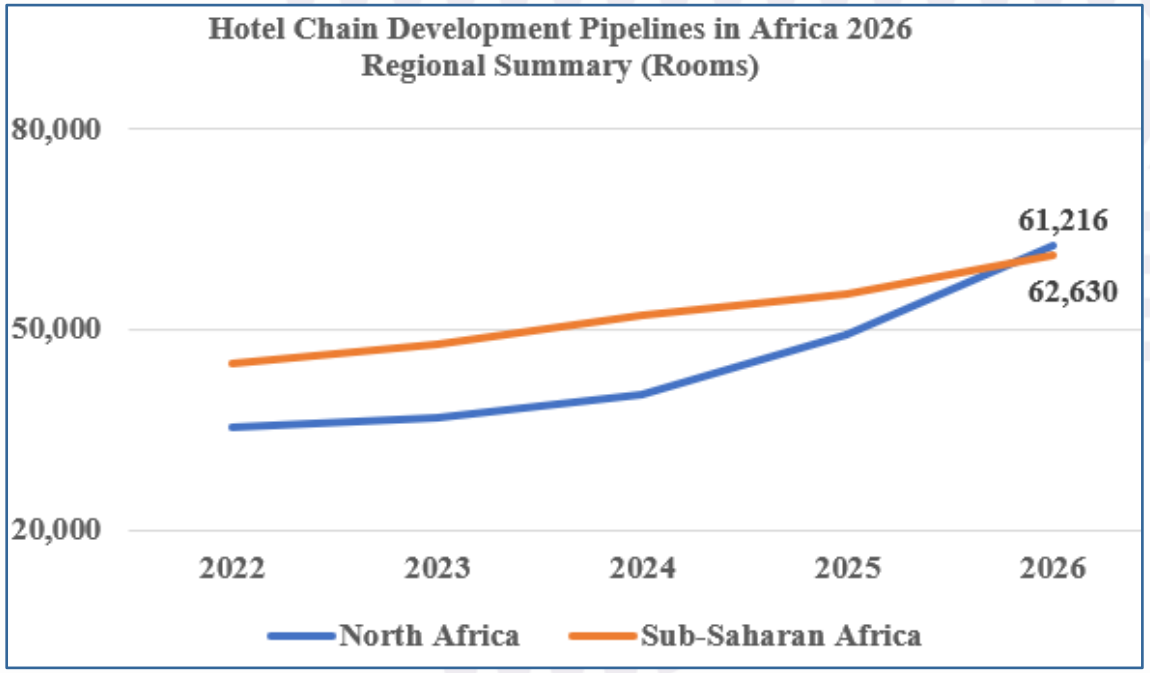
THE FUTURE

The number of pipeline hotels and resorts – the Top 10



THEN AND NOW





THEN **NOW**

THE PIPELINE DATA - THE WHO

Hotel Chain Development Pipelines in Africa 2026 Top 10 Hotel Chains by Number of Planned Rooms in Hotels and Resorts						
	Hotel Chain	Hotels	Rooms	Change on 2025	Average Size	Share of Total
1	Marriott International	180	31,782	7%	177	25.7%
2	Hilton	109	19,599	15%	180	15.8%
3	Accor	88	18,298	22%	208	14.8%
4	IHG Hotels & Resorts	48	9,495	19%	198	7.7%
5	Radisson Hotel Group	35	7,220	14%	206	5.8%
6	Kerten Hospitality	17	3,185	69%	187	2.6%
7	Jaz Hotel Group	13	2,651	-	204	2.1%
8	CityBlue Hotels	12	2,650	183%	221	2.1%
9	The Ascott	20	2,419	28%	121	2.0%
10	Rotana	10	2,282	-	228	1.8%

THE PIPELINE DATA – THE WHAT

Hotel Chain Development Pipelines in Africa 2026 Top 10 Brands by Number of Planned Rooms in Hotels and Resorts						
	Brand	Hotels	Rooms	Change on 2025	Average Size	Share of Total
1	Hilton	35	8,550	12.9%	244	6.9%
2	Marriott Hotels & Resorts	23	6,339	17.8%	276	5.1%
3	Hilton Garden Inn	26	4,033	29.4%	155	3.3%
4	DoubleTree by Hilton	21	3,652	-6.1%	174	2.9%
5	Protea Hotels	24	3,422	6.4%	143	2.8%
6	Rixos	5	3,295	33.6%	659	2.7%
7	Four Points by Sheraton	19	3,224	-12.0%	170	2.6%
8	Radisson	15	2,693	21.7%	180	2.2%
9	Radisson Blu	9	2,216	11.5%	246	1.8%
10	Courtyard by Marriott	10	2,196	5.8%	220	1.8%

THE REAL OBJECTIVE

THE OBJECTIVE

THE END

53
chains

42
countries

123,846
rooms

W HOSPITALITY GROUP

W Hospitality Group
Hotel Chain
Development Pipelines
in Africa 2026

168
brands

675
hotels

12.2%
growth

www.w-hospitalitygroup.com