

What's in the Pipeline for Africa's Booming Hospitality Market?



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47
chains

41
countries

92,193
rooms



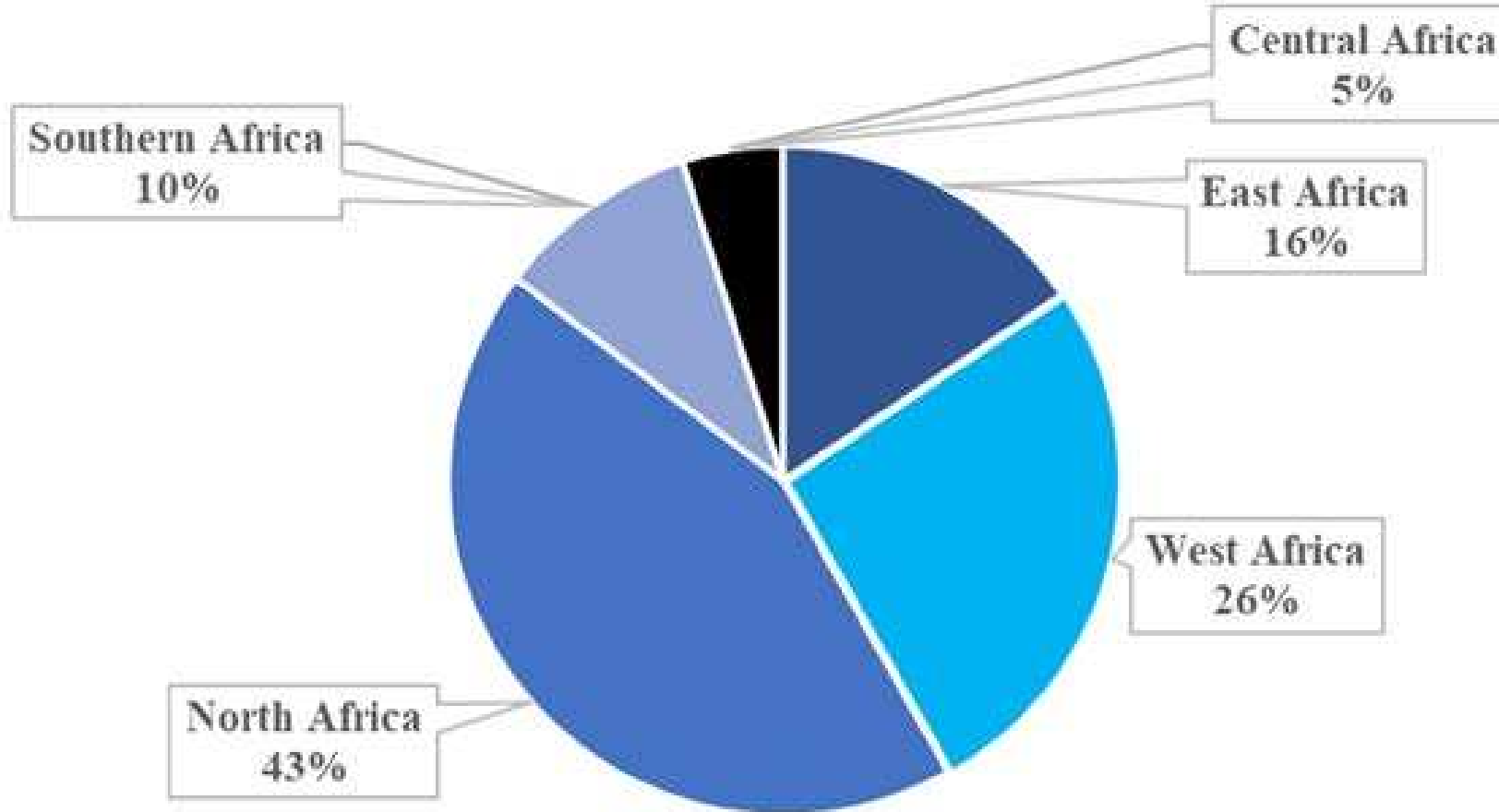
134
brands

524
hotels

9.2%
growth



Hotel Chain Development Pipelines in Africa 2024 Regional Breakdown (Rooms)





Hotel Chain Development Pipelines In Africa 2024 Countries with no Branded Pipeline

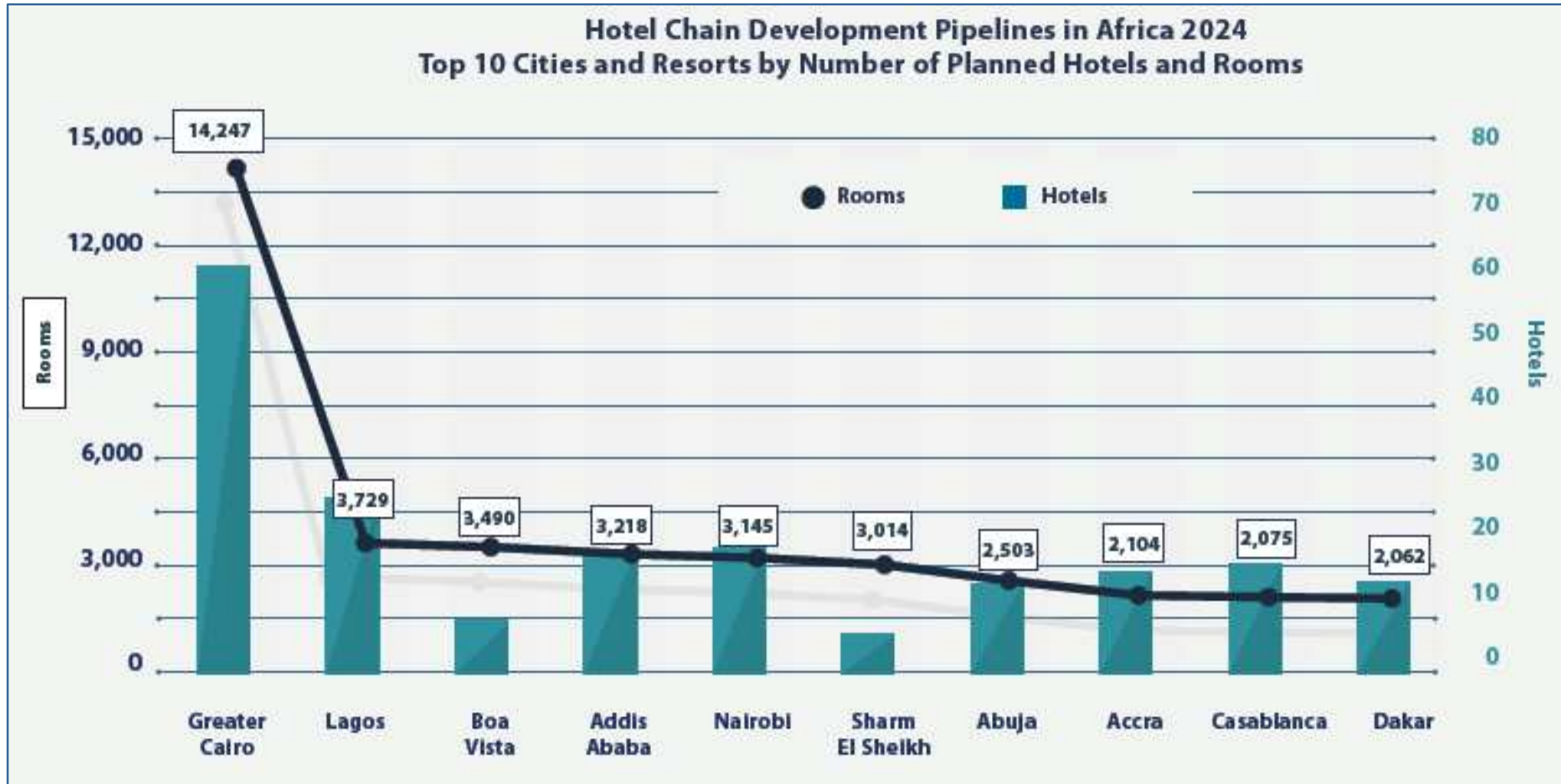
North Africa	Southern and Indian Ocean	West	East	Central
Libya	Comoros Islands Eswatini Lesotho	Guinea Bissau Mali	Burundi Eritrea Somalia Sudan	Central African Republic Equatorial Guinea São Tomé e Príncipe

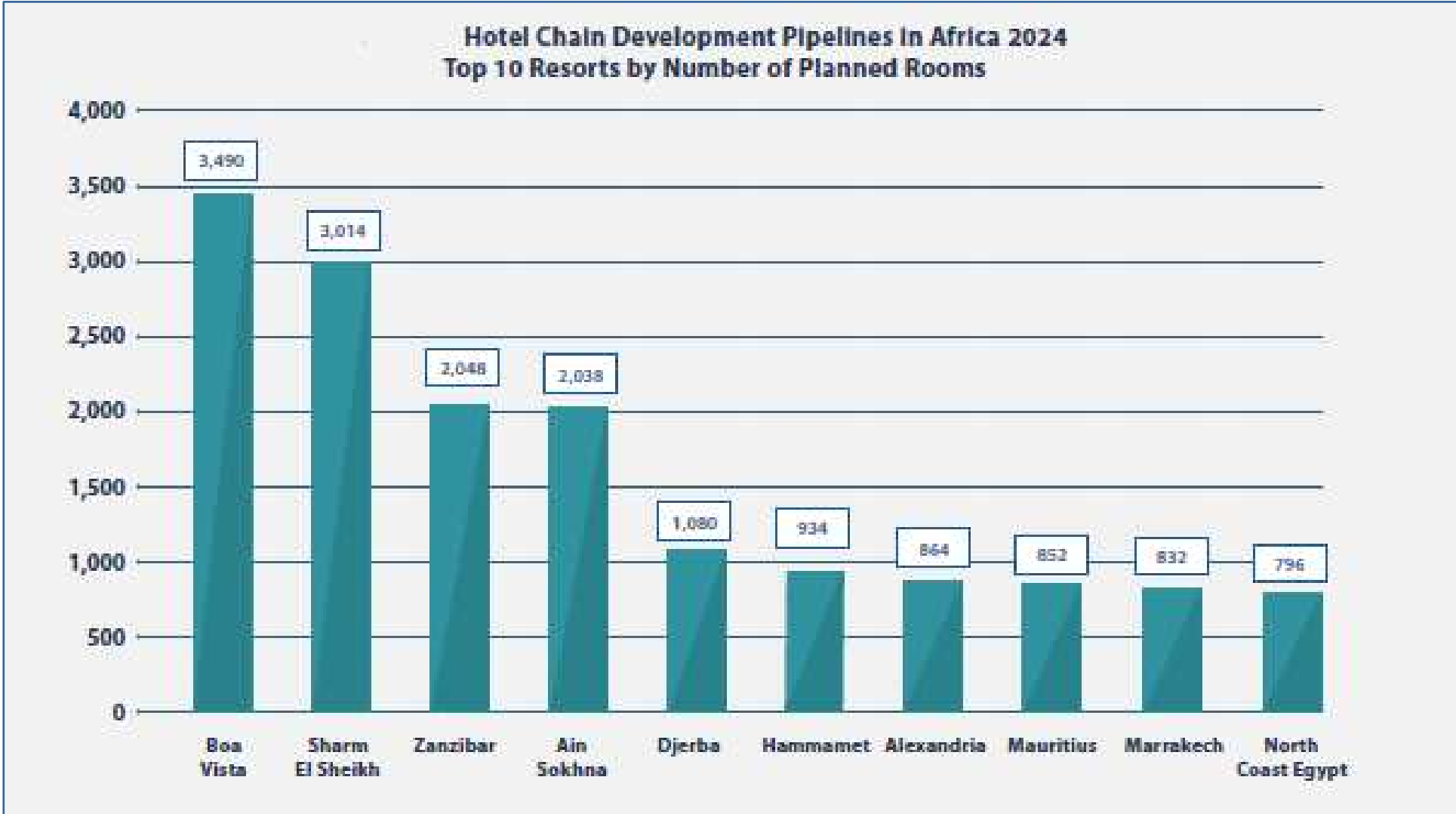




Hotel Chain Development Pipelines in Africa 2024 Top 10 Countries by Number of Rooms

		Hotels	Rooms	Average Size
1	Egypt	109	26,241	241
2	Nigeria	50	7,622	152
3	Morocco	52	7,169	138
4	Ethiopia	31	5,128	165
5	Cape Verde	16	5,056	316
6	Tunisia	18	4,121	229
7	Kenya	31	4,268	138
8	South Africa	22	3,427	156
9	Algeria	13	2,603	200
10	Ghana	19	2,568	135
	Total	361	68,203	189





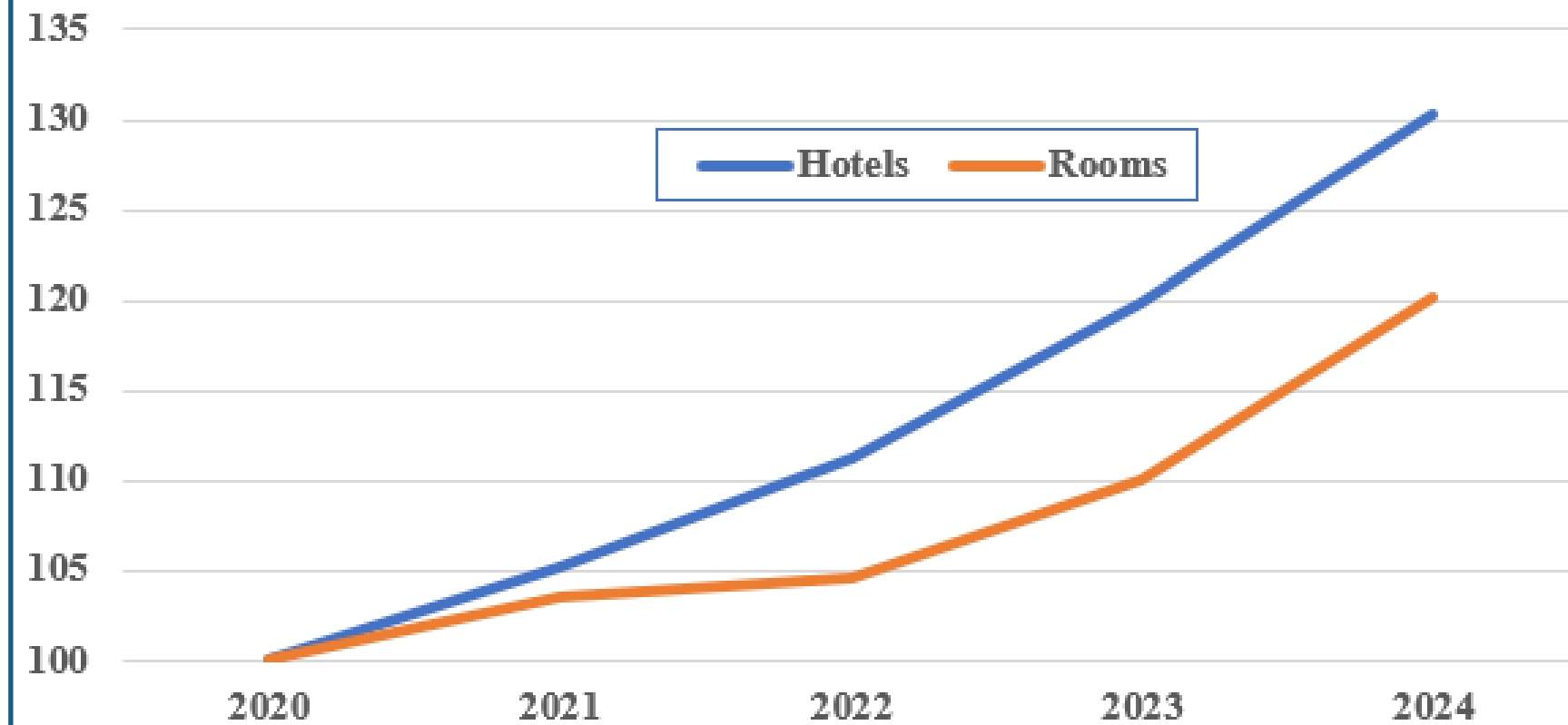


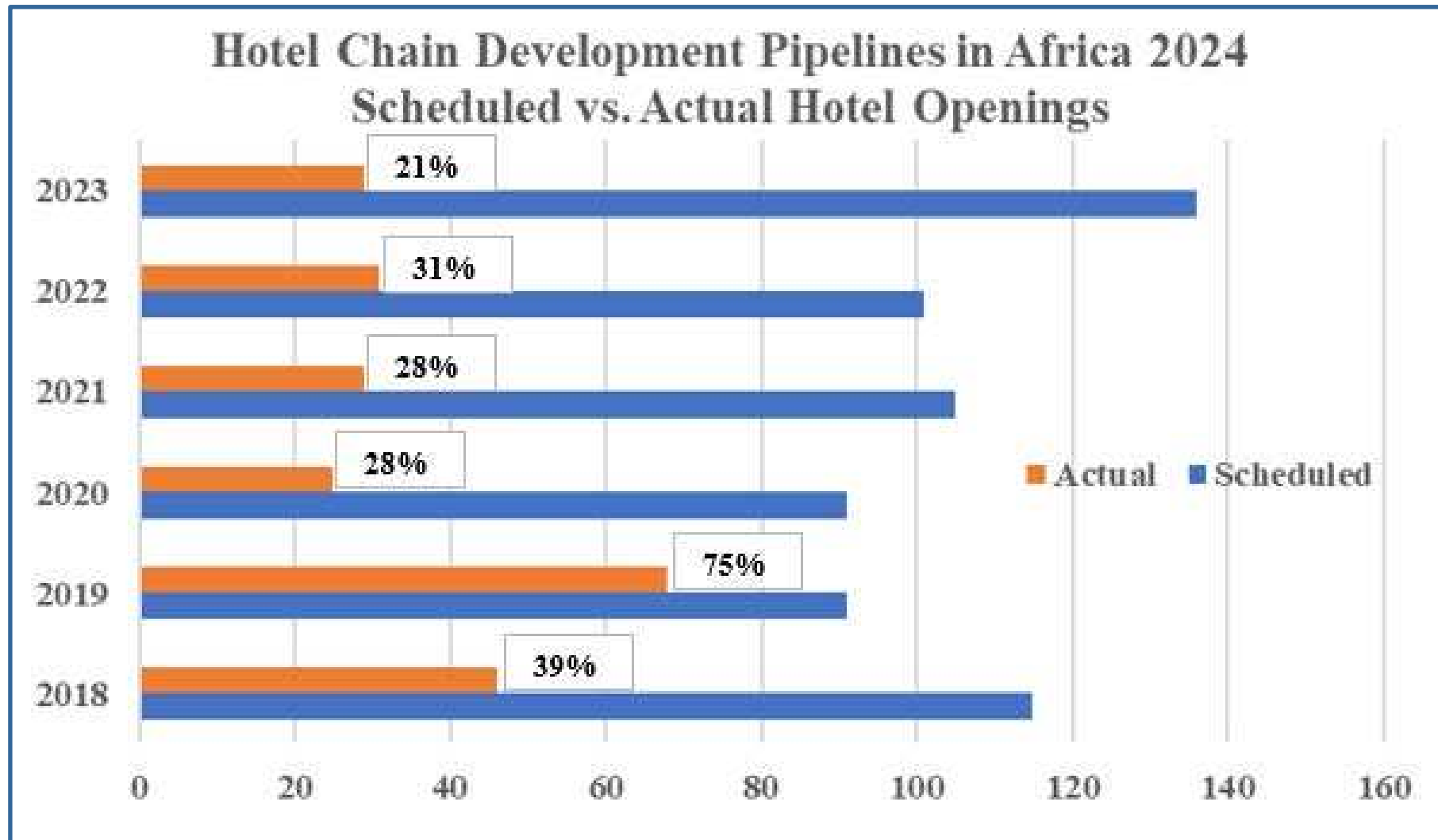
Hotel Chain Development Pipelines in Africa 2024 Top 10 Hotel Chains by Number of Planned Rooms

		Hotels	Rooms	Change on 2023		Average Size	Share of Total
				Rooms			
1	Marriott International	138	26,365	+3,589	+15.8%	191	28.6%
2	Hilton	72	13,584	+1,157	+9.3%	189	14.7%
3	Accor	70	13,375	-4,109	-23.5%	191	14.5%
4	Radisson Hotel Group	35	6,618	+1,046	+18.8%	189	7.2%
5	IHG Hotels & Resorts	30	5,113	+845	+19.8%	170	5.5%
6	TUI Hotels & Resorts	12	3,228	+2,801	+656.0%	269	3.5%
7	Hyatt Hotels & Resorts	11	1,936	+144	+8.0%	176	2.1%
8	Kerten Hospitality	13	1,889	-	+0.0%	145	2.0%
9	Wyndham Hotels & Resorts	10	1,633	+207	+14.5%	163	1.8%
10	Meliá Hotels International	5	1,623	-360	-18.2%	325	1.8%
	Total	396	75,364	3,297	4.6%	190	81.7%



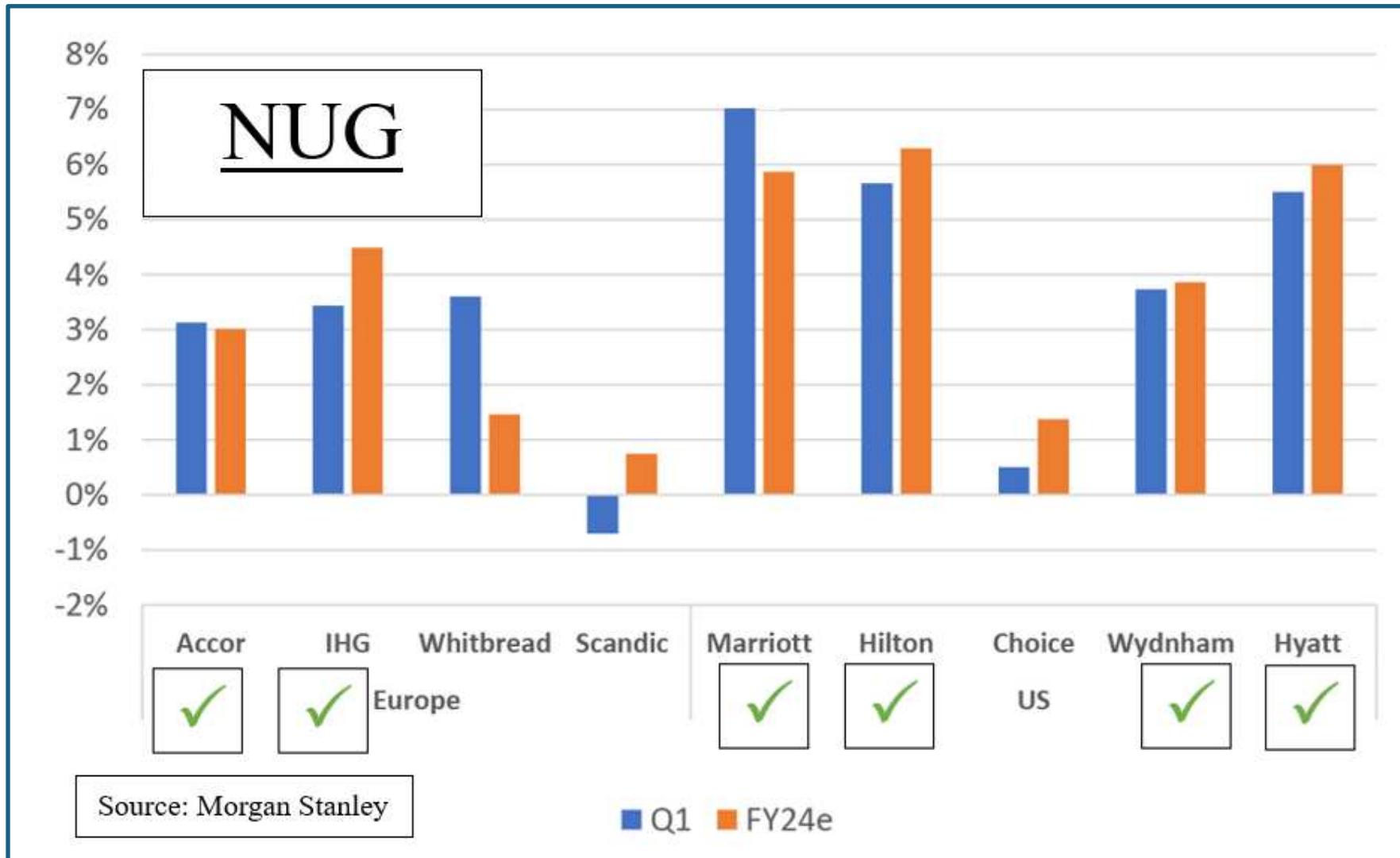
Hotel Chain Development Pipelines in Africa 2024 It's All About Growth and Value

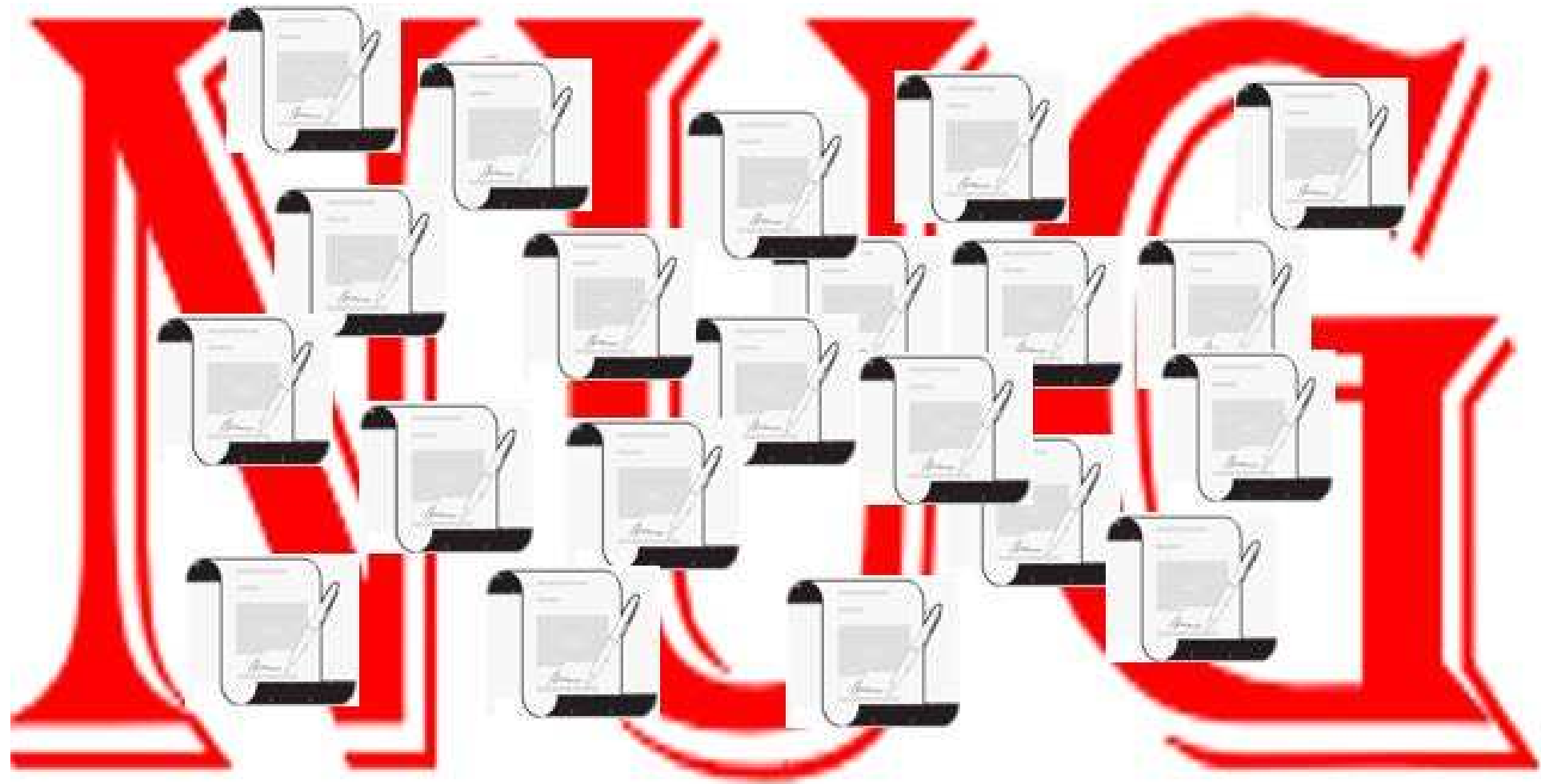






Hotel Chain Development Pipelines In Africa 2024 Anticipated Opening Years of Pipeline Deals			
	Hotels	Rooms	Cumulative New Rooms Open
2024	139	19,122	19,122
2025	152	27,448	46,570
2026	110	20,705	67,275
2027	56	11,845	79,120
2028	31	6,181	85,301
2029	-	-	85,301
2030	17	3,841	89,142
TBC	19	3,051	92,193
Total	524	92,193	







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