



# Hospitality Investment and Expansion in Africa

**PRESENTED BY:**

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**50**  
chains

**42**  
countries

**104,444**  
rooms

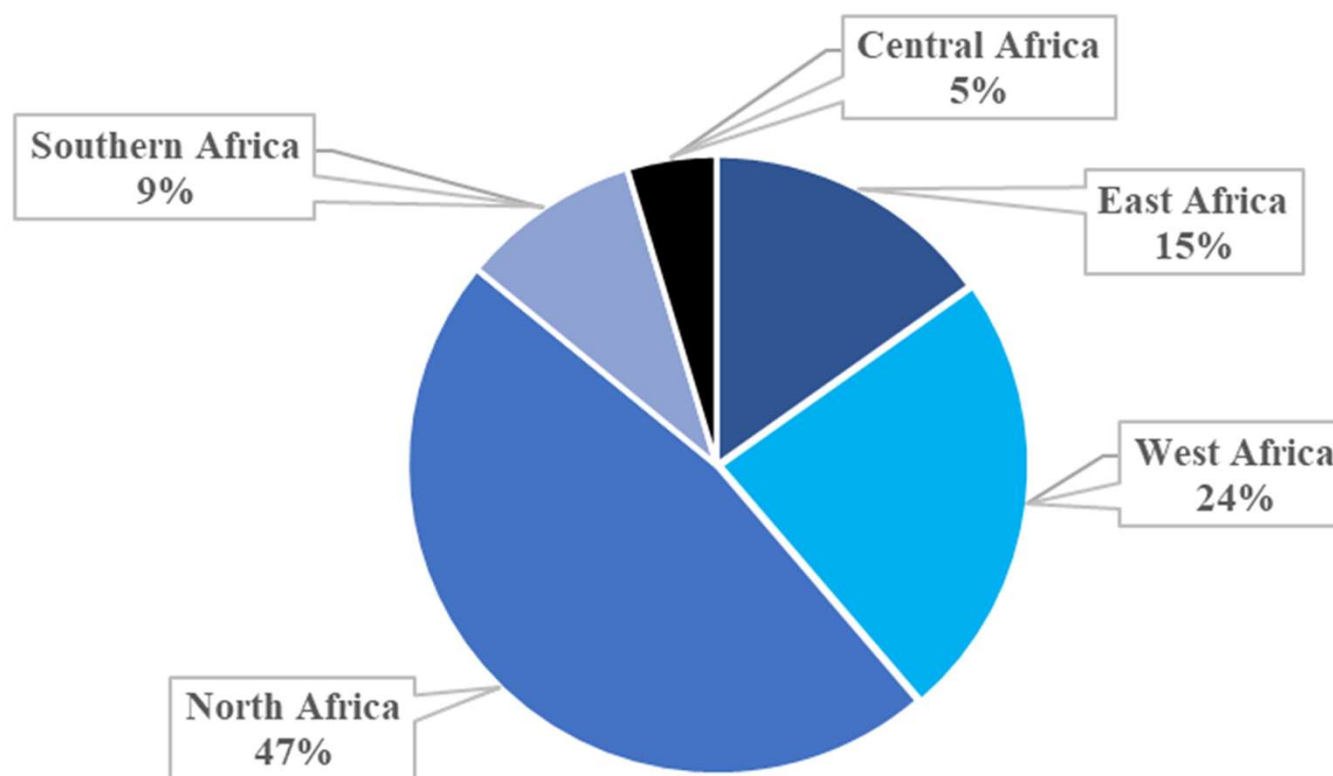


**145**  
brands

**577**  
hotels

**13.3%**  
growth

### Hotel Chain Development Pipelines in Africa 2025 Regional Breakdown (Rooms)



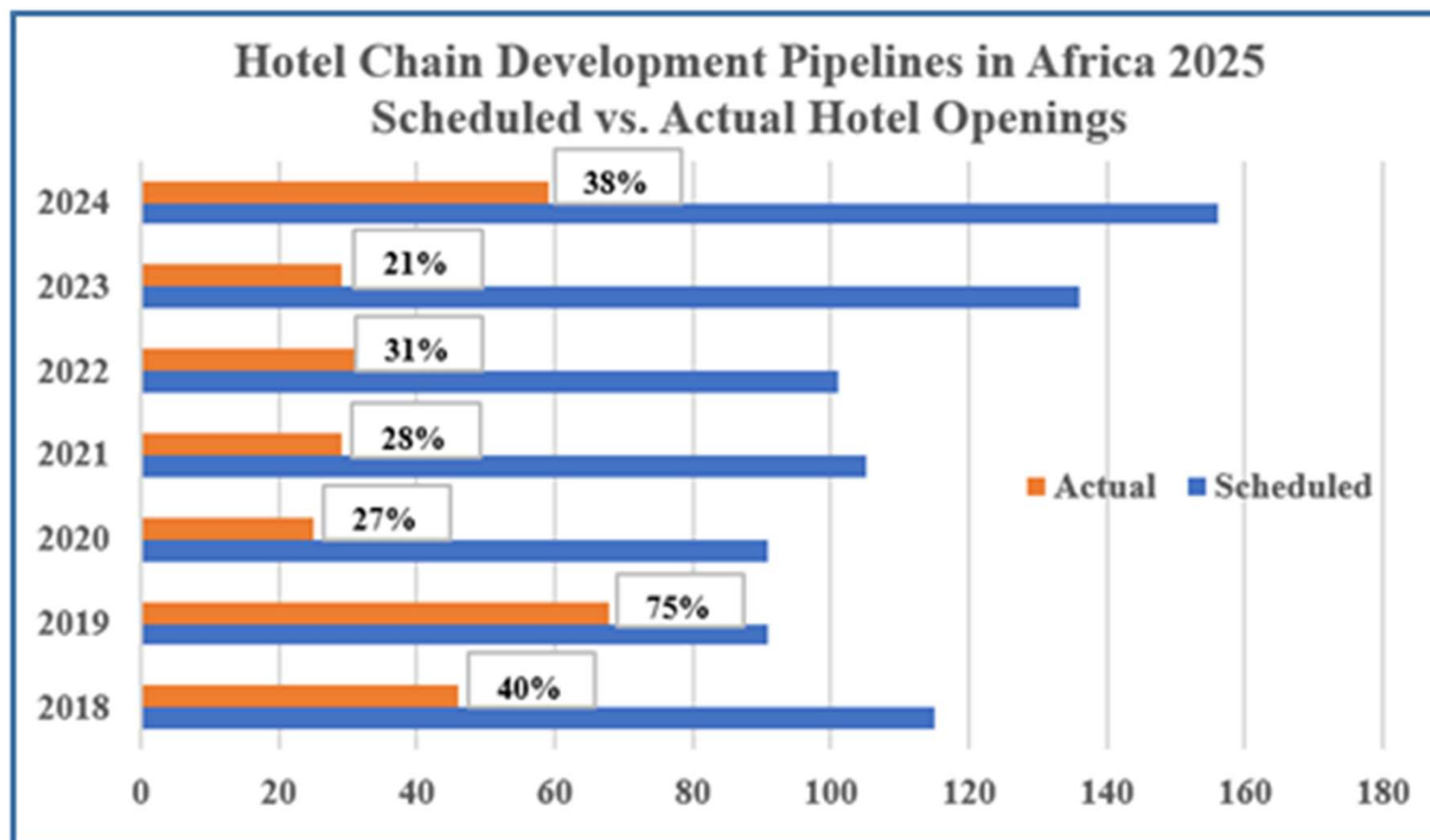
Hotel Chain Development Pipelines in Africa 2024 Countries with no Branded Pipeline				
North Africa	Southern and Indian Ocean	West	East	Central
Libya	Eswatini Lesotho	Burkina Faso Guinea Bissau Mali	Burundi Eritrea Sudan	Central African Republic Equatorial Guinea São Tomé e Príncipe

Hotel Chain Development Pipelines in Africa 2025 Top 10 Countries by Number of Room				
		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
	<b>TOTAL</b>	<b>420</b>	<b>80,351</b>	<b>192</b>

### Hotel Chain Development Pipelines in Africa 2025 Top 10 Hotel Chains by Number of Planned Rooms

		Hotels	Rooms	Change on 2023		Average Size	Share of Total
				Rooms			
1	Marriott International	165	29,639	+3,274	+12.4%	180	28.4%
2	Hilton	93	17,040	+3,456	+25.4%	183	16.3%
3	Accor	73	15,013	+1,638	+12.2%	206	14.4%
4	IHG	40	7,951	+2,838	+55.5%	199	7.6%
5	Radisson Hotel Group	32	6,346	+1,233	+24.1%	198	6.1%
6	TUI Hotels & Resorts	11	2,954	-274	-8.5%	269	2.8%
7	Barceló Hotels & Resorts	7	2,193	+1,127	+105.7%	313	2.1%
8	The Ascott	15	1,897	+382	+25.2%	126	1.8%
9	Kerten Hospitality	13	1,881	-8	-0.4%	145	1.8%
10	Wyndham Hotels & Resorts	7	1,706	+73	+4.5%	244	1.6%
	<b>Total</b>	<b>456</b>	<b>86,620</b>	<b>+11,715</b>	<b>+15.6%</b>	<b>190</b>	<b>82.9%</b>

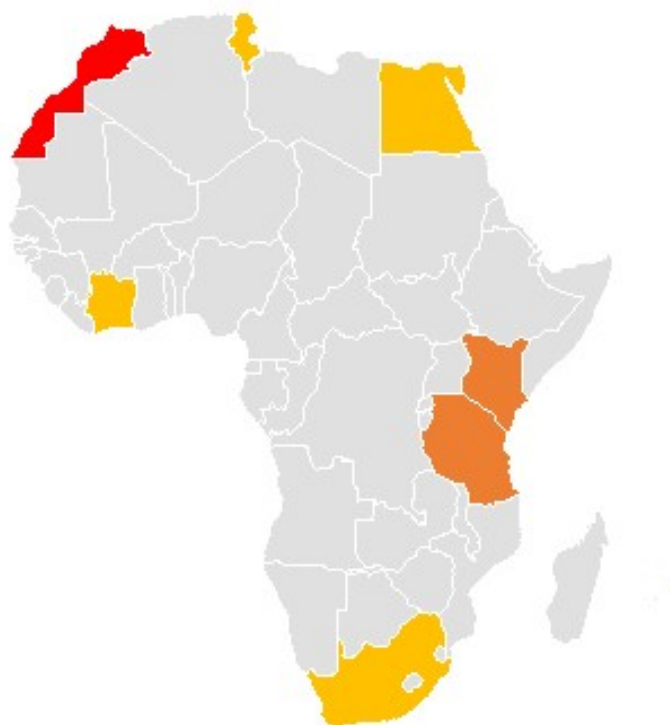




Hotel Openings 2024 Hotels and Rooms						
<b>Angola</b>	1	89		<b>Mauritius</b>	3	934
<b>Benin Rep.</b>	1	198		<b>Morocco</b>	10	1,511
<b>Burkina Faso</b>	1	232		<b>Namibia</b>	1	59
<b>Cape Verde</b>	2	415		<b>Nigeria</b>	2	172
<b>Congo</b>	1	221		<b>Seychelles</b>	3	229
<b>Côte d'Ivoire</b>	3	371		<b>South Africa</b>	3	330
<b>DRC</b>	1	120		<b>Tanzania</b>	7	711
<b>Egypt</b>	3	665		<b>Tunisia</b>	4	1,091
<b>Ghana</b>	2	179		<b>Zambia</b>	1	86
<b>Guinea</b>	1	282		<b>Zimbabwe</b>	2	324
<b>Kenya</b>	7	1,340		<b>TOTAL</b>	<b>59</b>	<b>9,559</b>

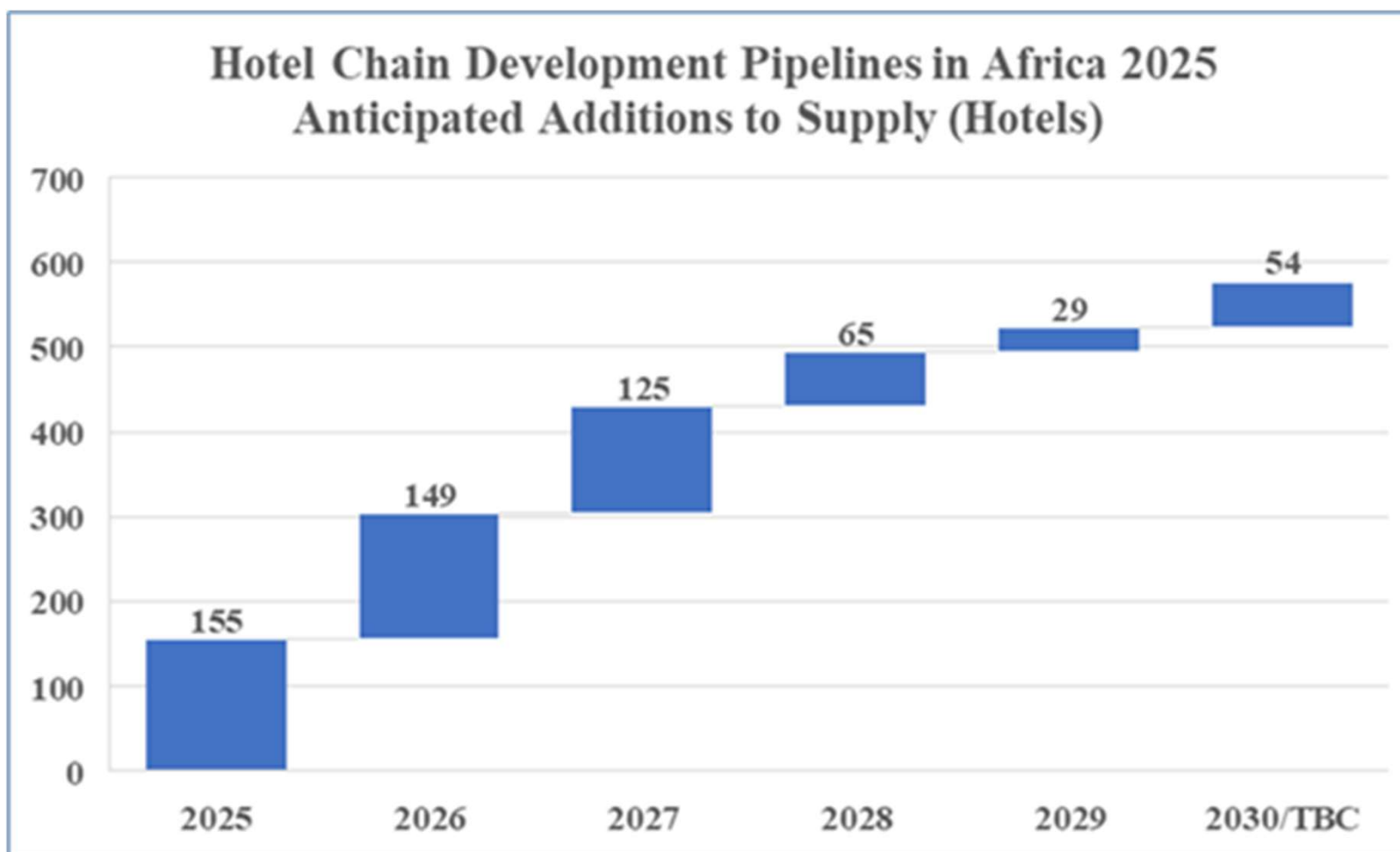


## Hotel Openings 2024 Top 10 Countries

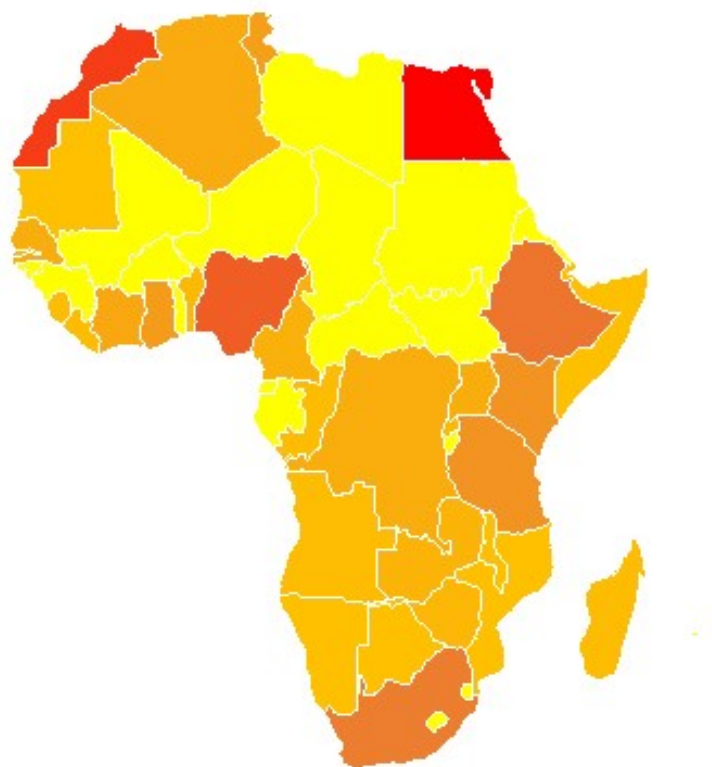


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Hotel Openings 2024 Type and Location		
<b>Airport</b>	1	Lusaka
<b>City</b>	31	Abidjan, Accra, Bouaké, Brazzaville, Cairo, Casablanca, Conakry, Cotonou, Dar es Salaam, Harare, Luanda, Lubumbashi, Nairobi, Ouagadougou, Pretoria, Rabat, Tunis, Walvis Bay, Warri, Yenagoa
<b>Resort</b>	27	Agadir, Hammamet, Hoedspruit, KwaZulu-Natal, Mahe, Marrakech, Mauritius, Ngorongoro, Nyahururu, Platte Island, Port Ghalib, Prampram, Sal, Santiago, Serengeti, Shungimbili Island, Tamuda Bay, Victoria Falls, Zanzibar

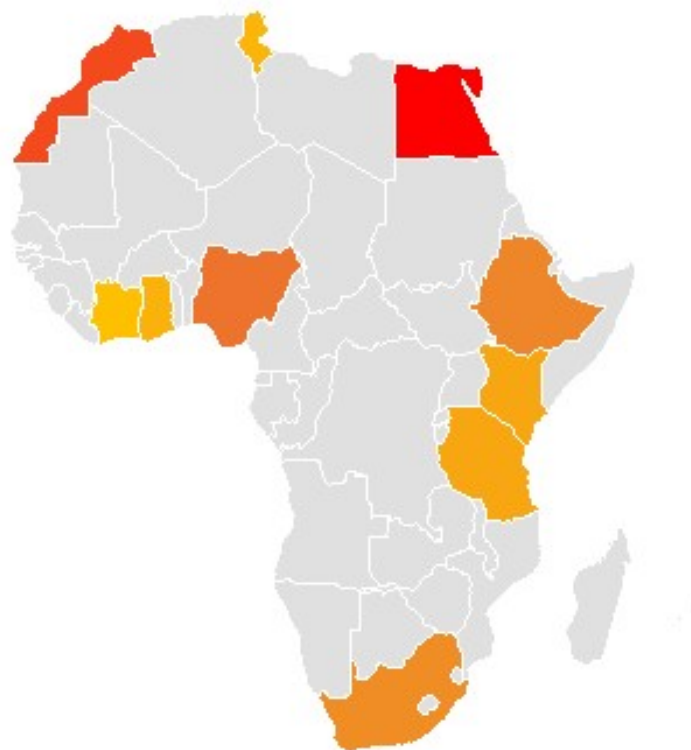


## Anticipated Hotel Openings 2025 & 2026 All Africa





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## Anticipated Hotel Openings 2025 & 2026 Top 10 Countries



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<b>Openings vs Pipeline 2024</b>	<b>13%</b>	<b>Openings vs Pipeline 2024</b>	<b>11%</b>
Source: Lodging Econometrics		Source: W Hospitality Group	



# THE OBJECTIVE



## THE CHALLENGE

			
Deals per Country 2024	<b>c100</b>	Deals per Country 2024	<b>c10</b>
Source: Lodging Econometrics		Source: W Hospitality Group	



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