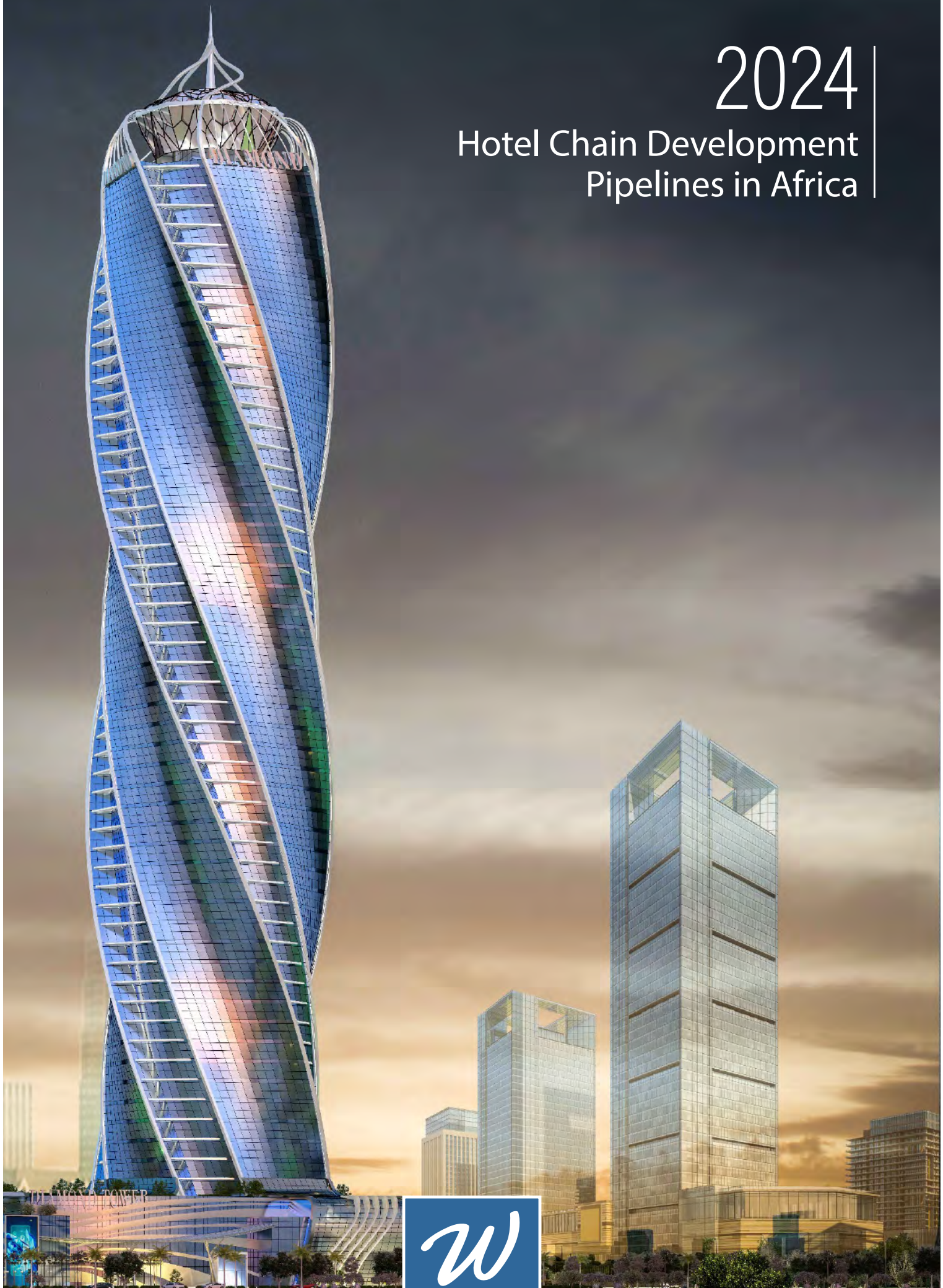


2024

Hotel Chain Development
Pipelines in Africa





Kertel Hotel
Kinshasa

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Hilton Cairo
New Capital Tower**

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**Wyndham
Lagos Ikeja**

**Barcelo
Michamwi Bay
Zanzibar**

This is the 16th edition of our annual Hotel Chain Development Pipelines in Africa survey and analysis. This year we received responses from 47 international and regional hotel chains (some with nil returns), reporting their pipeline activity for 134 of their brands for which they have signed deals in Africa.

As of early 2024 the chains' development pipelines total a record 524 hotels and resorts with 92,193 rooms, up an amazing 9.2 per cent on 2023. In this report, we provide an analysis of those deals, looking at who's doing what, where, how and when; we have up to 18 data points per planned hotel – that's a total of over 9,000 "bits"! Our analyses provide a unique understanding of the present and future (and a bit of the past, too) of the hotel industry in Africa, an understanding that is essential for investors, governments, hospitality and real estate professionals, students and others.

We tracked 29 hotels and resorts with about 3,500 rooms that opened in 2023, down on the 2022 figures. That's just 6 per cent of that year's pipeline, and 21 per cent of the hotels that were scheduled to open last year. The chains project that they will open 139 hotels in 2024, equivalent to almost 27 per cent of the pipeline. In 2019, we calculated that 75 per cent of scheduled hotels actually opened, so we look forward to getting back to that kind of figure this year. With the exception of 2019, then, we won't look back too much to envision the future of the chain hotel industry in Africa, we'll do what we can to get all those hotels open.

We also look to the future to overcome some of the challenges that Africa has faced in 2023, and continues to face this year. Economic and political woes, and natural and man-made disasters, hit the news regularly, and these macro-level events can cause negativity about some of the countries of Africa, if not, for some people, about the continent as a whole. But the fact that the hotel chains signed over 100 new deals last year, and that 29 hotels did actually open (even one hotel opening is good news!), is evidence that the glass is still much less than half full, with plenty of opportunities for further development. One interesting result from this year's analysis is that there has been a massive increase in the number of resort projects in the pipeline, and therefore the number of rooms, increasing from 24 per cent of the total last year to 30 per cent in 2024. Zanzibar's numbers doubled!

The growth of the hotel chains' presence and pipeline in Africa has been a really positive story, and we are proud to be closely involved with it. We are based in Africa (celebrating 21 years since the establishment of our office in Lagos in 2003) and, in addition to the research work carried out for this report each year, we have provided professional advice to the owners and operator of several of the deals that are included in the data.

134
Brands

We are extremely grateful to the hotel chains who contributed to our report this year. We welcome back our supporters who willingly provide their data every year (thank you!), and those new to the survey in 2024. A full list of the hotel chains and their brands who provided their data is provided in Appendix 1. We're so pleased to welcome seven new chains this year, namely Catalonia Hotels & Resorts, ENVI Lodges, Index Hotels, LVMH Hotel Management, Mandarin Oriental, RIU Hotels & Resorts and Valor Hospitality. Of those, Catalonia Hotels & Resorts, ENVI Lodges and LVMH Hotel Management are entering Africa for the first time, through investment or management, with the intention of doing more.

47
Chains

For the first time we report on the activities of the white label operators in Africa, extending their reach as the number of signed franchise deals increases, creating a virtuous circle, as the brand owners have greater confidence in signing a franchise when a competent third party management company is in place.

Should you have any comments and questions on the report, or would like to discuss how to obtain additional analyses to those included here, then please do get in touch.

Trevor J Ward
Managing Director
W Hospitality Group
Lagos, Nigeria

March 2024

**Pullman Hotel
Addis Ababa**



Our report covers the 54 countries in Africa, comprising North Africa (Morocco, Algeria, Tunisia, Libya and Egypt), sub-Saharan Africa and the Indian Ocean islands (Seychelles, Mauritius, Comoros and Madagascar), and provides consistent, reliable and comparable data on the development pipeline activity of the hotel chains who are operating in Africa, and those who are seeking to enter the continent for the first time.

This report has been compiled using the data on signed deals provided to us in early 2024 by 47 regional (African) and international hotel chains. To be included in this report, Africa-based chains need to operate in (or are planning on expanding into) more than one country on the continent, and the international hotel chains in more than one country globally. We do not, therefore, include hotel chains which are only domestic, i.e. operate in only one African country.

If you would like to participate in our survey, and meet the criteria stated above, then please do get in touch.

In addition, the deals need to be legally-binding management, franchise or other agreements (some of the hotel chains are owner-operators, or lease hotels) which state the intention of the parties to open a hotel or resort at a date in the future. Deals at the stage of an MOU, which are “hoped-for” (whether or not they are under construction) are not included.

47 Chains

As in previous years the data have been analysed in several ways, including by region, by country, by city, by hotel chain and by brand, and other permutations. This provides several ways in which to understand the chain hotel pipeline activity in Africa. The status of each project has been assessed, differentiating hotels that are in the pre-planning stage (i.e. still on paper) from those that are on-site, in the construction phase. “Under construction” means that work has started on site, but there are several projects where work has been suspended for some time (in a few cases for several years, we’re sorry to say). Whether or not they will ever materialise is a moot point, but if they remain as deals recorded in the hotel chains’ development pipelines, then they are included in the analysis.

41 Countries

We record only the development activity of the various hotel chains that contribute data – of course there are many other hotels in Africa that are planned and opening that are not chain affiliated, but that, as they say, is for another day.

Appendices 1, 3 and 4 list all the hotel chains and their brands that participated in our survey this year, and details of their individual development activity in Africa.





**Four Seasons
Zanzibar**

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Radisson
Safari Hotel
Hoedspruit



2024 Research Findings

Section 1: Regional Summary

The African hotel chain development pipeline now totals 524 hotels with 92,193 rooms, a massive 9.1 per cent increase on last year. This total has been analysed by us divided into two main regions, i.e. North Africa (we count this as five countries – Morocco, Algeria, Tunisia, Libya and Egypt) and sub-Saharan Africa (49 countries, including the Indian Ocean islands). The two regions saw similar increases in 2024 compared to 2023; the pipeline in sub-Saharan Africa is up 9 per cent on 2023 (measured by rooms), whilst in North Africa the total is up by 9.4 per cent.

524
hotels

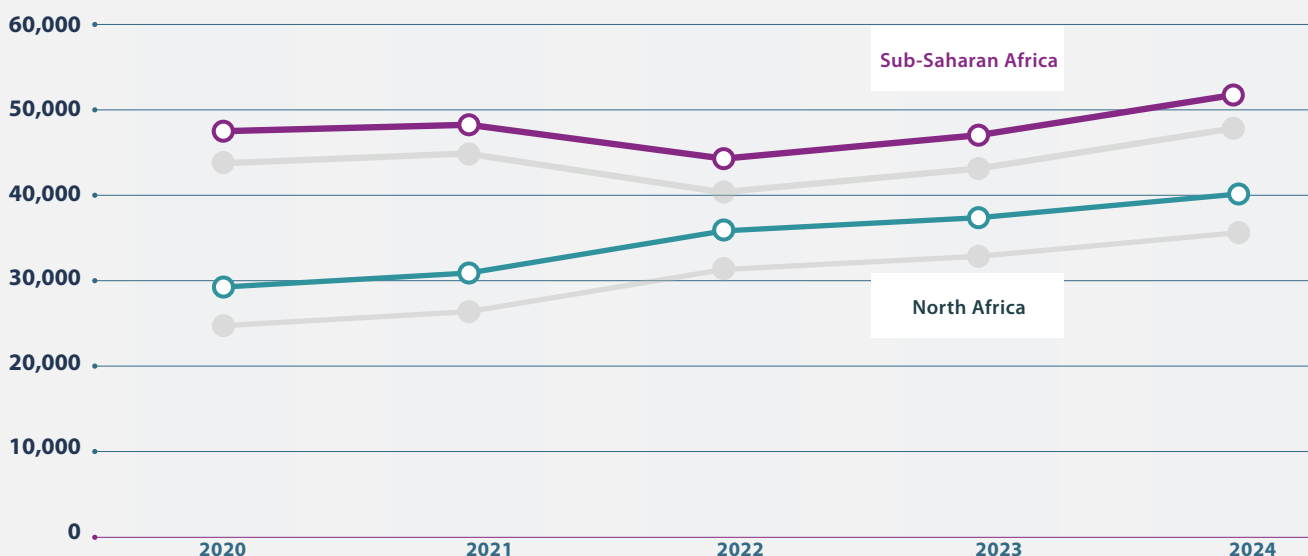
92,193
rooms

	2020		2021		2022		2023		2024	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	119	29,050	134	31,547	166	35,280	175	36,677	192	40,134
Sub-Saharan Africa	283	47,684	289	47,855	281	45,011	307	47,750	332	52,059
TOTAL	402	76,734	423	79,402	447	80,291	482	84,427	524	92,193

As noted previously, we welcomed seven new contributors, with between them 10 hotels and 1,624 rooms, of which nine are in sub-Saharan Africa. Whilst hugely welcome this year, they don't therefore require us to make any amendments to the data on a "same store" basis, as the 2024 rooms total without them would still be up 7.2 per cent on 2023.

The two regions are, of course, very different, with just four countries in North Africa and 37 in sub-Saharan Africa (that's the number of countries with a pipeline, see Tables 2 and 3). So the simple arithmetic is 44 potential new hotels per country in North Africa, and just eight per country in sub-Saharan Africa. Both regions have their "giants" – Egypt and Morocco in North Africa, Nigeria, Ethiopia, Cape Verde, South Africa and Kenya in sub-Saharan Africa. The actual numbers per country are provided in Appendix 2.

Chart 1: Hotel Chain Development Pipelines in Africa 2024 Regional Summary (Rooms)



The hotel chains have deals signed in 41 countries in Africa, as shown in Table 2 and on the map. West Africa leads with 14 countries (out of a total of 18), followed by the Southern & Indian Ocean sub-region where there are 11 countries with pipeline development activity.

This year we have lost Libya and Sudan (the single projects in each country were cancelled) but gained The Gambia.

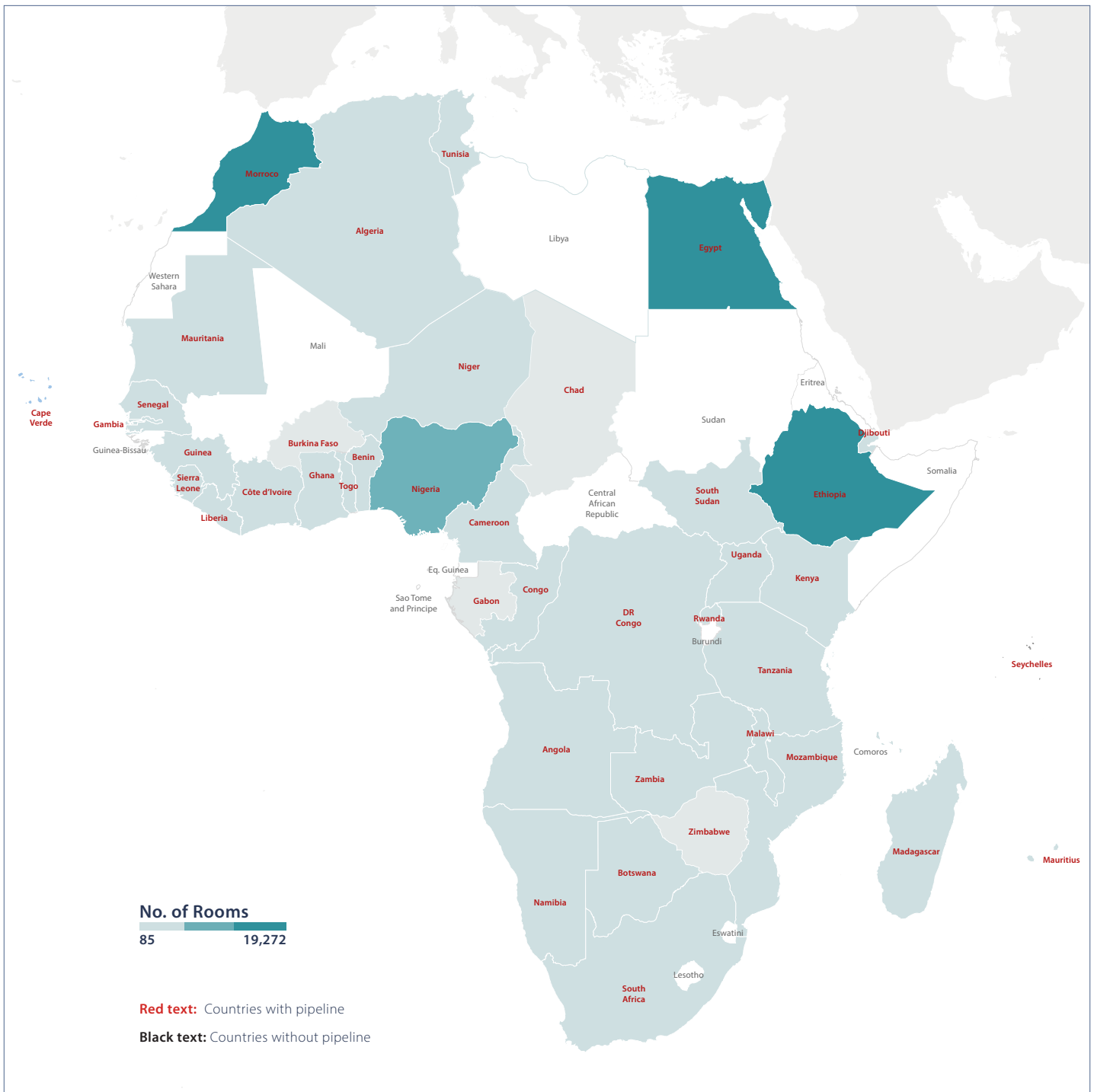
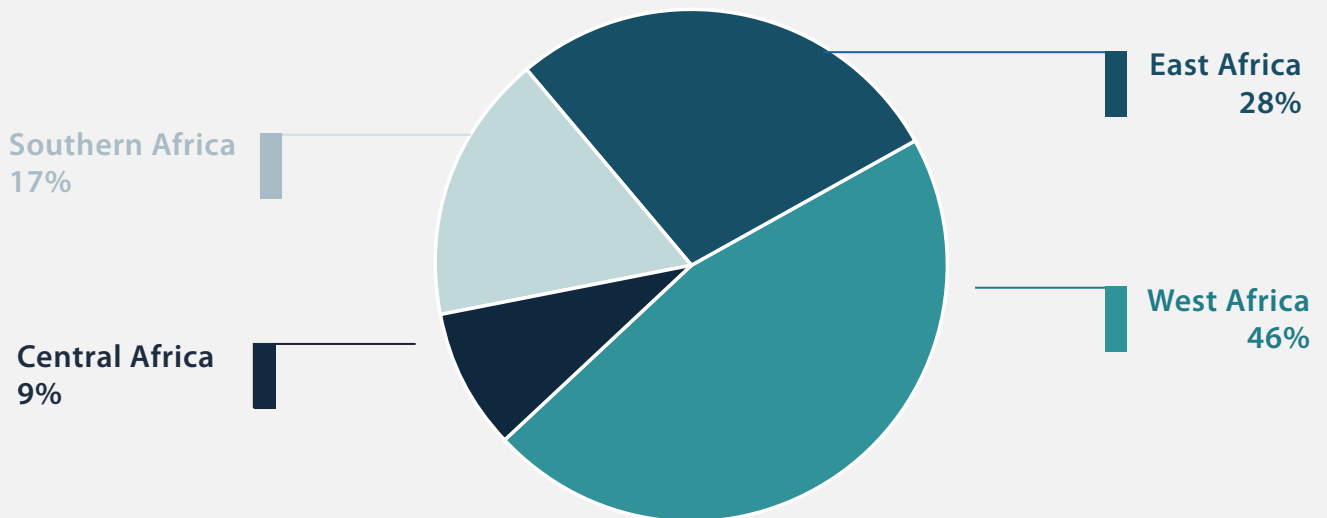


Table 2: Hotel Chain Development Pipelines in Africa 2024
Countries with Hotel Chain Pipeline Deals

North	Southern and Indian Ocean	West	East	Central
Algeria Egypt Morocco Tunisia	Angola Botswana Madagascar Malawi Mauritius Mozambique Namibia Seychelles South Africa Zambia Zimbabwe	Benin Republic Burkina Faso Cape Verde Côte d'Ivoire Ghana Guinea Liberia Mauritania Niger Nigeria Senegal Sierra Leone The Gambia Togo	Djibouti Ethiopia Kenya Rwanda South Sudan Tanzania Uganda	Cameroon Chad Congo DR Congo Gabon

Chart 2 provides the distribution of pipeline rooms into the four subregions of sub-Saharan Africa. West Africa has the main pipeline activity with 20,624 rooms (46 per cent of the regional total), followed by East Africa with 28 per cent.

Chart 2: Hotel Chain Development Pipelines in Africa 2024
Regional Breakdown Sub-Saharan Africa (Rooms)



There has been very little change in the regional distribution in the last three years, with West Africa still dominating, partly due to its largest number of countries. So far, the political unrest in the so-called “coup belt” hasn’t impacted on signings elsewhere in the region (Nigeria and Ghana having the largest pipelines), but it remains to see whether there is any contagion impact on openings. There’s been a small decrease in the number of rooms in the pipeline in East Africa (compared to the increases in the total and in West Africa), a region previously with a strong showing. Both Ethiopia and Uganda are down slightly on last year.

There are 13 countries in Africa which do not feature in this analysis, having zero chain pipeline hotels. These tend to be some of the smallest countries on the continent, although Libya and Sudan join the list this year, with cancellation of projects there by the chains; sad to say that they are two more countries in Africa where the difficulties in getting anything done seem to outweigh the opportunities for hotel operations.

Table 3: 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

Of the countries with no deals, nine already have branded supply, and there are only four countries – Burundi, Central African Republic, Eritrea and Somalia – which have no deals and no existing branded supply.

Table 4 shows the top 10 countries by number of rooms in the pipeline. Together, they account for 69 per cent of the total hotels in the survey, and 74 per cent of the rooms.

Table 4: 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

The extent to which Egypt dominates the African pipeline each year, with almost 26,250 rooms in 109 hotels this time around, is quite remarkable; the country is several lengths ahead of the field, with well over three times the number of rooms in second-placed Nigeria and third-placed Morocco. With continued signing activity (19 hotels with about 5,200 rooms in 2023) Egypt now accounts for fully 28 per cent of the total pipeline.

Why Egypt? Well, it does tick a lot of the boxes for hotel development and operations. Big country, multiple cities and resorts (including the New Cairo), big economy, well-established tourism industry with close proximity to source markets in Europe and the Middle East, several airports and high-volume airlift, availability of domestic finance for hotel development, to name just a few. Sadly, Egypt's tourism industry is negatively impacted at the time of writing by the conflict in the Eastern Mediterranean and the Red Sea, but history tells us that the country has the ability to recover quickly from such external impacts, and in any case, it's travel that's bearing the brunt of the war and terrorism, not signing nor development.

“ In 2023, West Africa experienced increased volatility, while Southern Africa saw limited new hotel developments due to higher construction costs and limited access to capital. Despite these challenges, we managed to counteract negative trends by focusing our efforts primarily in Nigeria, where the majority of our development took place for the year.

Ramsay Rankoussi
Vice President & Head of Development
for Africa & Turkey, Radisson Hotel Group

Nigeria, Morocco and Ethiopia are also large countries (geography and population), which means that, compared to several of their smaller neighbours, there are many locations for hotel development. In this year’s data, we count 16 different locations in Egypt with pipeline hotels, 12 in Morocco, 11 in Nigeria and 10 in Ethiopia. Compare that to say Ghana, 10th on the list, where 16 of the 19 projects are in Accra, with only three other locations with pipeline hotels.

Nigeria moves into second place this year, with nine new deals signed there in 2023, by Hilton and Radisson (3 each), Marriott International (2) and Leva Hotels (1). Lagos remains the focus of deal-signing, with five of the new deals located there. Ten deals were signed last year in Morocco, by Hilton (4), Marriott International (3), The Ascott (2) and TUI Hotels & Resorts (1). Most of the deals were in three cities, namely Casablanca, Rabat and Marrakech.

The pipelines are increasing in these countries, but the hotels actually in operation are not. We comment more fully on the actualisation of pipeline deals in Section 3: in 2023 we tracked only two chain hotels opening in Egypt, and only four in Morocco, with none at all in Nigeria and just one in Ethiopia. Three of those four countries (i.e. excluding Morocco) are experiencing economic difficulties, with Ethiopia also suffering from internal conflict, but hotel development and investment is a long-term game, and signings continue almost regardless.

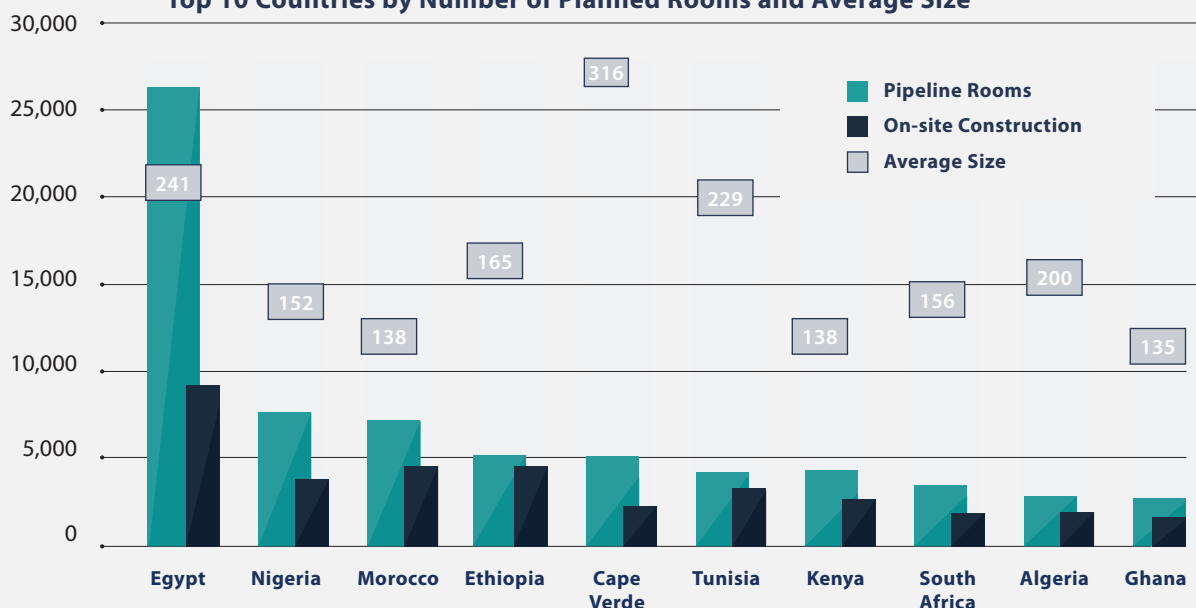
Chart 3 shows the top 10 countries by number of planned rooms, their average size and the construction status. Cape Verde has hotels which on average are much larger, 316 rooms, the majority being large beach resorts, catering mainly to the European market. Of the pipeline hotels there, Meliá Hotels International’s White Sands resort is the largest, with 800 rooms and suites. Even that’s a tiddler compared to the largest hotel in the pipeline, that accolade goes to a Rixos resort being planned in Sharm El Sheikh, with over 1,800 rooms.

Ghana, Kenya and Morocco have the smallest average number of rooms of the top 10 countries.

“ Being the largest hotel company in the world, Africa remains a key focus region for Wyndham Hotel & Resorts. With projects (operational and under development) located in major markets like Nigeria, Morocco, Egypt, Ethiopia, Tanzania, Tunisia, Senegal and Uganda, we’re looking to increase our portfolio with new partnerships in key African capitals, resort locations and financial hubs under both franchise and management contracts. New focus markets include Kenya, Ghana, South Africa, Côte d’Ivoire, Mauritius, Cameroon, Angola, Mozambique and the DR Congo, to name just a few. ”

*Govind Mundra
Head of Development, Middle East & Africa,
Wyndham Hotels & Resorts*

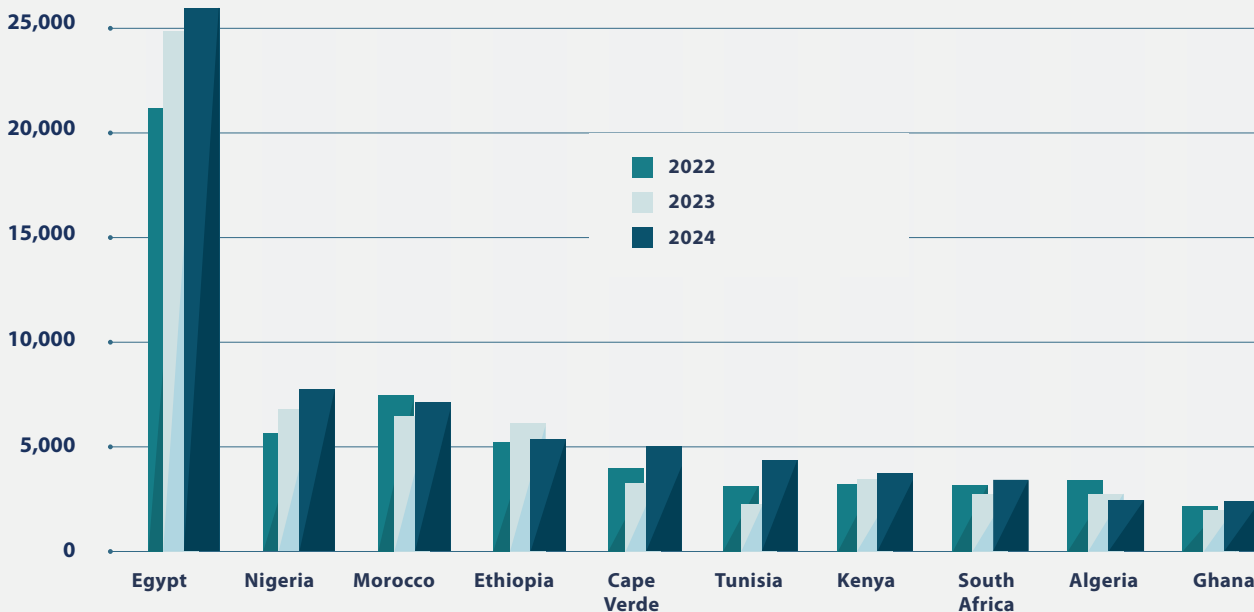
**Chart 3: Hotel Chain Development Pipelines in Africa 2024
Top 10 Countries by Number of Planned Rooms and Average Size**



Of the 10 largest hotels in the pipeline, five are in Egypt, four are in Cape Verde, and one is in Tanzania (Zanzibar). The average size of the top 10 hotels is 770 rooms (up from 723 rooms in 2023), compared to an average of 176 rooms for the total pipeline.

Chart 4 tracks the development activity in the top 10 countries in the last three years. Egypt has seen consistent growth year on year, as have Nigeria and Kenya. Morocco is back to 2022 levels, after a large number of openings in 2022 reduced the 2023 pipeline figure. Renewed interest in Tunisia, with TUI Hotels & Resorts very active there last year, has resulted in a large increase in pipeline rooms there. Table 7 provides information on opening activities in 2023.

**Chart 4: Hotel Chain Development Pipelines in Africa 2024
Top 10 Countries by Number of Planned Rooms 2022-2024**



Appendix 2 provides country by country information on the hotel chains’ development activity.

“ In my engagements across East and West Africa, including countries like Cote D’Ivoire, Ghana, and Nigeria, where we are opening our flagship 5-star hotel, I’ve witnessed firsthand its potential for growth. However, the journey of hotel development is complex, requiring attention to infrastructure, streamlined processes, and improved access to financing.

As a lifestyle operator, our model aims to address the region’s diverse needs, offering solutions ranging from midscale to affordable luxury hotels. There’s a growing openness among hotel owners to introduce fresh lifestyle brands from other parts of the world. Our brand has already signed agreements for six greenfield projects, slated for completion within the next 2-3 years. We are eager to expand our presence on the continent, which is why we have recently appointed a new Director of Development stationed in Africa.”

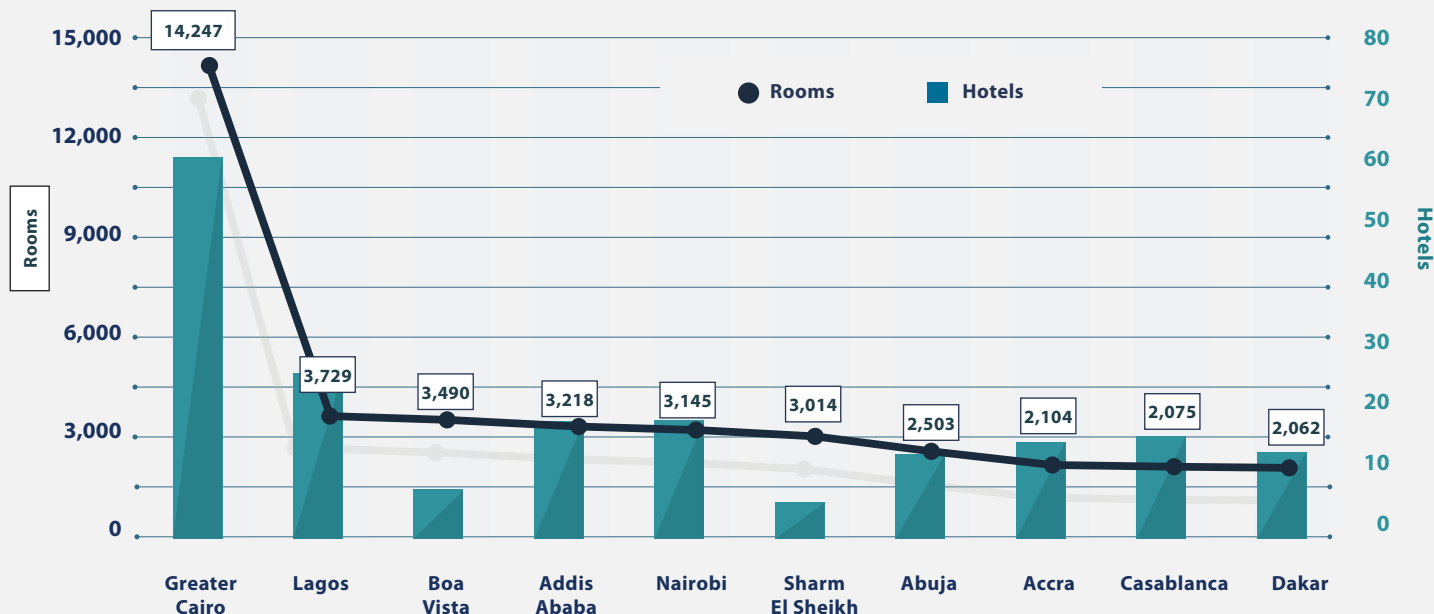
*JS Anand,
Founder & CEO. Leva Hotels*



**Reiz Continental
Hotel by Leva,
Lagos**

Chart 5 shows the top 10 cities and resorts in Africa by number of planned hotels and rooms.

**Chart 5: Hotel Chain Development Pipelines in Africa 2024
Top 10 Cities and Resorts by Number of Planned Hotels and Rooms**



Greater Cairo has by far the largest pipeline (15 per cent of the entire pipeline, up from 12 per cent last year), followed by Lagos and Boa Vista (Cape Verde). There’s a huge difference in the average size of hotels, ranging from about 600 rooms in Sharm El Sheikh and about 500 in Boa Vista (large beach resorts), to about 150 rooms in Lagos and Accra and 130 rooms in Casablanca.

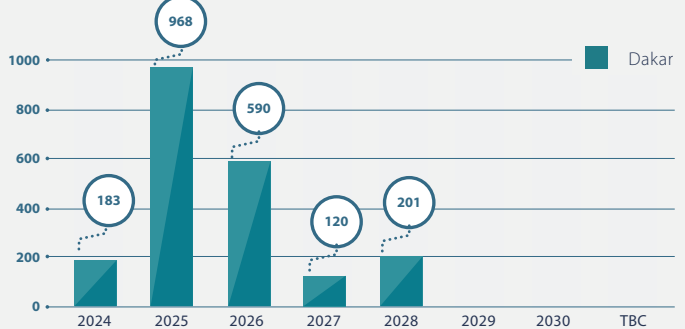
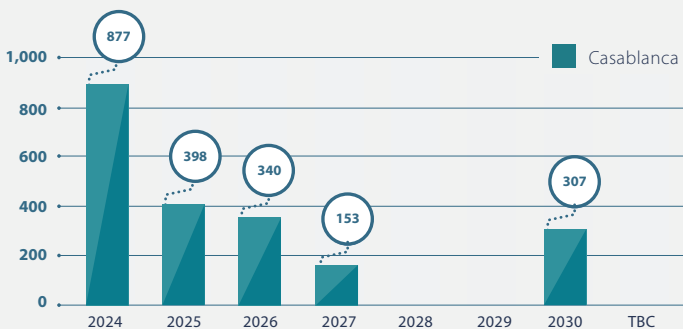
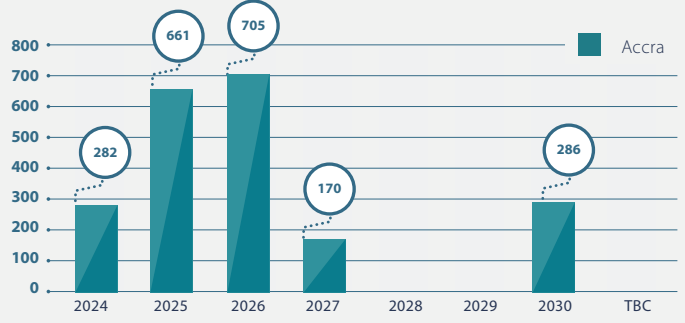
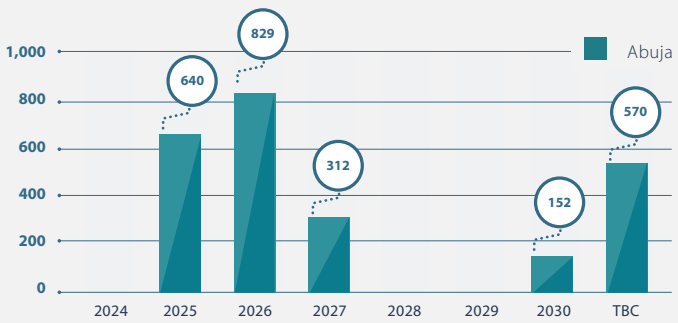
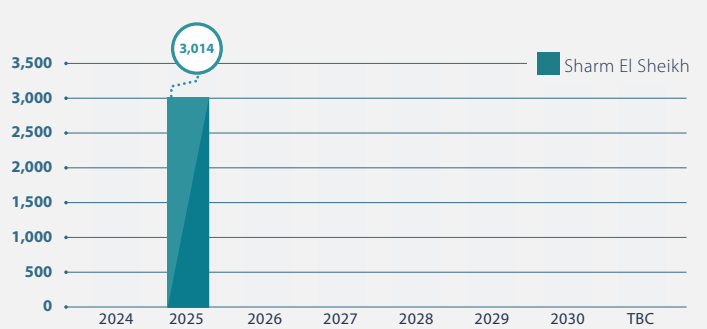
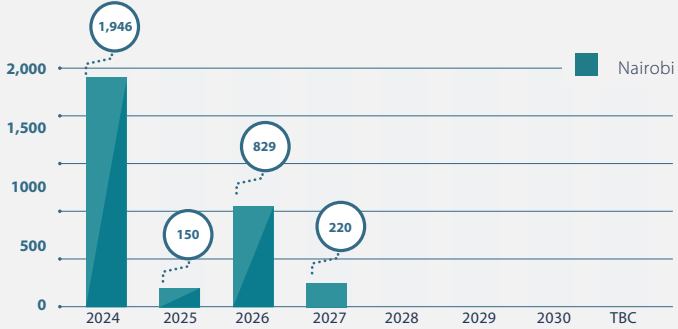
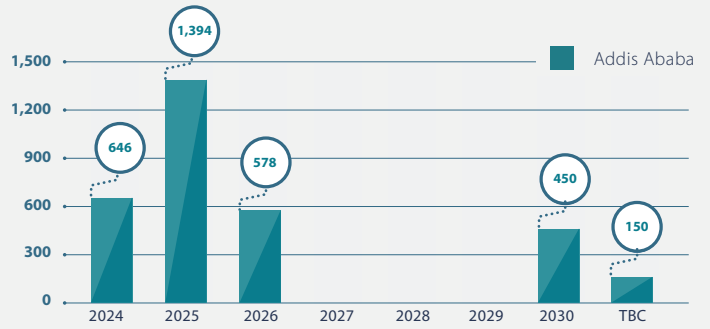
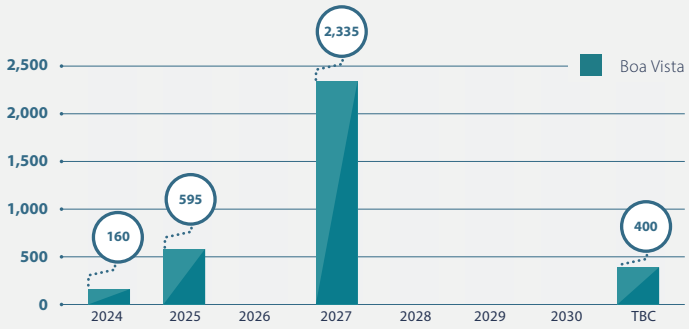
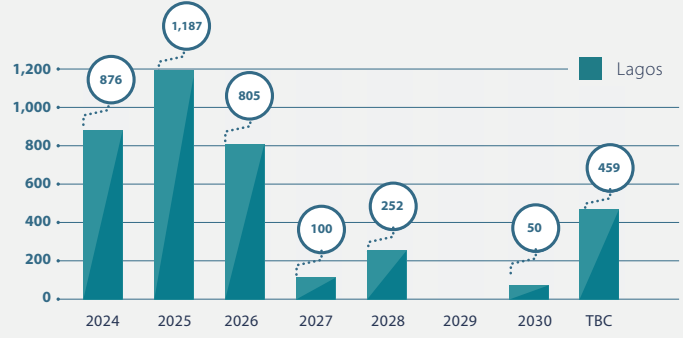
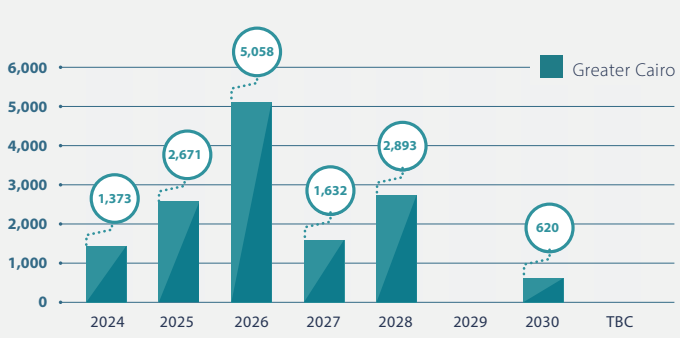
The charts overleaf show the evolution of new supply entering these markets, as anticipated by the hotel chains.

“ The year 2023 was very exciting and rewarding. We’ve witnessed significant interest in our brands for new hotel projects in both the West and East Africa regions, resulting in 2 new signings for Kyriad hotels. Looking ahead to 2024, we anticipate the opening of several hotels in West Africa, including the Golden Tulip Kinshasa scheduled to open by December. Furthermore, our presence in Tanzania will expand with the signature of a resort in Zanzibar, part of our expansion across the entire continent. ”

*Stephane Sebah, Vice President Development.
Louvre Hotels Group*



Chart 6: Hotel Chain Development Pipelines in Africa 2024
Top 10 Cities and Resorts - Anticipated Additions to Supply (Rooms)



Based on what the chains believe are the future opening dates of the hotels in these cities and resorts, there could be some large increases in supply, as shown by the peaks in these charts. All of the 3,000 rooms planned in Sharm El Sheikh are due to open in 2025, and two thirds of the new supply in Greater Cairo could open by the end of 2026 (admittedly in various locations in a mega-city). But it is always “could”, we talk about the rather disappointing actualisation rate in Section 3, construction costs globally have increased alongside general inflation, interest rates and geopolitical factors that have reduced the availability of funding and, for some countries, depreciating currencies have compounded owners’ ability to “get it done”.

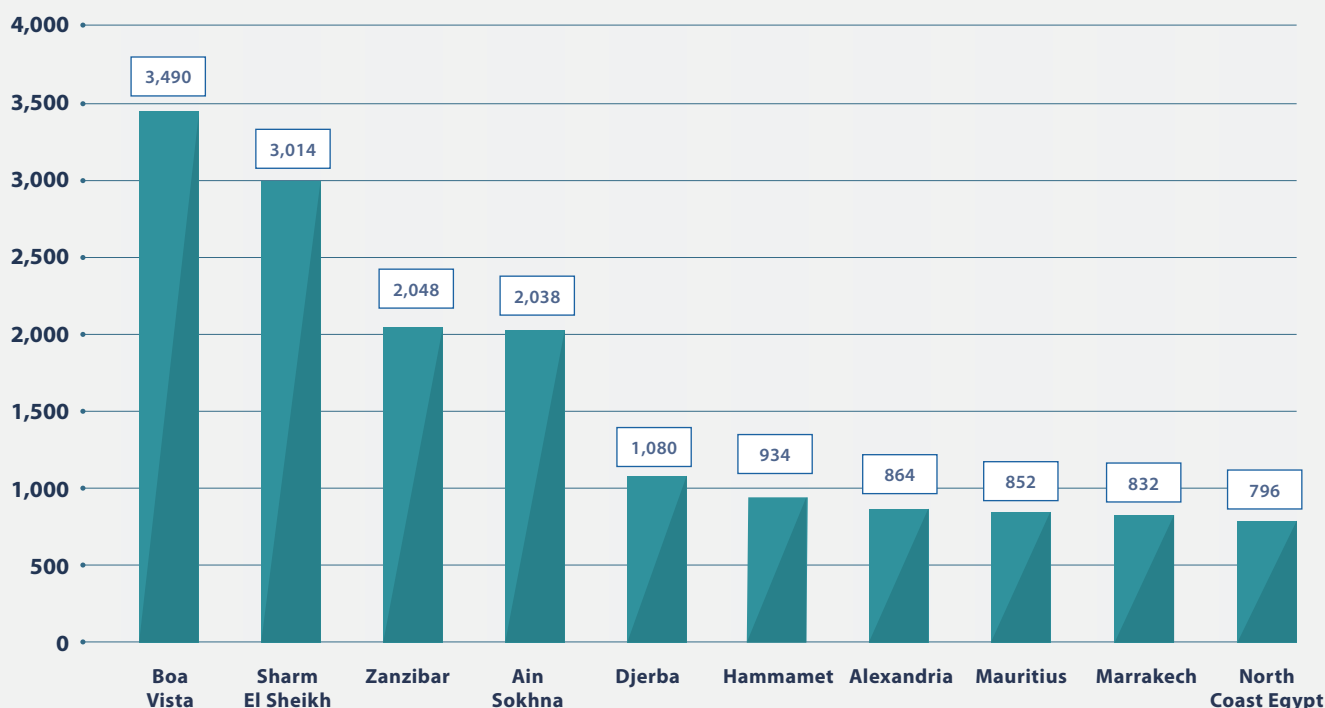
The word resort has cropped up several times in the paragraphs above, and it is with good reason that we draw attention to the rise in the number of resort projects in Africa, as shown in Table 5:

Table 5: Hotel Chain Development Pipelines in Africa 2024 Location Analysis								
	2023		2024		Change 2024 vs 2023			
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
City	367	63,053	374	62,839	+1.9%	-0.5%	+7	-311
Resort	103	19,825	136	27,379	+32.0%	+34.5%	+33	+7,029
Airport	12	1,549	14	1,975	+16.7%	+27.5%	+2	+426
TOTAL	482	84,427	524	92,193	+8.7%	+9.2%	+42	+7,766

There has been a massive increase in the number of resort projects in the pipeline, and therefore the number of rooms, increasing from 24 per cent of the total in 2023 to 30 per cent in 2024. Added to that, about half of the rooms in properties that opened last year were in resorts.

Which resorts? These ones:

**Chart 7: Hotel Chain Development Pipelines in Africa 2024
Top 10 Resorts by Number of Planned Rooms**



Both Boa Vista and Sharm El Sheikh score high because of the large average size of the resorts there. The most interesting resort destination for us is Zanzibar, which has gone from seven resorts with 983 rooms in 2023 to 14 resorts and 2,048 rooms in 2024, a sure sign of confidence in these beautiful islands.

“ 2023 was a very dynamic year for us at TUI BLUE, marked by the signing of 8 new resorts and a successful opening on the continent. Looking ahead to 2024 and 2025, our projections remain optimistic with plans to open more than 7 new resorts, adding over 1,700 rooms to our portfolio. While we have encountered delays in certain markets due to the disruption of global shipping supply chains, our overall sentiment towards resort openings remains positive. This is evident with the launch of TUI’s own luxury brand, The Mora, with the first resort, The Mora Zanzibar, opening in Spring 2024. At TUI BLUE we’re committed to navigating challenges and leveraging opportunities as we continue to expand our presence in Africa. ”

*Wesam Okasha
Head of Global Development, TUI BLUE*



The Mora
Zanzibar

Four Seasons
Private Residences,
Sharm El Sheikh



2024 Research Findings

Section 2: Hotel Chains and Their Brands

In this section we present our analysis of the activity of the hotel chains and their brands – differentiating between the companies and their flags. Table 6 shows the top 10 brands by number of planned hotels and by number of rooms.

Rank by Hotels				Rank by Rooms				Change on 2023	Average Size Rooms
	Brand	Hotels	Rooms		Brand	Hotels	Rooms		
1	Hilton	28	6,770	1	Hilton	28	6,770	7.1%	242
2	Protea Hotels	22	3,247	2	Marriott Hotels & Resorts	18	5,172	20.1%	287
3=	Marriott Hotels & Resorts	18	5,172	3	Protea Hotels	22	3,247	8.8%	148
3=	Four Points by Sheraton	18	3,207	4	Four Points by Sheraton	18	3,207	7.4%	178
3=	Radisson	18	2,818	5	DoubleTree by Hilton	15	2,945	12.0%	196
6	DoubleTree by Hilton	15	2,945	6	Radisson	18	2,818	19.9%	157
7	Novotel	11	1,754	7	Rixos	2	2,302	-30.5%	1,151
8=	Fairmont Residences	9	1,506	8	TUI BLUE	9	2,048	248.3%	228
8=	Hilton Garden Inn	9	1,413	9	Radisson Blu	7	2,005	22.9%	286
8=	Ritz-Carlton	9	1,100	10	Sheraton	8	1,818	-	227

For several years now, Hilton has been first in this ranking of brands, by both the number of hotels and the number of rooms. We note again that this is for hotels that are branded as Hilton, and doesn't include other brands in the Hilton chain, for example their fast-growing DoubleTree by Hilton brand, which is there at number 5. Likewise with Marriott International, their Marriott Hotels & Resorts brand appears at number 2, with other brands in the Marriott International chain, such as Protea and Sheraton, also in the list.

“ Africa’s diversity provides a wealth of opportunity for Accor’s multi-faceted brand portfolio across the premium, midscale and economy segment. Our strategy emphasises tailored approaches for each location, with a focus on conversions. We aim to expand through management agreements and strategically explore franchises in markets where local partners possess expertise and existing networks that complement our global brand strength. Our commitment to Africa’s hospitality landscape is exemplified by key openings such as Adagio Abidjan Marcory, Novotel Abidjan Marcory and Novotel Lubumbashi, aligning with our vision for exceptional guest experiences while fostering sustainable growth and economic development across the region. ”

*Geri Flanagan
Development Manager: Premium, Midscale & Economy,
sub-Saharan Africa, Accor*

Nearly all of the top 10 brands are owned by four global hotel chains, Accor, Hilton, Marriott International and Radisson Hotel Group. TUI BLUE pops up this year at number 8, after a signing spree by their development team, fully eight resorts signed last year with 1,824 rooms (average 224 per property), half of them in Tunisia. They also signed two deals in The Gambia, ending that country's "chain hotel drought" which has lasted for many years. Radisson Hotel Group also signed a Radisson Blu resort in 2023 in Banjul, the capital of The Gambia, a huge hotel with 462 rooms. Accor's Rixos brand, whilst still having the largest hotels in the survey, saw a decrease in 2024, not losing the projects but changing to other brands in their stable, such as Fairmont and Mondrian.

Similarly, their Swissôtel brand, in at number 7 last year with seven hotels (all in Egypt), no longer features in the top 10 as a result of rebranding, or due to openings (one resort in Sharm El Sheik). Radisson Hotel Group achieved double-digit increases in their Radisson and Radisson Blu brands. Marriott Hotels & Resorts increased by more than 20 per cent.

Of the top 5, three of the largest pipelines in terms of rooms are Marriott International brands.

We mentioned the white label operators earlier, and it's worthy of note here that they are increasing their footprint not just with the international chains as franchisors, but also managing unbranded hotels. Aleph Hospitality has an existing unbranded system in sub-Saharan Africa of nine hotels and a pipeline of four properties, Index has five existing and a pipeline of three, and Valor's numbers are seven and one. Further expansion by them is likely, with both branded (franchised) and unbranded hotels and resorts.

The previous analysis is of individual brands (see also Appendix 3). Several of the hotel chains have more than one brand which they are seeking to expand or establish in Africa – Marriott International has signed deals for 20 different brands (out of their global total of 34 in their portfolio), and Accor for 11 (global total 53).

“ 2023 was both a challenging year and an exceptionally good year for Hilton across the African Continent. It was our most successful year for concluding deals, signing 18 deals in seven countries – most notably in Angola & Zanzibar, but four fantastic properties in Morocco and five in Egypt. We anticipate that 2024 and 2025 will bring remarkable opportunities and growth for all of Hilton's brands. ”

*Esteban Lozada
Managing Director of Development,
North-West, West & South Africa, Hilton*

“ Signing new management agreements in 2023 was challenging, despite the growth in international travel post the pandemic and most African countries achieving above 2019 arrivals. However, development has slowed down, in part due the increased cost of construction but also due to a more cautious investment climate. The economic climate in 2024 will remain relatively conservative due to elections in Ghana, South Africa and the USA; nevertheless, there is a more optimistic outlook for the future, from 2025 onwards. ”

*Craig Seaman
CEO, Index Hotels*

Table 7 shows the top 10 hotel chains by number of planned rooms in Africa.

Table 7: 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%

Further detail regarding each hotel chain is provided in Appendix 5.

The Big 5 global chains – Marriott International, Hilton, Accor, Radisson Hotel Group and IHG Hotels & Resorts – account for 66 per cent of hotels and 71 per cent of rooms in the entire African pipeline. Marriott International, the world’s largest hotel chain, remains in the lead for the third consecutive year, in a seemingly unassailable position at number 1 with almost twice the number of pipeline hotels and rooms as second placed Hilton, and the largest number of rooms added in the year.

Looking back at previous years, it used to be a neck and neck race between Accor and Marriott International, but we note that, for the second year running, the former’s pipeline has actually decreased, from a high of about 20,250 rooms in 2022 to 13,375 rooms today. We spoke to Accor about this, and the response is that they are focused on having a “clean” and achievable pipeline, rather than numbers for numbers sake.

They have been assiduously cleaning house again (“a clean out of our inactive projects”), particularly projects one of the brands that they acquired about six years ago. Interestingly, a lot of that clearance was of projects in where a drastic increase in construction costs resulted in delays and a reported inability of developers to meet brand requirements.

In Table 8 we detail when the hotel chains’ pipeline deals with projects. The table shows only the hotels that are still in the pipeline as of 2024, many others having opened or been deleted from the pipeline.



Table 8: Hotel Chain Development Pipelines in Africa 2024
Years the Deals Were Signed

	Hotels	Years Since signing
2008	1	16
2009	2	15
2010	3	14
2011	4	13
2012	6	12
2013	9	11
2014	10	10
2015	18	9
2016	25	8
2017	24	7
2018	36	6
2019	68	5
2020	44	4
2021	67	3
2022	85	2
2023	109	1
2024 (Q1)	6	-
Not Stated	7	

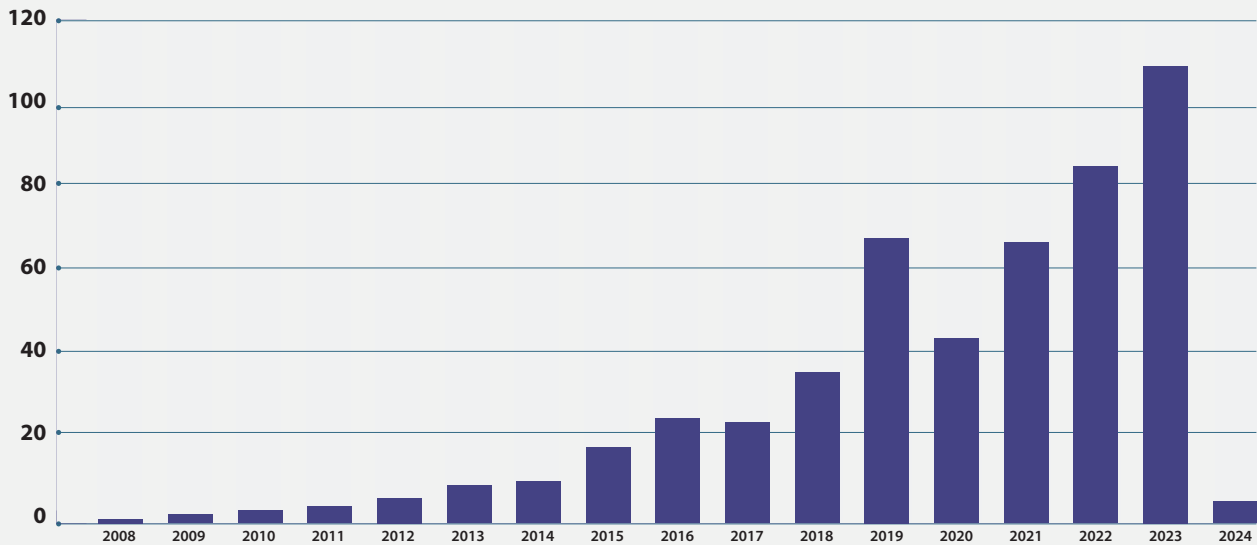
A total of 379 projects were signed since 2019, i.e. 5 years ago. The significance of that period is that, on average (and there will always be some outliers), the length of time between signing and opening is between four and five years. Statistically therefore, those 379 projects are more likely to actually open, and generate fees for the brands, than those hoary old projects that were signed 10 or more years ago.

There are 35 projects in that list that are 10 or more years old, with almost 8,000 rooms. Far be it for us to say what policies the chains should adopt when it comes to reporting their pipelines – and those reports on global pipelines are used by stock analysts when appraising the attractiveness or otherwise of the shares of quoted hotel chains – but one does wonder why some more rigorous “cleansing” is not taking place.

“ For several years we have seen an increase in the number of hotel openings. Noom, Seen and Yaas, the three brands of the Mangalis Hotel Group, have become references in the hotel landscape of West and Central Africa. Our blend of modernity and design remains anchored in African values and tradition, making these hotels sought-after and popular places to stay. Building on this growing reputation, the Mangalis Hotel Group has opened a new hotel in Bouaké, the Seen Ran Hotel, and others will soon be opened such as the Yaas République in Dakar and the Noom in Pointe Noire. The group is resolutely in tune with the New African Hospitality.

José M^a Torras
Group Financial Director, Mangalis Hotel Group

**Chart 8: Hotel Chain Development Pipelines in Africa 2024
Years the Deals Were Signed**



As well as looking at signed deals (which may or may not materialise into value-added operations), we look at who was opening hotels in Africa in 2023:

**Table 9: Hotel Chain Development Pipelines in Africa 2024
Hotel Openings 2023 (Ranked by Rooms)**

	Actual Openings 2023	
	Hotels	Rooms
Accor	6	853
Hilton	2	518
TUI Hotels & Resorts	1	364
Radisson Hotel Group	2	312
Marriott International	5	221
Azalai Hotels Group	1	202
Hyatt Hotels & Resorts	1	181
BWH Hotel Group	2	178
Pan Pacific Hotels & Resorts	1	128
Dusit International	1	100
Lux Collective	1	82
CityBlue	2	80
Nobu	1	71
Mandarin Oriental	1	63
Meliá Hotels International	1	60
Sonesta	1	45
TOTAL	29	3,458

We include in Appendix 4 a list of hotels that we have tracked that opened in 2023 – apologies for any that we missed! Unlike in 2022, when half of the hotels that opened were in North Africa, in 2023 the split was 10 hotels in North Africa and 19 in sub-Saharan Africa. Of those 19 openings, 11 were in East Africa, including six new hotels and resorts in Tanzania. That’s the most new openings of any African country (even exceeding Egypt, which has by far the largest pipeline), and is evidence of the attractiveness of the country – both mainland and Zanzibar – to investors and operators.

“ We opened four new properties, in Morocco, Tunisia, Namibia, and the DRC, in the latter with the much-anticipated Hilton Kinshasa. We continue to focus our efforts in supporting our owners to successfully complete and open their hotels with our pragmatic solutions, and some other great hotels will open in 2024.

Esteban Lozada

*Managing Director of Development,
North-West, West & South Africa, Hilton*

Accor came out top of the openings last year, and also tops the number of hotels and rooms open over the past five years (2019-2023 inclusive), with 34 hotels opening with about 5,500 rooms, about 50 per cent more than second placed Marriott International. Radisson Hotel Group is in fourth place (after Hilton in third place) but opened more rooms in sub-Saharan Africa than any other chain (Accor were first in North Africa).

We doubt that many of the chains can be happy about 2023, the slowest year in terms of actualisation since we started measuring that, with the exception of 2020 when opening anything was really difficult (not to mention uneconomic). Table 18 provides greater detail on actualisation rates.

Looking forward, these are the projected openings of hotels by the top 10 chains for this year.

**Table 10: Hotel Chain Development Pipelines in Africa 2024
Top 10 Chains - 2024 Projected Openings**

	Hotels	Rooms
Marriott International	23	4,229
Hilton	9	1,213
Accor	8	1,413
Radisson Hotel Group	10	1,226
IHG Hotels & Resorts	4	151
TUI Hotels & Resorts	5	1,409
Hyatt Hotels & Resorts	6	1,036
Kerten Hospitality	2	377
Wyndham Hotels & Resorts	1	203
Meliá Hotels International	3	600
TOTAL	71	11,857

Although not in the top 10, BWH Hotels deserve a mention here, with all of their 14 pipeline hotels with 1,312 rooms due to open this year - much the same number as Hilton, Accor and Radisson Hotel Group.

In total, the contributors to this survey have 134 hotels and resorts scheduled to open in Africa this year (the number last year was almost the same, at 133), with the top 10 chains accounting for about 72 per cent of that total. More on those expectations this time next year.

“ 2023 was an important year for BWH Hotels in Africa, with the establishment of an Africa-focused development executive in Nairobi. As a result, we have made big steps forward in supporting our current properties, building and growing our professional network. By talking to and working with stakeholders at events such as AHIF, we see opportunities to grow in many African countries. Our large, international company structure perfectly supports our ambitions and the opportunities. In 2024 we will grow our portfolio and our pipeline in Africa, and we are looking forward to that with great confidence and pride.”

Stefan Dubbeling
Managing Director Development EMEA,
BWH Hotel Group

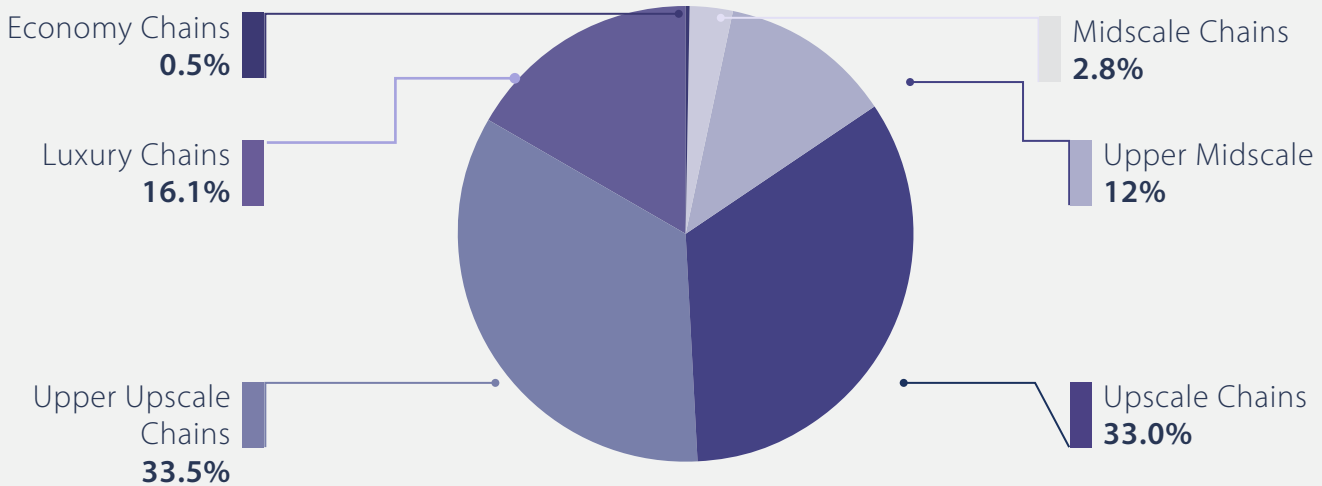
“ Our overarching goal remains to become the most diversified hotel management company on the continent, not only in terms of our presence in various countries but also by achieving the biggest organic growth in materialized openings.”

Ramsay Rankoussi
Vice President & Head of Development
for Africa & Turkey, Radisson Hotel Group

Tables 11 and 12, and Chart 9, analyse the total pipeline according to STR’s chain scales (which we use in preference to star ratings, which vary too much from country to country, and sometimes between regions in the same country).

Table 11: Hotel Chain Development Pipelines in Africa 2024 STR Chain Scale Analysis					
	Hotels	Rooms	Share	Brands per Scale	Average Size (Rooms)
Economy	4	441	0.5%	2	110
Midscale	21	2,618	2.8%	8	125
Upper Midscale	89	11,093	12.0%	28	125
Upscale	172	30,419	33.0%	37	177
Upper Upscale	149	32,754	35.5%	29	220
Luxury	89	14,868	16.1%	30	167
TOTAL	524	92,193	100.0%	134	176

Chart 9: Hotel Chain Development Pipelines in Africa 2024
Hotel Chain Scale Analysis



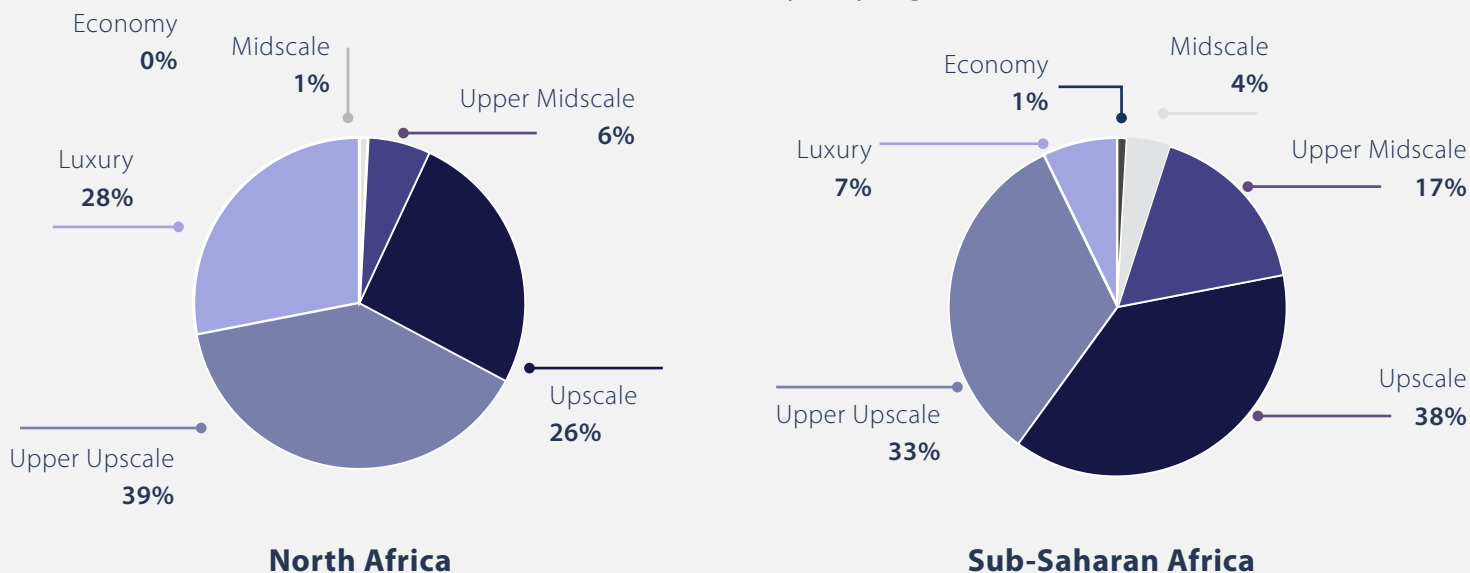
This is much the same each year, with the majority of the pipeline in the Upscale and Upper Upscale chain scales, whilst adding Luxury to that gives a figure of over 80 per cent. There’s still no sign of any increase in the Economy and Midscale segments, despite the (to us) obvious opportunities there – in the recent earnings announcements by the big American chains, new development (and rebranding of existing hotels) in the Midscale segment in the USA was a recurring theme, with a number of new brands launched in both the transient and the extended-stay spaces. A lot of the US growth is, however, conversions of hotels from one brand to another – there are far fewer opportunities to do that in Africa, particularly in the midscale segment.

Whilst the brands are interested in expanding their Economy and Midscale footprint in Africa, their requirement tends to be to find a multi-site developer, so that economies of scale can be achieved for both owner and operator. Single site deals are rarely signed, because of the central costs of supporting the brand, and in any case fewer prospective hotel owners are interested in those segments. Developers with the finance and a land bank seem to be equally rare. The segments are mostly inhabited by independent properties (sometimes very small chains) which are (of course, with exceptions) of very varying physical quality, lacking in service quality, and they quickly deteriorate.

Table 12 and Chart 10 compare the chain scales by region:

Table 12: Hotel Chain Development Pipelines in Africa 2024						
STR Chain Scale Analysis by Region						
	North Africa			Sub-Saharan Africa		
	Hotels	Rooms	Share	Hotels	Rooms	Share
Economy	-	-	-	4	441	0.8%
Midscale	4	546	1.4%	17	2,072	4.0%
Upper Midscale	16	2,363	5.9%	73	8,730	16.8%
Upscale	56	10,498	26.2%	116	19,921	38.3%
Upper Upscale	59	15,657	39.0%	90	17,097	32.8%
Luxury	57	11,070	27.5%	32	3,798	7.3%
TOTAL	192	40,134	100.0%	332	52,059	100.0%

Chart 10: Hotel Chain Development Pipelines in Africa 2024
STR Chain Scale Analysis by Region



There's considerably more activity in the Luxury segment in North Africa, with almost three times the number of rooms in that chain scale as are in the pipeline in sub-Saharan Africa. Over 92 per cent of the North African pipeline is in Upscale and above, compared to 78 per cent in sub-Saharan Africa.

Our analysis of the types of agreement signed by the hotel chains (Chart 11) shows that the majority, 81 per cent, are management contracts. Franchises account for 15 per cent of pipeline deals, up from 11 per cent in 2022, with 25 signed in 2023. As in other regions, owners are investigating

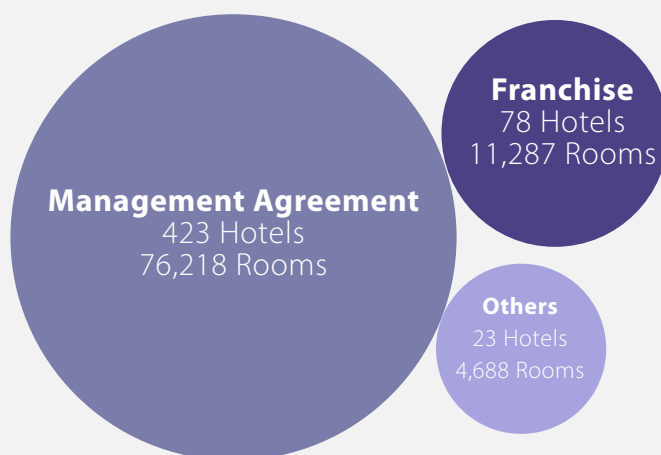
“ **Our pipeline continued to grow during 2023, with new hotels signed in Cameroon and Rwanda, and we look forward to some great openings during 2024 in Kigali, Nairobi, Accra, Kinshasa and Zanzibar.** ”

Bani Haddad

Founder & Managing Director, Aleph Hospitality

the franchise model, and there's clearly a growing willingness on the part of some of the hotel chains to offer them. The increase in the presence of third party "white label" management companies such as Aleph and Valor helps both parties to get franchise deals signed, as the chains want the comfort that the hotel will be managed to their standards. Not too many individual owners can deliver on that.

Chart 11: Hotel Chain Development Pipelines in Africa 2024
Type of Agreement - Number of Deals and Rooms



The 'Other' category includes joint ventures between hotel chains and hotel owners, owner-operators such as Azalai, and a small number of leases.

Aleph Hospitality have eight branded hotels in their pipeline, being management agreements with the owner and a franchise from chains such as Accor, IHG Hotels & Resorts and Marriott International.

All of the major chains are now signing franchises with owners, the largest number being signed by Marriott International, with 33 deals in the pipeline (of which six were signed in 2023), and BWH Hotels (who sign only franchise deals), with 14 (eight signed in 2023).

At 145 rooms, the average size of a franchise hotel tends to be smaller than a managed hotel (180 rooms).

Table 13 compares the top 10 hotel chains' pipelines with their existing presence in Africa.

Table 13: Hotel Chain Development Pipelines in Africa 2024 Top 10 Hotel Chains: Pipeline vs Existing Hotels in Africa							
		Pipeline		Existing		Pipeline vs Existing (Rooms)	Potential Total
		Hotels	Rooms	Hotels	Rooms		Rooms
1	Marriott International	138	26,365	143	25,451	104%	51,816
2	Hilton	72	13,584	47	12,525	108%	26,109
3	Accor	70	13,375	165	29,041	46%	42,416
4	Radisson Hotel Group	35	6,618	61	12,179	54%	18,797
5	IHG Hotels & Resorts	30	5,113	33	6,576	78%	11,689
6	TUI Hotels & Resorts	12	3,228	25	8,140	40%	11,368
7	Hyatt Hotels & Resorts	11	1,936	12	2,124	91%	4,060
8	Kerten Hospitality	13	1,889	-	-	-	-
9	Wyndham Hotels & Resorts	10	1,633	7	1,114	147%	2,747
10	Meliá Hotels International	5	1,623	11	2,832	57%	4,455
	TOTAL	396	75,364	504	99,982	75%	175,346

The ratio of pipeline rooms to existing for the top 10, at 75 per cent, is about 5 percentage points down on last year, mostly because of Accor's "cleansing". Potentially, Marriott International, Hilton and Hyatt Hotels & Resorts are set to double their African footprint. Wyndham has the highest potential increase, but off a lower base.



2024 Research Findings

Section 3: Status of Hotel Development Activity

As the title of this report states, we focus on the future openings of hotels and resorts in Africa. There's no need to go into the semantics of the difference in meaning of "project" vs "development", but suffice it to say that if a signed deal doesn't progress to on-site construction, then it remains just a piece of paper (actually, a heck of a lot of pieces of paper, digital or the real stuff!). And those pieces of paper are only the start of the process to get a hotel opened and earning profits for the owner and fees for the brand/operator.

So an important part of our analysis of who, what and where is the status of a signed deal – has it yet progressed to work on site? Therefore, as well as looking at the overall quantum of the countries' and hotel chains' pipelines in Africa, we look also at the status of their hotel development activity.

Table 14 details the status of the deals by region, regarding whether construction has started. The percentages are slightly up on last year, and there's a greater proportion under construction in sub-Saharan Africa than in North Africa, because of the large number of recent signings in the latter, particularly in Morocco and Egypt.

**Table 14: Hotel Chain Development Pipelines in Africa 2024
Sub-Saharan Africa vs. North Africa by Pipeline Status**

	Hotels	Rooms		
		Total	On-site Construction	
North Africa	192	40,134	19,637	49%
Sub-Saharan Africa	332	52,059	29,664	57%
TOTAL	524	92,193	49,301	54%

As usual, we need to explain (or question?) the term "on-site construction". On the face of it, it sounds quite simple, with trucks and cranes moving, lots of noise, people with hard hats doing whatever people with hard hats are supposed to do, and reports being written on increasing progress of the building. So those projects are definitely under construction, there's forward progress. But what about those projects where there's very little forward progress, but you've still got some people with hard hats on site (often looking very worried!) and the odd vehicle going in and out of the site? They're still classified here as "under construction".

And then there are those projects which are effectively closed, sometimes for years, and for a variety of reasons, often money-related (lack of), but sometimes due to government enforcement; they may or may not be less likely to represent hotels that will open. We can't possibly quantify the level of progress on all those hotels deemed to be under construction (there are 305 of them), but we can report on those in Lagos, a city we know well (we've been active there for 35 years), and which has the second largest pipeline (Cairo is first). Of 13 hotels reported to be under construction, seven sites are closed, three have very slow work underway, and only three are moving ahead (delayed, but still moving ahead). Three out of 13 is less than one quarter. Far be it for us to suggest that only something less than 25 per cent of hotels in the "on-site construction" category in all of Africa are active, but you get the point.

Four Seasons
Hotel
Luxor



Table 15 shows the pipeline status of the top 10 countries. Despite its clear leadership in the absolute pipeline numbers, Egypt has the lowest percentage of rooms on-site, due to its relatively “young” pipeline; of the total 109 deals there, half were signed in 2021 and later, and 19 were signed last year, that’s about 20 per cent of the total. Of the top 10 countries, Ethiopia has the highest ratio of rooms under construction, (although several have stalled) followed by Tunisia and Algeria.

Cape Verde has a low percentage on site. Standouts there are two Spanish hotel chains, Barceló Hotels & Resorts and Meliá Hotels International, who have all of their planned resorts under construction on the various islands.

**Table 15: Hotel Chain Development Pipelines in Africa 2024
Top 10 Countries by Pipeline Status**

Rank		Hotels	Rooms		
			Total Pipeline	On-site Construction	
1	Egypt	109	26,241	9,470	36.1%
2	Nigeria	50	7,622	3,645	47.8%
3	Morocco	52	7,169	4,658	65.0%
4	Ethiopia	31	5,128	4,792	93.4%
5	Cape Verde	16	5,056	2,360	46.7%
6	Tunisia	18	4,121	3,387	82.2%
7	Kenya	31	4,268	2,724	63.8%
8	South Africa	22	3,427	2,017	58.9%
9	Algeria	13	2,603	2,122	81.5%
10	Ghana	19	2,568	1,732	67.4%
	TOTAL	361	68,203	36,907	54.1%

Table 16 looks at the top 10 brands according to pipeline status. Although its percentage under construction is lower than most others in the top 10, Hilton (the brand) still has the highest number of rooms on-site construction, but Radisson and Marriott Hotels & Resorts are not far behind. Radisson’s percentage is high, and therefore likely to have more rooms opening than other brands.

**Table 16: Hotel Chain Development Pipelines in Africa 2024
Top 10 Brands Ranked by Pipeline Status**

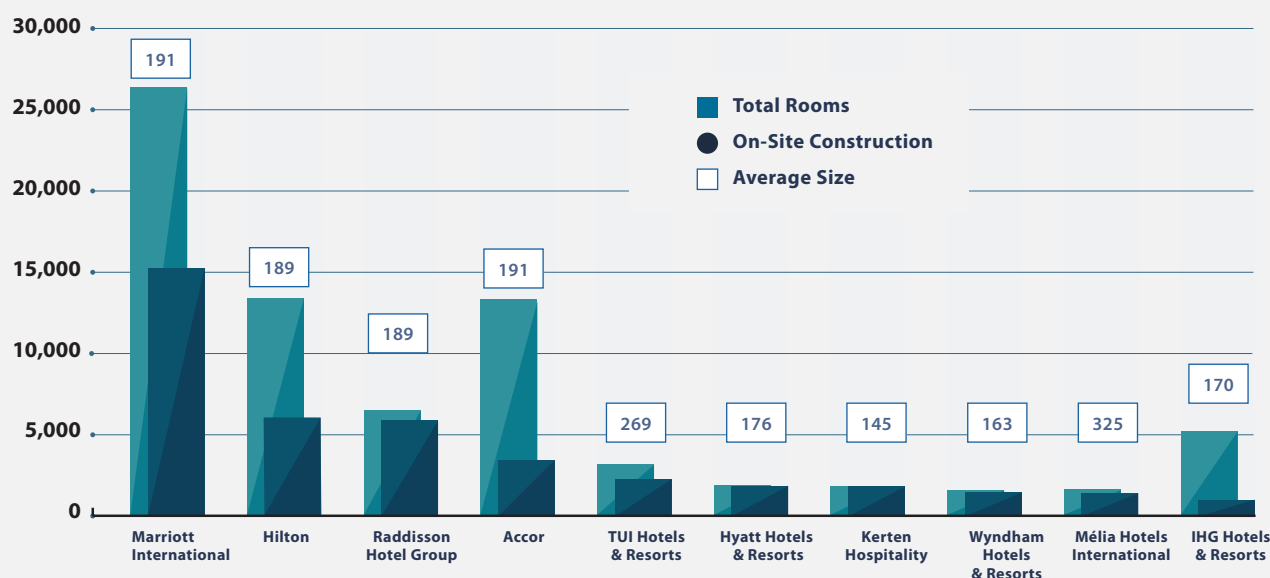
	Brands	Hotels	Rooms		
			Total Pipeline	On-site Construction	
1	Hilton	28	6,770	2,794	41.3%
2	Radisson	18	2,818	2,618	92.9%
3	Marriott Hotels & Resorts	18	5,172	2,612	50.5%
4	Protea Hotels	22	3,247	2,517	77.5%
5	Four Points by Sheraton	18	3,207	2,461	76.7%
6	TUI BLUE	9	2,048	1,623	79.2%
7	DoubleTree by Hilton	15	2,945	1,499	50.9%
8	Radisson Collection	6	1,494	1,494	100.0%
9	Courtyard by Marriott	8	1,740	1,438	82.6%
10	Meliá	5	1,623	1,435	88.4%
	TOTAL	147	31,064	20,491	66.0%

The Top 10 brands account for about half of all chain hotels and resorts under construction in Africa, with the top 5, being Hilton, Radisson, Marriott Hotels & Resorts, Protea Hotels and Four Points by Sheraton, all having similar numbers. Three of those top 5 brands are owned by Marriott International, who also have Courtyard by Marriott at number 9.

Table 17 shows the status of the top 10 hotel chains' pipelines.

Table 17 Hotel Chain Development Pipelines in Africa 2024 Top 10 Hotel Chains Ranked by Pipeline Status						
		Hotels	Rooms			
			Total	Average Size	On-site Construction	
1	Marriott International	138	26,365	191	15,011	56.9%
2	Hilton	72	13,584	189	5,955	43.8%
3	Radisson Hotel Group	35	6,618	189	5,748	86.9%
4	Accor	70	13,375	191	3,346	25.0%
5	TUI Hotels & Resorts	12	3,228	269	2,208	68.4%
6	Hyatt Hotels & Resorts	11	1,936	176	1,936	100.0%
7	Kerten Hospitality	13	1,889	145	1,889	100.0%
8	Wyndham Hotels & Resorts	10	1,633	163	1,483	90.8%
9	Meliá Hotels International	5	1,623	325	1,435	88.4%
10	IHG Hotels & Resorts	30	5,113	170	983	19.2%
	TOTAL	396	75,364	190	39,994	53.1%

Chart 12 Hotel Chain Development Pipelines in Africa 2024
Top 10 Hotel Chains Ranked by Pipeline Status



Kerten Hospitality and Hyatt Hotels & Resorts have all of their pipeline under construction, which is great in terms of the objective of getting hotels open, but Marriott International has almost four times the number of on-site rooms of those two hotel chains put together. Hilton is in second place after Marriott International, but can claim the largest on-site brand, as seen in Table 16.

The Top 10 combined have over 50 per cent of all the chain hotel rooms under construction in Africa, and the top four – Marriott International, Hilton, Radisson Hotel Group and Accor – account for 61 per cent of the total.

We have further analysed the data to quantify the hotels that were scheduled to open each year since 2018 (according to the data provided by the hotel chains at the beginning of each year), and have compared those expectations with what actually happened.

“ 2023 was another year of record deal signings in Africa and EMEA. We have a robust pipeline in Africa, many signed hotels are under construction or renovation, promising increased openings ahead. We continue to collaborate closely with our owners and franchisees to help them ensure projects are delivered on time. Looking to 2024 and 2025, we are confident that this momentum to continue. ”

*Karim Cheltout
Regional Vice President Development Africa,
and All-Inclusive EMEA, Marriott International*

**Table 18: Hotel Chain Development Pipelines in Africa 2024
2018-2023 Scheduled vs. Actual Hotel Openings**

	Scheduled	Actual	Actualisation
2018	115	46	39%
2019	91	68	75%
2020	91	25	28%
2021	105	29	28%
2022	101	31	31%
2023	136	29	21%
TOTAL	639	228	36%
AVERAGE	107	38	36%

We cannot but find this a bit disappointing. The average actualisation rate over the last six years is just over one third. The low numbers in 2020 and 2021, even into 2022, can be contributed to the impact of the global pandemic, but that can't, surely, be the reason for the low number last year? 2019 was a real success story for Africa, and we had hoped that 2023 would see a return to "normal". It was not to be. As the months went by, we saw more and more openings delayed, and of the 107 hotels that did not open on schedule last year we've counted about half of that number that are now scheduled to open in 2024. Those are included in the number shown in Table 19.

The chains tell us that they're scheduled to open 291 hotels and resorts this year and next, that's 250 per cent up on what opened in the last two years.

“ Looking ahead to 2024, we anticipate a more balanced year with several new openings, including our inaugural Radisson Safari hotel near Kruger Park in Hoedspruit. We plan to solidify our leadership position in key markets like Nigeria and Morocco while expanding into new territories such as Tanzania after having recently secured a new market entry into The Gambia. ”

*Ramsay Rankoussi,
Vice President & Head of Development for Africa & Turkey,
Radisson Hotel Group*

Table 19 shows the anticipated future opening years of the pipeline hotels, as per the hotel chains' expectations.

Table 19: 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	

Funny that, 2029 was zero last year as well!

Of the total 92,193 rooms in the pipeline, over 46,500 rooms (that's just over 50 per cent) are expected by the hotel chains to open in 2024 and 2025. This "two-year" opening total gets larger each year, perhaps inflated due to the high number of delays from 2023 (which represent about 40 per cent of the 2024 total rooms)? There are far fewer hotels this year (36 hotels vs 60 last year, about 7.5 per cent of total rooms) which the hotel chains really don't know when they are likely to open – "2030" is used by some chains as shorthand for "TBC". This has to be a good thing; it means the pipeline is getting more definitive.



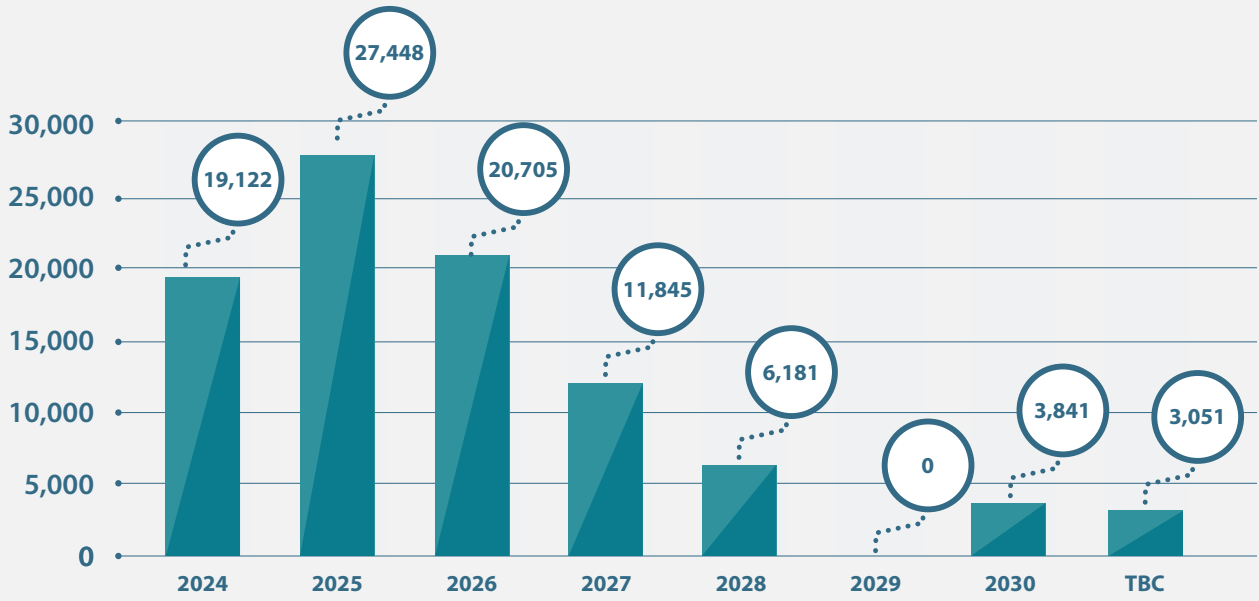
**Four Seasons
Hotel & Private
Residences,
New Cairo Capital
at Madinaty**

“ As we seek to deliver on stays that are experienced through our spectrum of brands, 2023 was a significant year for our expansion particularly into North Africa, with the signing of two new brands in Morocco, Ascott and The Unlimited Collection in Marrakech, in addition to the existing Citadines in Casablanca. Our expansion plan in Africa for 2024, which marks Ascott's 40th anniversary, is even more ambitious as we continue bringing value and influential track records in global operations to our owners and partners.

We remain, however, mindful of the specific challenges in a few countries of the continent, such as access to forex and supply chain interruptions, hindering the opening of our pipeline on schedule, and we will continue supporting our owners through our global network of partners in an attempt to ease and tackle these issues.

*Hafid Mirabti
Director of Business Development, Middle East, Africa & Turkey,
Ascott International Management*

**Chart 13 Hotel Chain Development Pipelines in Africa 2024
Anticipated Opening Years of Pipeline Deals**



**Moxy
& Residence Inn
Casablanca**

The top 10 hotel chains account for 75 per cent of all pipeline rooms scheduled to open in 2024 and 2025 (down from 80 per cent last year), and the top five (in terms of ranking of rooms opening) for 65 per cent (same as 2023). Overall, the percentage of pipeline rooms to their existing footprint in Africa for the top 10 is about one third.

“ In 2023 there was an acceleration of Club Med development in Africa, with the final phase of the renovation and addition of the family zone in Marrakech, the signing of the first Club Med Bush & Safari Resort on the North Coast of Durban, and the completion of the design for our resort in the Republic of Benin. Given the potential of the African market, we expect the coming years to be very exciting. ”

*David Vely,
VP Development Middle East, Africa & India
Club Med*

**Table 20: Hotel Chain Development Pipelines in Africa 2024
Top 10 Hotel Chains Opening Hotels in 2024 and 2025**

		Hotels Opening	Rooms Opening	Average Size	New Rooms Increase on Existing
1	Marriott International	73	13,217	181	51.9%
2	Accor	36	7,920	220	27.3%
3	Radisson Hotel Group	25	3,690	148	30.3%
4	TUI Hotels & Resorts	10	2,887	289	35.5%
5	Hilton	17	2,743	161	21.9%
6	Hyatt Hotels & Resorts	7	1,182	169	55.6%
7	Wyndham Hotels & Resorts	6	1,062	177	95.3%
8	IHG Hotels & Resorts	9	935	104	14.2%
9	Kerten Hospitality	7	830	119	-
10	Meliá Hotels International	4	788	197	27.8%
	TOTAL	194	35,254	182	35.3%

“ We came out of COVID-19 with three key items on our African agenda: to grow faster than everyone else; to use AI quicker than everyone else; and to be the operator and dealmaker of choice in our niche. We expect 2024 and 2025 to outperform 2023 many times over in terms of results and openings, as we all adjust to the African hospitality rebound and our first mover tech advantage. ”

*Jameel Verjee,
Founder & CEO, CityBlue Hotels (a member of The Diar Group)*

**Canopy by
Hilton,
Zanzibar
The Burj**



This is a future-looking report, detailing the hotel and resorts that the international and regional chains expect to open in years to come. It contains very positive data, with the pipeline expanding by more than 9 per cent on 2023. This is the largest increase since 2018 and, according to data produced by CoStar/STR, is one of the highest increases globally, surpassed only by the Americas (mostly the USA), which recorded an increase at the end of 2023 of 16.7 per cent in pipeline rooms.

Growth is a must for all the hotel chains contributing to this survey, both public (quoted) and private, and almost without exception they are delivering that growth to their shareholders.

But growth in what, exactly?

In summary, what we show in this report is: a) signed deals for future openings of hotels and resorts; b) the status of those deals, i.e. whether they're still "on paper" or whether they're under construction (with a lack of clarity regarding what the latter means!); and c) the historical actualisation of these deals. This year, we've placed greater emphasis than we have in the past on the last of these three, because if the deals don't become operating businesses, generating profits to the owners and paying fees to the hotel chains – well, no one's objectives are being met, are they?

Accor opened almost 300 rooms worldwide last year, Hilton's number was almost 400, and Marriott International achieved almost 560 openings, remarkable growth figures. But of those, only two of Hilton's total were in Africa, with four for Marriott International and six for Accor. Between the three of them, they opened 73 hotels and resorts (6 per cent of their 2023 achievements) in Africa in the five years, split pretty equally between North Africa and sub-Saharan Africa.

Are the challenges faced by developers in Africa really so different from other regions? Do note, of course, that Accor, Hilton and Marriott International don't actually develop any of those hotels they open, they are reliant on owners to do that for them, and that's the case for the vast majority of the hotels in the African pipeline. We comment in this report about some of the big countries in Africa such as Egypt, Nigeria and Ethiopia, which have much greater potential for hotel development than some of the smaller countries, like many in West Africa (where several countries are going through severe political challenges, in the so-called "coup belt". No disrespect intended, but they were never big players in terms of hotel development).



Those big countries have some pretty large pipelines (190 hotels in the three named), but all have equally big economic and political issues to contend with. Take Nigeria, for example, a country with 36 State capital cities, plus Abuja, the Federal capital, that's 37 cities with some potential for hotel development. But inflation is touching 30 per cent, and the currency is in freefall; nearly everything needed to build a modern hotel is imported, and that means that the cost of construction in local currency has doubled or tripled in a short space of time. No, revenues have not increased by anything like that.

But that's Nigeria, which does seem to have more than its fair share of troubles. Never, ever generalize about Africa, it's wrong to paint the entire continent of 54 countries with the same brush and colour. Look, for example, at Tanzania (including Zanzibar), where there has been a sea change in the government's approach to tourism, and with it a wave of investor interest in resorts, an asset class previously shunned by many as too risky. Look also at Morocco, another government that "gets" tourism, and understands their role of building infrastructure such as roads, railways and airports, and creating an enabling environment for the private sector to grow. Cape Verde, Mauritius, even Angola with its recent visa-free policy after decades of having the most restrictive entry regime on the continent.

There's so much more to say about the chain hotel pipeline in Africa. We've touched on some of the abundant stories in this report, but sometimes we feel that we're just scratching the surface of this amazing continent and its hotel (and increasingly its resort) industry! Every year we analyse the data, and find a new way of slicing and dicing the figures, to try and understand not just the big picture but also the minutiae of the who, the what, the where, the when and (sometimes) the why. Do contact us if you are looking for any specific analysis, we welcome new ideas.

We wish all our contributors, our readers and the global hospitality industry a prosperous 2024, and look forward to reporting further positive activity from the hotel chains next year, in their development activity but, most importantly, in getting those hotels and resorts open!



**Airport
Residential
Hotel, Accra**



**Radisson
Red,
Lagos**



**Zaria
Court,
Kigali**



APPENDIX 1
Hotel Chain Development Pipelines in Africa 2024
Contributors to the Survey – Hotel Chains & Their Brands

Hotel Chains	Brands	
Accor	Aparthotel Adagio Fairmont Fairmont Residences Handwritten Collection ibis ibis Styles Mama Shelter Mantis Mercure MGallery Mondrian	Mondrian Residences Mövenpick Novotel Novotel Living Pullman Raffles Raffles Residences Rixos So/ Sofitel Sofitel Residences Swissôtel
Aleph	- (white label)	
Azalaï Hotels Group	Azalaï	
Banyan Tree Hotels & Resorts	Banyan Tree Banyan Tree Veya	Dhawa
Barceló Hotels & Resorts	Barceló	
BWH Hotel Group	Best Western Best Western Plus	Best Western Premier BW Signature Collection
Catalonia Hotels & Resorts	Catalonia Hotels & Resorts	
CityBlue Hotels	Anasa C3 CityBlue Hotel & Suites	CityBlue Collection Residences by CityBlue Urban by CityBlue
Club Med	Club Med	
Continent Worldwide	Continent	
Deutsche Hospitality	Steigenberger Hotels & Resorts	
ENVI Lodges	ENVI Lodges	
Eurostars Hotel Group	Exe Hotels	Eurostars Hotels
Four Seasons Hotels & Resorts	Four Seasons	
Hilton	Canopy by Hilton Curio Collection by Hilton DoubleTree by Hilton Embassy Suites	Hampton by Hilton Hilton Hilton Garden Inn Waldorf Astoria
Hyatt International	Hyatt Centric Hyatt House Hyatt Place	Hyatt Regency Park Hyatt
IHG Hotels & Resorts	Crowne Plaza Holiday Inn Hotel Indigo InterContinental	Six Senses Staybridge Suites Vignette Collection voco

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2024
Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands	
Index Hotels	- (white label)	
Kempinski Hotels	Kempinski	
Kerten Hospitality	Cloud7 Hotel Cloud7 Residence	The House Hotel The House Residence
Leva Hotels	Leva Hotels	Leva Hotel Residences
Louvre Hotels Group	Golden Tulip Kyriad	Sarovar
LVMH Hotel Management	Cheval Blanc	
Mandarin Oriental Hotel Group	Mandarin Oriental Hotel Group	
Mangalis Hotel Group	Noom Seen	Yaas
Marriott International	AC Hotels Aloft Hotels Autograph Collection Courtyard by Marriott Delta Hotels Element by Westin Fairfield by Marriott Four Points by Sheraton JW Marriott Le Méridien Marriott Executive Apartments	Marriott Hotels & Resorts Moxy Protea Hotels Renaissance Residence Inn Ritz-Carlton Sheraton St. Regis Tribute Portfolio W Hotels Westin Hotels & Resorts
Meliá Hotels International	Meliá Hotels & Resorts	
Minor Hotel Group	Anantara	Oaks
Planhotel Hospitality Group	Diamonds	Sandies
Radisson Hotel Group	Park Inn by Radisson Radisson Radisson Blu	Radisson Collection Radisson Individuals Radisson Red

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2024
Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands	
RIU Hotels & Resorts	RIU Hotels & Resorts	
Swiss International Hotels & Resorts	Swiss International	
The Ascott	Ascott Citadines	The Unlimited Collection Somerset
The Urban Hotel Group	The Urban	
TIME Hotels & Resorts	TIME Hotels & Resorts	
TUI Hotels & Resorts	The Mora TUI BLUE	TUI MAGIC LIFE TUI SUNEO
Valor Hospitality	- (white label)	
Wyndham Hotels and Resorts	Howard Johnson by Wyndham Ramada Ramada Encore	Ramada Plaza Wyndham Wyndham Garden

Note: these are the brands for which the hotel chains have signed deals. Some have many more brands than are listed here, but no deals in Africa for those brands.



APPENDIX 2
Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Country

	Total by Country		Not on-site	On-site	Pre-Construction (Planning)	Rooms On-site (Construction)
	Hotels	Rooms				
Algeria	13	2,603	481	2,122	18.5%	81.5%
Angola	5	825	736	89	89.2%	10.8%
Benin	7	1,260	663	597	52.6%	47.4%
Botswana	3	352	0	352	0.0%	100.0%
Burkina Faso	1	232	0	232	0.0%	100.0%
Cameroon	14	2,476	1,444	1,032	58.3%	41.7%
Cape Verde	16	5,056	2,696	2,360	53.3%	46.7%
Chad	1	230	0	230	0.0%	100.0%
Congo	2	321	0	321	0.0%	100.0%
Côte d'Ivoire	14	2,282	1,691	591	74.1%	25.9%
Democratic Republic of Congo	10	1,313	736	577	56.1%	43.9%
Djibouti	5	519	168	351	32.4%	67.6%
Egypt	109	26,241	16,771	9,470	63.9%	36.1%
Ethiopia	31	5,128	336	4,792	6.6%	93.4%
Gabon	1	140	0	140	0.0%	100.0%
Ghana	19	2,568	836	1,732	32.6%	67.4%
Guinea	4	669	200	469	29.9%	70.1%
Kenya	31	4,268	1,544	2,724	36.2%	63.8%
Liberia	2	299	192	107	64.2%	35.8%
Madagascar	1	210	210	0	100.0%	0.0%
Malawi	2	324	0	324	0.0%	100.0%
Mauritania	2	354	154	200	43.5%	56.5%
Mauritius	6	1,290	288	1,002	22.3%	77.7%
Morocco	52	7,169	2,511	4,658	35.0%	65.0%
Mozambique	6	617	504	113	81.7%	18.3%
Namibia	1	59	0	59	0.0%	100.0%
Niger	1	188	188	0	100.0%	0.0%
Nigeria	50	7,622	3,977	3,645	52.2%	47.8%
Rwanda	4	474	394	80	83.1%	16.9%

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Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Country

	Total by Country		Not on-site	On-site	Pre-Construction (Planning)	Rooms On-site (Construction)
	Hotels	Rooms				
Senegal	15	2,336	985	1,351	42.2%	57.8%
Seychelles	4	417	188	229	45.1%	54.9%
Sierra Leone	2	306	0	306	0.0%	100.0%
South Africa	22	3,427	1410	2,017	41.1%	58.9%
South Sudan	3	379	235	144	62.0%	38.0%
Tanzania	21	2,353	1,296	1,057	55.1%	44.9%
The Gambia	3	686	84	602	12.2%	87.8%
Togo	1	85	85	0	100.0%	0.0%
Tunisia	18	4,121	734	3,387	17.8%	82.2%
Uganda	8	1,304	205	1,099	15.7%	84.3%
Zambia	8	725	297	428	41.0%	59.0%
Zimbabwe	6	965	653	312	67.7%	32.3%

**Cape Grace
Hotel
Cape Town**



APPENDIX 3
Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
AC Hotels by Marriott	3	578	100%	0%
Adagio	2	180	100%	0%
Aloft	4	900	50%	50%
Anantara	1	12	100%	0%
Anasa	2	28	0%	100%
Ascott	3	295	100%	0%
Autograph Collection	6	844	57%	43%
Azalai	4	777	47%	53%
Banyan Tree	2	55	27%	73%
Banyan Tree Veya	1	20	0%	100%
Barceló	4	1,066	57%	43%
Best Western	2	176	0%	100%
Best Western Plus	4	284	0%	100%
Best Western Premier	7	752	0%	100%
BW Signature Collection	1	100	0%	100%
c3	2	48	0%	100%
Canopy	7	1,040	49%	51%
Catalonia Hotels & Resorts	1	275	0%	100%
Cheval Blanc	1	52	0%	100%
Citadines	6	710	21%	79%
CityBlue Collection	2	130	0%	100%
CityBlue Hotel & Suites	1	75	0%	100%
Cloud7 Hotel	4	500	0%	100%
Cloud7 Residence	1	93	0%	100%
Club Med	4	918	93%	7%
Continent	5	495	31%	69%
Courtyard by Marriott	8	1,740	17%	83%
Crowne Plaza	2	254	100%	0%
Curio	4	345	28%	72%
Delta Hotels	2	953	73%	27%
Dhawa	1	135	100%	0%
Diamonds	2	250	40%	60%
DoubleTree by Hilton	15	2,945	49%	51%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Element	1	344	0%	100%
Embassy Suites	1	129	100%	0%
ENVI Lodges	1	22	100%	0%
Eurostars Hotels	6	938	64%	36%
Exe Hotels	2	126	0%	100%
Fairfield Inn by Marriott	1	100	0%	100%
Fairmont	5	1,185	77%	23%
Fairmont Residences	9	1,506	62%	38%
Family Lodge	1	130	0%	100%
Four Points by Sheraton	18	3,207	23%	77%
Four Seasons	4	816	0%	100%
Golden Tulip	4	740	85%	15%
Hampton by Hilton	5	715	78%	22%
Handwritten Collection	1	53	0%	100%
Hilton	28	6,770	59%	41%
Hilton Garden Inn	9	1,413	61%	39%
Holiday Inn	6	1,125	58%	42%
Hotel Indigo	4	650	100%	0%
Howard Johnson	1	102	0%	100%
Hyatt Centric	3	602	0%	100%
Hyatt House	1	120	0%	100%
Hyatt Place	1	173	0%	100%
Hyatt Regency	4	830	0%	100%
Ibis	2	266	100%	0%
Ibis Styles	5	909	65%	35%
InterContinental	7	1,790	80%	20%
JW Marriott	4	1,002	61%	39%
Kempinski	5	1,041	83%	17%
Kyriad	2	172	28%	72%
Le Méridien	6	978	20%	80%
Leva Hotels	5	749	69%	31%
Leva Hotel Residences	1	120	100%	0%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Mama Shelter	2	317	100%	0%
Mandarin Oriental	1	276	0%	100%
Mantis	3	130	100%	0%
Marriott Executive Apartment	5	796	43%	57%
Marriott Hotels & Resorts	18	5,172	49%	51%
Meliá	5	1,623	12%	88%
Mercure	3	387	46%	54%
MGallery	5	534	49%	51%
Mondrian	1	387	100%	0%
Mondrian Residences	1	374	100%	0%
Mövenpick	5	700	100%	0%
Moxy	5	565	28%	72%
Noom	3	443	68%	32%
Novotel	11	1,754	78%	22%
Novotel Living	1	80	100%	0%
Oaks	1	400	100%	0%
Park Hyatt	2	211	0%	100%
Park Inn by Radisson	1	135	0%	100%
Protea Hotel	22	3,247	22%	78%
Pullman	3	839	0%	100%
Radisson	18	2,818	7%	93%
Radisson Blu	7	2,005	33%	67%
Radisson Collection	6	1,494	0%	100%
Radisson Individuals	2	104	0%	100%
Radisson Red	1	62	0%	100%
Raffles	1	183	0%	100%
Raffles Residences	2	152	66%	34%
Ramada	1	150	100%	0%
Ramada Encore	2	224	0%	100%
Ramada Plaza	1	177	0%	100%
Renaissance	1	216	100%	0%
Residence Inn	8	1,018	77%	23%
Residences by CityBlue	6	707	48%	52%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Ritz-Carlton	9	1,100	53%	47%
RIU Hotels & Resorts	2	700	0%	100%
Rixos	2	2,302	100%	0%
Sandies	1	120	100%	0%
Sarovar	1	85	100%	0%
Seen	2	226	53%	47%
Sheraton	8	1,818	68%	32%
Six Senses Hotels Resorts Spas	4	128	42%	58%
So/	1	188	100%	0%
Sofitel	4	824	78%	22%
Sofitel Residences	1	125	100%	0%
Somerset	3	420	39%	61%
St Regis	3	308	39%	61%
Staybridge Suites	1	150	100%	0%
Steigenberger Hotels & Resorts	1	145	100%	0%
Swiss International	1	46	0%	100%
The House Hotel	4	358	0%	100%
The House Residence	4	938	0%	100%
The Mora	1	250	0%	100%
The Unlimited Collection	1	90	100%	0%
The Urban	3	205	41%	59%
TIME Hotels & Resorts	2	154	0%	100%
TIME Residence	1	216	0%	100%
Tribute Portfolio	1	115	0%	100%
TUI Blue	9	2048	21%	79%
TUI Magic Life	1	595	100%	0%
TUI SUNEO	1	335	0%	100%
Urban by CityBlue	1	80	100%	0%
Vignette Collection	1	99	100%	0%
voco	5	917	92%	8%
W Hotels	3	702	25%	75%
Waldorf Astoria	3	227	24%	76%
Westin Hotels & Resorts	2	662	59%	41%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2024
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Wyndham	4	868	0%	100%
Wyndham Garden	1	112	0%	100%
Yaas	3	339	0%	100%
No Brand (White Label)	8	670	16%	84%



APPENDIX 4
Hotel Chain Development Pipelines in Africa 2024
Chain Hotels Opened in Africa in 2023

Group Name	Brand name	Hotel Name	Country	City	Rooms
Accor	Mantis	Mantis Soanambo Hotel & Spa	Madagascar	Nosy Boraha (Ile Sainte-Marie)	48
Accor	Mantis	Mbano Manor Hotel	Zimbabwe	Victoria Falls	18
Accor	Fairmont	Fairmont Residences la Marina, Rabat-Salé	Morocco	Rabat	88
Accor	Mercure	Mercure Palais Des Congrès, Ain Benian	Algeria	Algiers	152
Accor	Swissôtel	Swissotel Namaa Bay, Sharm el Sheikh	Egypt	Sharm El Sheikh	432
Accor	Novotel	Novotel Kinshasa La Gombe	DR Congo	Kinshasa	115
Azalai Hotels Group	Azalai	Azalai Hotel Dakar	Senegal	Dakar	202
BWH Hotel Group	Best Western Plus	Dodoma City Hotel	Tanzania	Dodoma	89
BWH Hotel Group	Best Western Premier	Dynasty Hotel	Ethiopia	Addis Ababa	89
CityBlue	c3	c3 Cowrie Shell Residences	Kenya	Mombasa	15
CityBlue	Urban by CityBlue	Urban by CityBlue	Tanzania	Dar es Salaam	65
Dusit International	Dusit Princess	Dusit Princess Residences Westlands	Kenya	Nairobi	100
Hilton	Hilton	Hilton Kinshasa	DR Congo	Kinshasa	178
Hilton	Hilton	Hilton Skanes Monastir Beach Resort	Tunisia	Monastir	340
Hyatt Hotels & Resorts	Park Hyatt	Park Hyatt Marrakech	Morocco	Marrakech	181
Marriott International	Autograph Collection	Autograph Collection Skukusza, Kruger	South Africa	Kruger	18
Marriott International	Autograph Collection	Le Mersenne Zanzibar, Autograph Collection	Tanzania	Zanzibar	71
Marriott International	Tribute Portfolio	Laila, a Tribute Portfolio Resort	Seychelles	Mahe	84
Marriott International	Tribute Portfolio	Tribute Zanzibar	Tanzania	Zanzibar	28
Marriott International	JW Marriott	JW Marriott Masai Mara Lodge	Kenya	Maasai Mara	20

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2024
Chain Hotels Opened in Africa in 2023

Group Name	Brand name	Hotel Name	Country	City	Rooms
Meliá Hotels International	The Meliá Collection	Ngorongoro Lodge, Member of Meliá Collection	Tanzania	Ngorongoro	60
Nobu	Nobu	Nobu Hotel Marrakech	Morocco	Marrakech	71
Pan Pacific Hotels & Resorts	Pan Pacific	Pan Pacific Serviced Suites Nairobi	Kenya	Nairobi	128
Radisson Hotel Group	Radisson Blu	Radisson Blu Residences, Saidia	Morocco	Saidia	192
Radisson Hotel Group	Radisson	Radisson Safari Hotel Hoedspruit	South Africa	Hoedspruit	120
TUI Hotels & Resorts	TUI BLUE	TUI BLUE Crystal Bay	Egypt	Hurghada	364
Lux Collective	Lux*	LUX* Marijani	Tanzania	Zanzibar	82
Sonesta	Sonesta	Sonesta Nouba Hotel Aswan	Egypt	Aswan	45
Mandarin Oriental Hotel Group	Mandarin Oriental	Mandarin Oriental Marrakech	Morocco	Marrakech	63



APPENDIX 5
Hotel Chain Development Pipelines in Africa 2024
Pipeline Hotels and Rooms by Hotel Chain

	Total Per Hotel Chain						Pre-Construction (Planning)	Rooms on Site (Construction)		
	2023			2024						
	Countries	Hotels	Rooms	Countries	Hotels	Rooms			Rooms	% Change
Accor	18	89	17,484	19	70	13,375	75%	25%	-4,109	-24%
Aleph Hospitality	4	4	371	4	4	371	29%	71%	0	0%
Azalai Hotels Group	5	5	979	5	5	907	41%	59%	-72	-7%
Banyan Tree Hotels & Resorts	3	4	210	3	4	210	71%	29%	-	0%
Barceló Hotels & Resorts	2	4	1,066	2	4	1,066	57%	43%	-	0%
BWH Hotel Group	7	8	718	9	14	1,312	0%	100%	594	83%
Catalonia Hotels & Resorts				1	1	275			275	-
CityBlue Hotels	3	6	705	5	14	1,068	39%	61%	363	51%
Club Med	3	3	509	4	4	918	93%	7%	409	80%
Continent Worldwide	2	5	495	2	5	495	31%	69%	-	0%
Deutsche Hospitality	1	1	145	1	1	145	100%	0%	-	0%
ENVI Lodges				1	1	22			22	-
Eurostars Hotel Group	5	8	1,064	5	8	1,064	56%	44%	-	0%
Four Seasons Hotels & Resorts	3	4	885	3	4	816	0%	100%	-69	-8%
Hilton	24	67	12,427	25	72	13,584	56%	44%	1,157	9%
Hyatt International	8	11	1,792	8	11	1,936	0%	100%	144	8%
IHG Hotels & Resorts	6	25	4,268	7	30	5,113	81%	19%	845	20%
Index Hotels				1	3	275			275	-
Kempinski Hotels	2	4	353	3	5	1,041	83%	17%	688	195%
Kerten Hospitality	1	13	1,889	1	13	1,889	0%	100%	-	0%

APPENDIX 5
Hotel Chain Development Pipelines in Africa 2024
Pipeline Hotels and Rooms by Hotel Chain

Total by Hotel Chain										Pre-Construction (Planning)	Rooms on Site (Construction)
	2023			2024					Change on 2023		
	Countries	Hotels	2018 Rooms	Countries	Hotels	Rooms			Change	% Change	
Leva Hotels	3	4	423	4	6	869	74%	26%	446	105%	
Louvre Hotels Group	6	8	991	6	7	997	77%	23%	6	1%	
LVMH Hotel Management				1	1	52			52	-	
Mandarin Oriental Hotel Group				1	1	276			276	-	
Mangalis Hotel Group	6	9	1,090	6	8	1,008	42%	58%	-82	-8%	
Marriott International	31	123	22,776	29	138	26,365	43%	57%	3,589	16%	
Meliá Hotels International	3	7	1,983	2	5	1,623	12%	88%	-360	-18%	
Minor Hotel Group	3	3	666	2	2	412	100%	0%	-254	-38%	
Planhotel Hospitality Group	1	1	120	1	3	370	59%	41%	250	208%	
Radisson Hotel Group	13	30	5,572	15	35	6,618	13%	87%	1,046	19%	
RIU Hotels & Resorts				1	2	700			700	-	
Swiss International Hotels & Resorts	2	2	186	1	1	46	0%	100%	-140	-75%	
The Ascott	8	11	1,322	8	13	1,515	46%	54%	193	15%	
The Urban Hotel Group	2	3	1,145	2	3	205	32%	68%	-940	-82%	
TIME Hotels & Resorts	3	3	205	3	3	370	41%	59%	165	80%	
TUI Hotels & Resorts	3	4	427	7	12	3,228	0%	100%	2,801	656%	
Valor Hospitality				1	1	24			24	-	
Wyndham Hotels and Resorts	5	9	1,426	6	10	1,633	9%	91%	207	15%	
TOTAL	41	478	83,692	41	524	92,193	47%	53%	8,501	10%	



CityBlue
Le Mirage,
Nairobi

About Us

At **W Hospitality Group** we specialise in the hotel, tourism and leisure industries in Africa, providing a full range of services to our clients who have investments in the sector, or who are looking to enter them, through development, acquisition or other means. Our services are integral parts of the process of realising a successful project, and delivering profitability post-completion. For many years we have been regarded as the market leader in sub-Saharan Africa due to the market and financial expertise of our staff, our experience of the global and African hotel industry, our commitment to our clients and our desire to see them succeed.

Our team has experience of more than 90 countries, including 40 in Africa, both developed and developing, and at all market levels, from deluxe hotels to roadside lodges, exclusive health clubs to public recreation facilities, and from the master planning of thousand-hectare sites to the best use of city blocks. This experience is essential when advising on multi-million-dollar projects, in order to bring first-hand knowledge of success factors – and sometimes how not to do it.

We have worked with many of the major international and regional hotel companies, as well as multilateral funding agencies, financial institutions and governments, and individual entrepreneurs. Our clients benefit from our relationships with senior executives in these stakeholders, and our knowledge of how they operate. We are engaged by several clients currently to advise them on the choice of brand and operator for their proposed or existing hotel, and contribute in a small way to getting the chains to sign only on “real” projects.

Our expertise in hotel development and operations is considered by our clients to be of great benefit to them. In recognition of our expertise, we were on two occasions awarded the accolade of Tourism Investment Advisor of the Year by Africa Investor magazine, for our work on projects in Africa, where we have been able to “make it happen”.

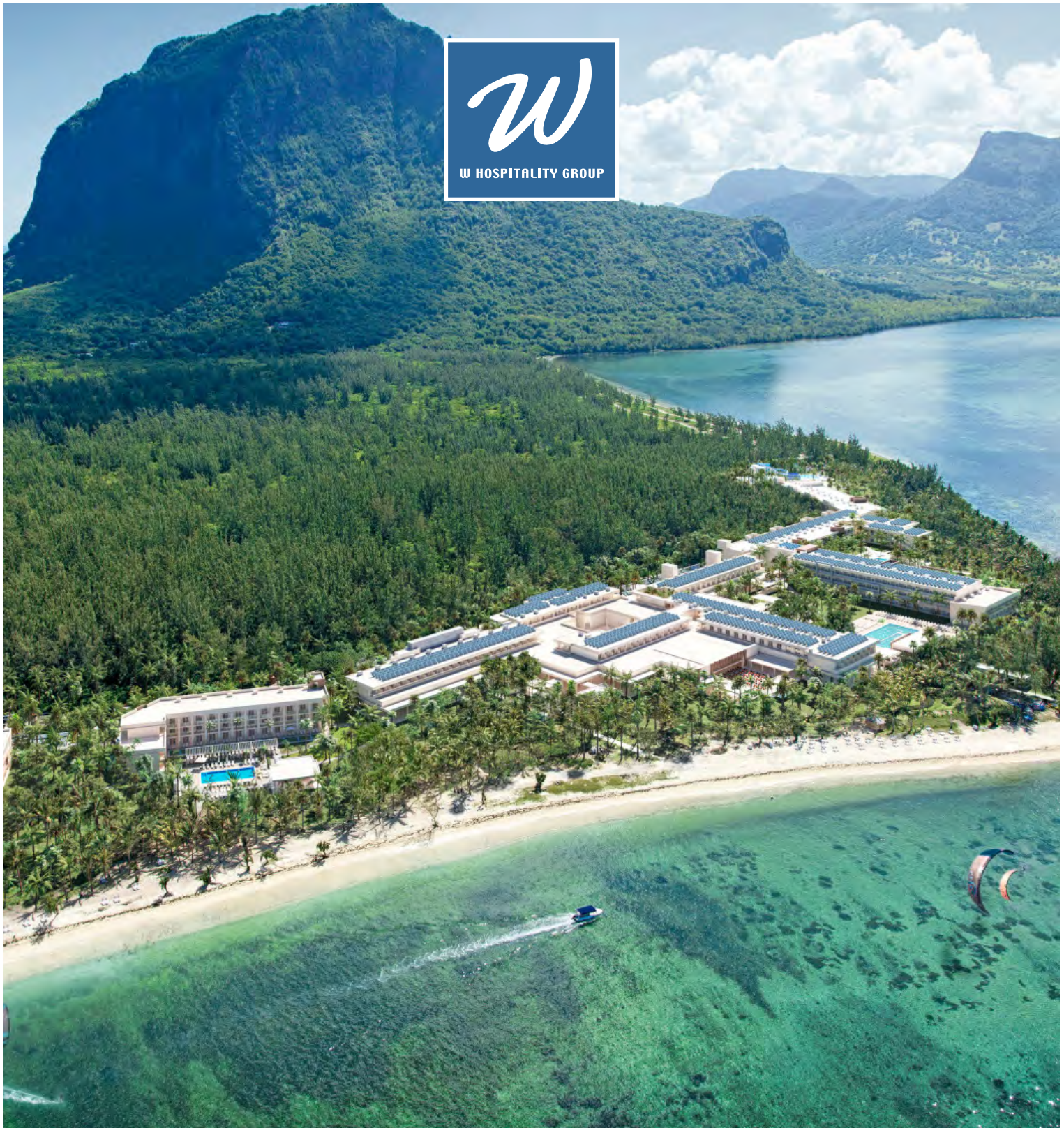
We are a founder member of **Hotel Partners Africa (HPA)**, a group of consultants and advisers offering complementary services to hotel developers and owners. In the complex world of hotel development and management, where a client’s specific needs must be balanced with all the processes and requirements to satisfy funders, manage risk, oversee cost efficient and fit-for-purpose construction, (including specialist IT systems) contract negotiation with operators, asset management, valuations, sales and acquisitions, and recruitment, HPA is a unique professional and integrated complete-solutions provider with integrity, experience and a proven track record, providing a seamless service throughout the lifecycle of a hotel project.

HPA has a highly proactive team with long-standing relationships with major players, particularly branded hotel chains, developers, fund managers and property owners. The partners are based in Lagos, London, Addis Ababa and Florida.



**Radisson Blu
Resort,
Mosi-oa-Tunya
Livingstone**

**Back Cover:
RIU Palace &
RIU Turquoise
Mauritius**



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