

Hotel Pipeline Report

MIDDLE EAST & NORTH AFRICA

October 2023

OVERVIEW

Regions



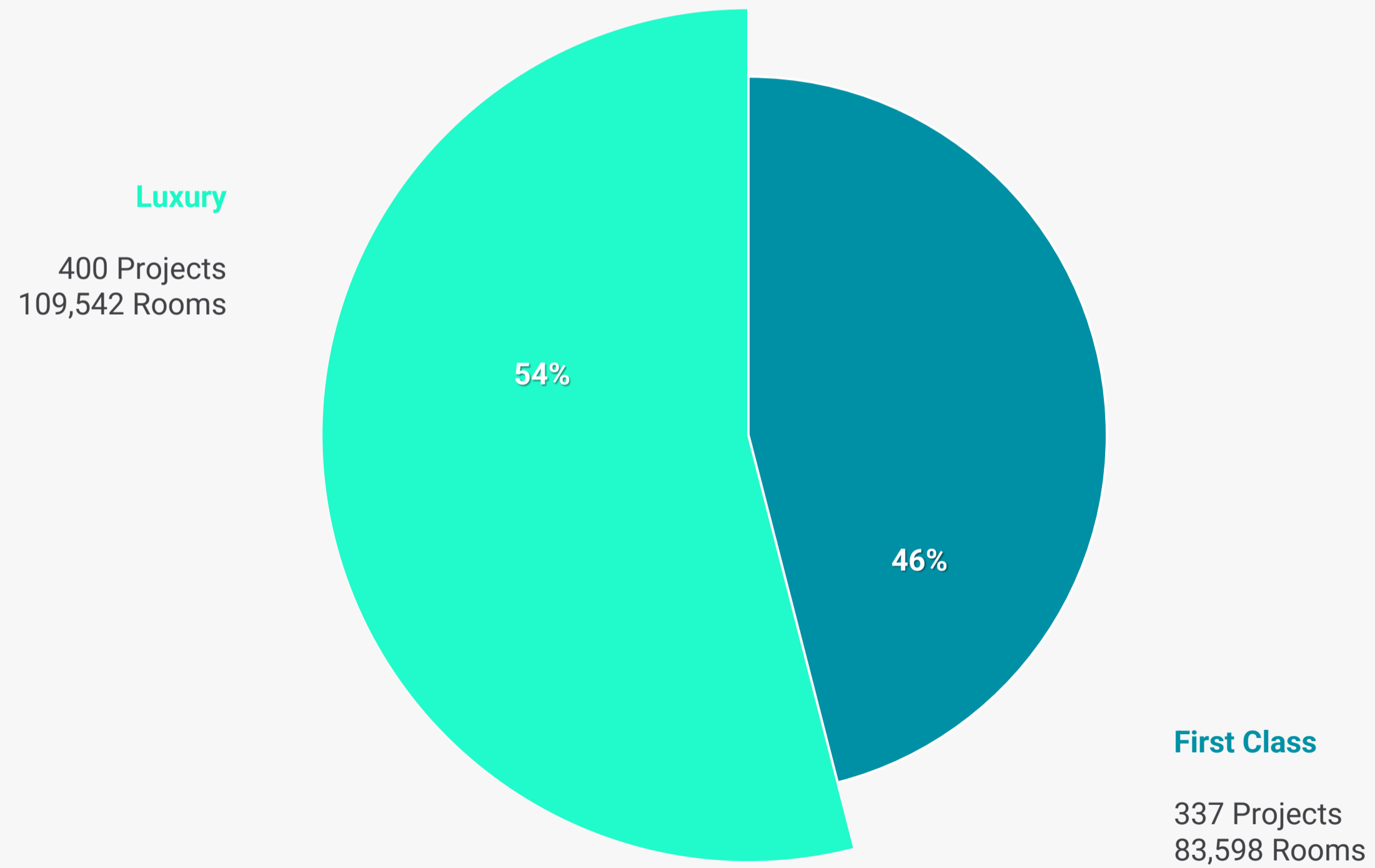
7,593
Projects

1,520,779
Rooms

HOTEL SEGMENT

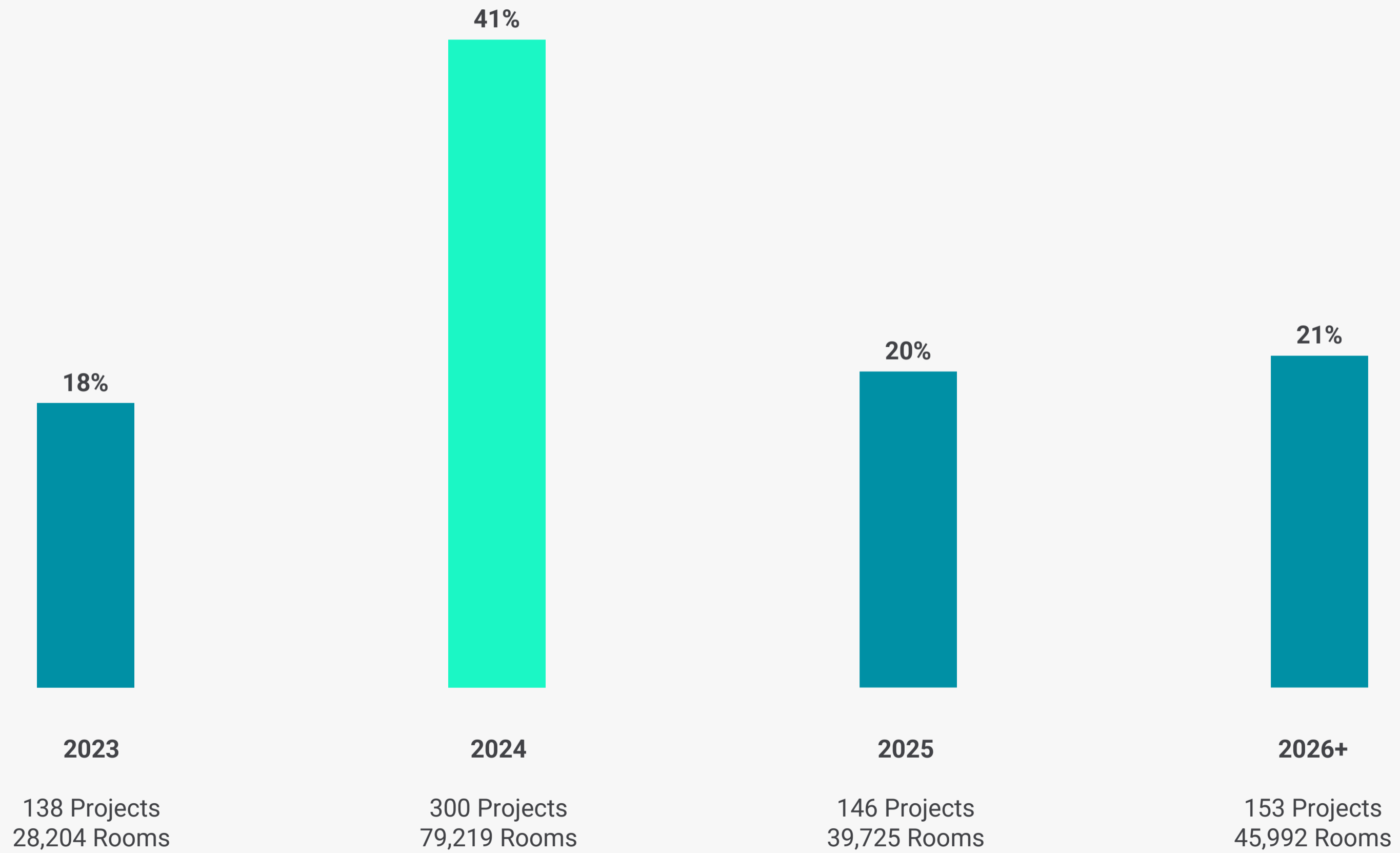
Categories

54% of all 737 hotel projects that are currently arising in the MENA region will be five-star hotels.



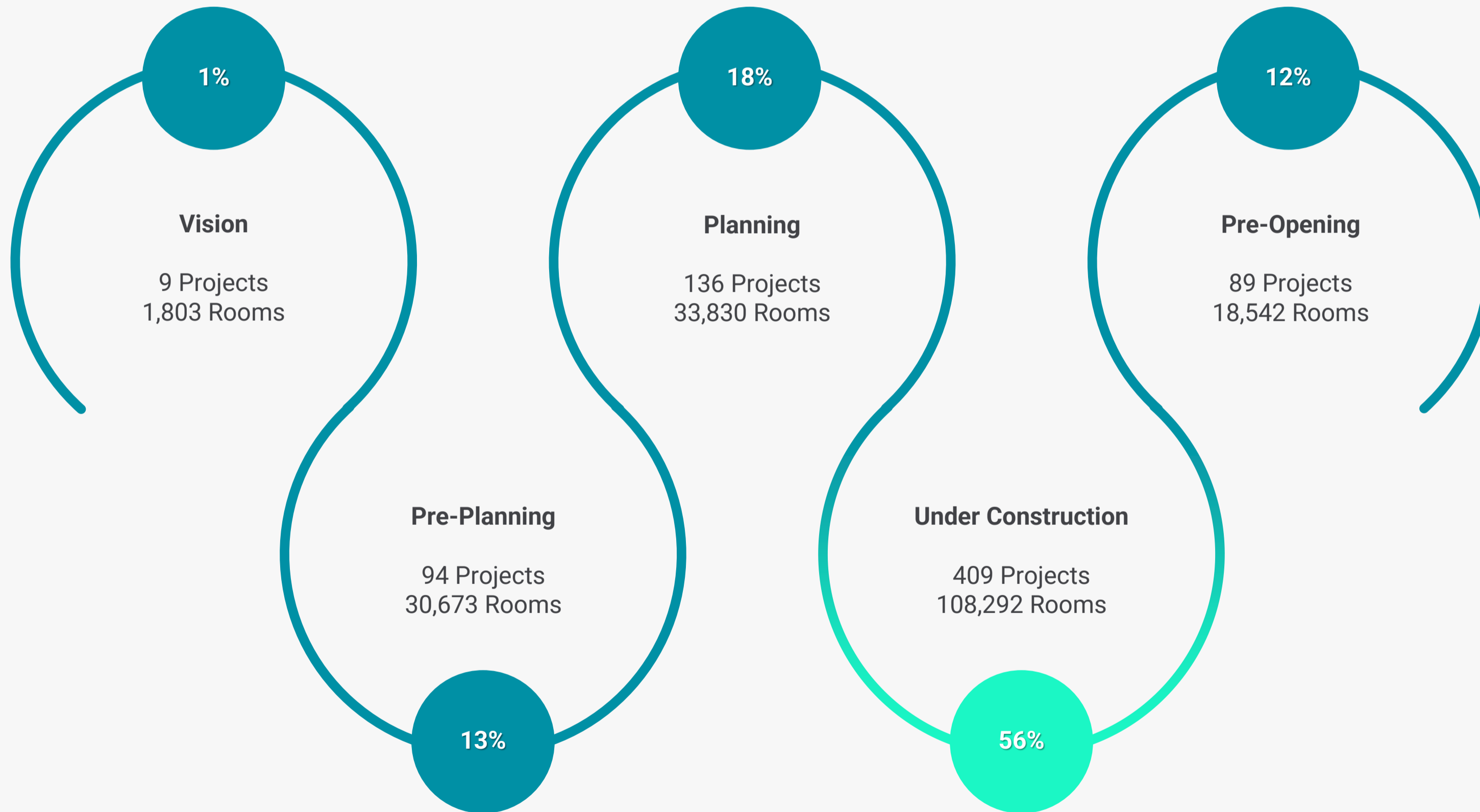
OVERVIEW

Year of Opening



PHASE

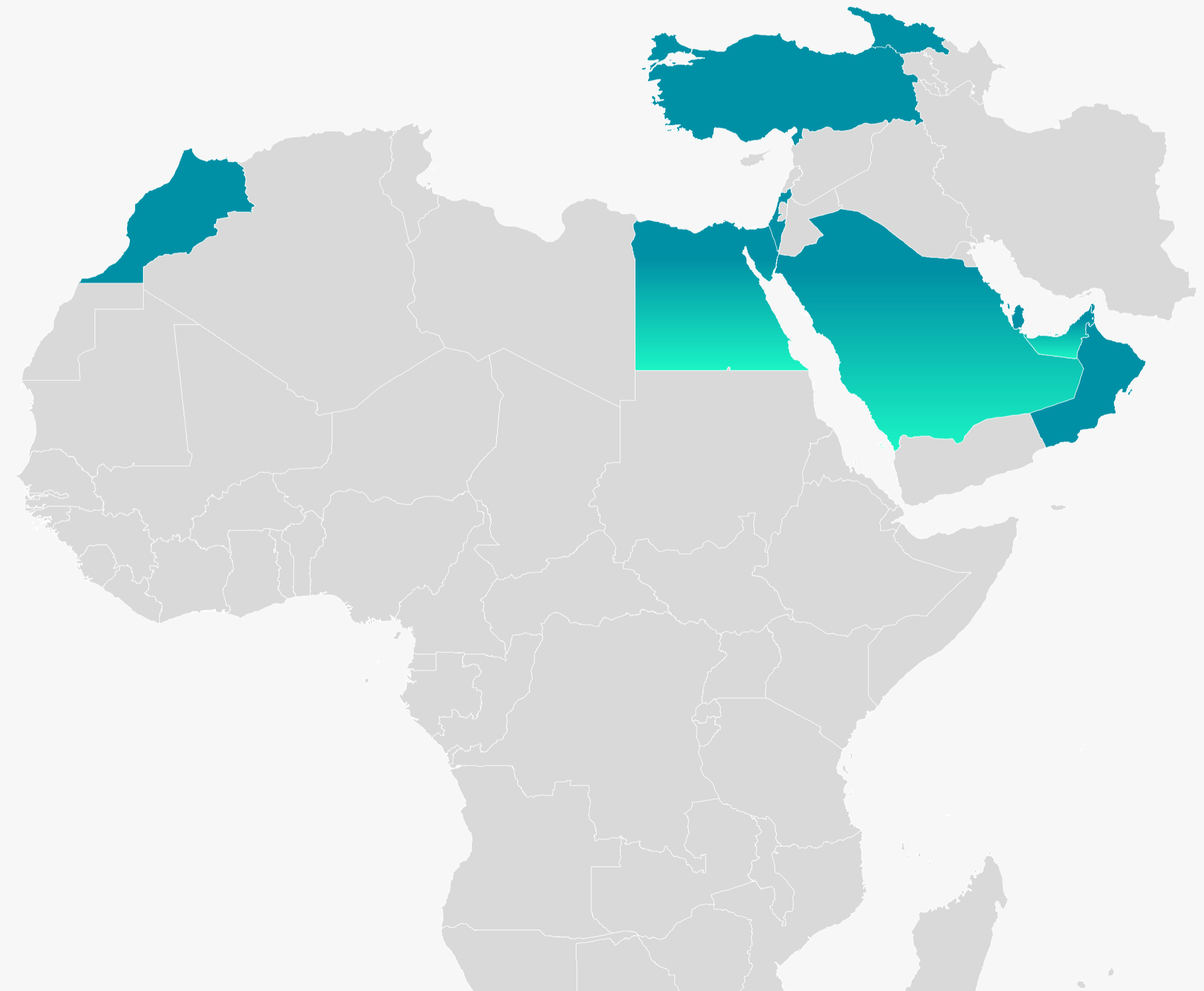
Construction



TOP 10 Countries

While the global hotel industry is a vibrant one, changing year to year in many surprising and interesting ways, when it comes to the top 10 countries for hotel construction in the MENA region, the list is perhaps less surprising that one might think. With more than 200 projects, Saudi Arabia is currently leading in terms of new hotel projects in the pipeline.

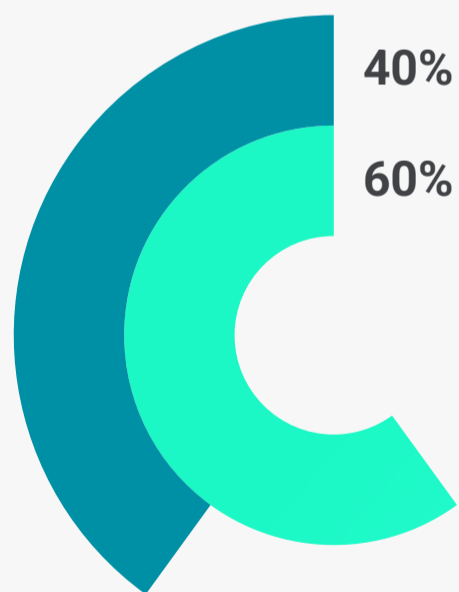
	Country	Projects	Rooms
1.	Saudi Arabia	236	80,977
2.	United Arab Emirates	125	31,102
3.	Egypt	73	19,692
4.	Israel	64	11,768
5.	Turkey	50	7,923
6.	Qatar	33	9,611
7.	Oman	33	6,669
8.	Georgia	33	6,415
9.	Morocco	28	6,684
10.	Bahrain	15	2,866



PROJECT PIPELINE
Saudi Arabia

236
Projects

80,977
Rooms

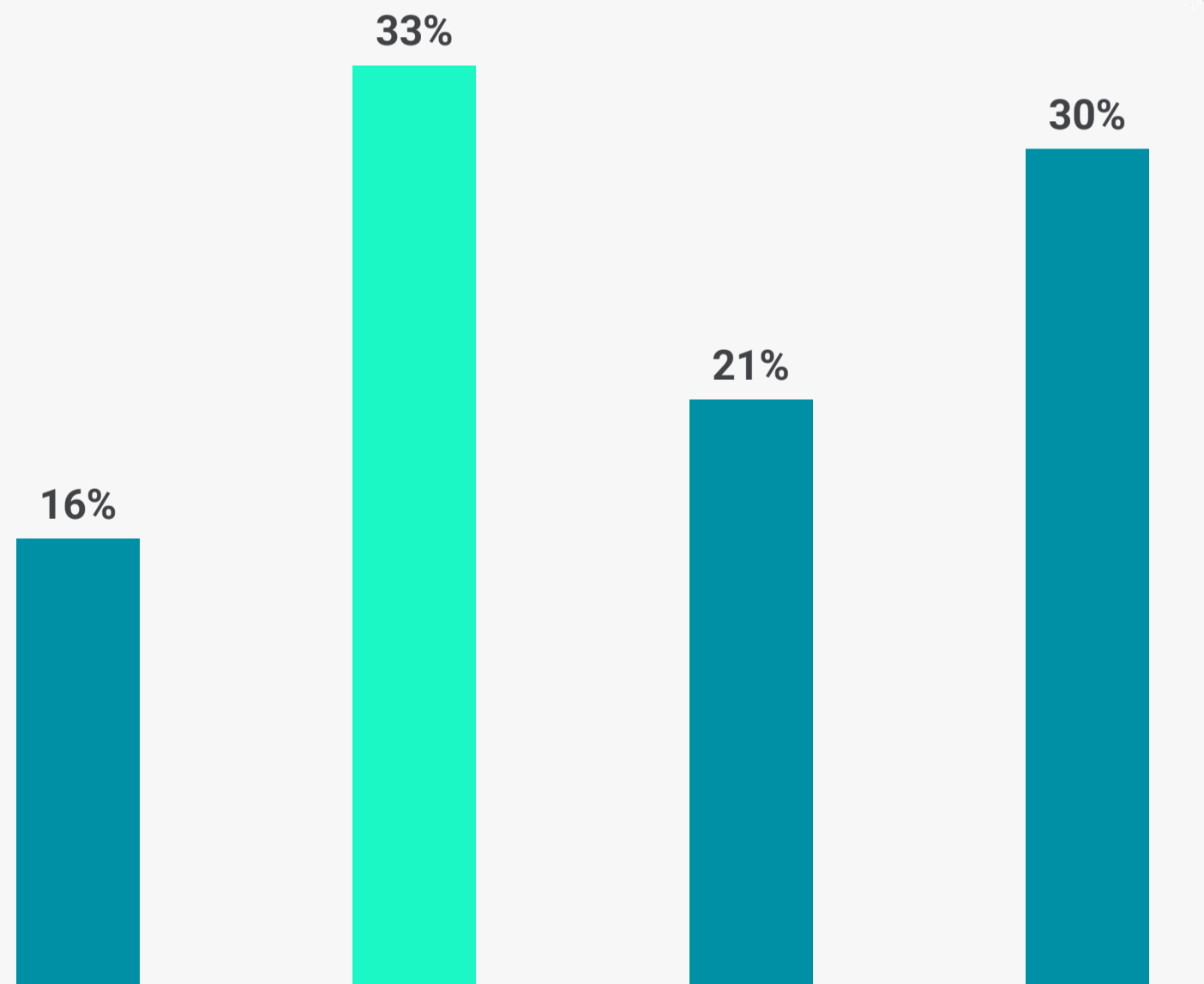


First Class

95 Projects
33,294 Rooms

Luxury

141 Projects
47,683 Rooms



2023

38 Projects
8,387 Rooms

2024

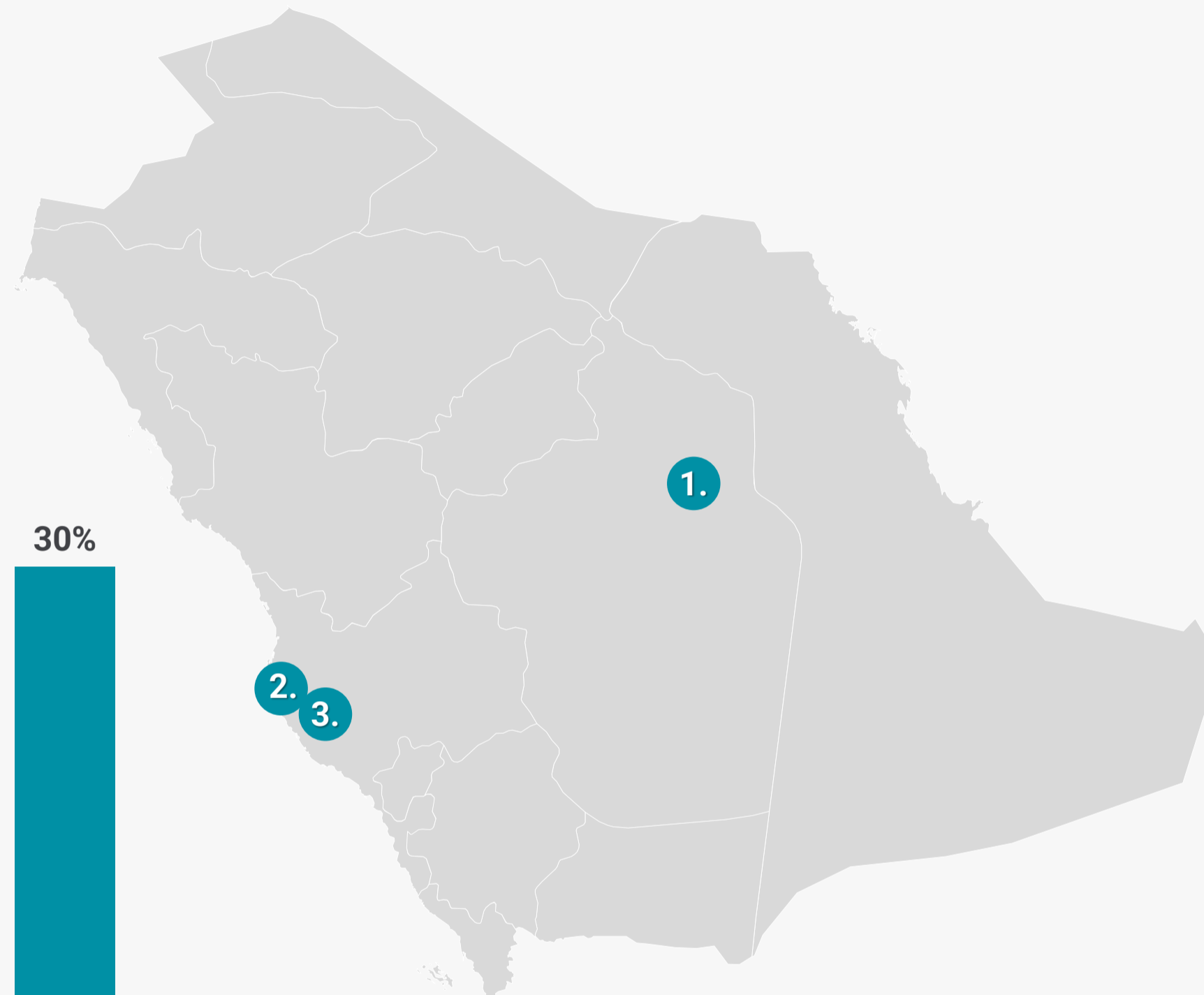
77 Projects
31,432 Rooms

2025

51 Projects
15,807 Rooms

2026+

70 Projects
25,351 Rooms



1. Riyadh

54 Projects
19,375 Rooms

2. Jeddah

37 Projects
7,473 Rooms

3. Makkah

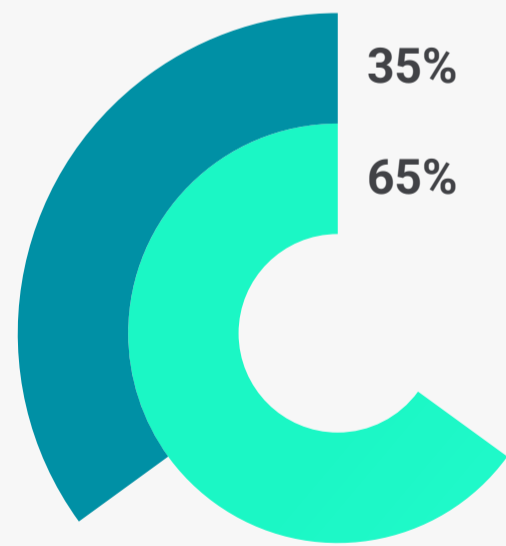
22 Projects
24,847 Rooms

PROJECT PIPELINE

United Arab Emirates

125
Projects

31,102
Rooms

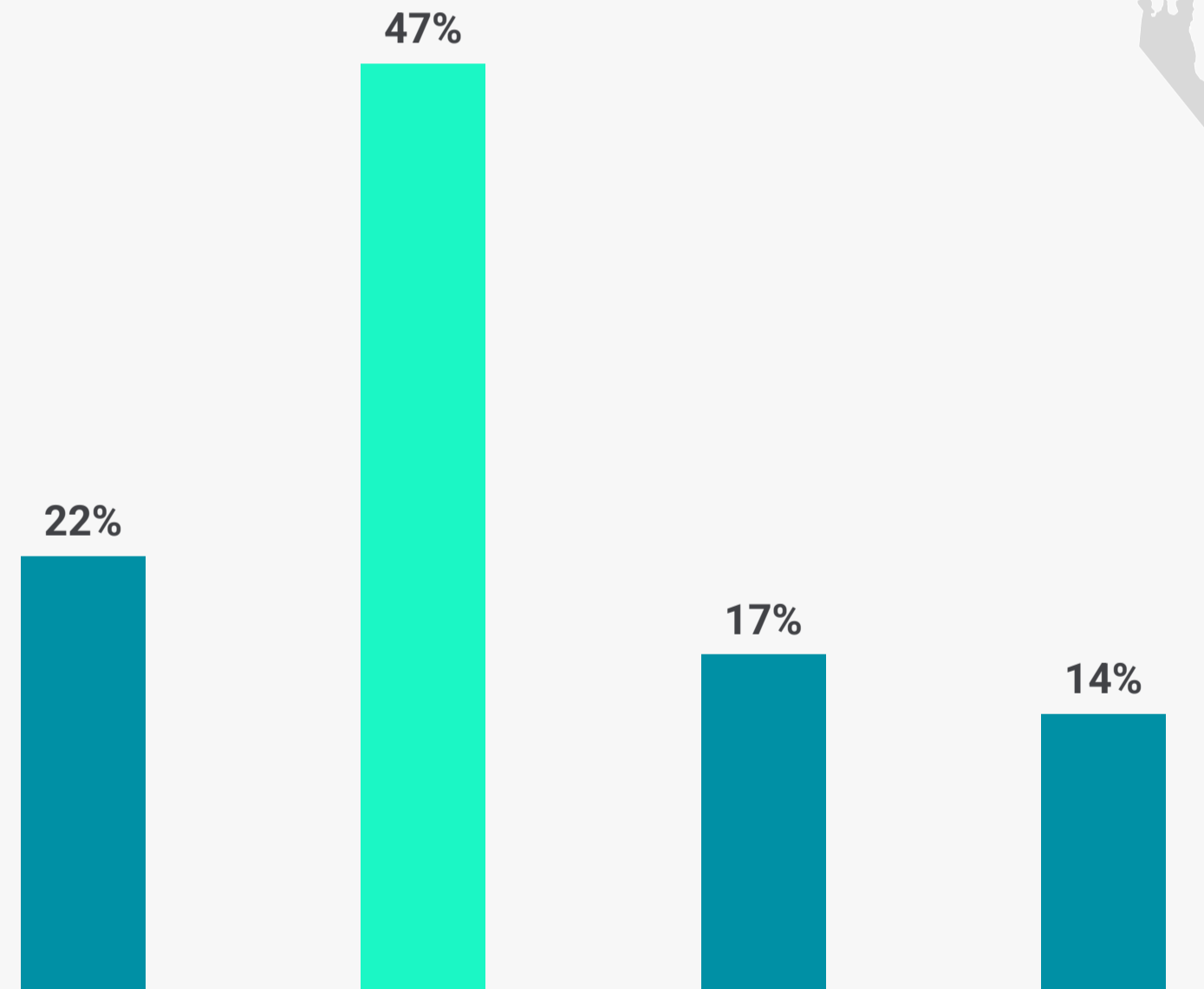


First Class

44, Projects
11,471 Rooms

Luxury

81 Projects
19,631 Rooms



2023

28 Projects
6,842 Rooms

2024

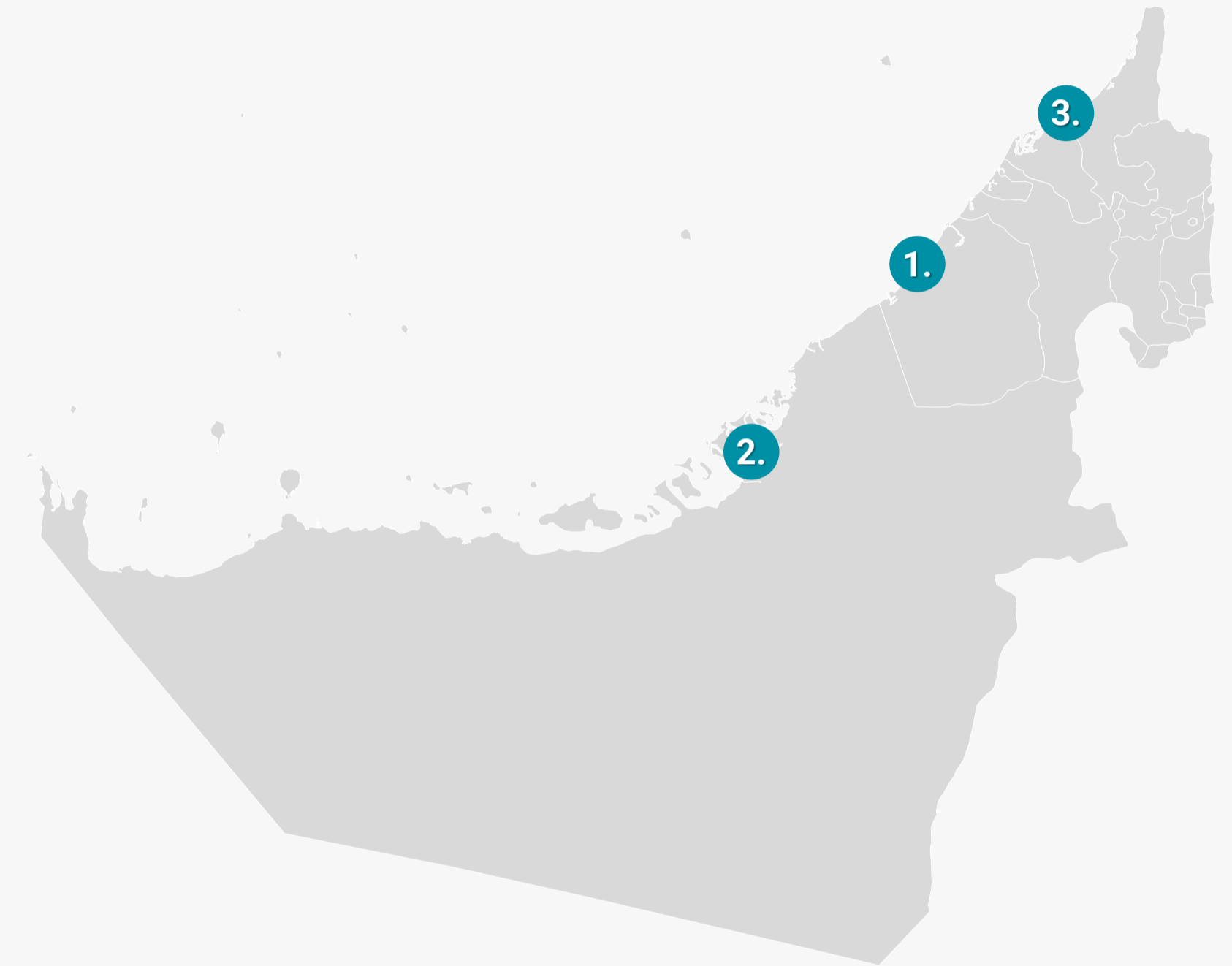
57 Projects
13,188 Rooms

2025

22 Projects
5,246 Rooms

2026+

18 Projects
5,826 Rooms



1. Dubai

72 Projects
19,305 Rooms

2. Sharjah

13 Projects
1,887 Rooms

3. Ras Al-Khaimah

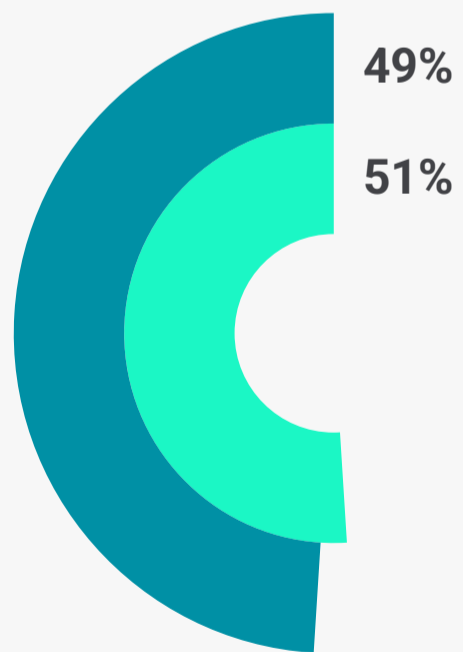
12 Projects
4,108 Rooms

PROJECT PIPELINE

Egypt

73
Projects

19,692
Rooms

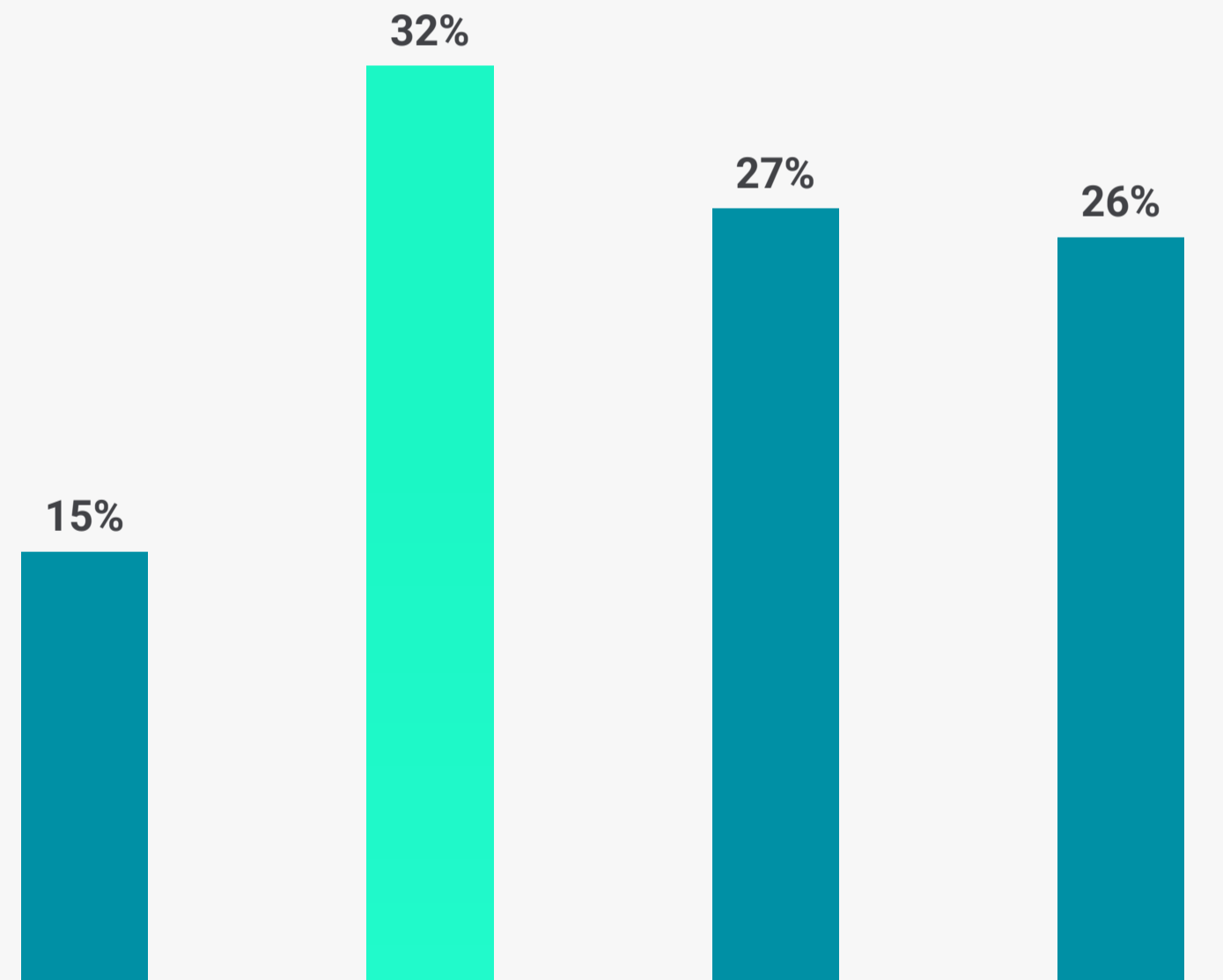


First Class

36 Projects
7,493 Rooms

Luxury

37 Projects
12,199 Rooms



2023

11 Projects
2,578 Rooms

2024

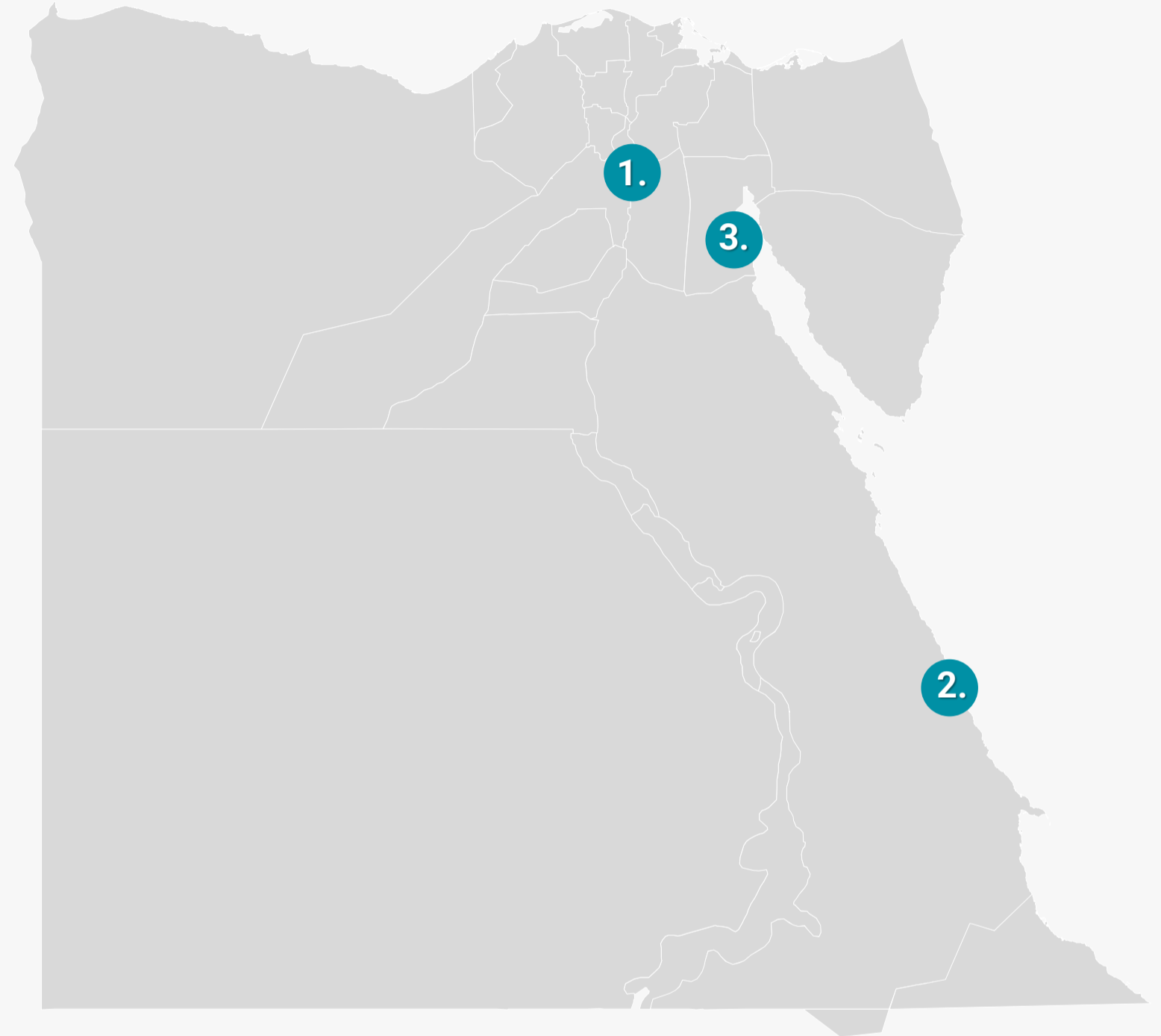
23 Projects
7,144 Rooms

2025

20 Projects
5,128 Rooms

2026+

19 Projects
4,842 Rooms



1. Cairo

20 Projects
4,773 Rooms

2. Marsa Alam

6 Projects
1,692 Rooms

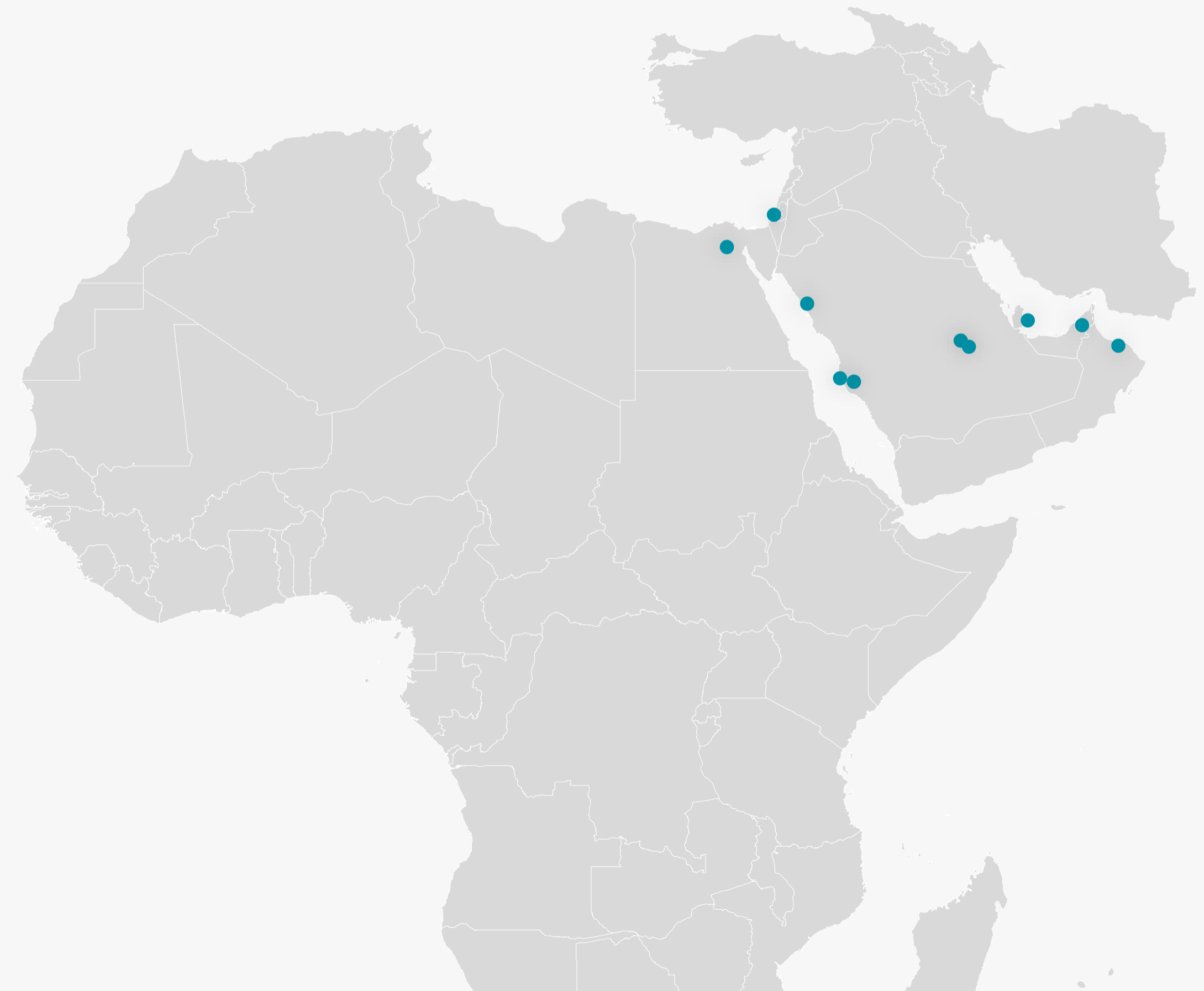
3. Ain Sokhna

5 Projects
1,667 Rooms

TOP 10 Cities

Around the world, the hospitality industry shows no signs of slowing growth. When it comes to the top 10 cities for hotel construction in the MENA region, this ranking should not come as a surprise. With 72 hotels in the pipeline Dubai is still a pioneer in expanding its hotel industry strongly.

	City	Projects	Rooms
1.	Dubai	72	19,305
2.	Riyadh	54	19,375
3.	Jeddah	37	7,473
4.	Doha	26	6,962
5.	Tel Aviv	26	4,921
6.	Makkah	22	24,847
7.	Muscat	21	4,627
8.	Ad Diriyah	21	3,140
9.	Cairo	20	4,773
10.	Al Wajh	16	5,357

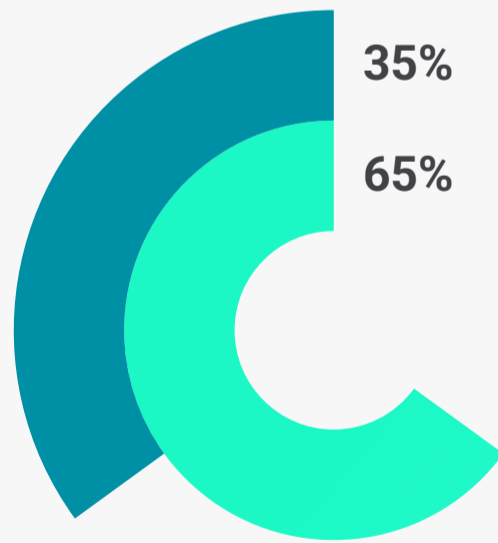


PROJECT PIPELINE

Dubai

72
Projects

19,305
Rooms

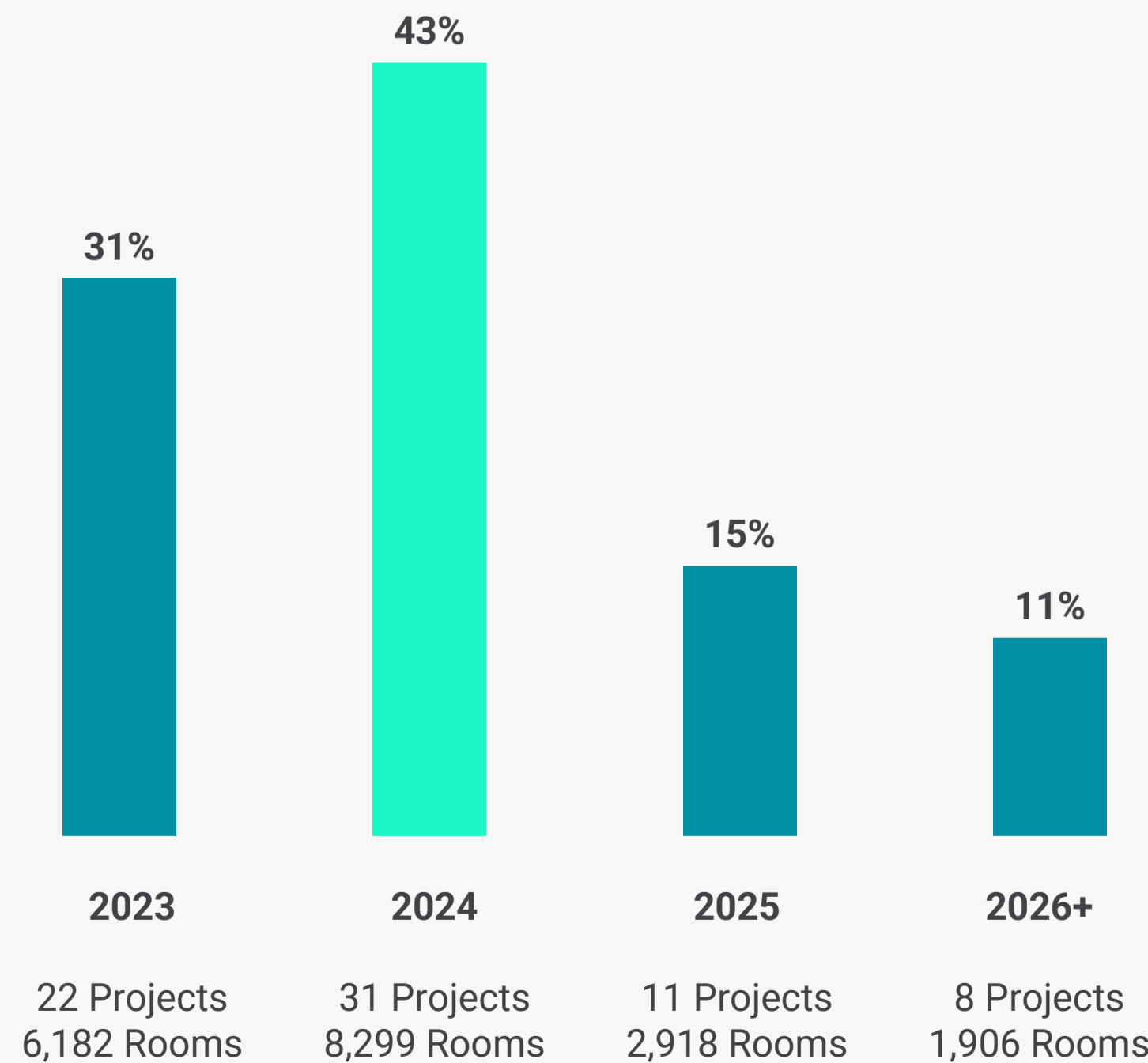


First Class

25 Projects
7,100 Rooms

Luxury

47 Projects
12,205 Rooms



2023

22 Projects
6,182 Rooms

2024

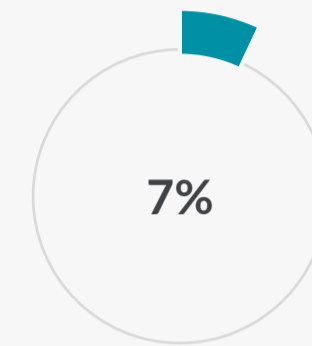
31 Projects
8,299 Rooms

2025

11 Projects
2,918 Rooms

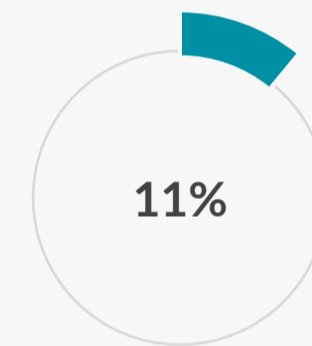
2026+

8 Projects
1,906 Rooms



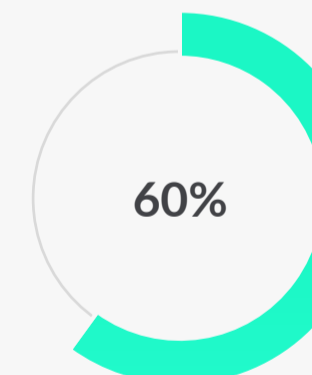
Pre-planning

5 Projects
964 Rooms



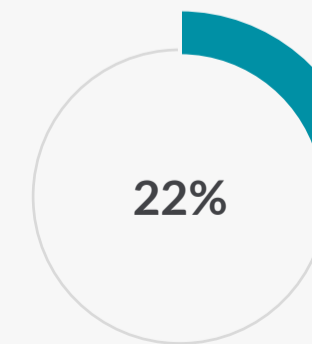
Planning

8 Projects
2,530 Rooms



Construction

43 Projects
11,537 Rooms



Pre-opening

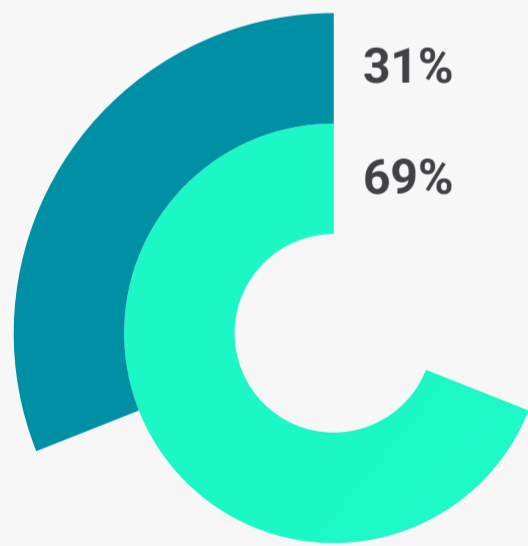
16 Projects
4,274 Rooms

PROJECT PIPELINE

Riyadh

54
Projects

19,375
Rooms

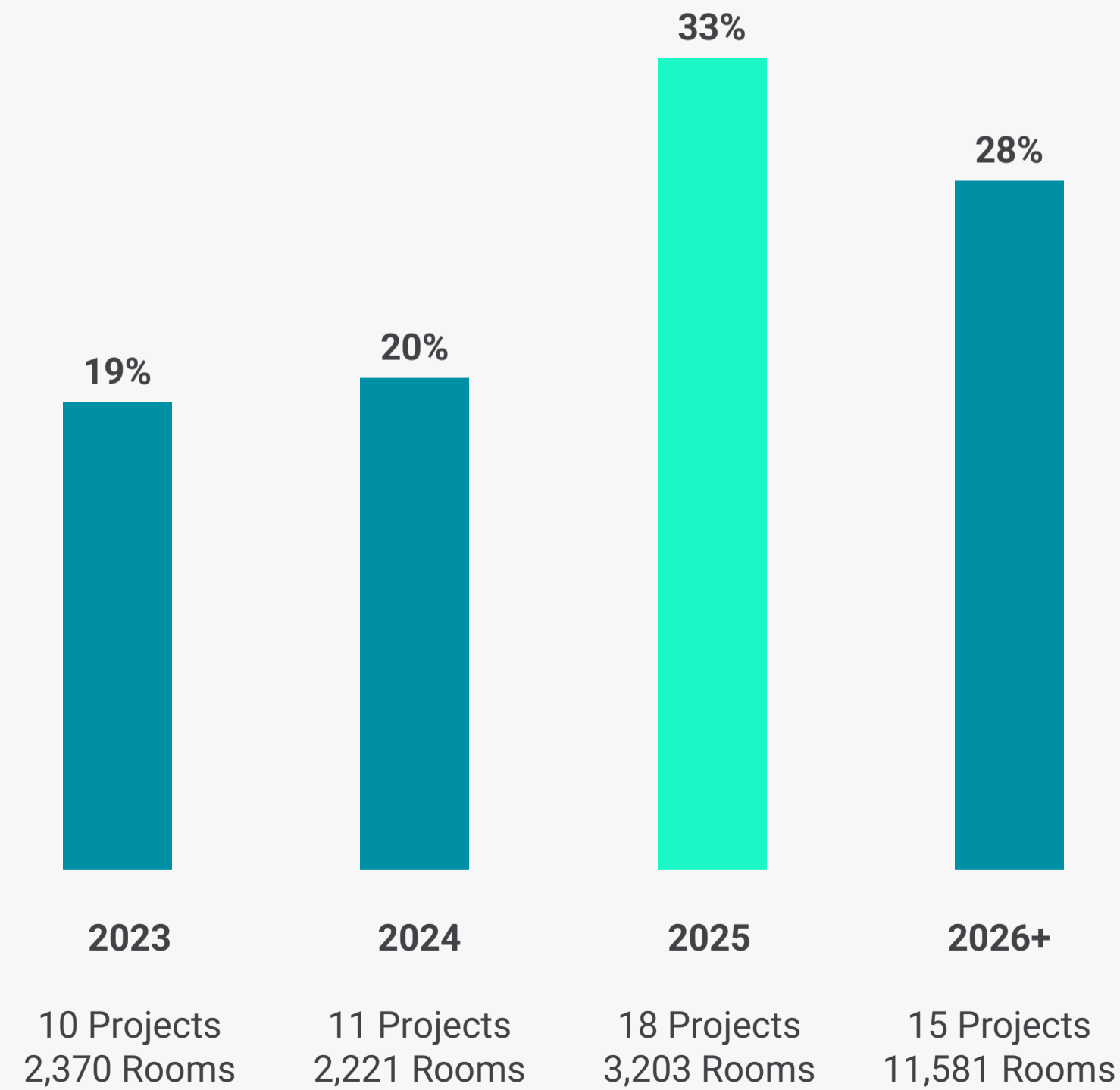


First Class

17 Projects
3,358 Rooms

Luxury

37 Projects
16,017 Rooms



2023

10 Projects
2,370 Rooms

2024

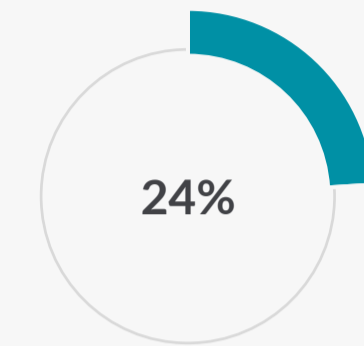
11 Projects
2,221 Rooms

2025

18 Projects
3,203 Rooms

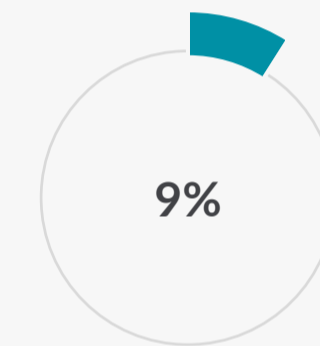
2026+

15 Projects
11,581 Rooms



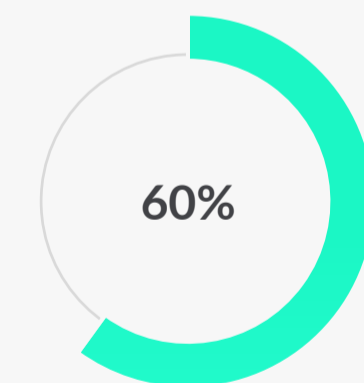
Pre-planning

13 Projects
11,483 Rooms



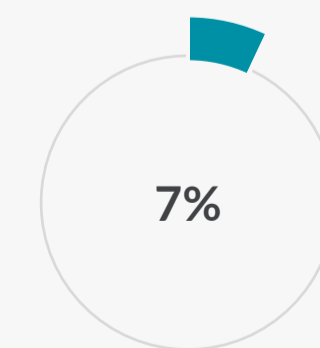
Planning

5 Projects
915 Rooms



Construction

32 Projects
6,465 Rooms



Pre-opening

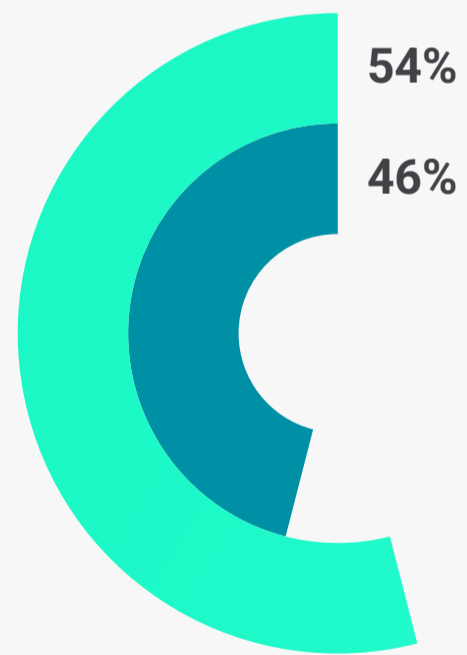
4 Projects
512 Rooms

PROJECT PIPELINE

Jeddah

37
Projects

7,473
Rooms

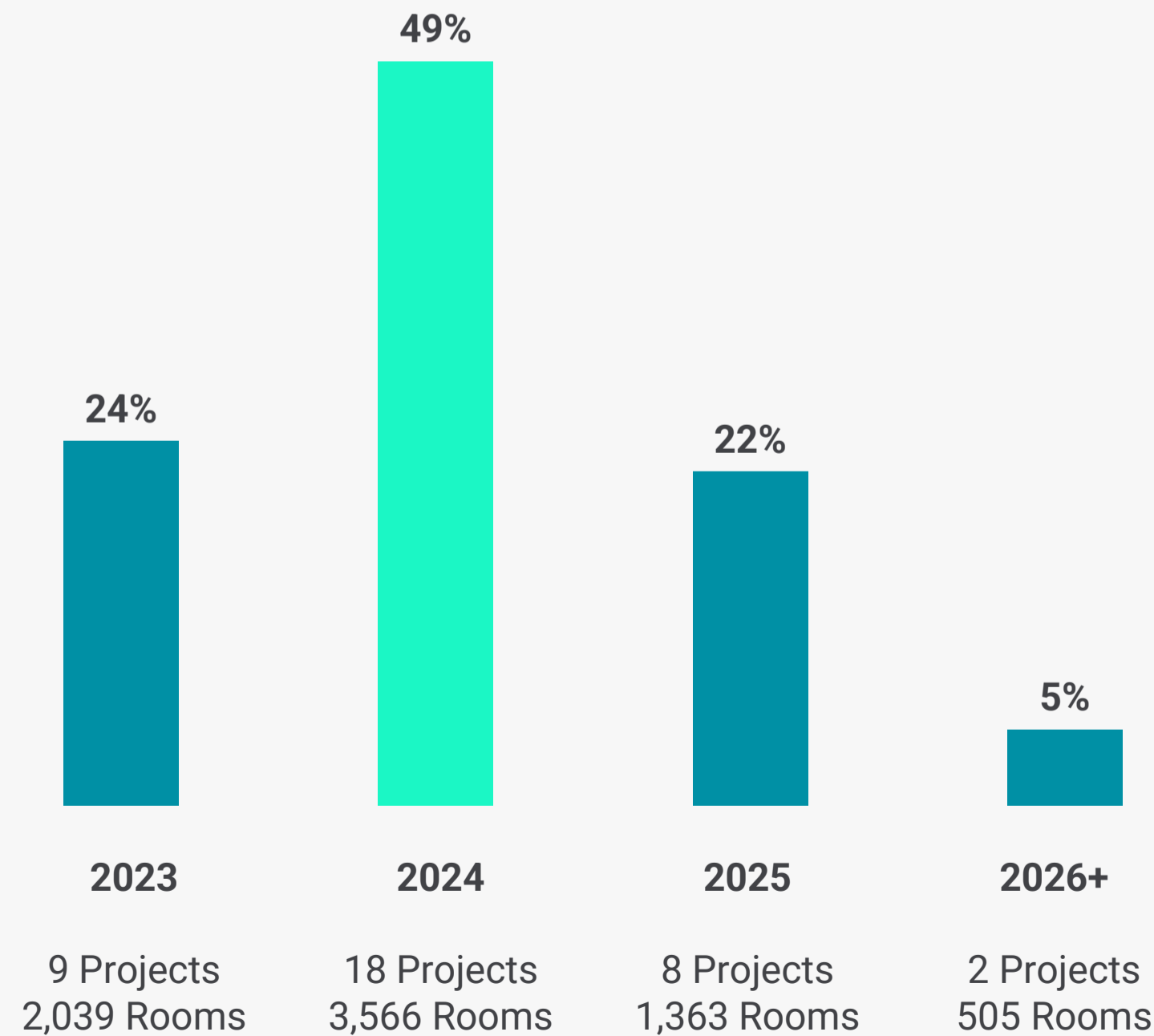


First Class

20 Projects
4,177 Rooms

Luxury

17 Projects
3,296 Rooms



2023

9 Projects
2,039 Rooms

2024

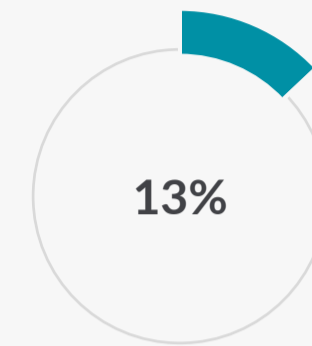
18 Projects
3,566 Rooms

2025

8 Projects
1,363 Rooms

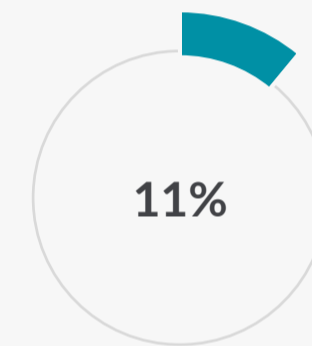
2026+

2 Projects
505 Rooms



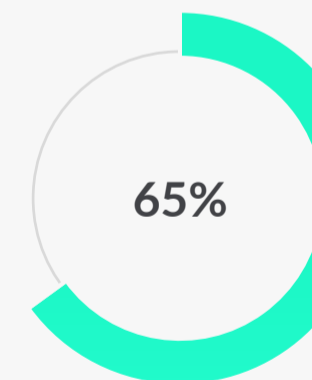
Pre-planning

5 Projects
856 Rooms



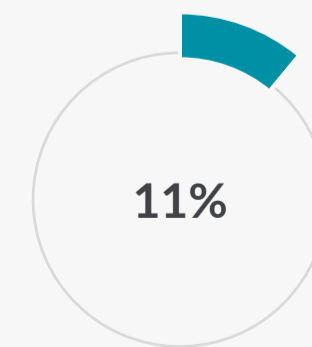
Planning

4 Projects
805 Rooms



Construction

24 Projects
4,635 Rooms



Pre-opening

4 Projects
1,177 Rooms

TOP 5
Hotel Groups



Marriott International

84 Projects
23,010 Rooms



Accor

78 Projects
21,067 Rooms



Hilton Worldwide

76 Projects
15,695 Rooms



IHG Hotels & Resorts

62 Projects
14,046 Rooms



Radisson Hotel Group

39 Projects
8,082 Rooms

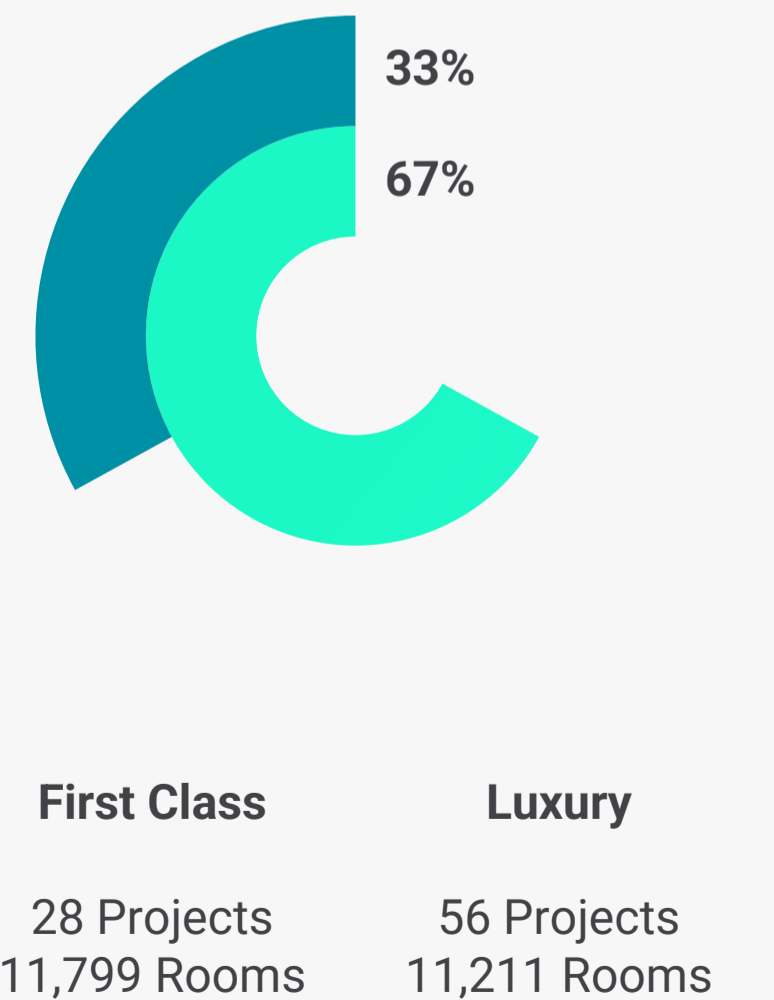
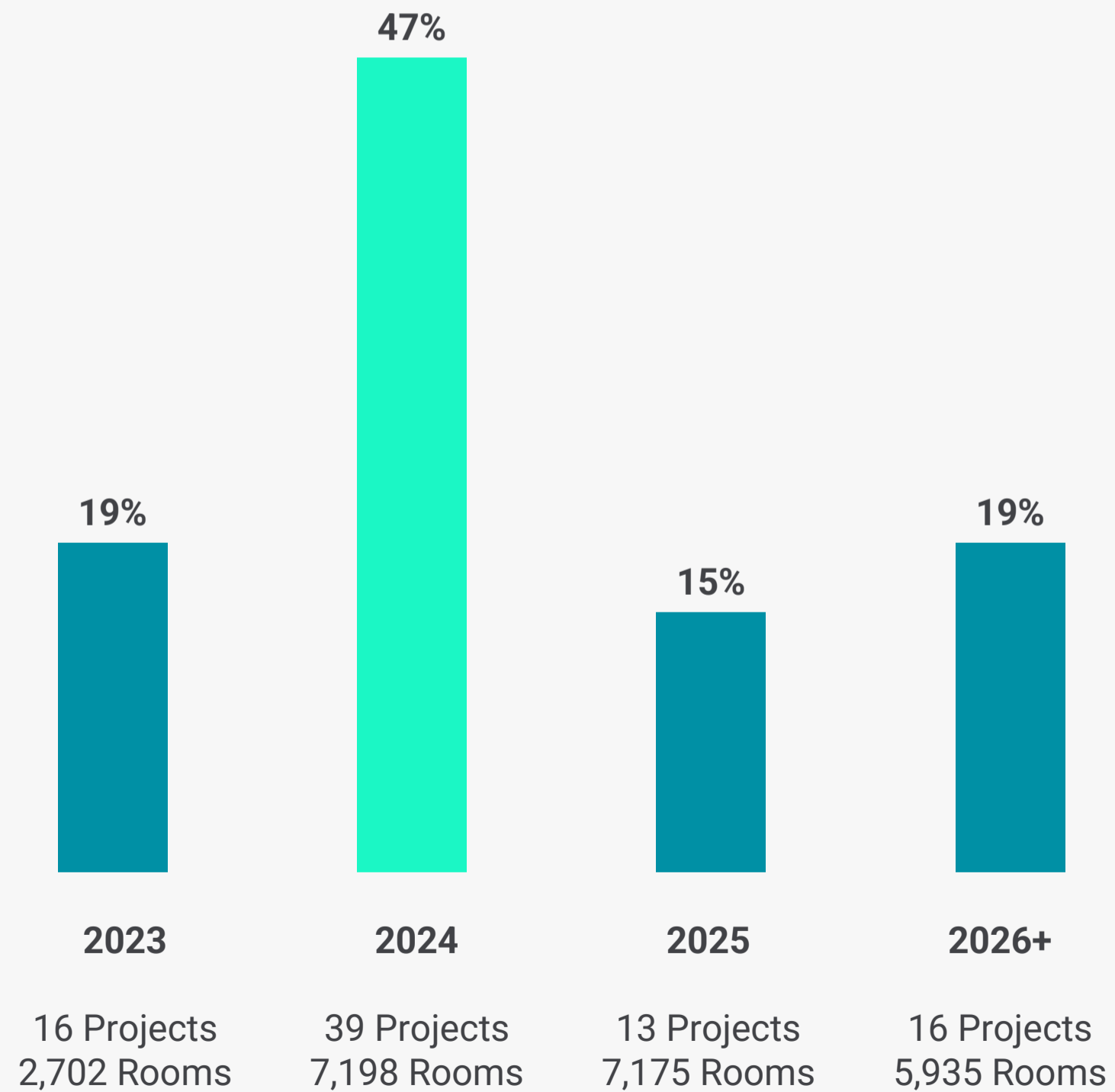
PROJECT PIPELINE

Marriott International

84
Projects

23,010
Rooms

	Country	Projects	Rooms
1.	Saudi Arabia	30	12,496
2.	United Arab Emirates	14	3,171
3.	Turkey	11	1,654
4.	Georgia	8	1,308
5.	Qatar	6	1,497
6.	Morocco	6	800



PROJECT PIPELINE

Accor

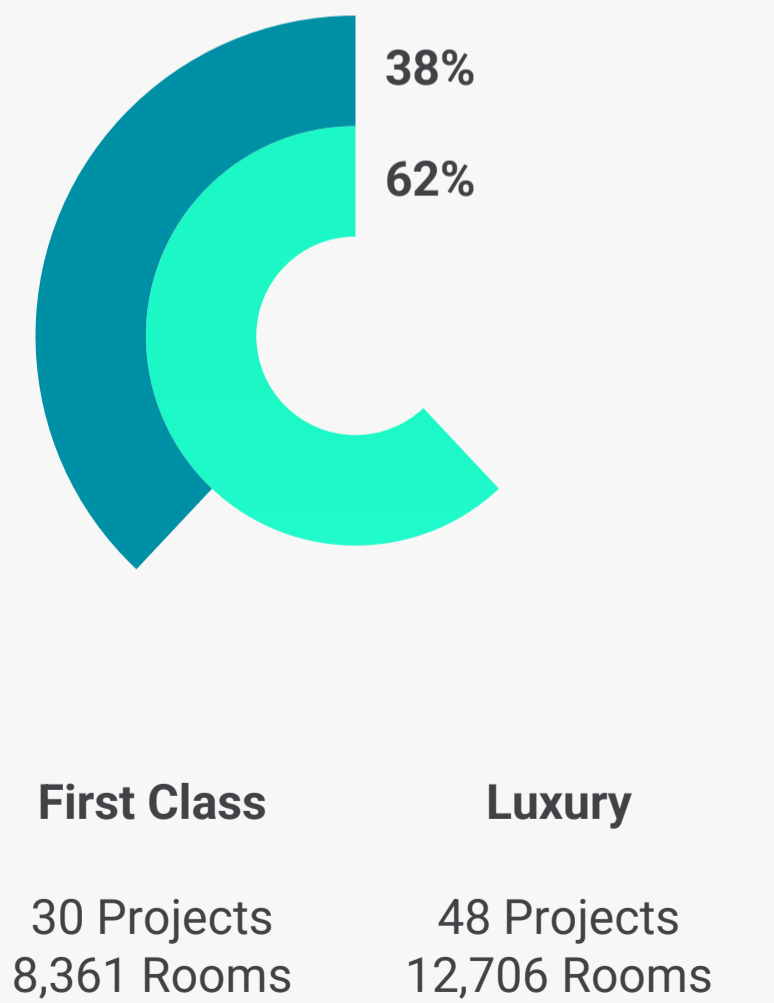
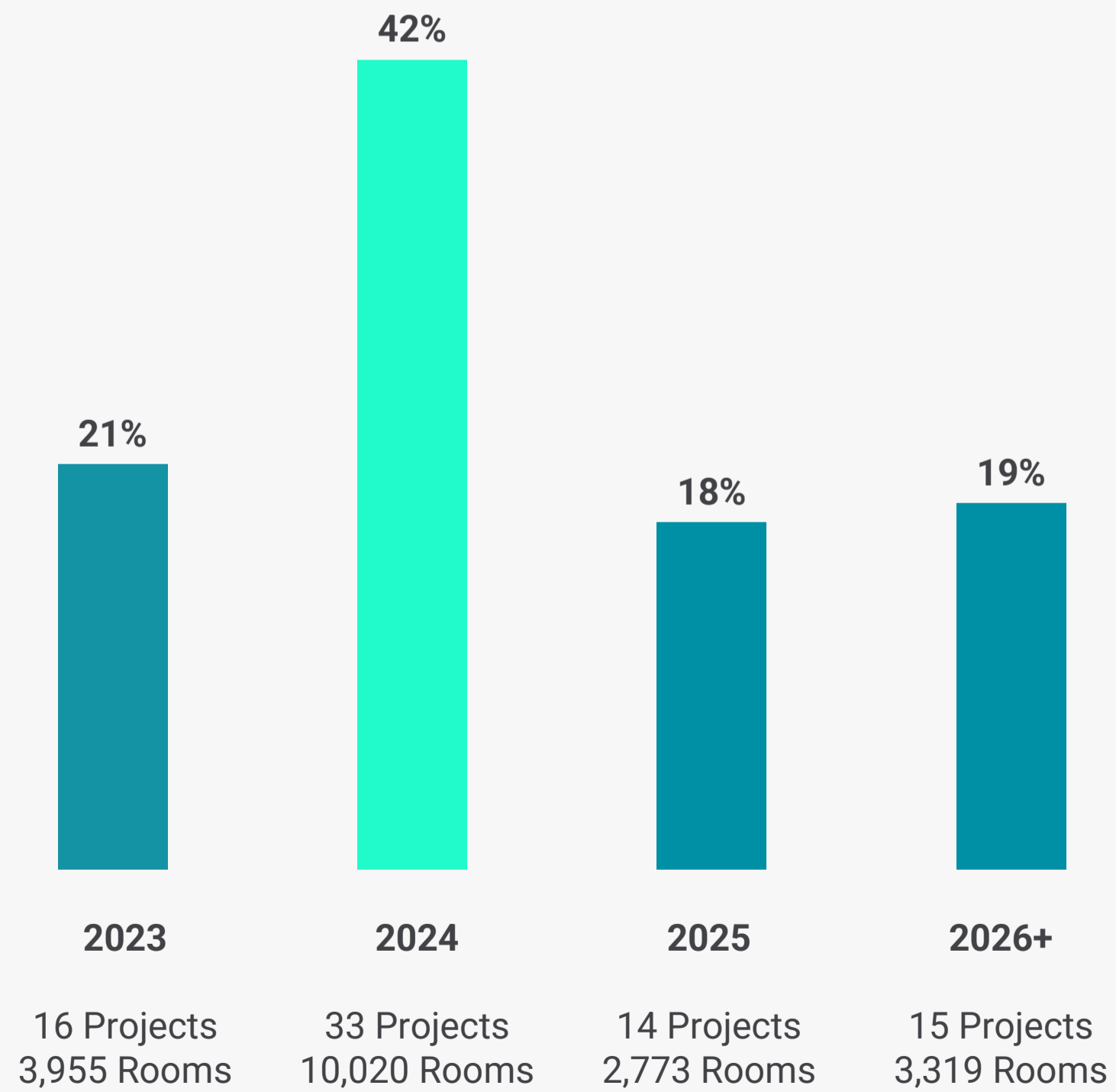
78

Projects

21,067

Rooms

	Country	Projects	Rooms
1.	Saudi Arabia	27	7,886
2.	Egypt	14	5,105
3.	United Arab Emirates	7	1,889
4.	Algeria	6	1,005
5.	Qatar	4	1,511
6.	Georgia	4	703



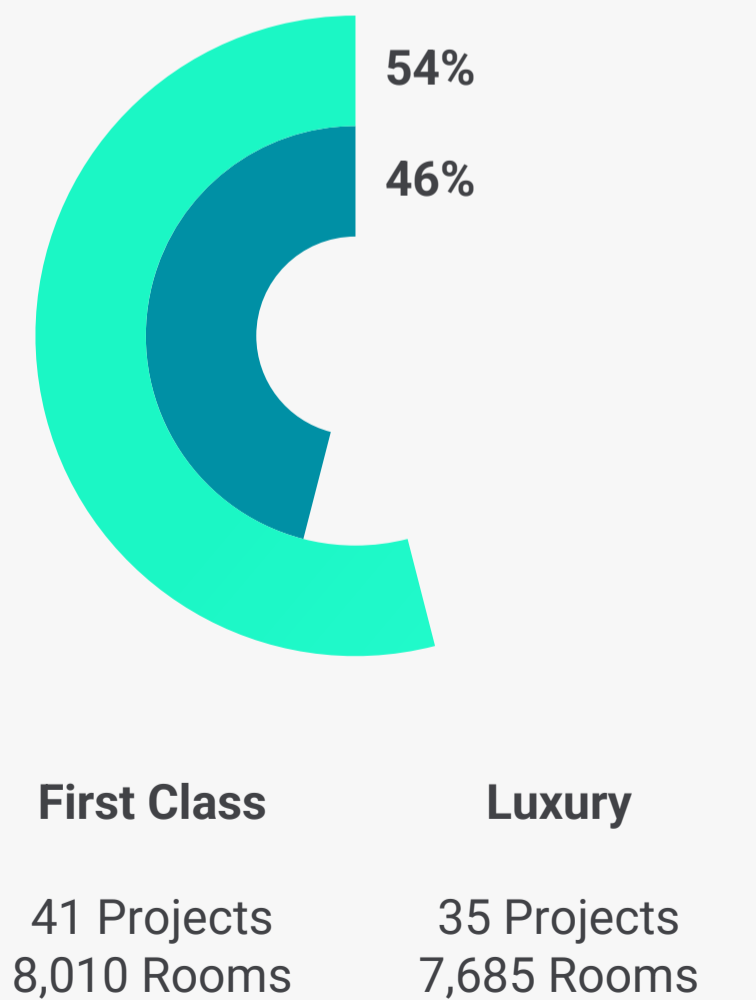
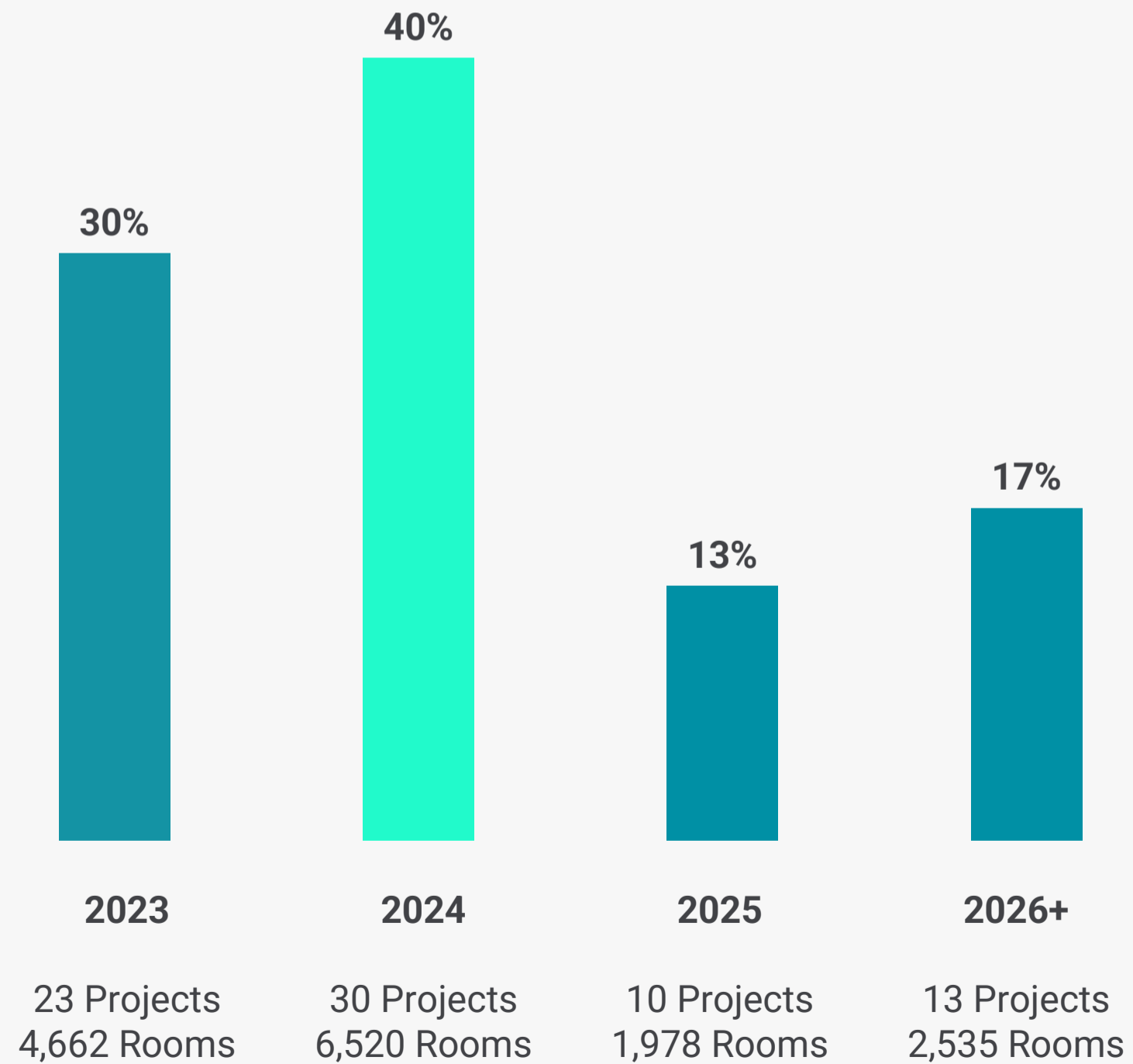
PROJECT PIPELINE

Hilton Worldwide

76
Projects

15,695
Rooms

	Country	Projects	Rooms
1.	Saudi Arabia	30	6,485
2.	United Arab Emirates	9	1,983
3.	Egypt	9	1,917
4.	Morocco	6	974
5.	Turkey	6	907
6.	Israel	4	821



TOP 10
Hotel Brands



Hilton Hotels & Resorts

17 Projects
4,227 Rooms



InterContinental Hotels & Resorts

13 Projects
3,242 Rooms



Four Seasons Hotels & Resorts

13 Projects
3,020 Rooms



Doubletree by Hilton

13 Projects
2,686 Rooms



Hilton Garden Inn

13 Projects
2,632 Rooms



Radisson Blu Hotels & Resorts

12 Projects
2,599 Rooms



Radisson Hotels & Resorts

12 Projects
2,470 Rooms



Hotel Indigo

12 Projects
2,0457 Rooms



Autograph Collection

12 Projects
1,567 Rooms



Rotana Hotels & Resorts

11 Projects
3,092 Rooms

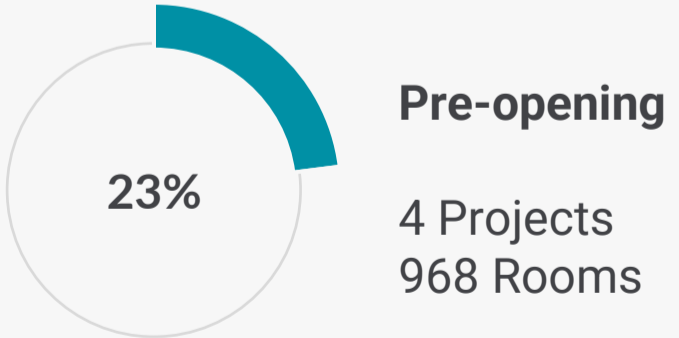
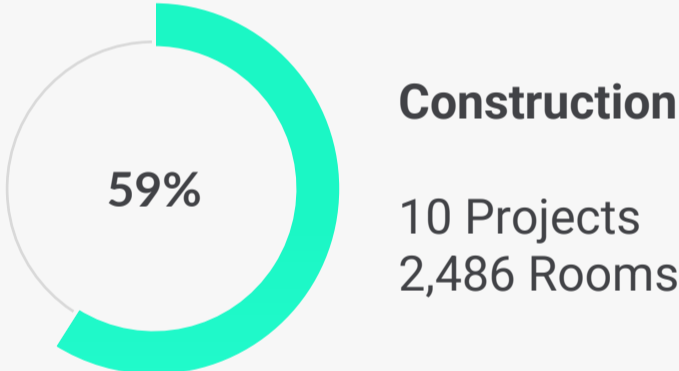
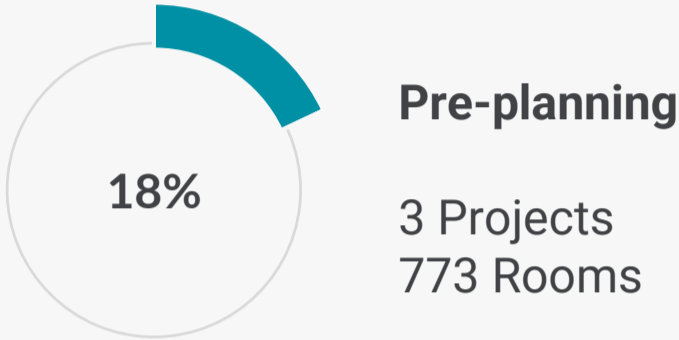
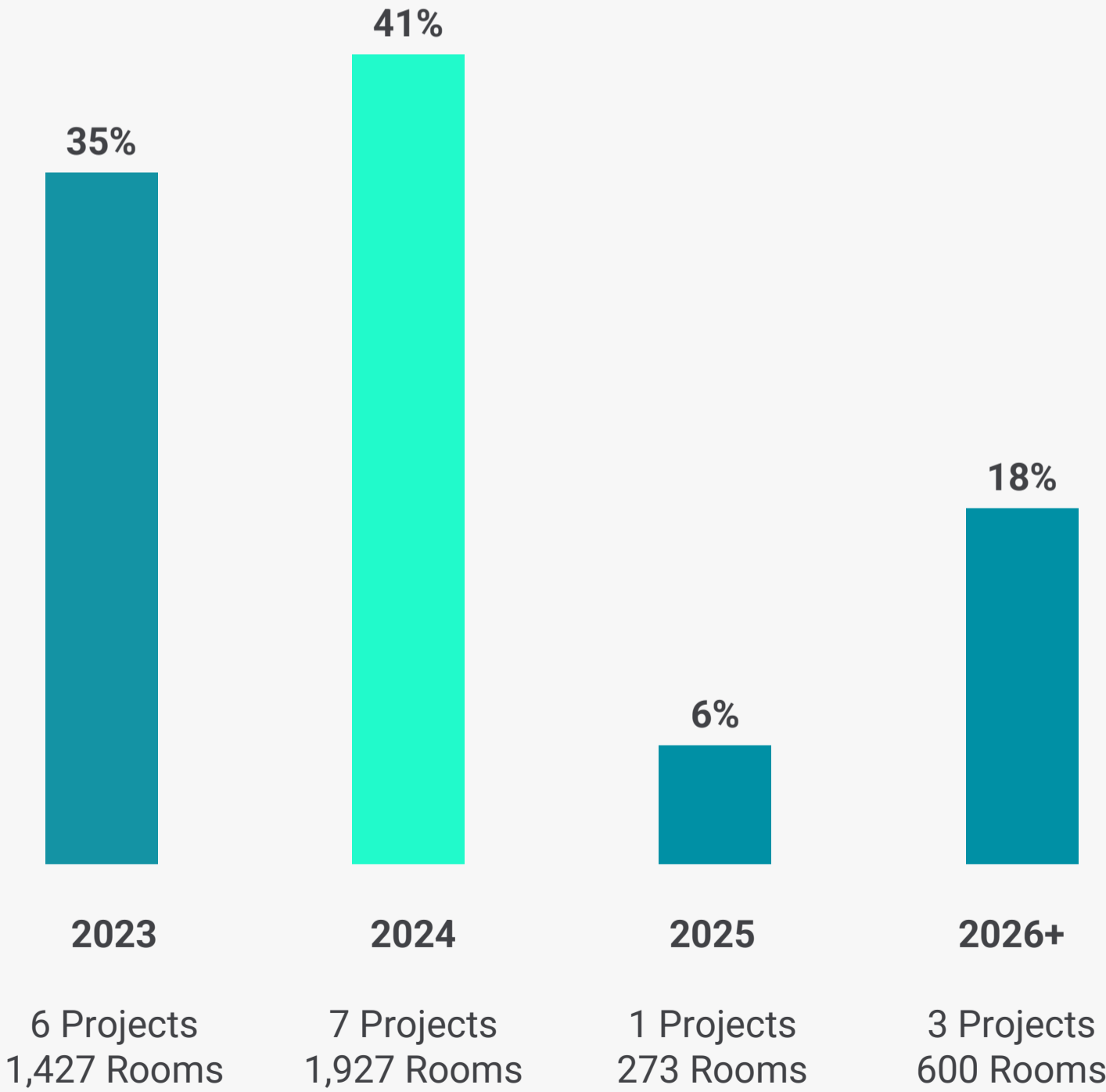
PROJECT PIPELINE

Hilton Hotels & Resorts

17
Projects

4,227
Rooms

	Country	Projects	Rooms
1.	Saudi Arabia	7	1,514
2.	Egypt	4	957
3.	United Arab Emirates	1	447



6 Projects
1,427 Rooms

7 Projects
1,927 Rooms

1 Projects
273 Rooms

3 Projects
600 Rooms

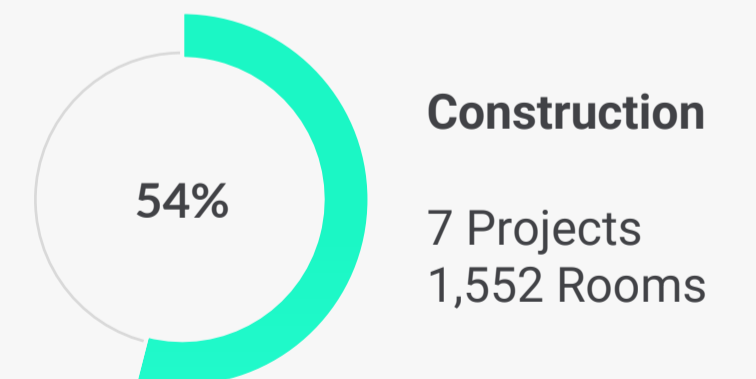
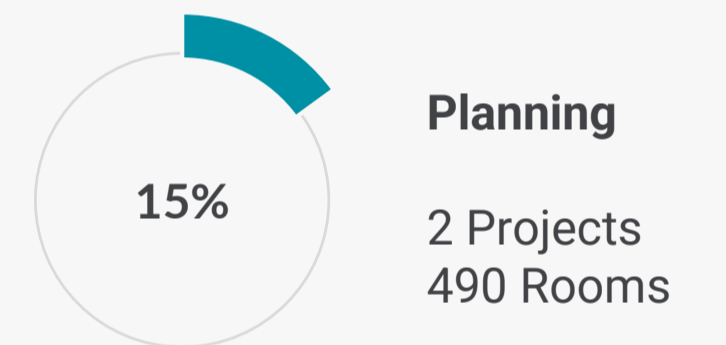
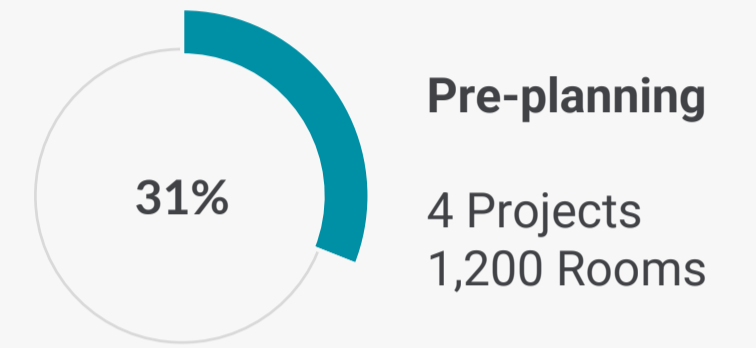
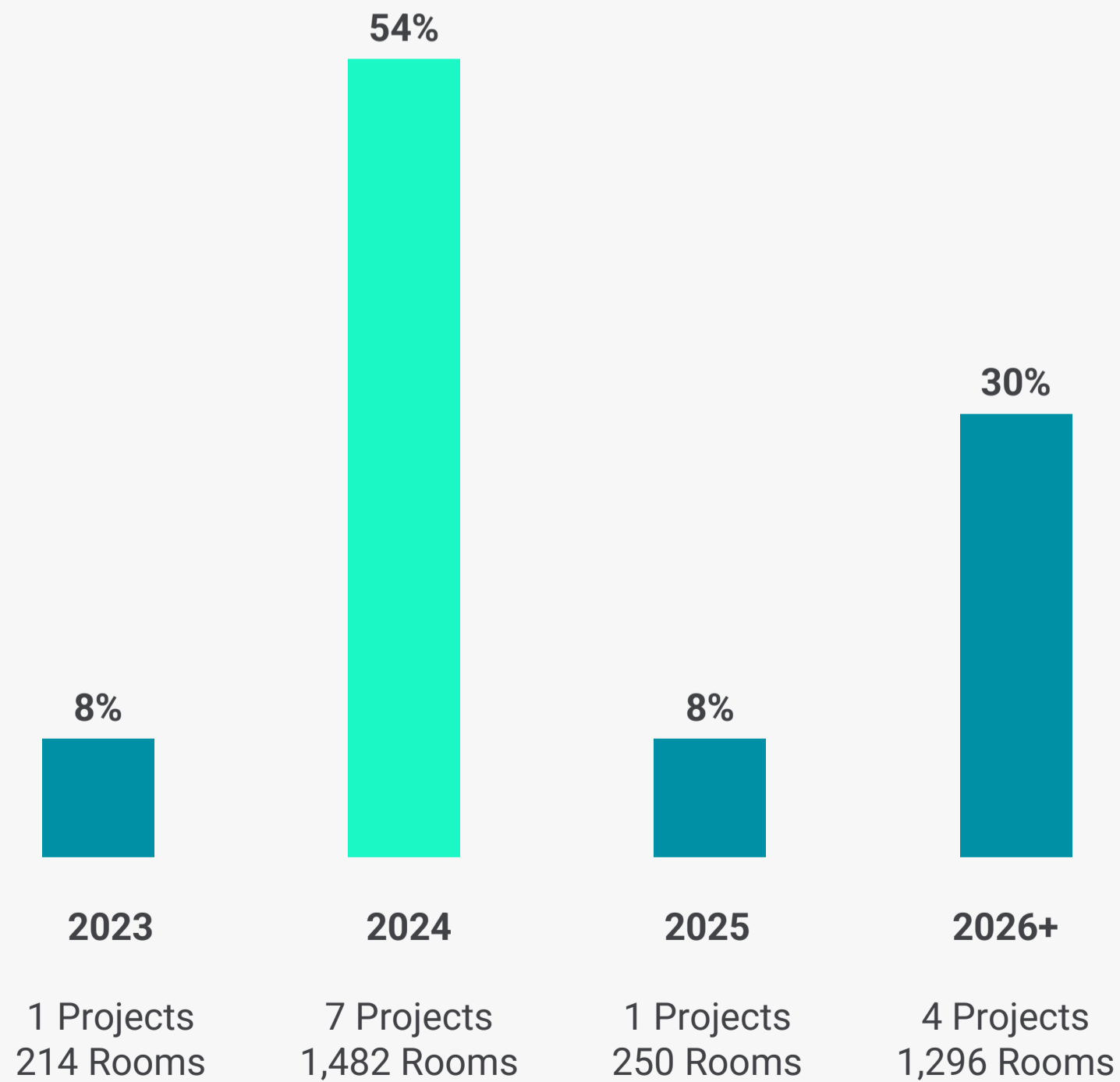
PROJECT PIPELINE

InterContinental Hotels & Resorts

13
Projects

3,242
Rooms

	Country	Projects	Rooms
1.	Saudi Arabia	5	1,408
2.	Egypt	3	896
3.	Turkey	2	445
4.	Israel	1	229



PROJECT PIPELINE

Four Seasons Hotels & Resorts

13
Projects

3,020
Rooms

	Country	Projects	Rooms
1.	Saudi Arabia	7	1,634
2.	Egypt	2	546
3.	Israel	1	250

