

HTLroundtable
horn of africa

Djibouti, Eritrea,
Ethiopia, Somalia

Hyatt Regency
Addis Ababa
(30.01.2020)

15
participants

supply

41 properties; 6,778 rooms¹

BRANDED ROOMS



CHAIN AFFILIATED ROOMS



GROUP / BRAND PROFILE

- strongest brand: Sheraton
- strongest group: Marriott
- fastest growing brand: Grand Skylight
- fastest growing group: GSHM

pipeline

22 properties; 4,764 rooms^{1,2}



17

HOTELS UNDER CONSTRUCTION



5

PLANNED HOTELS

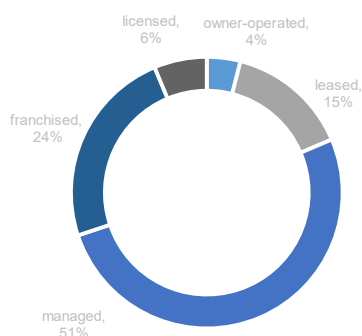


BIGGEST OPENINGS of 2019

- Ethiopian Skylight Hotel, Addis Ababa, 373 rooms
- Hyatt Regency Addis Ababa, Addis Ababa, 188 rooms

hotel contracts

12 properties; 2,548 rooms under contract^{2,3,4}



key takeaways

- with 25 hotels in the pipeline the challenge for smaller unbranded properties, the former backbone of the industry is huge and many of which are facing closure
- development of policies etc. facilitating business development is still a challenge
- statistics are unreliable making this market very opaque
- the African Union is still seen as the main demand driver with related conferences bolstering demand. A new exhibition and convention centre is planned however finance is needed
- the service culture needs to be fostered as it is challenging to attract, develop and retain qualified staff

sponsors



HTLroundtables around the globe



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www.pkfhotels.com

NOTES:

1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2019; 3) as per the PKF contract database 4) from the viewpoint of hotel groups

For enquiries about our **research** offerings, please contact **Akshara Walia** at research@pkfhotels.com
For enquiries about upcoming PKF **hotelexperts events**, please contact **Natalia Anistratova** at events@pkfhotels.com