



# Cairo

- With no major hotel openings taking place in Q3, Cairo’s hotel stock remained stable at 28,700 keys. An additional 500 keys are scheduled for delivery during the remainder of the year.
- New project launches and development activity remain highly robust, with significant market-entry and expansion initiatives underway.
- The hospitality sector in Cairo is set for continued growth, fueled by the government's wide-ranging tourism investment plan spanning 2025-2031.

Although no major hotel openings occurred in Cairo during Q3 2025, approximately 500 keys are anticipated for delivery in the final quarter, keeping the total hotel inventory steady at nearly 28,700 keys. The hospitality sector remains highly active in new project launches and development, with significant market-entry and expansion initiatives spearheaded by leading operators, including Accor, Ennismore, Hilton, and IHG Hotels & Resorts.

Cairo's hospitality sector maintained strong momentum throughout Q3 2025, even during what is traditionally considered a low-tourism period for the city. STR Global data reveals that occupancy rates climbed 2.0 percentage points year-over-year through September, while average daily rates (ADR) grew by 6.0%. This, in turn, drove revenue per available room (RevPAR) to USD 96.3, representing a substantial 9.3% annual increase. This performance demonstrates Cairo's evolution from a seasonal destination to a year-round tourism hub that successfully attracts diverse visitor segments throughout all quarters.

## Outlook

Cairo's hospitality sector is positioned for sustained expansion, driven by the government's comprehensive tourism investment strategy for 2025-2031. This ambitious framework aims to position Egypt as a premier investment destination by showcasing diverse tourism and hospitality projects while attracting substantial foreign direct investment.

The extensive calendar of government-led initiatives and events designed to attract tourists, particularly in West Cairo, is creating both opportunities and pressures within the hospitality landscape. This heightened activity makes it increasingly essential for outdated and aging hotels to undertake significant refurbishment projects to remain competitive in an evolving market. The combination of new hotel developments from major international operators and home-grown brands and the imperative for existing properties to modernise is reshaping Cairo's hospitality sector, positioning it for a new era of growth supported by enhanced infrastructure and strategic government backing.

Fundamentals	
<b>Total stock</b>	28,700 keys
<b>Upcoming stock (2025)</b>	500 keys

Source: STR Global

## Cairo Hospitality Performance

YTD Sept. 2025

Key Performance Indicator	
<b>ADR</b>	\$146.6
<b>Occupancy</b>	65.7%
<b>RevPAR</b>	\$96.3
<b>ADR, YoY % Change</b>	6.0%
<b>Occupancy, YoY PP Change</b>	2.0%
<b>RevPAR, YoY % Change</b>	9.3%

Source: STR Global



**Taimur Khan**

Head of Research  
Middle East and Africa  
[taimur.khan@jll.com](mailto:taimur.khan@jll.com)

**Ayman Sami**

Country Head  
Egypt  
[Ayman.sami@jll.com](mailto:Ayman.sami@jll.com)

**Dana Williamson**

Head of Offices, Business Space & Retail  
Middle East and Africa  
[dana.williamson@jll.com](mailto:dana.williamson@jll.com)

**Faraz Ahmed**

Director  
Middle East and Africa  
[faraz.ahmed@jll.com](mailto:faraz.ahmed@jll.com)

**Ahmed Hemmat**

Head of P&DS  
Egypt  
[Ahmed.hemmat@jll.com](mailto:Ahmed.hemmat@jll.com)

**Tim Millard**

Head of Valuations and Risk Advisory  
Middle East and Africa  
[tim.millard@jll.com](mailto:tim.millard@jll.com)

**Zenah Alsaraeji**

Research Associate  
Middle East and Africa  
[zenah.alsaraeji@jll.com](mailto:zenah.alsaraeji@jll.com)

**Mireille Azzam Vidjen**

Head of Consulting  
Middle East and Africa  
[mireille.azzam@jll.com](mailto:mireille.azzam@jll.com)

**Amr Elnady**

Head of Hotels and Hospitality  
Middle East and Africa  
[amr.elnady@jll.com](mailto:amr.elnady@jll.com)

COPYRIGHT © JONES LANG LASALLE IP, INC. 2025

This report has been prepared solely for information purposes and does not necessarily purport to be a complete analysis of the topics discussed, which are inherently unpredictable. It has been based on sources we believe to be reliable, but we have not independently verified those sources, and we do not guarantee that the information in the report is accurate or complete. Any views expressed in the report reflect our judgment at this date and are subject to change without notice. Statements that are forward-looking involve known and unknown risks and uncertainties that may cause future realities to be materially different from those implied by such forward-looking statements. Advice we give to clients in particular situations may differ from the views expressed in this report. No investment or other business decisions should be made based solely on the views expressed in this report.