SEE A BRIGHTER WAY

Research

Cairo

Hospitality | Q3 2025

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 This heightened activity makes it increasingly essential for outdated and aging hotels to undertake significant refurbishment projects to remain competitive in an evolving market.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	
Total stock	28,700 keys
Upcoming stock (2025)	500 keys

Source: STR Global

Cairo Hospitality Performance

YTD Sept. 2025

Key Performance Indicator	
ADR	$146.6
Occupancy	65.7%
RevPAR	$96.3
ADR, YoY % Change	6.0%
Occupancy, YoY PP Change	2.0%
RevPAR, YoY % Change	9.3%

Source: STR Global

SEE A BRIGHTER WAY

Research

Cairo

Hospitality | Q3 2025

Taimur Khan
Head of Research
Middle East and Africa
taimur.khan@jll.com

Faraz Ahmed
Director
Middle East and Africa
faraz.ahmed@jll.com

Zenah Alsaraeji
Research Associate
Middle East and Africa
zenah.alsaraeji@jll.com

Ayman Sami
Country Head
Egypt
Ayman.sami@jll.com

Ahmed Hemmat
Head of P&DS
Egypt
Ahmed.hemmat@jll.com

Mireille Azzam Vidjen
Head of Consulting
Middle East and Africa
mireille.azzam@jll.com

Dana Williamson
Head of Offices, Business Space & Retail
Middle East and Africa
dana.williamson@jll.com

Tim Millard
Head of Valuations and Risk Advisory
Middle East and Africa
tim.millard@jll.com

Amr Elnady
Head of Hotels and Hospitality
Middle East and Africa
amr.elnady@jll.com