



13th East Africa Property
Investment Summit

Hospitality Market Overview: Eastern Africa

May 2026

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An aerial photograph of a coastal city, likely Cape Town, South Africa, showing a dense urban area, a harbor, and a large mountain range in the background under a clear sky.

2025 East Africa Performance

Ethiopia Uganda
 Kenya Zanzibar
 Tanzania

Weighted Occ	56%		
Weighted ADR	USD 152		
Weighted RevPAR	USD 81		
Weighted Recovery			
<i>2025 vs. 2019</i>			
Supply	Demand	Occupancy	ADR
113%	121%	117%	101%



Source: SVG, STR, HTI Consulting



Ethiopia



Occupancy

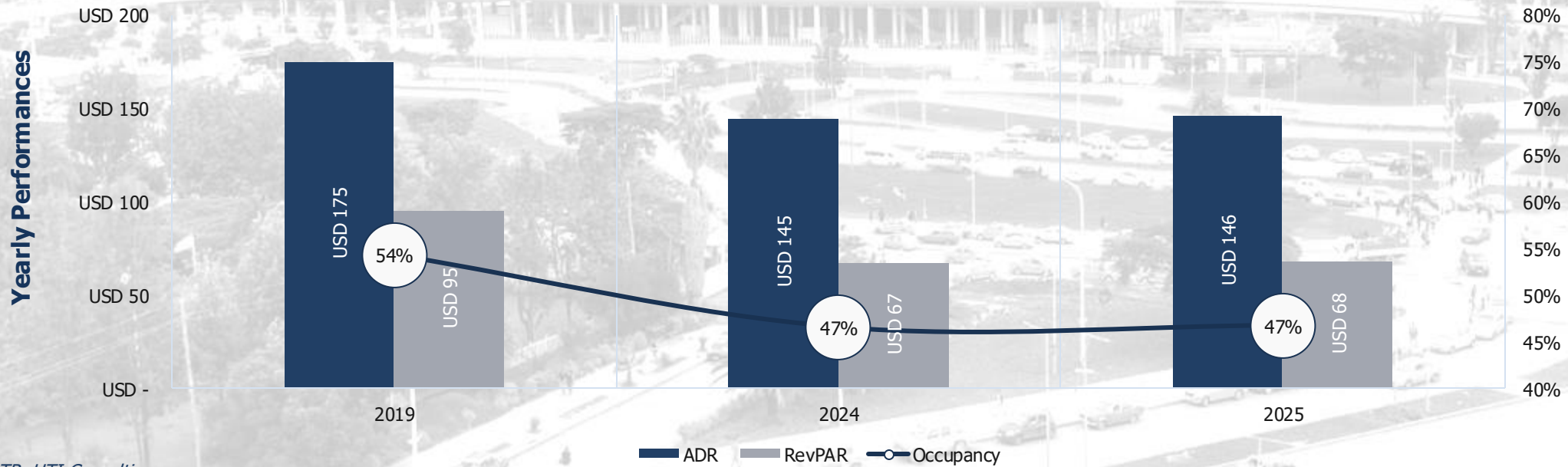
47%
+0.4% YoY
(vs. 2024)

Recovery
(vs. 2019)
86%

ADR FY 2025 84% Recovery vs. 2019	\$146 1.1% YoY
RevPAR FY 2025 72% Recovery vs. 2019	\$68 1.5% YoY

**Demand
(RNS)**
148%

**Supply
(RNA)**
125%



Source: SVG, STR, HTI Consulting



Tanzania



Occupancy

54%
-4.6% YoY
(vs. 2024)

Recovery
(vs. 2019)
103%

Demand (RNS)
111%

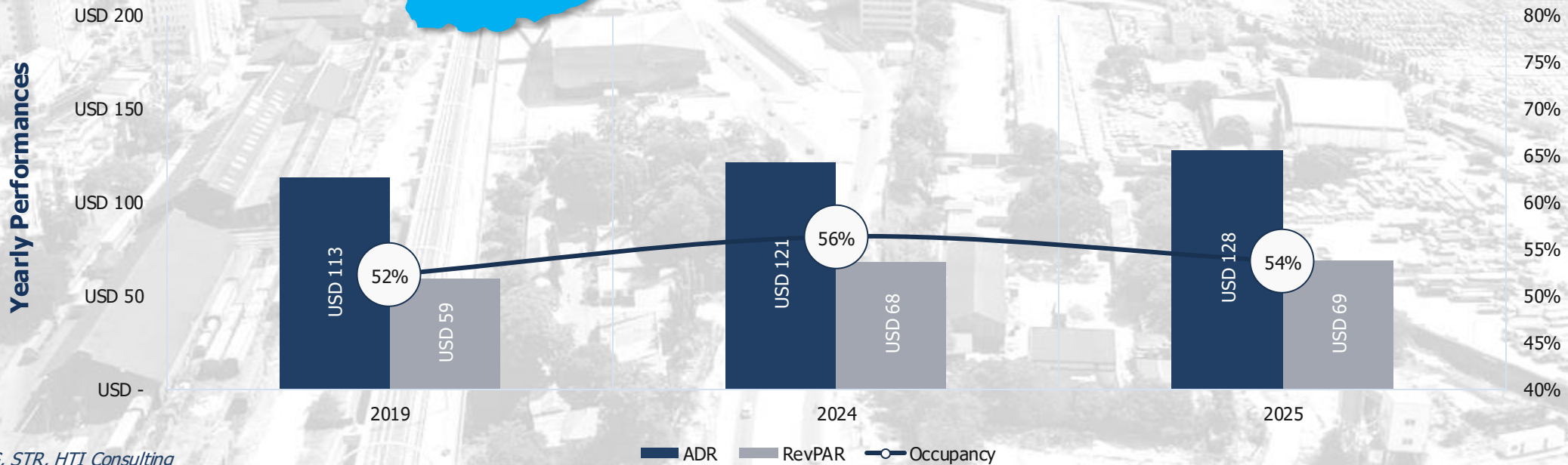
Supply (RNA)
97%

ADR
FY 2025
113%
Recovery vs. 2019

\$128
+5.3% YoY

RevPAR
FY 2025
116%
Recovery vs. 2019

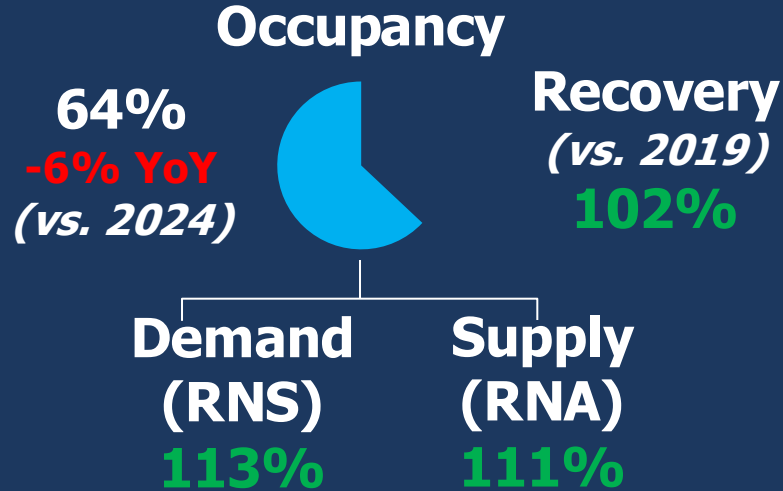
\$69
+0.4% YoY



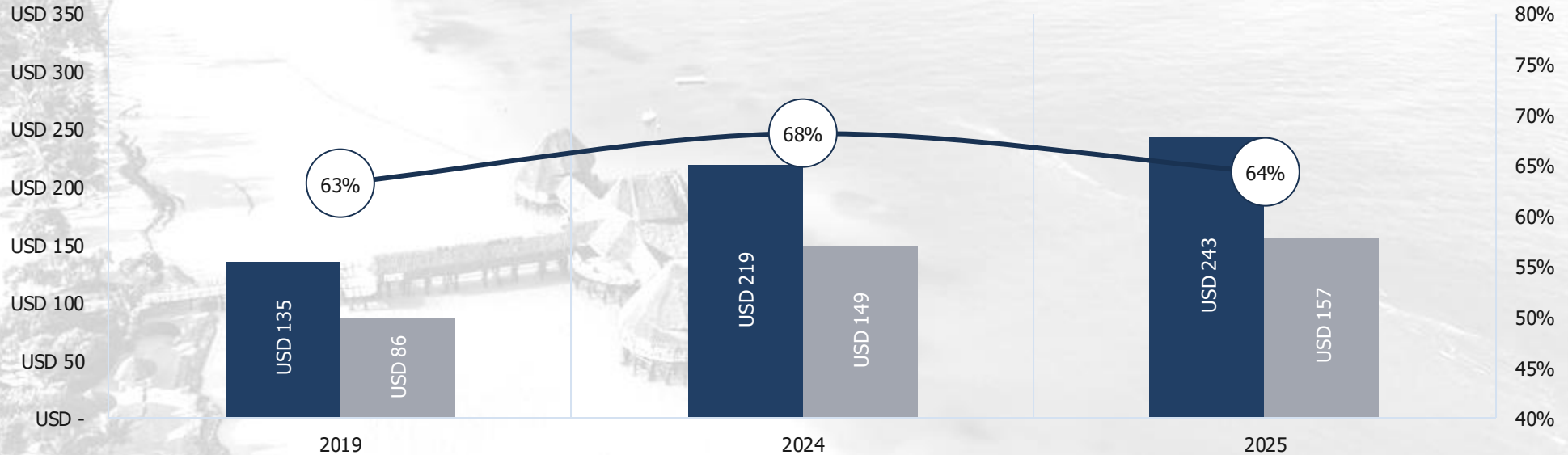
Source: SVG, STR, HTI Consulting



Zanzibar



Yearly Performances



Source: SVG, STR, HTI Consulting

■ ADR ■ RevPAR —○— Occupancy



Kenya



Occupancy

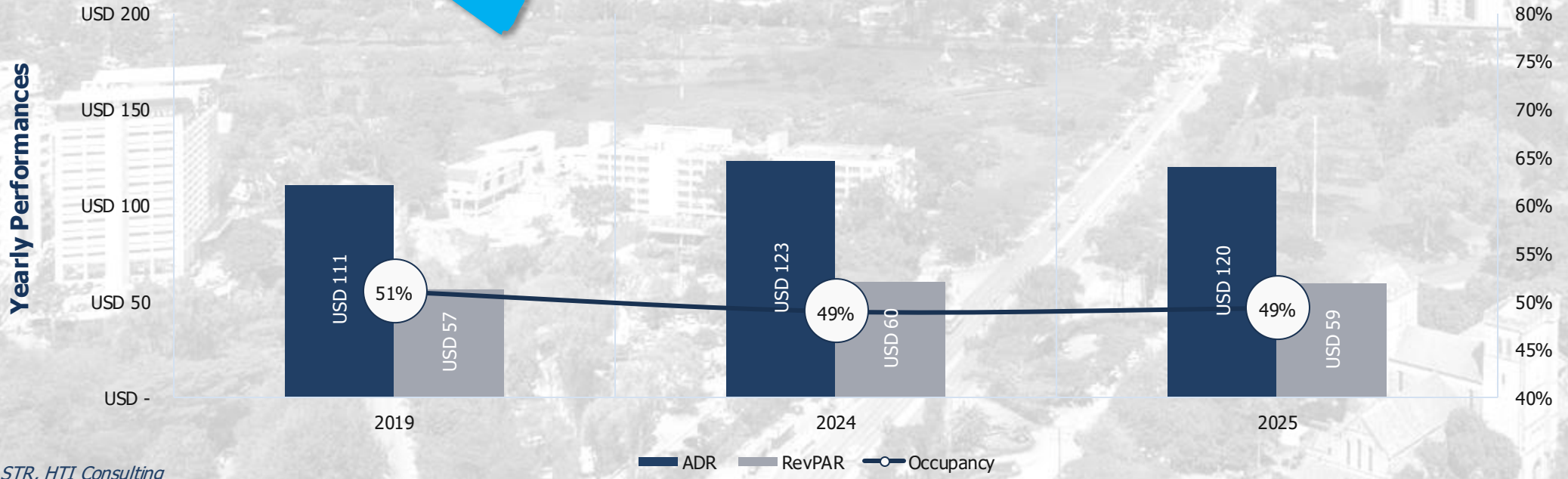
49%
0.8% YoY
(vs. 2024)

Recovery
(vs. 2019)
98%

Demand
(RNS)
121%

Supply
(RNA)
124%

ADR FY 2025	\$120 -3% YoY
	108% Recovery vs. 2019
RevPAR FY 2025	\$59 -2% YoY
	105% Recovery vs. 2019



Source: SVG, STR, HTI Consulting



Uganda



Occupancy

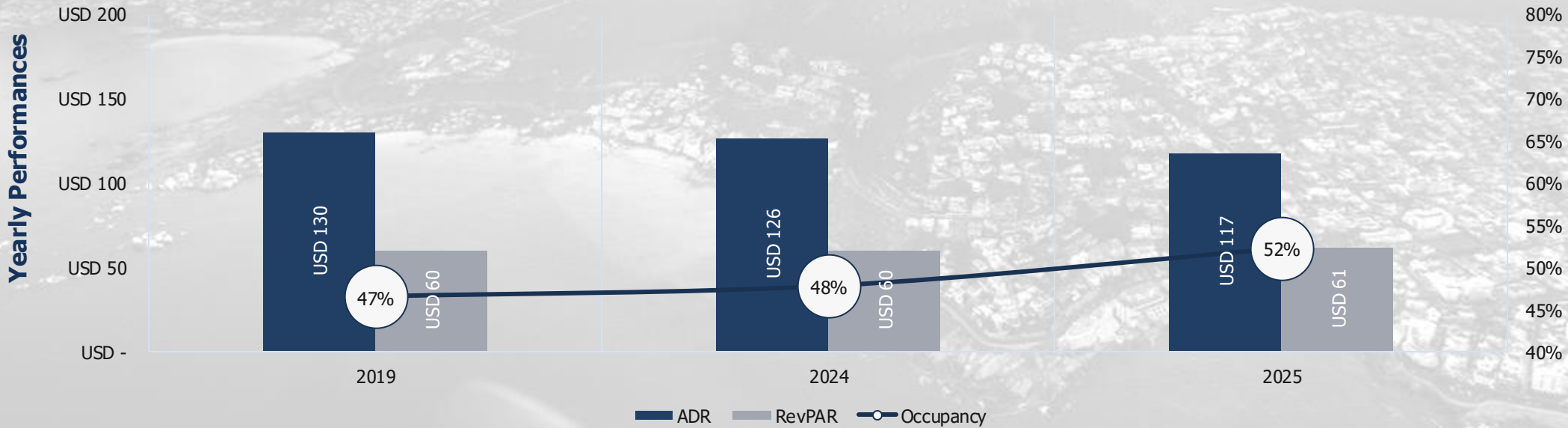
52%
9.4% YoY
(vs. 2024)

Recovery
(vs. 2019)
113%

Demand
(RNS)
119%

Supply
(RNA)
106%

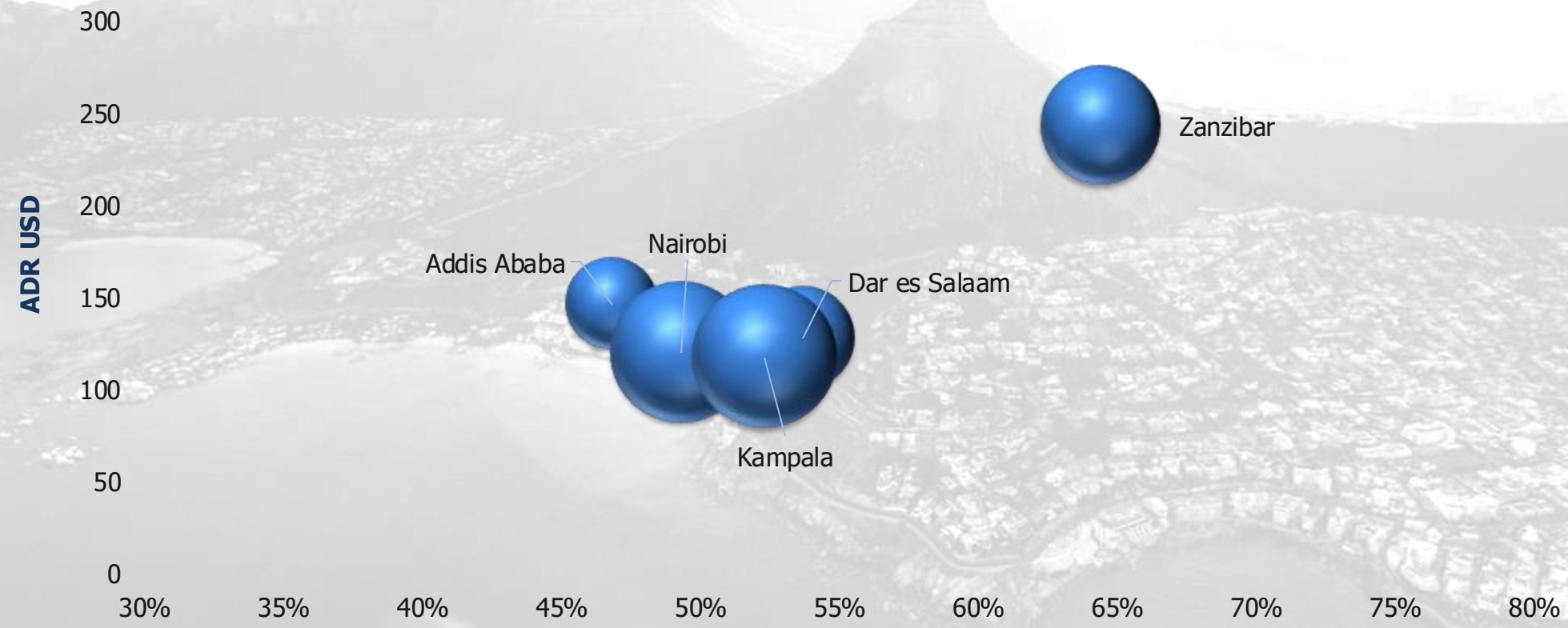
ADR FY 2025 91% <i>Recovery vs. 2019</i>	\$117 -7% YoY
RevPAR FY 2025 102% <i>Recovery vs. 2019</i>	\$61 2% YoY



Source: SVG, STR, HTI Consulting

East Africa

2025 Occupancy vs. ADR (Sized by Room Nights Available)



Source: STR, HTI Consulting

Swiss-Belhotel International Strengthens Africa Portfolio with the Launch of The Gama by Swiss-Belhotel, Kilimani, Nairobi

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The First Group Hospitality and MIDROC sign 10-hotel Ethiopia deal ✨
Partnership to deliver over 1,100 keys across key destinations, strengthening East Africa's hospitality landscape.

The writing is on the wall. **Marriott International** is making an aggressive and strategic play for East Africa's hospitality market.

The First Group Hospitality and MIDROC Investment Group Sign Master Agreement for 10 Properties in Ethiopia

Valor Hospitality Expands Its Management Portfolio in East Africa

By Valor Admin

"Kenya, Ethiopia and Tanzania Set to Deliver Africa's Next Wave of Hotel Supply as Global Brands Expand Across East Africa." | – CEO East Africa

Ethiopia Leads Africa's Hotel Construction Pipeline with Nearly 6,000 Rooms

Beyond overall scale, the pipeline status data reveal that execution momentum is currently strongest in East Africa. Ethiopia and Kenya both have nearly 80% of their rooms under construction, closely followed by Tanzania at 77.5%.





Thank You!