

The logo for Voltere, featuring the word "Voltere" in a bold, white, sans-serif font. The background of the logo is a dark blue circle with a white outline, set against a larger, lighter blue background with a subtle pattern of overlapping circles.

Voltere

by  egis

Shaping Tomorrow's Tourism

The background of the title section is a photograph of a sky filled with white, fluffy clouds. In the foreground, there are several wooden poles or sticks, some of which are painted with bright colors like green and yellow. The poles are arranged in a way that they appear to be part of a structure or a fence.

MARKET SNAPSHOT TOURISM AND HOSPITALITY TRENDS

Cotonou, Benin

February 2025

DESTINATION PROFILE

BENIN



Benin, an **emerging power** in West Africa, benefits from **dynamic economic growth** and political stability, granting it a **significant role** within the WAEMU (West African Economic and Monetary Union).

- Population: 14.6 million (2025)
- Demographic growth rate: 2.5%
- Surface area: 114,763 km²
- Capital: Porto-Novo

- GDP growth 2024: +6.5%
- GDP per capita: 1,433 USD
- Inflation 2024: 2% (-0.8 pp vs. 2023)
- Growth forecast 2025: 6.5%



Cotonou



Porto Novo



Ouidah



ECONOMY

- From 2021 to 2024 inclusive, Benin experienced **sustained economic growth**, with an average annual growth rate exceeding 6%. This performance is largely attributed to **economic reforms** and **substantial investments** in infrastructure, particularly in roads, ports, and energy.
- The medium- to long-term outlook is favorable, with **massive investments** planned following an agreement reached in 2022 between the International Monetary Fund (IMF) and Benin. This agreement will enable the release of **significant funds** to support **the country's development initiatives**.



POLITICS

- Politically, Benin is recognized for its **stable governance** in West Africa. Since the introduction of multiparty democracy in 1990, the country has successfully carried out **several peaceful democratic transitions**.
- Following the 2016 elections, Patrice Talon's government has been acknowledged for strengthening the constitutional state. However, **security** in the **northern part of the country remains a concern**, as evidenced by the January 8, 2025, attack on Beninese soldiers.
- On the **international stage**, Benin plays an **active role** within the Economic Community of West African States (**ECOWAS**), influencing commercial, political, and diplomatic matters.



TERRITORIAL DEVELOPMENT

- As part of the **implementation of the flagship projects** in its Municipal Development Plan (PDC), the Cotonou City Hall has opted for delegated project management (MOD) contracts with three agencies to soon carry out **ten major infrastructure construction projects** (bus stations, secondary markets, district offices, etc.).
- A **renovation program** for Cotonou's current **airport** is underway, **aiming to triple its annual passenger** capacity to reach 1.5 million in the long run.

COTONOU



Cotonou, the **economic capital** and **main city** of **Benin**, is the country's **commercial and transportation hub**, with strategic port infrastructure and a rapidly expanding urban dynamism.

- Department: Littoral
- Population 2024 (excluding agglomeration): 738,444
- Density: 9,300 inhabitants/km²
- Demographic growth rate 2023: 1.85%

- Surface area: 79 km²
- Districts: 13
- Neighborhoods: 143



Cotonou harbour



International market (Dantokpa)



Cotonou QCC model



A STRATEGIC GATEWAY

- Located at the **heart of the Gulf of Guinea** and home to one of **West Africa's largest ports**, handling nearly **10 million tons of freight annually**, the city of Cotonou has become a key commercial hub in the region.
- The Port of Cotonou is undergoing a major **modernization** with an **investment** of over **€450 million**. As part of its renovation, the Maritime Business Center is nearly completed, and Terminal 5 is currently under construction (2025). **The entire project is set to be finalized by 2026.**
- As the country's economic capital, **Cotonou hosts two-thirds of Benin's industries**. The main **corporations, banks, and government institutions** have their **headquarters there**.



A DYNAMIC URBAN HUB

- Cotonou, with its **pleasant coastal living environment**, is **experiencing rapid** and sometimes **uncontrolled urbanization**, leading to an **unbalanced urban structure**.
- This expansion, which also affects Porto-Novo and Abomey-Calavi, is causing **demographic spillover** into the outskirts, bringing the population of Greater Nokoué to 3 million inhabitants by 2025. **To support this growth, key projects are being developed to meet infrastructure needs.**
- The city also hosts the **largest international market in West Africa** (approximately 20 hectares of open-air space), directly contributing to **Cotonou's prominence** in the sub-region.



DEVELOPMENT OPPORTUNITIES

- **Urban and Infrastructure Development under the Government Action Program (2021-2026):**
 - ✓ **The Creative Cultural District (QCC) Project**, which includes a ministerial city, an arts and gallery district, a contemporary art museum, a 7,000-seat arena, a leisure hub, and more.
 - ✓ The construction of the **Maritime Business Center**, aimed at centralizing port administrative activities.
 - ✓ A **social and economic housing program**, with the construction of 20,000 housing units.



HOTEL MARKET - COTONOU

A BUSINESS-ORIENTED TOURISM ACTIVITY*

Cotonou is now the **main hub for tourism demand** in Benin, thanks to its **well-developed hotel infrastructure** and the **presence of key structural facilities**.

The city leverages its autonomous port, international airport, and the headquarters of international companies to **attract business travelers**, primarily from the sub-region.

In addition to **Cotonou's historic International Conference Center** and the newly developed facility within the **new Sofitel**, the local hotel industry offers a **wide range of meeting and conference rooms**.

Leisure tourism, though a **minority segment**, is primarily concentrated in Cotonou, largely due to the presence of **cultural venues** and the **organization of festivals** (such as the WeLovEya Festival and the creation of the International Arts Festival of Benin). The opening of a **Partouche Casino** (French group) will further **enhance the city's leisure offerings**.

The **Creative and Cultural District project**, along with the establishment of **four different museums**, reflects the **government's ambition to boost this tourism sector**, which remains largely underdeveloped at the national level.

REASON FOR VISIT



10% *Leisure and VFR**

Business

90%

* *Visiting Friends and Relatives*

CUSTOMER ORIGIN



Ivory Coast, Togo, Nigeria, Ghana



France, Canada, India, Qatar, Morocco

HOTEL PERFORMANCES 2024 (vs 2023)



69 %
+ 3pts

Occupancy rate



FCFA 60,515
+5.0 %

Average Daily rate



FCFA 41,756
+9.8 %

RevPAR



Sofitel Cotonou Marina Hotel & Spa *****



Golden Tulip Le Diplomate ****



Tamarin Hôtel Cotonou

A FAST-CHANGING HOTEL MARKET

↓ HOTEL SUPPLY

- The **hotel market** in Benin is predominantly centered in **Cotonou**, serving primarily **business travelers** attracted by the **city's economic dynamism**.
- In 2024, the room supply grew by over **23%** from the 862 rooms in 2023, mainly due to the **recent opening of the Sofitel** (198 rooms), the **market's first luxury hotel**.
- **Compared to other destinations in West Africa, Cotonou's hotel market offers a well-balanced mix across different accommodation categories.**

Distribution of reference supply in Cotonou - 2024

Categories	Number of hotels	%	Number of rooms	%
Economy	5	31 %	189	18 %
Mid-range	5	31 %	399	38 %
Upper mid-range	3	19 %	237	22 %
High-end	2	13 %	37	3 %
Luxury	1	6 %	198	19 %
Total	16	100 %	1 060	100 %

Source: Voltere by Egis

- By 2030, **Cotonou's hotel supply** will be **enhanced** by **two high-end hotels affiliated with international brands**, adding approximately 350 keys, representing a **25% increase in total capacity**.
- Among these projects, the government announced in September 2024 the renovation of the former Marriott hotel to develop a **Hilton-branded property** (~200 keys).

↓ HOTEL DEMAND *

The Cotonou region primarily caters to **business** and **MICE clientele**, with a **smaller share of leisure guests**, estimated at approximately **10%**. As of 2024, hotel demand in the Cotonou area was distributed as follows:

Business travelers: Representing ~90% of demand in internationally branded hotels, this segment is driven by the region's economic growth and the increasing presence of diplomatic, governmental, and continental/international organizations.

This clientele includes both international visitors and sub-regional travelers, particularly from neighboring countries seeking access to the Port of Cotonou.

Within this demand, we distinguish:

- **Individuals:** Employees or executives traveling independently.
- **Corporate travelers:** Employees from companies with corporate agreements with hotels.
- **MICE** :** Complementing business demand, this segment is supported by institutions and international corporations, accounting for approximately one in five arrivals in 2024. According to our observations, this segment is experiencing growth.
- **Crew members:** This demand varies significantly between hotels, with properties attracting this clientele due to their proximity to Cotonou Airport.

Leisure and et VFR* :** This segment is the second-largest reason for arrivals in Benin, representing about 40% of total arrivals in 2024. However, it accounts for only 10% of overnight stays in internationally branded hotels (reference supply).

* Voltere by Egis estimates based on field surveys

** Meetings, Incentives, Conferences and Exhibitions

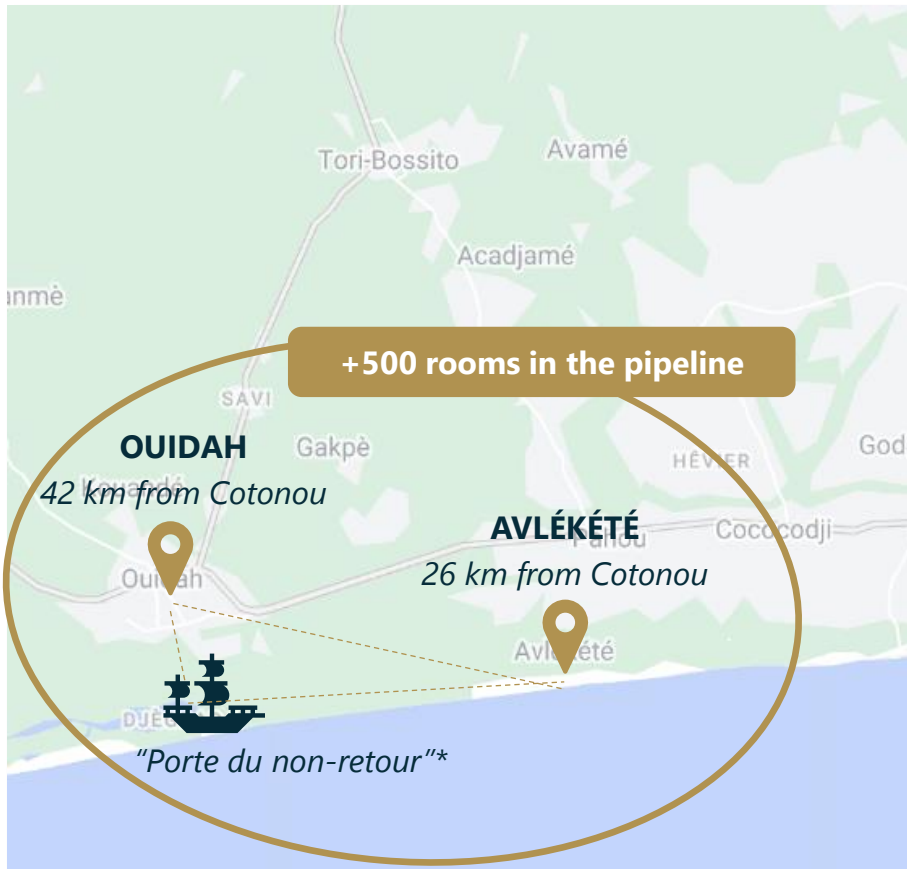
*** Visiting Friends & Relatives



FOCUS ON DYNAMIC DESTINATIONS

EMERGING TOURIST DESTINATIONS

LEISURE RESORTS AT THE GATES OF COTONOU



AVLÉKÉTÉ

- The **Avlékété seaside resort project**, part of the Government Action Program (PAG) 2021-2026, aims to develop an **"exceptional" resort** designed to attract an **international clientele**.
- Its proximity to Cotonou and its international airport ensures **optimal accessibility**. In the long term, the area could accommodate between **500 and 1,000 rooms**, including a Club Med, a Beach Village, and golf residences.
- The development of **high-end hotel infrastructure** will **strengthen Benin's tourism offering**, providing **luxury experiences** and **enhancing its international visibility**.

OUIDAH

- The expansion of tourism services in Ouidah city center and the Marina, with the **"Porte du non-retour"*** and the **"Departure Boat"** (museum ship) as **key landmarks**, will significantly **boost the region's tourism potential**. This will indirectly enhance the attractiveness of the Avlékété area.
- At the same time, Ouidah will offer a **complementary cultural and heritage dimension** to the **tourist circuit**, facilitated by the improvement of the Route des Pêches, which is currently being expanded.

* Gate of no return

Destination to come

While the major tourism projects are mainly focused in the South, the government is also emphasizing the exploitation of new assets, highlighting the country's natural and historical wealth through adventure tourism, ecotourism, and cultural tourism.

Northern Benin, currently affected by security issues, is home to several national parks, such as Pendjari and W, which offer safari and wildlife discovery opportunities that could attract an international clientele.

Aware of this potential, the government has implemented measures to support the sector, investing in infrastructure and strengthening security in sensitive areas, with the goal of fostering a virtuous circle of tourism development, local economic benefits, and enhanced security.

Voltere

by  egis

FRANCE

4 rue Dolorès Ibaruri – 93100 Montreuil, FRA

AFRICA

Immeuble Amoryan – rue du Canal – Zone 4 – Abidjan, CIV

Le Continental Business Center – Lot 54 Hay Hassani – 1 Avenue Main Street – Casablanca, MAR

MESA

Dubai Digital Park - Building A1 Unit 308 – PO Box 34116 – Dubai, UAE

www.egis-group.com

www.voltere-consulting.com