



Hotel construction in Poland 2007

Development forecasts for 2007-2012

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A word from the author

"The Polish hotel market is significantly less developed than hotel markets in the countries of Western Europe, which, at the same time, constitutes a very high growth potential. Hotel construction in Poland will face several years of extraordinary growth, mainly facilitated by the organisation of the European Football Championship in 2012, an increase in the value of EU funds dedicated to the development of tourism, an increase in the number of conferences organised in Poland, improved transportation infrastructure, and the favourable economic situation in the region. All these factors will contribute to an intense growth in the number of tourists visiting Poland and thus to increased demand for hotel spaces.



Apart from the current state of the Polish hotel market and its growth factors, our latest report presents an in-depth study of the largest hotel groups and developers operating on the Polish hotel market along with their expansion plans, which will result in a rapid increase in the number of constructed hotels in each category expected in the several five years. We estimate that the value of hotel construction and the number of hotels in Poland will double by 2012 compared with the end of 2006".

Bartłomiej Sosna, Construction Market Analyst

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Report description

Hotel construction in Poland 2007 is a comprehensive report that presents a detailed evaluation of the current status of all market segments of the Polish hotel construction sector. It **provides up to date numeric data as well as in depth analysis of important economic factors and their influence on current and future market development**. Forecasts predict planned expansion and estimate the required increase in accommodation spaces over the next five years along with the investment plans of major developers poised to take advantage of this market's extensive potential for growth.

Hotel construction in Poland 2007 presents complete market data for all major segments in these three sections:

Section One focuses on the current hotel construction market in Poland. Data on the size of the market, the value of investment in existing facilities and projects currently in progress and the value of recently completed projects are provided.

Section Two is dedicated to the factors that influence the current hotel construction market as well as those that will play a major role in expansion over the next five years. This section describes how a combination of a low level of recent construction and planned future events focused on the stimulation of the tourism and business travel sectors of the economy will create a huge potential for increased market development in the near future.

Section Three presents a detailed listing of the largest hotel groups operating in the market at present, as well as major developers and hotel chains. It describes the investment structure of institutional real estate and details planned investment levels for 2007-2012.

Report overview

The current hotel and institutional real estate market has begun to expand, but is not large enough to meet the demands of a growing economy in terms of business and tourism.

Hotel construction in Poland 2007 presents recent and current economic and market data, including:

- the value of investment in hotels and other tourism-oriented institutional real estate in 2006
- information indicating market size, such as the number of operational hotels in Poland as a whole, as well as in major cities and specific voivodships
- statistics illustrating the rates of occupancy and room rates at Polish hotels as well as hotels located in other European cities
- volume and value of hotel and tourism related construction in Poland for 2000-2006
- rising revenues from 2001-2006 construction projects in the sector, as demand rises and market supply of accommodation remains steady.





During the next five years, Poland's expanding business economy, along with the increased availability of EU funds dedicated to the promotion of the tourism industry, promise even higher demand for accommodation. **The report covers several factors at work in the Polish hotel construction market that work together to create high growth conditions:**

- recent and current levels of hotel development that have resulted in insufficient supply of accommodation, mostly due to low return on investment
- rapidly rising demand for rooms as shown by data detailing volume of visitors for tourism and business purposes in 2006
- data supporting a growing economy in terms of GDP and employment
- organization of the European Football Championship in 2012 and other projects expected to accelerate demand for accommodation.

There is plenty of room for investment in the Polish hotel construction sector. **This report provides a snapshot of the current investment landscape, including concise information on:**

- the largest active hotel groups and developers in the country
- the most important investment strategies of the major investors and investment groups
- plans for new and additional investments in institutional and non-residential real estate and construction projects, spanning the next five years.

This report is essential to the activities of:

- senior management personnel of construction companies active in Poland and surrounding areas
- strategic planners and executives of firms considering entry into the Polish construction market
- companies engaged in construction and those active in the production and distribution of building materials in the region
- architectural and consultancy firms interested in this market
- developers interested in participation in the Polish hotel construction market
- businesses that provide goods and services integral to the establishment and operation hotels and the tourism industry
- consultants and analysts that provide advice and intelligence to governmental and business organizations, as well as those seeking investment opportunities.





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