

Poland Hotel & Chains 2026

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Welcome

Welcome to the 2026 Poland Hotels and Chains Report, a comprehensive overview of the evolving hospitality landscape in Poland. This report examines the key trends, investment dynamics, and structural shifts shaping one of Central and Eastern Europe's fastest-growing hotel markets, providing valuable insights for investors, operators, developers, and industry stakeholders.

Poland's hotel sector continues to demonstrate strong resilience and long-term growth potential, supported by robust domestic demand, the gradual recovery of international travel, and sustained investor interest. In 2025, the market benefited from solid economic fundamentals, rising business travel activity, and the continued expansion of leisure Tourism. Major urban destinations such as Warsaw, Kraków, Tri-City remained key drivers of performance, while regional markets and resort destinations increasingly attracted development and investment activity.

International hotel chains continued to expand their presence across the country, strengthening their position within both established metropolitan markets and emerging regional destinations. At the same time, domestic operators maintained an important role in the market, particularly within the economy, midscale, and leisure segments.

Development activity remains concentrated in the Upscale and Midscale segments, although Luxury and lifestyle-oriented concepts are gaining momentum, particularly in Warsaw, Kraków and key leisure destinations. Investors continue to view Poland as an attractive market due to its relatively low chain penetration compared to Western Europe, strong long-term demand fundamentals, and ongoing infrastructure improvements supporting tourism and business mobility.

This report provides a detailed analysis of current market performance, branded supply, development pipelines, and the major trends shaping Poland's hotel industry. From expanding international chain presence and evolving segmentation patterns to geographic diversification and investment activity, the 2026 edition offers a timely and data-driven perspective on one of Europe's most dynamic hospitality markets.

Dariusz Futoma

Managing Partner, Horwath HTL Poland



Introduction

We are pleased to present the 2026 Hotel & Chains Report for the Polish hospitality market providing an overview of the structure and development of hotel chains operating in Poland in the year 2025. The report highlights key trends shaping the branded segment, including the continued expansion of both international and domestic hotel chains, operators, increasing market penetration of chain-affiliated hotels, and the evolving role of professional operators and asset-light models.

The Market

The Polish hotel market continues to demonstrate strengthening demand across both resort destinations and major urban centers. Rising occupancy levels in key cities confirm the sustained recovery of both domestic and international business and leisure travel segments.

Average room rates have continued to increase, supporting the gradual convergence with broader European benchmarks. However, rate growth remains largely cost-driven, reflecting ongoing increases in both operational expenses (notably labor) and non-operational costs, particularly energy.

The professionalization of the sector remains a defining trend, as evidenced by the growing prevalence of lease and management agreements with established operators (including Destigo, VHM, and Focus Hotels). At the same time, domestic hotel chains are expanding their footprint, with brands such as Arche and DeSilva continuing to strengthen their market position.

Ongoing geopolitical uncertainty continues to impact investor sentiment and increases the risk profile of new hotel developments. Consequently, there is a noticeable rise in interest in adaptive reuse projects, particularly office-to-hotel conversions.

While hotel supply growth has remained relatively moderate over the past 18 months, a significant pipeline is expected to drive future expansion. The most substantial increases are anticipated in the Tri-City area (12 projects in the pipeline and an estimated 18% growth in room supply) and Warsaw (9 projects and approximately 10% projected growth in room supply).



Key Points

Poland is becoming an increasingly popular destination among tourists

In 2025 Poland recorded 58.9 million guests in accommodation establishments, representing an 11.6% increase vs year 2024. International guests grew at a faster pace, rising by 13.1% to 15.2 million. Overall, total inbound foreign arrivals are estimated at 21.4 million, up 8.5% year-on-year.

High occupancy and record-breaking ADR levels

In 2025, Polish hotels recorded a continued and notable increase in ADR, driven by rising operational and undistributed costs. In Warsaw, ADR increased by nearly PLN 20 year-on-year to PLN 434, while in Kraków it rose by PLN 11 to PLN 426. The highest ADR level, PLN 449, was traditionally observed in the Tri-City area. However, the pace of rate growth has moderated compared to 2022–2023, indicating a gradual market stabilization and increased price sensitivity on the demand side. The highest occupancy levels were recorded in Kraków (77%) and Warsaw (76%). Market strength is further evidenced by a 14% year-on-year increase in RevPAR in both Kraków and Poznań compared to 2024. In Warsaw, RevPAR grew by 8%, while the Tri-City area recorded a 6% increase. At the same time, Wrocław recorded its lowest occupancy level in many years, while ADR remained broadly in line with 2024 levels. As a result, RevPAR declined by 3% year-on-year.

A steady increase in the number of chain hotels

Compared to 2024, the number of chain-affiliated hotels increased by 2.5%, while the total number of branded rooms grew by 5.6%. Notably, domestic hotel chains recorded strong growth, with the number of properties rising by nearly 5% and room supply expanding by approximately 9%. Accor continues to be the largest hotel operator in Poland, maintaining its leading position. Polish Hotel Holding ranks second in the market. Ranked third among hotel chains operating in Poland is Hilton, with 31 hotels under its brand, along with one additional property, NOBU Hotel Warsaw, which is the only hotel in Poland affiliated with Small Luxury Hotels of the World in partnership with Hilton.

Hotel leases continue to be in high demand

Lease agreements remain a key growth model for hotel chains in Poland. However, contract structures have evolved, with increased flexibility and a stronger linkage to operational performance, reflecting a more mature and risk-aware market environment.

Continued growth of Polish hotel operators and chains

The Polish hotel market continues to see strong growth of domestic chains, which are increasingly expanding their portfolios across both urban and resort destinations. These operators are strengthening their market position through portfolio diversification, brand development and improved operational standards, enhancing their competitiveness alongside international hotel groups. Notable increases in the number of properties were recorded by Arche Group (up by 5 compared to the previous report) and DeSilva (up by 3 properties). Further expansion is expected, particularly from chains such as Destigo, which currently ranks second among Polish hotel operators and is actively growing through the lease of existing properties, including branded hotels.

Numerous new hotels in the pipeline

Over the past year, several new international hotel brands have entered the Polish market, including Tribe and Mövenpick (Accor), as well as Voco (IHG). All major hotel chains are planning further expansion. In the coming years, market entry is planned for brands such as Prize by Radisson, JW Marriott, Canopy by Hilton, and Cloud One by Motel One. Additionally, along the coastal stretch from Darłowo to Świnoujście, 22 new hotels are expected to open, adding over 6,000 rooms, the majority of which will be independent properties.

Agata Przeniosło-Drozd

Partner & Project Manager, Horwath HTL Poland

Key Stats

Key Statistics	2024	2025	%
Total chain hotels	519	532*	2.5%
Total chain rooms	70,230	74,138	5.6%
Average size per chain hotel in rooms	135	139	3.0%
Country hotels stock (overall supply)	2,583	2,629	1.8%
Country rooms Stock (overall supply)	154,649	160,793	4.0%
Average size per hotel in rooms	60	61	2.2%
Chain penetration % by hotels	20.1%	20.2%	0.7%
Chain penetration % by keys	45.4%	46.1%	1.5%
International chain hotels	242	251	3.7%
Domestic chain hotels	329	345	4.9%
International chain rooms	38,795	40,746	5.0%
Domestic chain rooms	38,433	41,858	8.9%

*combined domestic and international chains



Ranking by Size

CHAINS

Rank	Chain Groups	Hotels	Rooms
1	ACCOR	88	14,644
2	Polski Holding Hotelowy	46	4,944
3	Hilton Worldwide	32	5,028
4	Louvre Hotel Group	29	3,675
5	Marriott International	27	4,604
6	Destigo	25	1,820
7	Arche	22	4,240
8	De Silva	20	2,335
9	Radisson	18	4,091
10	B&B	18	1,926

BRANDS

Rank	Chain Brands	Hotels	Rooms
1	IBIS (inc Ibis Styles, Ibis Budget)	41	5,591
2	Mercure	24	4,347
3	Arche	22	4,240
4	Destigo	20	1,284
5	Hampton	19	2,634
6	B&B	18	1,926
7	Diament	14	1,174
8	Novotel	13	3,277
9	Grupa Górskie Resorty	13	3,053
10	Qubus	13	1,341

Rank	Domestic Chain Groups	Hotels	Rooms
1	Polski Holding Hotelowy	46	4,944
2	Destigo	25	1,820
3	Arche	22	4,240
4	De Silva	20	2,335
5	Focus	17	1,649
6	CFI Hotels	17	1,577
7	Satoria Group	16	2,057
8	Qubus	14	1,495
9	Diament	14	1,174
10	Grupa Górskie Resorty	13	3,053

Rank	Domestic Chain Brands	Hotels	Rooms
1	Arche	22	4,240
2	Destigo	20	1,284
3	Diament	14	1,174
4	Grupa Górskie Resorty	13	3,053
5	Qubus	13	1,341
6	PHH	11	1,075
7	Focus Premium	10	994
8	NAT	10	850
9	Geovita	9	581
10	Gromada	8	895

Rank	International Chain Groups	Hotels	Rooms
1	ACCOR	88	14,644
2	Hilton Worldwide	32	5,028
3	Louvre Hotel Group	29	3,675
4	Marriott International	27	4,604
5	Radisson	18	4,182
6	B&B	18	1,926
7	IHG	16	2,799
8	Wyndham	8	1,632
9	BWH Hotels	8	714
10	Leonardo	4	669

Rank	International Chain Brands	Hotels	Rooms
1	IBIS (inc Ibis Styles, Ibis Budget)	41	5,591
2	Mercure	24	4,347
3	Hampton	19	2,634
4	B&B	18	1,926
5	Novotel	13	3,277
6	Campanile	11	1,258
7	Radisson Blu	8	2,094
8	Holiday Inn	6	1,167
9	Golden Tulip	6	817
10	MOXY	5	738

Ranking per Scale & Size

Category	OVERALL				DOMESTIC				INTERNATIONAL			
	Hotels	Rooms	%	Ave.	Hotels	Rooms	%	Ave.	Hotels	Rooms	%	Ave.
Budget & Economy	40	4,603	6%	115	12	856	28	3,747	40	4,603	6%	115
Midscale	190	21,039	29%	111	97	9,002	93	12,037	190	21,039	29%	111
Upscale & Upper Upscale	218	36,379	50%	167	121	17,868	97	18,511	218	36,379	50%	167
Luxury	62	10,039	14%	162	29	3,588	33	6,451	62	10,039	14%	162
TOTAL	510	72,060		141	259	31,314	251	40,746	510	72,060		141

Ranking by Destination

Rank	Destination	Hotels	Rooms
1	Warsaw	119	18,249
2	Cracow	195	14,150
3	TriCity	104	10,532
4	Wroclaw	78	8,489
5	Poznan	74	6,076

Destination Pipeline

Rank	Destination Pipeline	Hotels	Rooms
1	Warsaw	9	1,860
2	Cracow	7	798
3	TriCity	12	1,945
4	Wroclaw	4	693
5	Poznan	5	739



Business Model

By hotels	Franchising	%	Lease	%	Management Contract	%	Owned	%	Total	%
Economy	8	6%	8	13%	13	12%	11	6%	40	8%
Midscale	62	43%	21	34%	27	26%	80	40%	190	37%
Upscale & Upper-Upscale	57	40%	29	47%	43	41%	89	45%	218	43%
Luxury	16	11%	4	6%	22	21%	20	10%	62	12%
Total	143	100%	62	100%	105	100%	200	100%	510	100%

By rooms	Franchising	%	Lease	%	Management Contract	%	Owned	%	Total	%
Economy	914	5%	1,111	18%	1,745	9%	833	3%	4,603	6%
Midscale	7,311	36%	1,965	31%	4,343	22%	7,420	29%	21,039	29%
Upscale & Upper-Upscale	9,386	46%	2,974	47%	9,336	47%	14,683	57%	36,379	50%
Luxury	2,582	13%	282	4%	4,408	22%	2,767	11%	10,039	14%
Total	20,193	100%	6,332	100%	19,832	100%	25,703	100%	72,060	100%

Notes: All data as of March 2026





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Our clients choose us because we have earned a reputation for impartial advice that will often mean the difference between failure and success. Each project we help is different, so we need all of the experience we have gained over our 110+ year history.

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We are Horwath HTL, the global leader in hospitality, tourism and leisure consulting.