THE 6TH ANNUAL STATE OF THE EGYPTIAN OOH MARKET REPORT

The EGP 12.7B Milestone: Smart Expansion & Digital Dominance

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AdMetrics
By AdMazad

EXECUTIVE SUMMARY

The 2025 OOH Market Explosion

Financial & Structural Hyper-Growth

The Egyptian OOH market achieved a historic EGP 12.7B in billings, marking a 60% surge from EGP 7.9B last year. This capital influx was supported by a 9% expansion in supply to 59.3k AdSpaces, with demand remaining aggressive at an 86% average utilization rate.

Strategic Pivot: The New Hubs & Formats

Inventory growth is surgically concentrated in **Zayed and New Cairo**, focusing on **Unipoles, 6×3s, and DOOH**. Critically, while only **115 new DOOH locations** were added in 2025, the format has already **absorbed ~20% of total market revenue**, signaling a high-velocity migration toward digital flexibility.

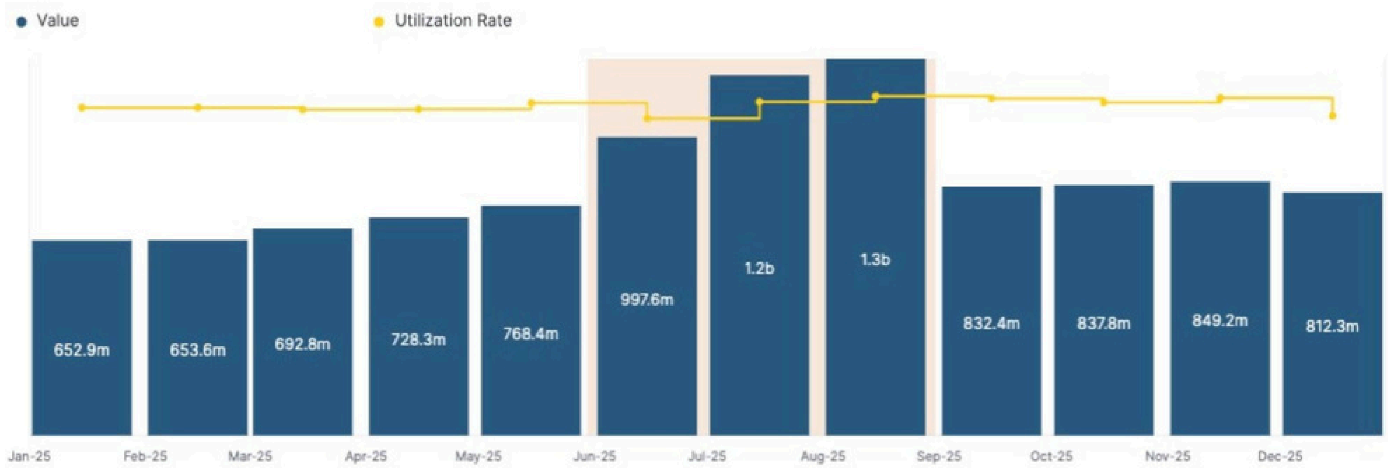
A Democratized Brand Landscape

Market participation has reached a tipping point with 1,905 active brands, fueled by an unprecedented 743 new entrants. This nearly 70% growth in new brand adoption (up from 432 in 2024) proves that OOH is now the primary battlefield for brands of all scales.

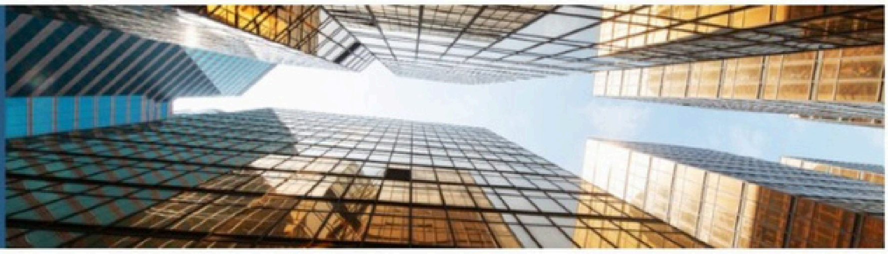
Monitored AdSpace	Utilized AdSpace	Utilization Rate	Expenditure	Expenditure YoY	Brands
LY 50.2k	LY 40.8k	LY 84%	LY 7.9b		LY 1,715 Brands
59.3k	**47.8k**	**86%**	**12.7b**	**60%**	**1,905**

Top 20 Advertisers

Monthly OOH Trends



INDUSTRIES & SECTORS



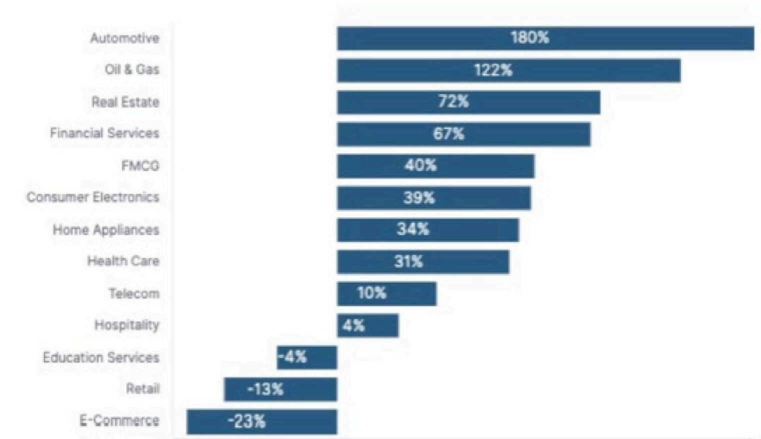
Growth Dynamics & The Concentration Challenge

The 2026 report reveals a market defined by heavy industry reliance and a shifting competitive landscape. While total expenditure reached EGP 12.7B, the performance across sectors highlights both the risks of high concentration and the emergence of high-growth non-real estate players.

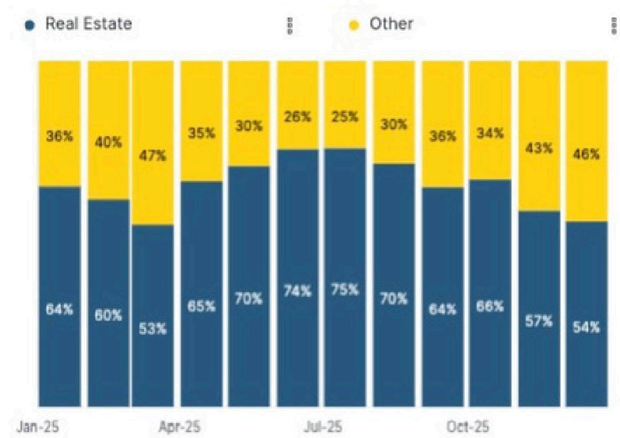
The Real Estate Hegemony & Concentration Risk

- Peak Dominance: Real Estate expenditure share surged to 65% of total market spend in 2025.
- Late-Year Cooling: By the end of 2025, the sector saw a cooling off, with its share settling at 54%.
- Strategic Risk: The OOH industry in Egypt faces a profound challenge due to this heavy dependence on a single sector. To ensure long-term stability and investor confidence, there is a critical need to grow the share and capabilities of non-real estate advertisers, diversifying the revenue base and reducing market vulnerability to sector-specific slowdowns.

Annual Growth in Expenditure for Select Sectors



Real Estate Monthly Marketshare



Sector Winners: High-Velocity Growth

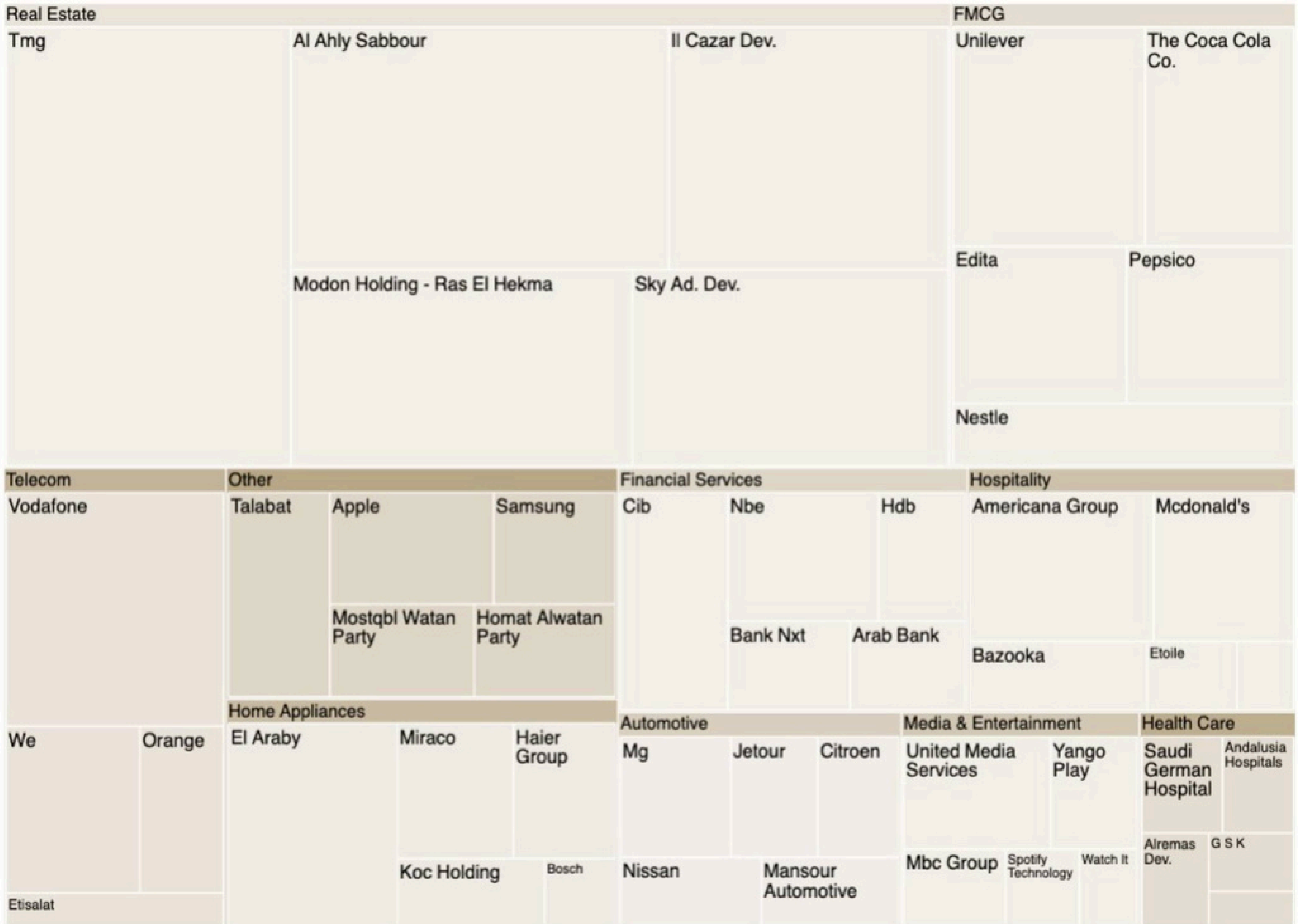
The market witnessed significant expansion in several key industries, signaling a broadening interest in OOH as a strategic medium:

- Automotive: The standout performer with a massive 180% growth in spend.
- Real Estate: Despite concentration concerns, the sector itself grew by 72% YoY.
- Financial Services: Experienced a robust 67% increase, acting as a critical power source for consumer expenditure.
- Oil & Gas: Showed notable upward momentum as a key market contributor.
- Consumer Electronics & Home Appliances: Grew by 39%, with products in these categories—alongside FMCG—consistently delivering double-digit growth.

Sector Losers: The Retreat & Sluggishness

- E-commerce: Recorded the sharpest decline with a -23% retreat in OOH spend.
- Retail: Continued to contract, seeing a -13% drop in its sector footprint.
- Service Providers: This segment exhibited general sluggishness, failing to keep pace with the hyper-growth seen in the product-heavy sectors.

Top 5 Advertisers in Select Sectors



GEOGRAPHIC PERFORMANCE

Concentration vs. Central Opportunity

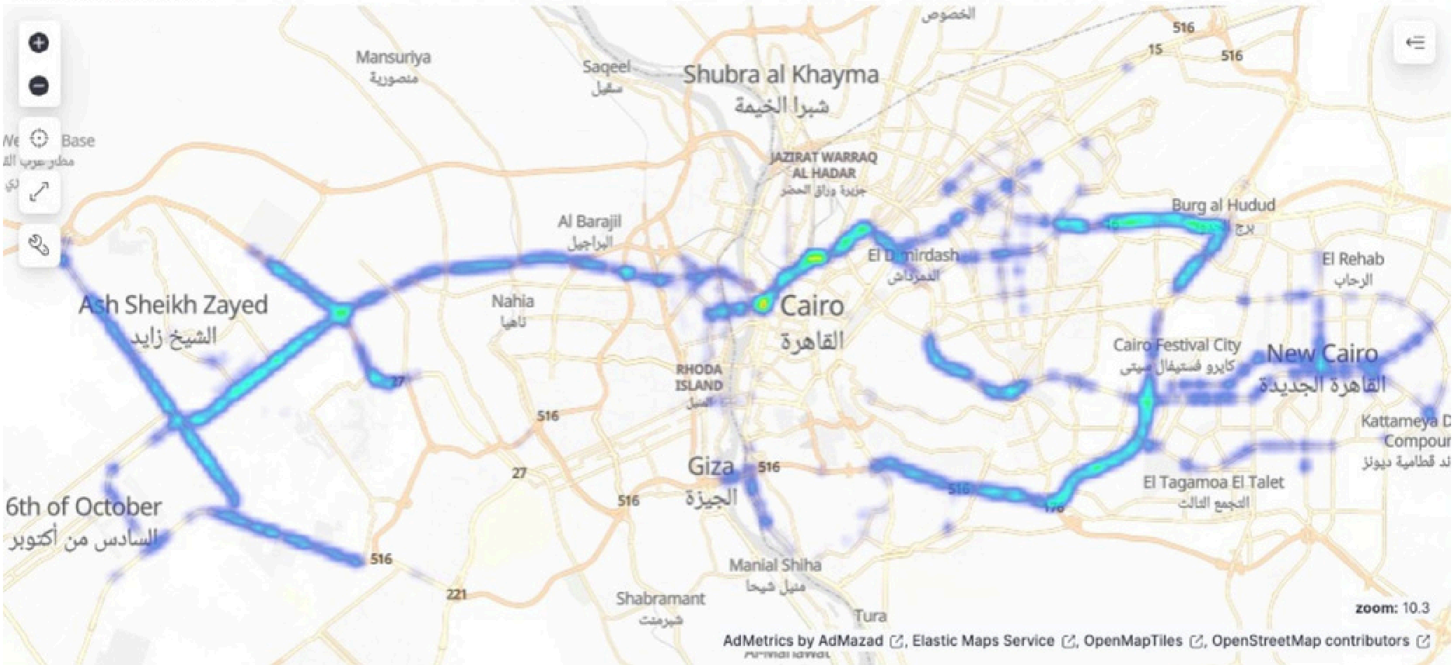
The Dual-Hub Monopoly: New Cairo & Sheikh Zayed

- Dominant Market Share: New Cairo and Sheikh Zayed now command over 40% of total market expenditure.
- Sector Imbalance: These zones exhibit extreme sector concentration, with Real Estate accounting for 80%+ of spend.
- The Brand Gap: In contrast, the "Brand Economy" (non-real estate) allocates only 21% of its budget to these areas combined, signaling a massive opportunity for non-RE brands to break the developer monopoly in premium districts.

The Central Brand Strongholds

- Primary Arteries: General brands continue to anchor their visibility in the urban core. The 6th October Bridge remains the top priority at 19% of non-RE expenditure, followed by the Ring Road at 16%.
- Utilization Divergence: Demand is at a breaking point on the Ring Road (94% utilization) and Sheikh Zayed (90%).
- Value Opportunity: Central and Western Cairo (notably Zamalek, Agouza, and Mohandeseen) are seeing utilization below 70%. This provides a strategic window for brands to negotiate prime inventory at competitive rates where demand has temporarily cooled.

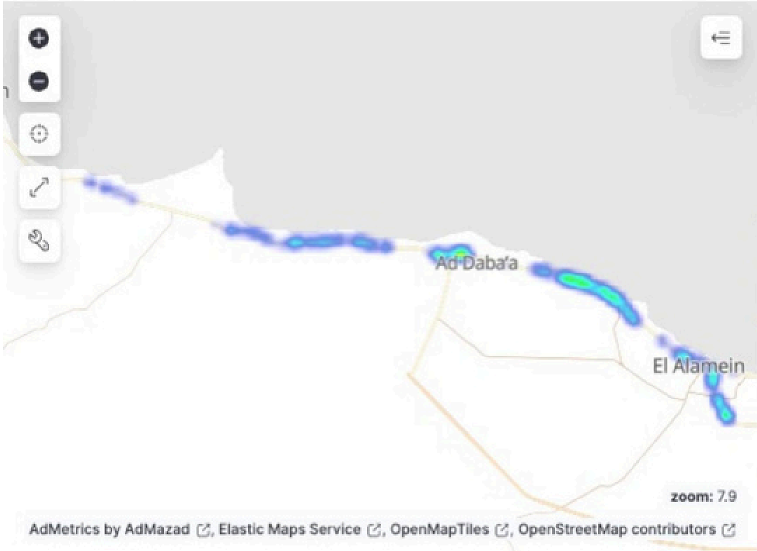
Cairo AdSpace Heatmap



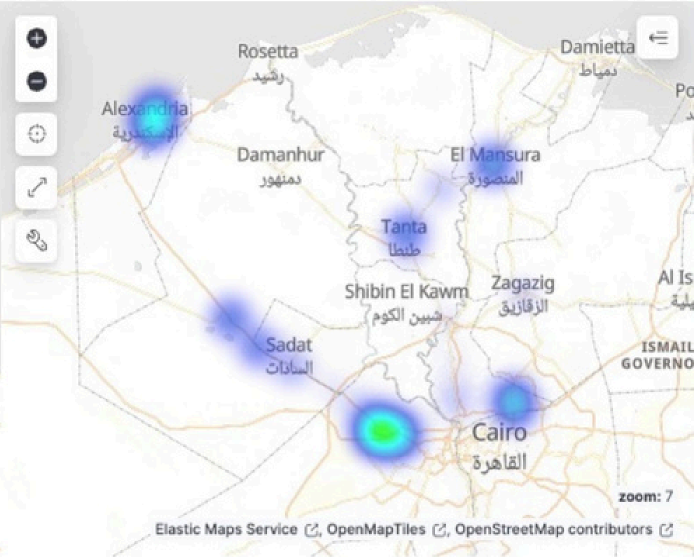
Regional Horizons: Sahel & The Delta Shift

- The Sahel Westward Creep: Driven by the Ras El Hekma mega-deal and luxury development migration, OOH inventory has officially crept westward past Ras El Hekma. This marks the transition of the North Coast into a year-round urban development corridor.
- Delta Ascendancy: A new hierarchy has emerged in the Delta. Mansoura and Zagazig have notably outpaced Tanta in performance this year, driven by high purchasing power and a greater appetite for diverse brand categories beyond real estate.

Sahel Heatmap

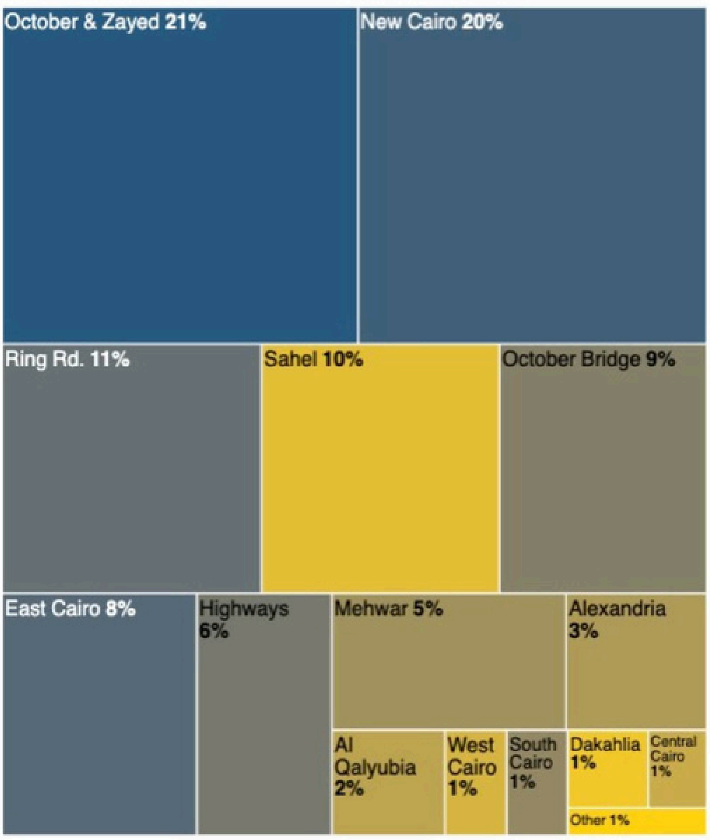


Delta AdSpace Heatmap

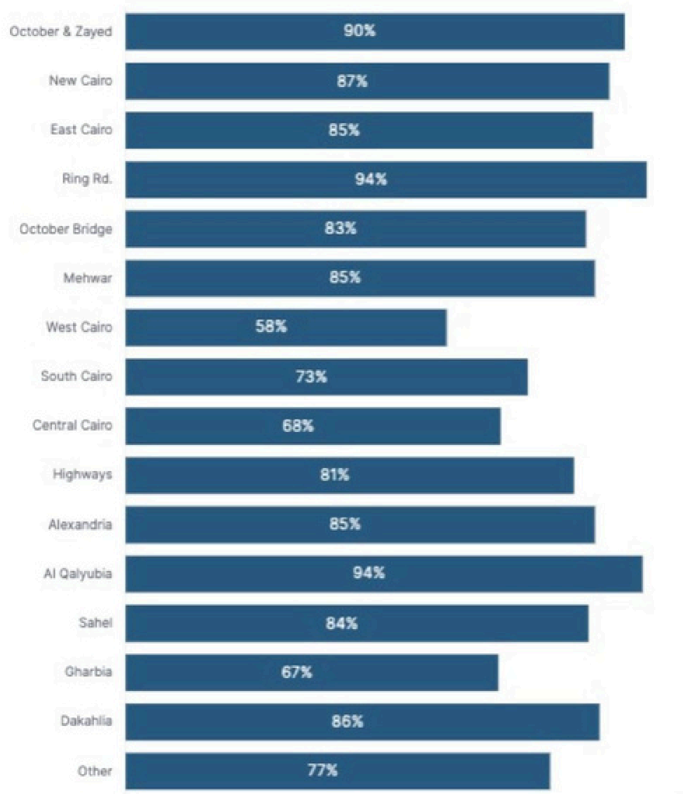


Regional Performance Data

Expenditure Share



Geographical Utilization Rate



FORMAT ANALYSIS

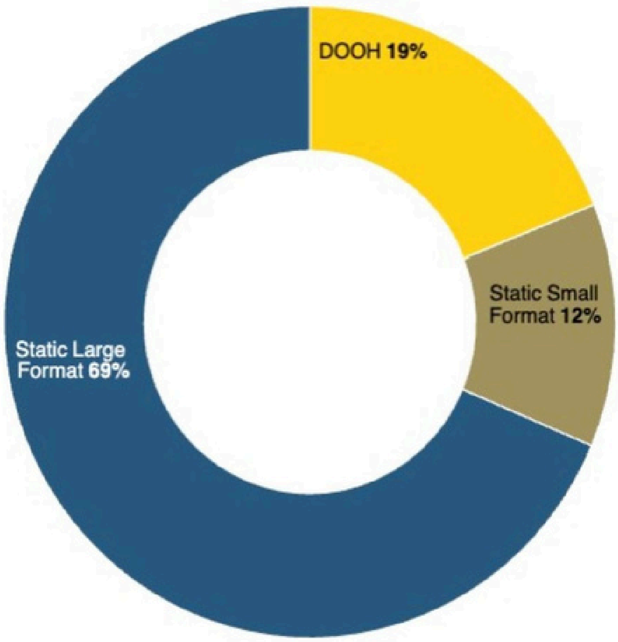
The Evolution of Impact & Digital Efficiency

DOOH: The Revenue Powerhouse & The Sustainability Challenge

DOOH has emerged as the market's most potent "money maker." While it represents only 5% of physical inventory, it commands 19% of total revenue. However, to sustain this growth, the format must transition from rapid expansion to strategic self-regulation:

- **Integrated Visual Standards**: To combat light pollution and "blinding brightness," the industry must mandate a dual approach to nighttime visibility. This includes requiring night-specific creatives with darker backgrounds (e.g., rich blacks or deep blues) paired with standardized automatic light sensors that dim screens appropriately. This ensures ads remain readable and premium rather than repulsive to the public eye.
- **Modern Reporting & Density**: Advertisers require validated delivery reports to ensure spots are aired as booked. Furthermore, the industry must address screen density to prevent "screen cannibalization," where multiple digital displays in close proximity dilute each other's impact.

Expenditure Share by Medium Type



The Infrastructure Drivers: Unipoles & Pedestrian Bridges

- Unipoles: Growth continues to mirror the expansion of the national road network. They remain the undisputed format for "Status & Authority," particularly for Real Estate leaders.
- Pedestrian Bridges: As the road network expands, pedestrian bridges have evolved into sleek, high-spec advertising solutions. These offer unique eye-level visibility and a "cleaner" aesthetic compared to traditional cluttered segments.

Conclusion: The Road to 2026 Resilience

The Egyptian OOH market enters 2026 in a state of high-value transition. While the 60% surge in billings to EGP 12.7B signals a historic era of growth, the report uncovers a critical structural fragility: the "Producer-Financier Alliance."

From Concentration to Diversification: With Real Estate occupying up to 65% of expenditure in 2025, the industry's primary mission for 2026 must be de-risking. Attracting the "Brand Economy"—which currently bypasses the new urban hubs in favor of the October Bridge (19%) and Ring Road (16%)—is essential to building a stable, multi-sector revenue base.

The Maturity of DOOH: Digital is no longer just a novelty; it is a revenue powerhouse (20% of spend from 5% of inventory). However, its continued growth depends on moving from "volume" to "value" through standardized reporting and the adoption of high-quality Night-Time Creative Standards.

Geography as Opportunity: The saturation of Sheikh Zayed (90% utilization) and the Ring Road (94%) should not be seen as a barrier, but as a signal to look inward. The under-70% utilization in central districts like Zamalek and Mohandeseen offers a "buyer's market" for brands to reclaim the urban core.

Final Verdict

The OOH landscape is expanding westward past Ras El Hekma and thriving in new Delta capitals like Mansoura, mirroring the nation's infrastructure push. For media owners and advertisers alike, the 2026 winner will not be the one with the most faces, but the one who masters digital efficiency, geographic diversification, and creative empathy for the public space.

About AdMazad & AdMetrics

AdMazad is the definitive data-driven ecosystem for the Egyptian Out-of-Home (OOH) market. We provide end-to-end intelligence solutions that empower brands to move from intuition-based buying to high-precision, ROI-driven strategies.

At the core of our ecosystem is **AdMetrics**, our proprietary performance measurement suite. Over the last 5 years, AdMetrics has built the market's most comprehensive archive, tracking the behavior and spending patterns of over 10,000 brands. Unlike traditional reporting, AdMetrics triangulates three critical data streams to provide a 360-degree view of market success:

- **Traffic Intelligence**: We integrate mobility and vehicular data to calculate granular impressions and audience flow across all major corridors.
- **Brand Analytics**: We monitor the "Brand Economy," tracking how thousands of unique brands utilize OOH to build share of voice and consumer mindshare.
- **Billboard Performance**: We audit physical "Viewability Scores" across 20 Egyptian cities, accounting for angle, clutter, illumination, and competition to ensure your message isn't just posted, but seen.

Our Comprehensive Suite of Strategic Services

- **Data-Led Campaign Management**: We engineer campaigns by leveraging five years of historical performance data to handle planning and execution, ensuring budget is allocated to the highest-performing inventory.
- **Plan Validation & Audit**: Gain total confidence in your media buy. We assess third-party proposals using our proprietary scoring methodology that filters out low-visibility assets to optimize for maximum reach.
- **Competitive Intelligence**: Stay ahead of the curve. By monitoring 5,000 billboards monthly (capturing 60,000+ data points annually), we provide real-time insights into competitor spending and sector-specific utilization trends.
- **Creative Technical Consulting**: Our consultants provide technical guidelines based on OOH visibility science to ensure your creative materials are optimized for maximum impact at scale.
- **Performance Benchmarking**: Our End-of-Campaign reports go beyond proof-of-posting, analyzing your results against industry benchmarks, peer groups, and geographical success drivers.

Partner with the market leader in OOH Intelligence. Get in touch at info@admazad.com to get started!