THE SPORTS INVESTMENT PLAYBOOOK

Egypt's $3 Billion Opportunity

Sector Intelligence Report | May 2026

Published in conjunction with the Malaikah Panel Discussion

Is Sports the Next Big Investment Goldmine or a Risky Game?

Tuesday May 12, 2026 | Founders Spaces Downtown

THREE FORCES CONVERGING

A Once-in-a-Decade Opportunity

$3.5B

Current Market Size

1.34% of GDP

$8B+

Target by 2032

3% of GDP — a 2.3x expansion

61%

Population Under 30

Largest youth cohort in MENA

Egypt’s sports sector is transitioning from a **state-subsidized service** to a **commercially investable asset class**. The regulatory unlock happened August 2025.

AUGUST 2025: THE DAY EGYPTIAN SPORTS BECAME INVESTABLE

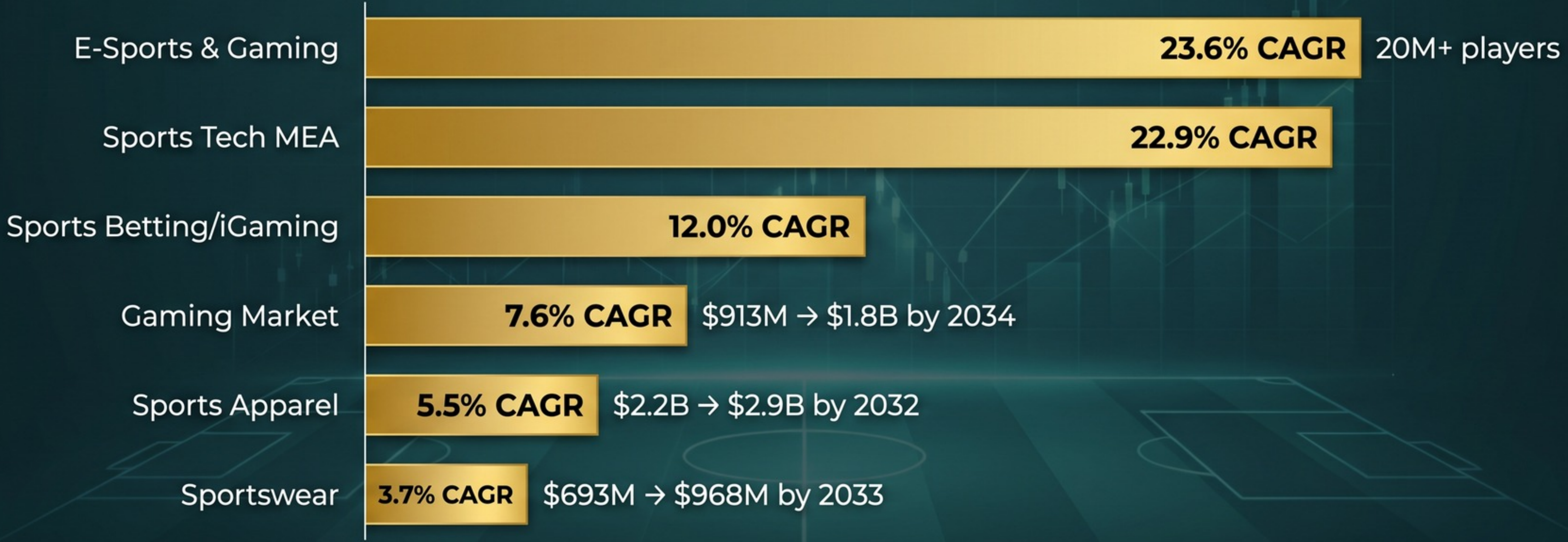
Sports Law **No. 171 of 2025** — The Regulatory Game-Changer

BEFORE	AFTER LAW 171
❌ Clubs = non-profit associations only	✓ Clubs CAN become commercial joint-stock companies
❌ Disputes in slow civil courts	✓ Dedicated Sports Arbitration Center established
❌ Opaque governance, no investor protections	✓ Mandatory financial transparency & compliance
❌ No path to equity ownership	✓ Clear mechanisms for private equity & acquisition

For the first time in Egyptian history, sports clubs can be structured as investable corporate entities.

SECTOR-BY-SECTOR: WHERE THE GROWTH IS

Market Sizing & CAGR Analysis



Egypt’s overall sports market: $3.5B today → **$8B+** by 2032 | **15-20%** implied CAGR

THE PADEL PHENOMENON

From Zero Courts to a $200M+ Industry in 5 Years

500+
Padel Courts in Egypt
From near-zero in 2019

EGP 3-5M
Average Court Investment
Per facility

18-24 months
ROI Timeline
For well-located facilities

#1
Fastest-Growing Sport
In Egypt by court count

Key Operators: JPadel Sports Co. (commercial court development) | Grid Sports (tech-enabled booking & league management)

"Padel is Egypt's fastest proof-of-concept for sports as a commercial asset class." — Investia Research

FOOTBALL: THE SLEEPING GIANT WAKES UP

110 Million Fans, Zero Publicly Traded Clubs — Until Now

THE PASSION

- **Al Ahly:** Most successful club in African football history
- **Egyptian Premier League:** One of Africa's most-watched leagues
- **110M+** passionate football consumers

THE COMMERCIAL GAP

- **Al Ahly market value:** Only €37M (vs. comparable global clubs)
- **Zamalek:** Preparing first-ever public share offering
- **Pyramids FC:** ADQ (Abu Dhabi) sponsorship validates foreign capital
- **Modern Sport FC:** Acquired — corporate ownership model proven

Egyptian football clubs are among the most undervalued sports assets in the world relative to their fan base and cultural reach.

EGP 45 BILLION IN INFRASTRUCTURE: THE BUILDOUT HAS BEGUN

Sports Real Estate — Where Concrete Meets Capital

NEW CAPITAL SPORTS CITY

- 93 Acres | 93,000-Seat Stadium | Olympic Aquatic Center

RED SEA OLYMPIC VILLAGE

- 225 Acres | Completion 2028 | Sports Tourism Anchor

EMAAR RED SEA MEGAPROJECT

- LE 900B Deal | Sports-Centric Community | TMG & Misr Italia

EGP 30B Private Sector Committed

EGP 15B State Budget Allocated

157 New Youth Centers Across 27 Governorates

20 MILLION GAMERS. $368M REVENUE. AFRICA'S #1 GAMING MARKET.

E-Sports & Sports Technology — The Digital Frontier

$368M
Gaming Revenue 2025

20M+
Active Players

$1.8B
Projected by 2034

22.9%
Sports Tech MEA CAGR

KEY PLAYERS

- **Startups:** CAZADOR, Scout4Star, Grinta App, el7lm
- **Investors:** Flat6Labs, Plug and Play, Beltone VC
- **Opportunity:** Esports arenas, tournament franchises, performance analytics

Egypt leads Africa in gaming revenue — the esports infrastructure buildout has barely begun.

THE SUPPORTING ECOSYSTEM: THREE VERTICALS WORTH WATCHING

MEDIA RIGHTS

- **PRO Company:** Exclusive global EPL rights
- **Digital OTT** streaming emerging
- 110M+ domestic audience
- **Opportunity:** Localized sports content platform

ACADEMIES

- Right to Dream Academy (Mansour Group)
- Shabab Balad Academy (national)
- Player export pipeline to Europe
- **Opportunity:** Talent development + transfer fee upside

SPORTS TOURISM

- Red Sea Open golf, international polo
- Year-round climate advantage
- 225-acre Olympic Village (2028)
- **Opportunity:** Sports resort + event hosting

EGYPT IS WHERE SAUDI ARABIA WAS IN 2017

But With 10x the Fan Base — Regional Comparison

	SAUDI ARABIA	UAE	EGYPT
Market Size	\$8.5B → \$22.4B (2030)	Diversified Hub	\$3.5B → \$8B+ (2032)
Investment Model	Sovereign PIF: \$6.3B deployed	Infrastructure + PPP	Private Sector + PPP
Population	36M	10M	**110M+**
Youth Under 30	63%	~50%	61%
Key Events	2034 World Cup	F1, UFC, Cricket	Building Pipeline
Sports Participation	50% (from 13%)	High (tourism)	Growing Rapidly

Saudi Arabia spent **\$6.3B** via PIF to manufacture a sports ecosystem. Egypt already has the organic fan base, talent pipeline, and cultural infrastructure.

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FIVE REASONS THIS IS A TIMING PLAY

The Investment Thesis — Why Now

1 REGULATORY UNLOCK
Law 171/2025 enables club corporatization for the first time (Aug 2025)

2 DEMOGRAPHIC DIVIDEND
61% under 30, 37M under 15, digital-native consumers

3 UNDERVALUED ASSETS
Al Ahly at €37M is a fraction of comparable global clubs

4 INFRASTRUCTURE WAVE
EGP 45B committed, mega-projects breaking ground

5 REGIONAL MOMENTUM
MENA sports market growing 8.7% annually; Egypt is the last major market to open

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INVESTABLE ≠ RISK-FREE

What Smart Capital Must Navigate

RISK FACTOR	SEVERITY	MITIGATION
Currency Volatility (EGP)	HIGH	Structure deals in USD/EUR; hedge via offshore vehicles.
Bureaucratic Execution	MEDIUM	Partner with local operators; use PPP frameworks.
Club Debt Overhang	MEDIUM	Target new-build assets or restructured entities.
Limited Precedent	MEDIUM	First-mover advantage; reference Saudi/UAE playbook.
Governance Legacy	LOW-MED	New arbitration center; enhanced compliance under Law 171.
Security/Stability	LOW	Stable since 2014; major international events hosted.

The risk profile has materially improved since August 2025.
The question is no longer IF but HOW and WHERE to deploy.

WHERE WE SEE ALPHA: INVESTIA'S CONVICTION SECTORS

Capital Deployment Framework

HIGHEST CONVICTION — DEPLOY NOW

- **Padel & Racquet Sports Facilities** (proven unit economics)
- **Sports Tech Startups** (AI coaching, analytics, fan engagement)
- **Sports Real Estate** (mixed-use with sports anchors)

HIGH CONVICTION — BUILD POSITION

- **E-Sports Infrastructure & Tournament Franchises**
- **Football Club Restructuring** (post-corporatization)
- **Sports Healthcare & Rehabilitation Centers**

WATCH & PREPARE

- **Media Rights & OTT Streaming**
- **Sports Tourism Resort Development**
- **Sports Betting** (pending regulatory clarity)

CONTINUING THE CONVERSATION

Malaikah Panel Discussion

“Is Sports the Next Big Investment Goldmine or a Risky Game?”

Tuesday, **May 12, 2026** | **5:30 – 7:30 PM** | Founders Spaces Downtown | Organized by Malaikah

PANELISTS

- **Ismail Seddik** — CEO, JPadel Sports Co.
- **Nada Zaher** — CEO, Grid Sports
- **Marwa Elwany** — Director of Sports Development, Misr Italia Properties

MODERATOR

- **Loay El Shawarby** — Angel Investor & Principal, Shawarby Attorneys-at-Law

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