



# MOROCCO NOW

National Investment and Export  
Brand Launch



15.3.2022 / 1495

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# THE RECENT GLOBAL CHALLENGES ARE GENERATING NEW REQUIREMENTS



- Growing pressure around climate change - consumers expectations and new regulations - require to move to **decarbonized production**
- Supply chain challenges during COVID crisis triggered **global value chains reorganization** towards less global dependency, more regional integration



# MOROCCO UP TO NOW

## STABILITY AND VISIONARY DECISIONS



His Majesty King Mohammed VI committed to national economic development and success of foreign investments.

Long lasting stability rooted in the monarchical pact

“

*Centuries old country, Morocco is a united nation, shaped by a common history.*

*It draws its strength from national cohesion and from unanimous support around its sacred symbols.*

”

His Majesty King Mohammed VI,  
Throne Speech, 31st July 2021



# MOROCCO UP TO NOW

## 20 YEARS OF DETERMINED TRANSFORMATION



Early Decision To Go For  
Free Trade Agreements



Top Class Trade And Transports  
Infrastructures



Massive Investment In Renewable  
Energies Since 2009



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# ... SHAPED A LEADING INDUSTRIAL AND EXPORTING PLATFORM



## WORLD FASTEST GROWING AUTOMOTIVE CLUSTER

**#1**  
producer in Africa

**700 K**  
vehicles production  
capacity

**27%**  
of total Moroccan exports  
in 2019, X 10 in 20 years



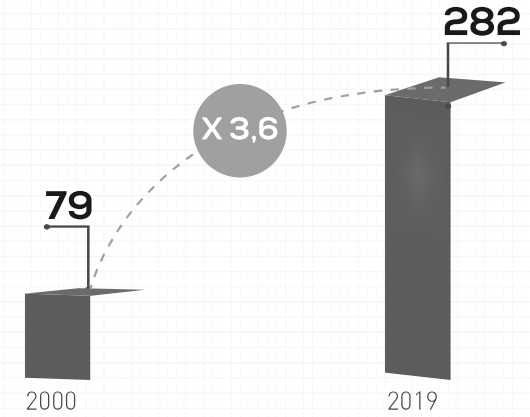
## FAST EMERGING AEROSPACE INDUSTRY

**20%**  
average growth

**#1**  
aerospace equipment  
exporter in Africa



## INCREASING EXPORTATIONS Morocco in MAD billion





# Now Morocco

has the ambition to go a **step further** while  
being the **most attractive destination**  
**to invest in the region.**

This ambition will be supported by a new identity.

# MOROCCO



INVEST AND EXPORT



# MOROCCO NOW

**the future proof industrial platform to capture opportunities in a changing world**

relying on a successful track record of business transformation execution that make the destination a reliable place to invest

**NOW  
SUSTAINABLE**

**NOW  
WELL-PROVEN**

**NOW  
COMPETITIVE**

**NOW  
AGILE**



# NOW SUSTAINABLE



Renewable energies **represent 37%** of the energy mix in 2020

1st producer of renewable energies in Africa

Renewable energies **objective of 52%** by 2030

4GW of installed capacity in 2021, investment of \$ 6 billion

# NOW COMPETITIVE



Best cost offer based on competitive production and export costs :

327 \$/month average labor cost

156 \$/container cost to export, the most competitive in the region

Privileged access to an international market of more than 1 billion consumers thanks to 54 FTAs

Gateway to be part of Africa's fast growth potential

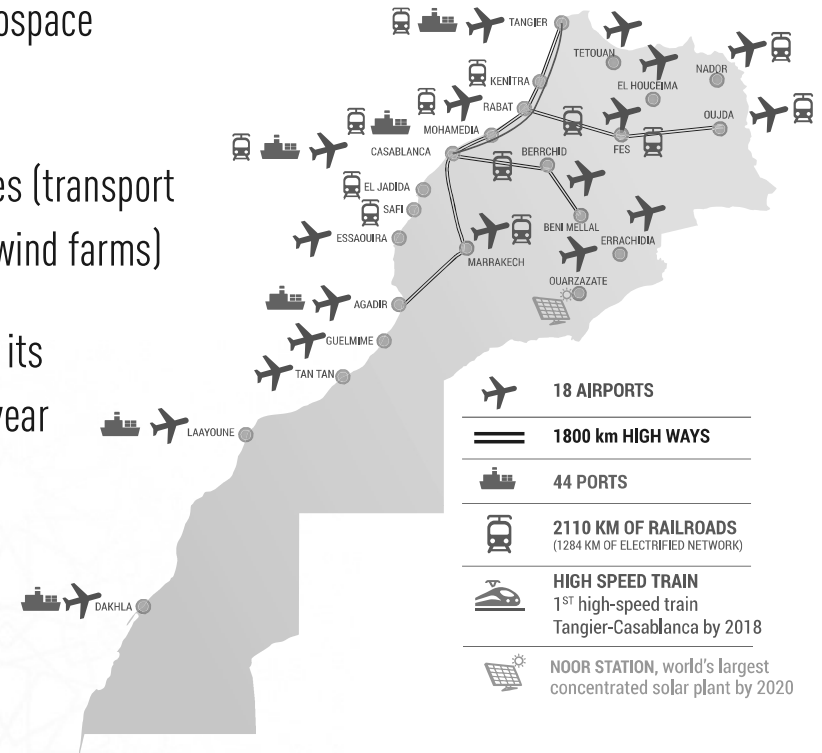




# NOW WELL-PROVEN

Strong track record in:

- Foreign investment: automotive and aerospace ecosystems, textile and agro-industry...
- Delivering mega projects : infrastructures (transport & logistics), renewable energy (solar & wind farms)
- Made possible by investing in educating its young population - 152 000 graduates/year





# NOW AGILE

## Capacity to quickly adapt is part of Morocco DNA as illustrated recently during COVID

- Swift reallocation of industrial production capacity towards health equipment (e.g. masks, respirators), best in class vaccination roll out paving the way to a quick path to recovery

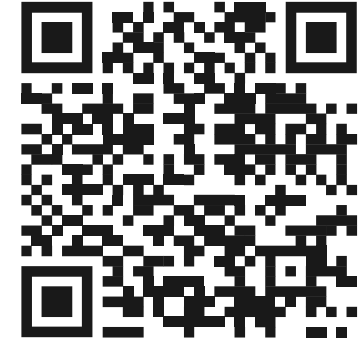


# MOROCCO



INVEST AND EXPORT

For further information



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**MOROCCO**  
**NOW**

INVEST AND EXPORT

# AEROSPACE INDUSTRY

**OCTOBER 2021**

15.3.2022 / 1495

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# WHY MOROCCO ?

## World class aeronautics platform...

- Morocco emerged as a prime aeronautics platform with annual growth rates of 20% over the last years
- The country is ranked among the world's most dynamic aerospace ecosystems
- Diversified and highly integrated supply chain

## ...appealing to major international players...

- Top OEMs are using parts produced in Morocco and many key industry players have built successful long-term partnerships in the country



## ...attracted by a geostrategic location and a unique set of competitive advantages...

- A unique combination of competitive advantages
- Well-trained Human Resources and dedicated training institutes ensure access to a top qualified and competitive labor cost
- Closest African country to the US, Canada and Europe ensuring on time delivery, and easy access to the main aerospace industry markets

## ...long term vision to enhance the competitiveness of the Moroccan aerospace

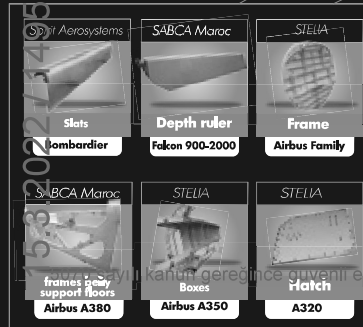
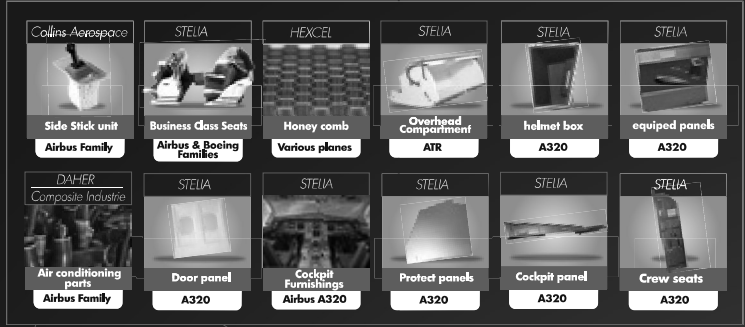
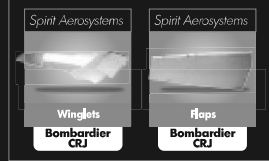
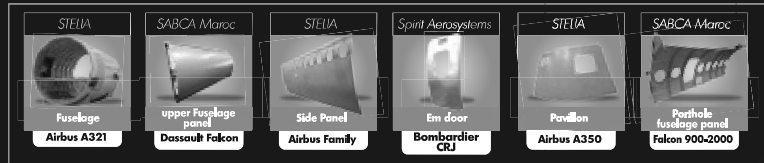
- Target to grow more complex capabilities
- New opportunities: Space industry, Composites, Interiors...
- Vision to support the decarbonization of the industry







15.3.2022 / 11:05

# HIGH VALUE-ADDED PARTS PRODUCED USING THE LOCAL SUPPLY CHAIN

## PARTS MADE IN MOROCCO HIGHLY INTEGRATED CAPABILITIES



### LEGEND

-  Subassembly aerostructure & engines parts
-  interior equipments & composite parts
-  Machined & sheet metal parts
-  Electrical harnesses, components & parts

## THESE AIRCRAFT FLY WITH PARTS MADE IN MOROCCO





# THEY TRUST MOROCCO



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# DIVERSIFIED SUPPLY CHAIN WITH ENHANCED CAPABILITIES (1/2)

## AERONAUTIC EQUIPMENT

Equipment, final assembly & test ( Actuators, Cockpit & Cabin Equipment)

## AEROSTRUCTURE AND ENGINE PARTS

Assembly work packages (fuselage, nacelles...) Composite structural & non-structural

## MACHINING

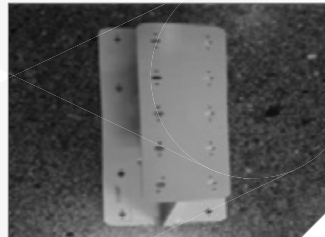
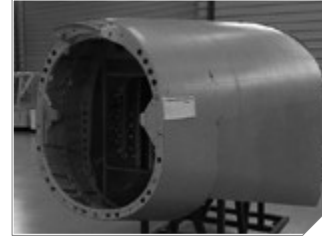
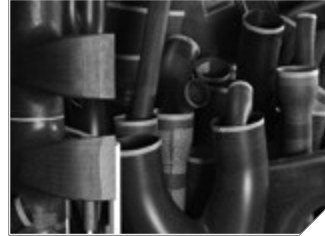
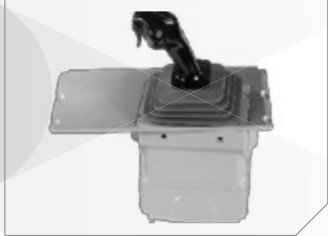
CNC machining /aluminum/ steel/titanium metal analysis/ mechanical testing

## SPECIAL PROCESSES

Anodizing (OAC,OAD,OAS,OAT...) Plating, coating, phosphating, passivation

## SHEET METAL WORKS

Cutting metals stamping, bending, shot peening, or welding processes



38% OF LOCAL INTEGRATION RATE

# DIVERSIFIED SUPPLY CHAIN WITH ENHANCED CAPABILITIES (2/2)

## ELECTRICAL WIRING

Wiring /technical harnesses  
electronics systems testing



## ENGINEERING

Mechanic, Electric, Electronic,  
Hydraulic Study, design, FEA,  
Simulations, 3D Printing



## MRO

Heavy/line engine support services  
interiors



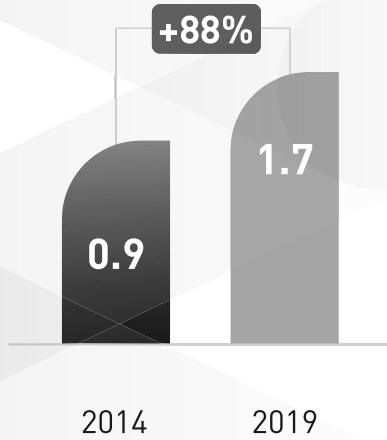
38% OF LOCAL INTEGRATION RATE

AEROSPACE INDUSTRY OCTOBER 2021

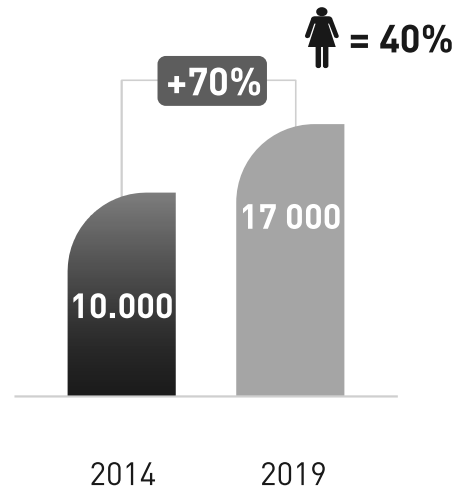
# THE FUTURE OF AVIATION WILL BE MADE "WITH" MOROCCO

## Key figures

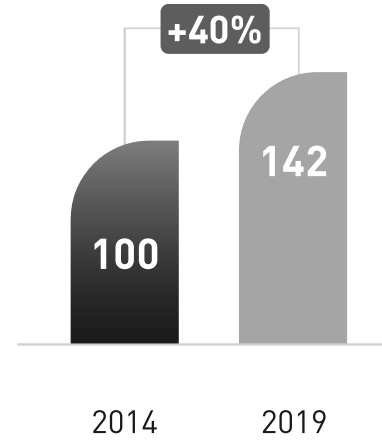
**Revenue**  
(USD bn)  
20% growth rate average



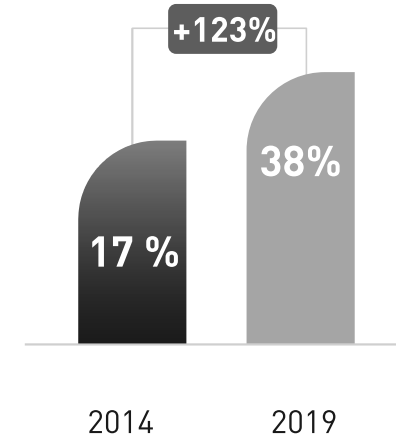
**JOBS**  
(# employees)  
= 40%



**COMPANIES**  
(# companies)



**LOCAL INTEGRATION**  
(% local integration)



“

*In 2020, like the rest of the aeronautics industry, we have been going through a period of economic turbulence for the past year, but at no time did we question this strategic choice.*

”

*Olivier Andriès, CEO, Safran*