



# AUTOMOTIVE INDUSTRY



Bu belge, 5070 sayılı Elektronik İmza Kanununa göre Güvenli Elektronik İmza ile imzalanmıştır.  
Evrak sorgulaması [https://odaborsaebys.tobb.org.tr/tso-kutahya-envision/Dogrula/Validate\\_Doc.aspx?eD=BSE64H7Z2&eS=1115](https://odaborsaebys.tobb.org.tr/tso-kutahya-envision/Dogrula/Validate_Doc.aspx?eD=BSE64H7Z2&eS=1115) adresinden yapılabilir.

OCTOBER 2021

# WHY INVEST IN MOROCCO'S AUTOMOTIVE INDUSTRY ?

## A THRIVING AUTOMOTIVE CLUSTER...

- **1<sup>st</sup>** passenger car producer in Africa
- **2<sup>nd</sup>** exporter to the EU of new vehicles
- **+250** international suppliers and **60%** integration rate
- **700,000 cars** Installed capacity in 2021



## ...THANKS TO DIFFERENTIATING COMPETITIVE ADVANTAGES

- **Morocco's** geostrategic location, provides an **easy access to main markets**
- **Free Trade Agreements** with more than 50 countries
- **14km from Europe** ; 1# sea connectivity in Africa
- **Well-trained and competitive workforce**
- **World-class industrial zones**



## ...WITH A VISION TO TACKLE THE INDUSTRY'S FUTURE CHALLENGES...

- Targeting **80% of integration rate by 2023**
- **1,5 million cars** production
- **Full decarbonization** of production
- This will result in a positioning as **most competitive** platform worldwide...
- ...and attract **new categories of players** in the already comprehensive ecosystem



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# AUTOMOTIVE INDUSTRY AT A GLANCE

60%

Integration rate

75

75 global destinations of exports

8,3B\$

8,3 billion \$ automotive exportations

700K

Installed capacity

250

More than 250 companies already installed

220K

More than 220k jobs in the sector



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# SUCCESS STORIES : RENAULT GROUP

## Renault Group

2 sites

500K  
installed capacity

5 models  
manufactured

Already **1,02€ Bn** per  
year in sourcing from  
Morocco and a new  
agreement to raise it  
to **2,5€ Bn** per year



LODGY



SANDERO STEPWAY



SANDERO



DOKKER



LOGAN

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Zero  
factory

# SUCCESS STORIES : STELLANTIS

STELLANTIS

1 site

200K  
installed capacity

3 models  
manufactured

Already **1,2€ Bn**  
per year in sourcing  
from Morocco and a new  
agreement to raise it to  
**3€ Bn** per year

## Africa Technical Center

- More than **4000 engineers within the ecosystem**

Specialized team in **electronic architecture**

- Dedicated teams for **powertrain and chassis** with skills in perceived **quality and style**

Opel Rocks-E



Peugeot 208



Citroën Ami

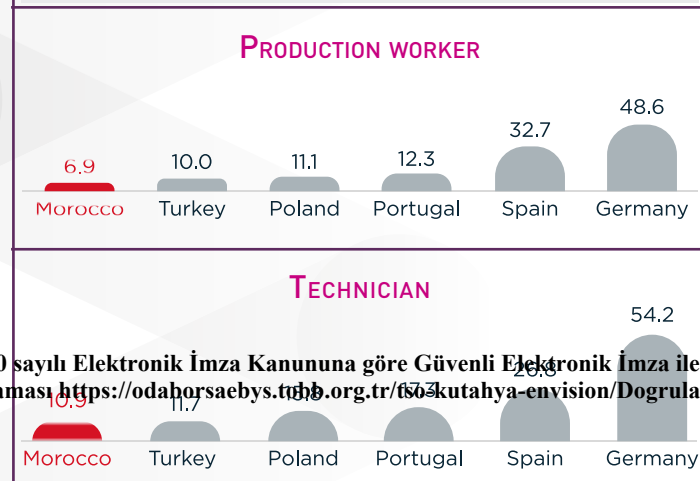


# MULTIPLE ADVANTAGES OF THE MOROCCAN PLATFORM

## HIGHLY TRAINED LABOR

- **15.000 engineers** graduating each year in Moroccan specialized engineering schools
- **Tailor-made training modules** co-developed with industrialists to address industry-specific needs

## MEDIAN TOTAL ANNUAL COMPENSATION (PER EMPLOYEE IN USD K)



Source: Mercer - Labor costs benchmark - 2018

## ACCESS TO MARKETS

Total market surpassing  
**40 million cars**

### • European Union



- 18 400 new cars market
- Free trade agreement
- 1 day transportation

### • NAFTA



- 20.300 new cars market
- Free trade agreement with the US
- 5 days transportation

### • Middle East - North Africa



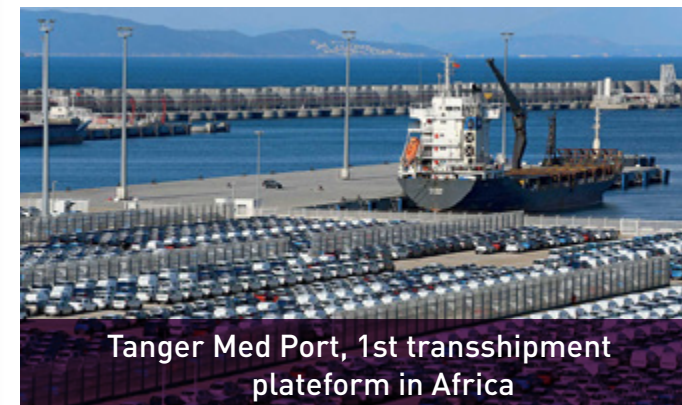
- FTAs with Turkey, UAE and Egypt
- 1-3 days transportation

### • Western Africa



- market with high growth potential
- 1-3 days transportation

## INFRASTRUCTURE

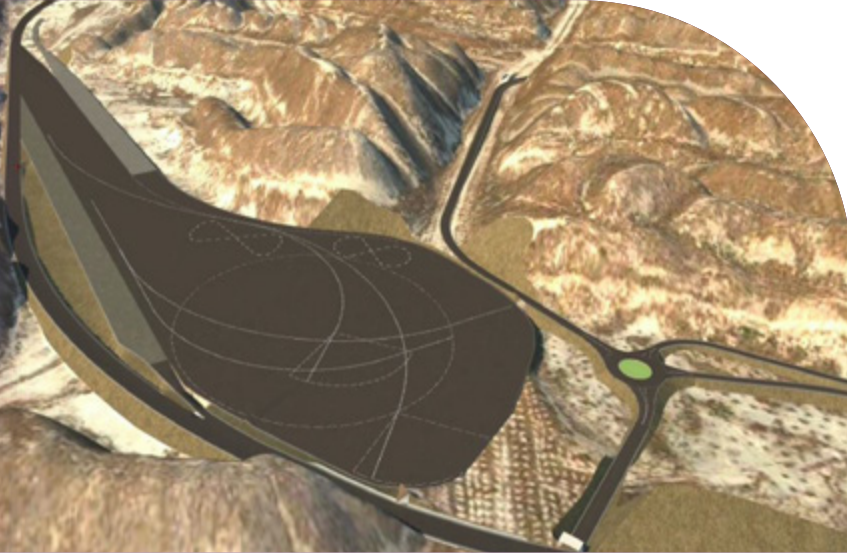


Tanger Med Port, 1st transshipment platform in Africa



Special economic zones dedicated to automotive industry

# ENGINEERING AND R&D CAPACITIES, FROM DESIGN TO MANUFACTURING



The Automobile Test Center will allow Morocco to be autonomous in terms of validation and homologation of parts and vehicles.

- **1st test center in Africa**

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- **A competitive** cost of services
- **4km test track** unique in Europe and in Africa

## Cetiev 2.0

The Technical Center for Vehicle Equipment Industries is equipped with high technologies technical installations, to be able to carry out physical tests related to automotive development activities (electrical/electronic, mechatronic, acoustic and vibration tests, etc.)



Collaboration with universities to co-develop modules with industrialists to address industry-specific needs



# MAKE MOROCCO THE MOST COMPETITIVE AUTOMOTIVE PRODUCTION HUB BY 2023

Known as one of the most competitive hubs in the world, Morocco is aiming to become the most attractive automotive platform worldwide by 2023



**Low carbon** production using local renewable energies



More **local integration** to reach out **80%**



Competitive production costs and **highly skilled** labor force



**Attractive logistic costs** at the crossroad of continents





# MORE LOCAL INTEGRATION AS A COMPETITIVE LEVER FOR AUTOMOTIVE ECOSYSTEMS

## > Raw material suppliers



PLASTIC  
Polypropylene



PLASTIC  
Polyethylene



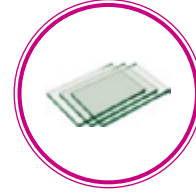
ALUMINIUM  
(1<sup>st</sup> fusion)



SCRAPS  
METAL



ALUMINIUM  
(2<sup>nd</sup> fusion)



FLOAT

## > Raw material processors



Flat Steel



Long Steel



Bar Turning



Pipes



Fondry



Stamping



Injection



Blow Molding



Technical  
Painting



Chrome Plating



Fixings



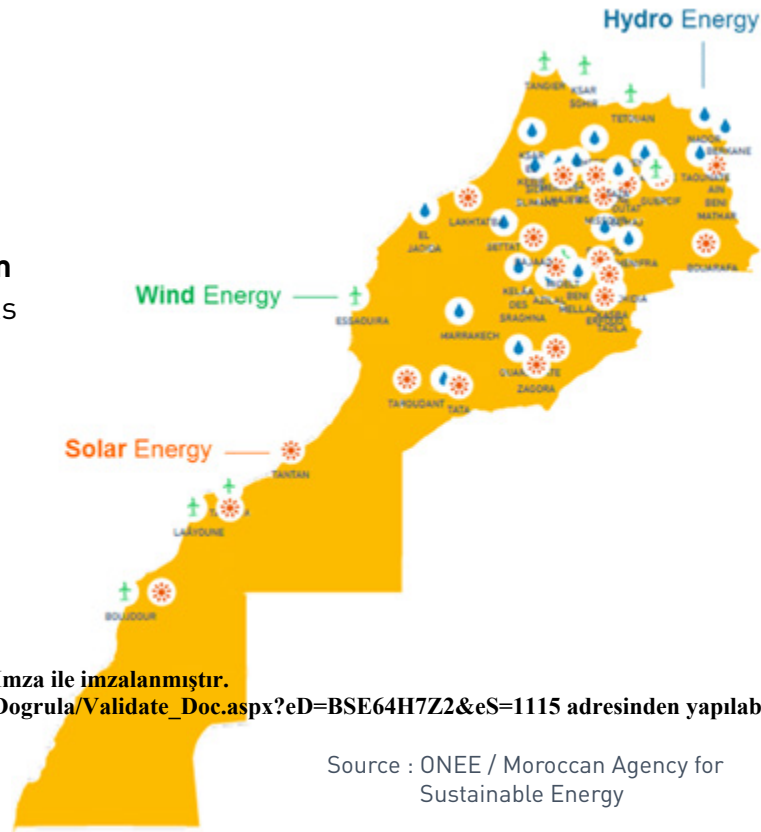
New commodities to be developed to improve the local integration rate from

**60% to 80%**

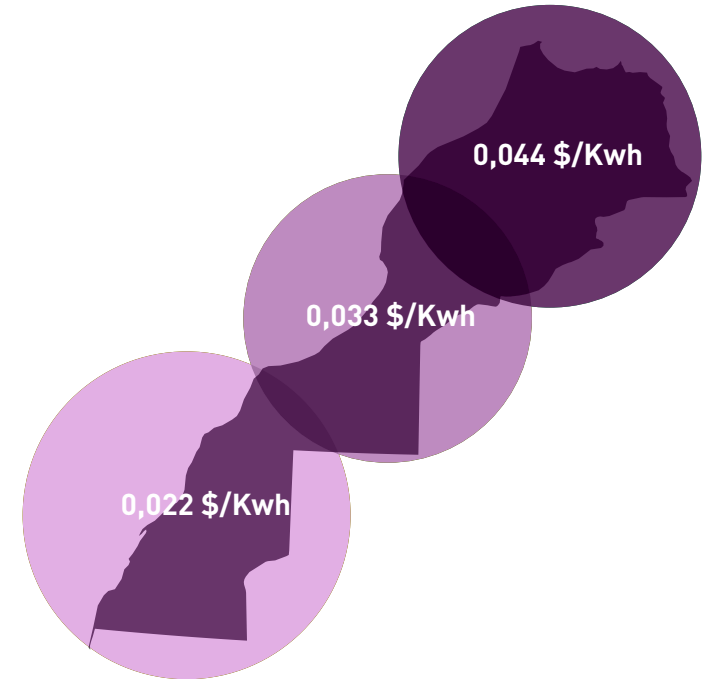


# CARBON FREE ZONES AND HIGHLY COMPETITIVE RENEWABLE ENERGY

Morocco's Renewable Energy Projects Map



Morocco wind-PV mix production cost



**52%** energy mix by 2030

Morocco will get 52% of its electricity from renewable energy sources by 2030, thanks to an ambitious plan with a strong Royal vision to increase the share of renewable energies in the energy mix

Source : ONEE / Moroccan Agency for Sustainable Energy

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# MOROCCO



INVEST AND EXPORT

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