

Morocco Freight and Logistics Market - Growth, Trends, Covid-19 Impact, and Forecast (2023 - 2028)

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Report description:

Key Highlights

The Moroccan freight and logistics market is expected to register a CAGR of more than 6% during the forecast period. The road transport sector played a vital role during the COVID-19 pandemic in moving goods, supporting the operation of supply chains, repatriating citizens, and transporting people to their workplaces. Meanwhile, freight transport companies were affected to a lesser extent due to the collective efforts of the authorities and professionals in the sector to ensure the continuity of operations. The political stability and the geostrategic location offer a competitive advantage compared to other countries in northern Africa. The country receives the region's highest foreign direct (FDI) investments, with focused investments in manufacturing, real estate, and tourism.

Yet, FDIs in the transport and logistics sector are relatively limited in the country and account for less than 3% of total FDI. The geostrategic location of Morocco within Africa and the Mediterranean, the signing of free trade arrangements with the EU, USA, Turkey, and a rise in income per capita resulted in increased volumes of international trade during the past fifteen years. The vast majority of Morocco's foreign trade comes by sea, making it crucial for further economic growth to invest in the country's commercial ports. Along with successful maritime, Morocco's air, rail, and road freight transport and logistics sectors have shown strong growth rates.

National Logistics Strategy 2030, an initiative that the government of Morocco introduced, focuses on decreasing logistics costs to contribute to higher GDP growth rates, reducing carbon dioxide emissions, and creating 36,000 jobs is anticipated to strengthen the logistics sector in the country.

Morocco Freight & Logistics Market Trends

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Increasing Infrastructure Investments in the Country are Anticipated to Drive the Market

Increasing public investments in the country's physical infrastructure during the study period contributed to expanding the domestic transport and logistics sector. The construction of 1,800 km of new expressways, the expansion of the rail network, and the development of logistic and industrial zones led to a sharp rise in the number of companies active in the transport and logistics business. Upgrades in transport and logistics infrastructure have driven economic growth in Morocco in recent years.

As the country develops and urban areas expand, the interconnectivity of economic centers and efficient connections to the rest of the world would be paramount to supporting the growth of other sectors, such as agriculture, manufacturing, and tourism.

Over the last two decades, the kingdom spent an average of about MAD 40 billion (USD 4.2 billion) on transport and logistics, representing 10% of total investment in the country and 20-25% of the state's investment budget. In the base year, the sector accounted for around 4% of GDP.

Morocco is planning to link two cities on its western flank overlooking the Atlantic in a rail project that might cost an estimated MAD 75 billion (USD 7.58 billion). The 'Express Train' will connect Morocco's largest city, Casablanca, with Agadir, located in the south.

Growth in E-commerce Sector Driving the Market

According to industry estimates, e-commerce in Morocco employs nearly 2 million people, about 14% of the active population, and contributes 8% to the national GDP. COVID-19 led to an e-commerce boom in many African countries, but its growth in Morocco has been particularly impressive.

With a four-month lockdown, Moroccans relied on the internet to purchase almost everything from food and clothing to electronics. By the end of the year, more than 1,000 e-commerce websites were operating in the country.

In the base year, e-commerce sites in Morocco witnessed a 46% increase in transaction volume and a 36% increase in the amount of money spent compared to the same period last year, according to figures from the Interbank electronic banking center (CMI), which monitors online transactions in the country.

Spurred on by the pandemic, Morocco's e-commerce growth is not slowing down any time soon. The figures in the base year show an increase of 48% in the number of transactions and 30% in the amount from the last year. Online businesses in Morocco are not limited to e-commerce giants like Jumia and Shein.com, which operate virtual marketplaces.

Currently, the proportion of Internet users in the country reached 75% of the country's 37 million population, with 89.6% of users connecting via mobile devices in the base year. The popularity of the internet and smartphones greatly contributed to the growth and development of online commerce in Morocco.

Morocco Freight & Logistics Market Competitor Analysis

Most international vital players and European companies dominate the Moroccan freight and logistics market. Most logistics companies are also active in various freight transport and warehousing services. The market is anticipated to grow during the forecast period with the growing e-commerce and increasing investments in the infrastructure sector of the market.

Major regional players have been observed to venture into new regions, allowing companies to improve their geographic reach. New competitors are entering the freight and logistics market with customized and industry-specific services.

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Some significant players include Bollore Africa Logistics, SMTR Carre, DB Schenker, Kuehne & Nagel, and LOGICOLD. The construction of 1,800 km of new expressways, the expansion of the rail network, and the development of logistics and industrial zones led to a sharp rise in the number of companies active in the transport and logistics business.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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