

Morocco Flexible Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Moroccan flexible packaging market was valued at USD 1.77 billion the previous year and is expected to reach USD 2.18 billion by the end of the forecast period, registering a CAGR of 3.53%.

Key Highlights

- Flexible packaging allows more economical and customizable options for packaging products. Flexible packaging products are particularly useful in industries requiring versatile packaging, such as the food and beverage, personal care, and pharmaceutical industries. It has grown popular due to its high efficiency and cost-effectiveness.
- Major technological trends are emerging in flexible packaging: growing e-commerce demand for shippable packaging or convenient packaging; the need to integrate technology with packaging is driven by rising demand for packaging materials with improved barrier qualities, product innovation, and increasing supply chain digitization.
- The growth of the food ingredients market in the region is driven by the expansion of the food and beverage industry, increasing consumption of dairy and frozen dairy products, and increased focus on demand for processed and packaged foods. Flexible packaging is the common packaging material. The growing demand for portable and suitable food packaging is driving the use of flexible packaging across various industries.
- The demand for flexible packaging products is generally driven by millennial customers, who prefer single-serving and on-the-go food and beverage foodstuffs. Its flexible packaging, durability, portability, and lightweight properties make it a prominent option for packing products. This is expected to drive the demand for flexible packaging in Morocco's food and beverage industry.
- Morocco is concerned about managing solid waste, especially non-biodegradable post-consumer plastics, mainly generated from the packaging industry. The government of Morocco is focused on developing action plans to reduce the amount of marine plastic pollution that enters the oceans. It plans to prevent this by adopting a "circular economy" to minimize waste and pollution by extending the life cycle of plastic products and promoting the sharing of materials and products. This can restrain the market's

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growth.

-In the era of post-COVID packaging, most consumers also became aware of sustainability as a broader idea, although having embraced the use of plastic for more advanced safety in terms of hygiene. The pandemic increased awareness of flexible food packaging. The crisis accelerated the online shopping boom, causing significant disruption to shopping and consumption habits, especially among rural residents who traditionally shop at retail stores. Multiple factors, such as the increasing use of soft and flexible materials, drive the market with varying impacts over the short, medium, and long term.

Morocco Flexible Packaging Market Trends

Plastic to Dominate the Material Segment

- Morocco is focused on collecting solid waste, especially non-biodegradable post-consumer plastics, mainly from the packaging industry. The government of Morocco is focused on developing action plans to reduce the amount of marine plastic pollution that enters the oceans. It plans to prevent this by adopting a "circular economy" to minimize waste and pollution by extending the life cycle of plastic products and promoting the sharing of materials and products, which is expected to promote the growth of flexible pouches during the forecast timeframe.

- Additionally, Morocco plastic recycling company Sumilon is expanding operations to fulfill the growing global demand for recycled plastics. Its research showed that only 1,000-1,200 tonnes are collected yearly. The company aims to process 90% of this supply in Morocco, and its new production line is anticipated to come online towards the end of 2023. The company is boosting its presence in Morocco and other parts of Africa.

- Moreover, organizations are focused on expanding their business in the country. For instance, in July 2023, Smurfit Kappa inaugurated a packaging facility in Rabat, Morocco. The group has invested over EUR 35 million (USD 37.5 million approximately) in the 25,000 m² facility, which will be completed from ground break to operation in seven months and will support 400 direct and indirect jobs. The facility will allow the company to efficiently supply advanced and sustainable packaging solutions to local customers and multinationals in Morocco. Such expansion will leverage the market for bags and pouches in the country.

- Furthermore, growing demand for non-alcoholic beverages is expected to fuel market growth. Flexible packaging is crucial in reducing waste and allowing online brands to innovate their packaging to enhance the experience. There is a considerable high demand for flexible packaging in the beverage sector due to reduced production, shipment costs, and ease of handling. According to the Government of Canada, The total retail sales of beverages in Morocco in 2020 were estimated at more than USD 3.1 billion. This included approximately USD 2.7 billion in non-alcoholic beverage sales. By 2024, the total retail sales value is expected to be around USD 3.5 billion, with USD 3.1 billion million generated from non-alcoholic beverage sales.

Food Industry to be the Largest End User

- The food processing industry in Morocco contributes nearly 6% of the country's GDP. It benefits from first-rate manufacturing facilities, good infrastructure, and easy market access in neighboring African nations. Over the medium-term forecast period, Fitch Solutions indicated a favorable outlook for Morocco's food service market. It anticipated that between 2022 and 2026, nominal household spending on restaurants and hotels (as a stand-in for food services) would increase at a compound annual growth rate of 3.9%.

- Morocco has been working to produce local plastic, metallic, and paperboard packages because packaging is an integral part of agrifood production and distribution. Morocco's federations in the agrifood and packaging industries agreed in June 2022 to reduce its reliance on imports. Moroccan players in the agrifood and packaging industries banded together to lessen the MAD 8 billion (~USD 786 million) burden of imports after being adversely affected by the economic crisis and the rise in raw material prices.

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- Market players are increasing their investment, partially supported by the government's initiatives to become a self-sustained food economy. Packaging organizations are poised to witness growth owing to this development. For instance, in May 2022, the largest retailer in Morocco, Retail Holding, and the UAE-based packaging manufacturer Hotpack Global announced plans to take 80% of the country's packaging market jointly.
- Moreover, in March 2022, International Paper (IP), one of the largest manufacturers of packaging, pulp, and paper products made from renewable fibers, announced a new 2020 investment program worth MAD 100 million (nearly USD 10 million) for its Moroccan production facilities. The purchase of new machinery to increase the plant's production capacities is planned to receive MAD 65 million (nearly USD 7 million) as part of this investment program. The goal is to strengthen International Paper's position in the fresh produce industry.
- Further, Moroccan federations in the agrifood and packaging sectors agreed to cut the country's reliance on imports and create 7,500 direct job opportunities by 2060. Impacted by the economic crisis and surge in the prices of raw materials, Moroccan actors in the agrifood and packaging industries came together to reduce the MAD 8 billion (USD 786 million) burden of imports. The price rise has prompted Moroccan agrifood federations, in partnership with the packaging industry, to increase the sector's integration rate to 39%, up from the current rate of 26%. This is causing players to set up their regional manufacturing units to meet the growing demand for paper packaging.

Morocco Flexible Packaging Industry Overview

The Moroccan flexible packaging market is characterized by fragmentation. It features several key players, including Mondi Pap Sac Maghreb SA (Mondi PLC), Compagnie Industrielle Des Fibres, Multisac SA, Afrimag Glue, and Hotpack Packaging Industries LLC. These market leaders with significant market share are actively engaged in expanding their customer base across the country.

In July 2023, Smurfit Kappa made a substantial investment of approximately EUR 4.7 billion (USD 5.17 billion) to support its global customer base. The company celebrated the opening of its inaugural site in North Africa, a state-of-the-art integrated plant located in Rabat, Morocco. Morocco, recognized as one of the fastest-growing economies globally, is anticipated to achieve a growth rate of 3.5% in 2023, with a further 3.7% increase projected for 2024, according to OECD forecasts. Smurfit Kappa's strategic positioning in Morocco allows it to efficiently serve both the local market and the broader African regions. Notably, the group has invested more than EUR 35 million (USD 38.51 million) in this expansive 25,000 m² facility.

In December 2022, Mondi announced the commencement of production at its impressive EUR 16 million (USD 16.8 million) manufacturing plant located in Tangier, Morocco. This strategic investment significantly enhances production capacity in West Africa, enabling the production of over 500 million paper bags annually. This investment was undertaken with the primary objective of capitalizing on Mondi's existing expertise to meet the rising demand for paper bags within the region.

Additional Benefits:

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

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