

Morocco Flexible Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Morocco Flexible Packaging Market size is estimated at USD 2.00 billion in 2025, and is expected to reach USD 2.45 billion by 2030, at a CAGR of 4.17% during the forecast period (2025-2030).

The flexible packaging market is driven by factors such as the increasing demand for convenient and lightweight packaging solutions, rising consumer awareness about sustainability, and advancements in packaging technology for improved shelf life and product protection.

Key Highlights

- The booming consumer market in Morocco is driven by the growing economy, rising investments, and increasing domestic consumption. According to data from the Organisation for Economic Co-operation and Development (OECD), Morocco's GDP is expected to grow to 3.5% in 2024 and 4.0% by 2025, likely supported by increased foreign demand for Moroccan goods and services.
- Flexible packaging requires less material than rigid packaging, increasing companies' customization options. It also allows high-impact graphics on the product that ensure 360-degree branding, driving the market growth. Companies in Morocco aim to provide safe, affordable, and sustainable flexible packaging solutions.
- Major technological trends are emerging in flexible packaging with the growing e-commerce demand for convenient packaging in Morocco. According to the International Trade Administration, E-commerce is expected to grow in Morocco with the digital transformation and the rising internet penetration rate in the forecast period.
- The growth of the region's food ingredients and food industry is driven by the expansion of the food and beverage industry, increasing consumption of dairy and frozen dairy products, and increasing focus on demand for processed and packaged foods. The growing demand for single-serving and on-the-go food and beverage options is expected to drive the demand for flexible

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packaging in Morocco's food and beverage industry.

- Various companies in Morocco need to be better equipped to recycle plastic, especially non-biodegradable post-consumer plastics, which are mainly generated by the packaging industry and can hamper market growth. Morocco's government aims to develop action plans to reduce the amount of plastic pollution that enters the oceans and landfills. The government seeks to reduce plastic consumption in the country, which can hamper the demand for plastic packaging in the market.

Morocco Flexible Packaging Market Trends

Plastic is Expected to Dominate the Material Segment

- The Moroccan government is focused on collecting solid waste, especially non-biodegradable post-consumer plastics, mainly from the packaging industry. It is also focused on developing action plans to reduce the amount of marine plastic pollution that enters the oceans.
- The government 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 period.
- The government of Morocco focuses on investment in workshops and events to promote the increased use of recycled plastics for various end-user industries in the country. In January 2024, the Moroccan Ministry of Trade and Industry and the Ministry of Energy Transition and Sustainable Development co-organized a workshop in partnership with the Switch to Circular Economy Value Chain (SWITCH2CE) project. Industry experts and government representatives from Morocco highlighted the use of recycled packaging plastics such as rPET to reduce the use of virgin plastics and prevent plastic leakage in the environment.
- Companies aim to provide sustainable packaging solutions and invest in initiatives to integrate sustainable materials in production processes and minimize waste generation across operations. Companies such as Hotpack Packaging Industries LLC, a UAE-based company, manufacture packaging products that are environmentally friendly, recyclable, or both. The company also invests in partnerships with like-minded organizations to amplify its impact on the environment and drive toward sustainability.
- Morocco is one of the top destinations for Indian exports. Products such as auto parts, plastics, textiles, and specialty chemicals are exported to Morocco from India. The growth in Indian plastic imports boosts the country's demand for plastic flexible packaging. According to the IMC Chamber of Commerce and Industry, the import of plastics from India increased by 278.51% in 2023 compared to the previous year.

The Food Industry is Expected to Be the Largest End User Segment

- Food packaging is undergoing a significant shift in Morocco. Heavy, rigid cardboard and plastic containers are phasing out, making way for flexible packaging. This transition is largely driven by the cost-effectiveness and efficiency of flexible packaging. Unlike their heavier counterparts, flexible packages demand fewer materials and are more economical to produce, offering a budget-friendly solution without sacrificing quality.
- The rise in the food retail industry in Morocco is attributable to changing demographics, urbanization, growing tourism, and the evolution in consumer buying behavior. According to data by the Kenya Association of Travel Agents (KATA), Africa recovered 92% of pre-COVID arrivals in 2023 due to growth in tourism in Tanzania, Ethiopia, and Morocco, which drives the food retail industry in the country.
- The government of Morocco is focusing on investments to develop effective and sustainable flexible packaging solutions. In February 2024, Circle Economy, an Amsterdam-based organization, partnered with the Centre Technique de Plasturgie et de Caoutchouc (CTPC), a non-profit organization in Morocco, to support small and medium-sized enterprises (SMEs) in the plastic

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packaging sector to adopt circular economy practices.

- The rapidly growing food service industry in Morocco, due to growing tourism and the increasing number of food service outlets, is driving the market growth. Quick-service restaurants (QSRs) and food service establishments, including Pizza Hut, Domino, KFC, and Burger King, have a strong presence in Moroccan cities such as Casablanca, Marrakech, and Rabat, boosting the food industry.
- The growth in the production of cereals, including wheat and other grains, in Morocco enhances the country's flexible packaging industry. Growth is expected in the food industry due to an increase in the use of packaging materials for cereals, savory snacks, and confectionery. According to the Food and Agriculture Association (FAO), the production of wheat and cereals in Morocco increased from 3.3 million tons and 2.5 million tons in 2022 to 5 million tons and 3.7 million tons, respectively, in 2023. Such trends are expected to boost the reliance on large flexible bags and sacks across the market.

Morocco Flexible Packaging Industry Overview

The Moroccan flexible packaging market is fragmented. It features several key players, including Mondi Pap Sac Maghreb SA (Mondi PLC), Compagnie Industrielle Des Fibres, Alpla Werke Alwin Lehner GmbH & CO KG, Afrimag Glue, and Hotpack Packaging Industries LLC. These market leaders with significant market share are actively engaged in enhancing their customer base across the country through expansion, partnerships, and acquisitions.

- November 2023: Alpla Group, an Austrian plastic manufacturer, expanded its presence in North Africa in Morocco. The company acquired a majority stake in Atlantic Packaging, a Moroccan company, and partnered with Diana Holding to manufacture affordable and sustainable plastic packaging solutions in Morocco. The expansion was intended to help Alpla Group grow its customer base and geographic footprint in Africa.

Additional Benefits:

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

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