



Association Marocaine
pour l'Industrie et le Commerce de l'Automobile

MOROCCO AUTOMOTIVE INDUSTRY PRESENTATION

CONTENT

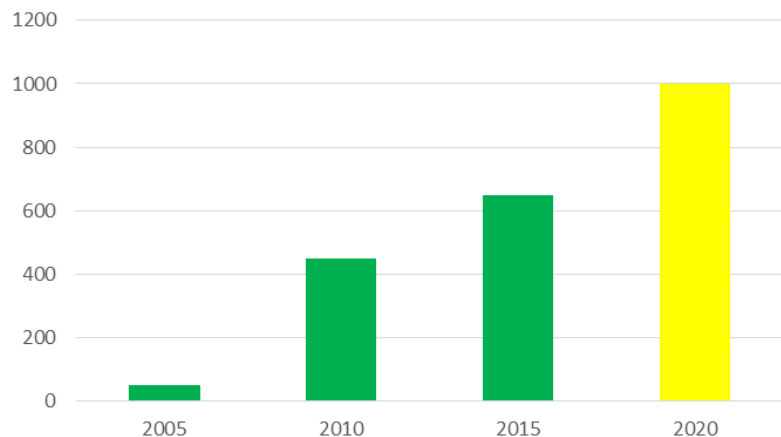
- Sector Evolution
- Cost Structure
- Development Strategy
- Automotive Ecosystems
- AMICA Instances

CMP Platform
P2 Program – B-Hatch silhouette
1.2l & 1.6l petrol engines



Automotive Production in Morocco

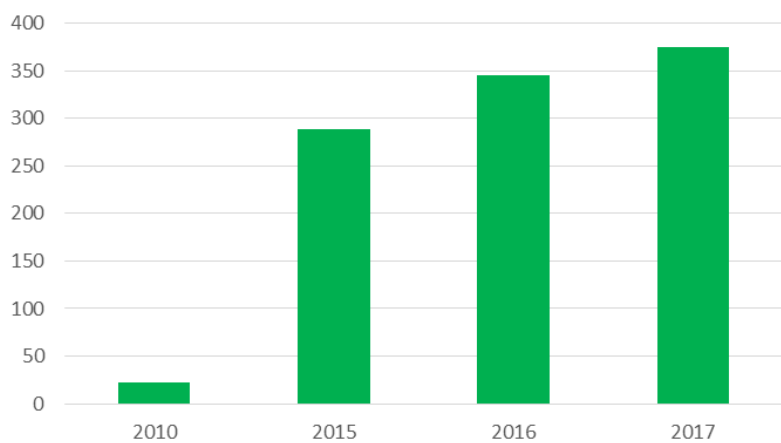
OEM capacity engaged (x1000)



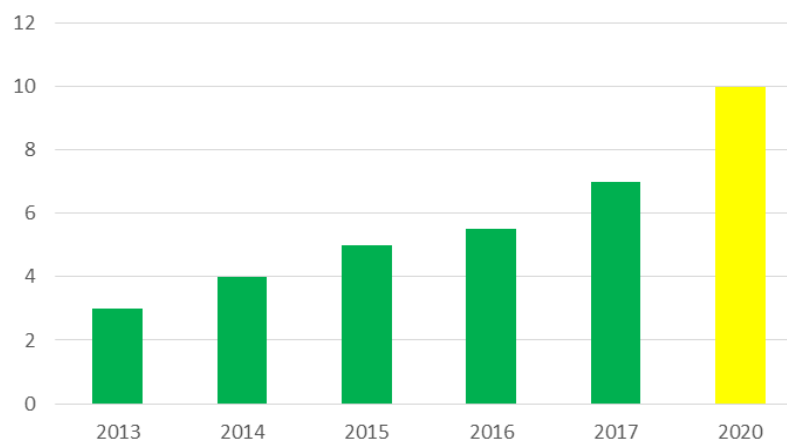
Jobs created (x1000)



Vehicules production (x1000)



Turnover BEuros

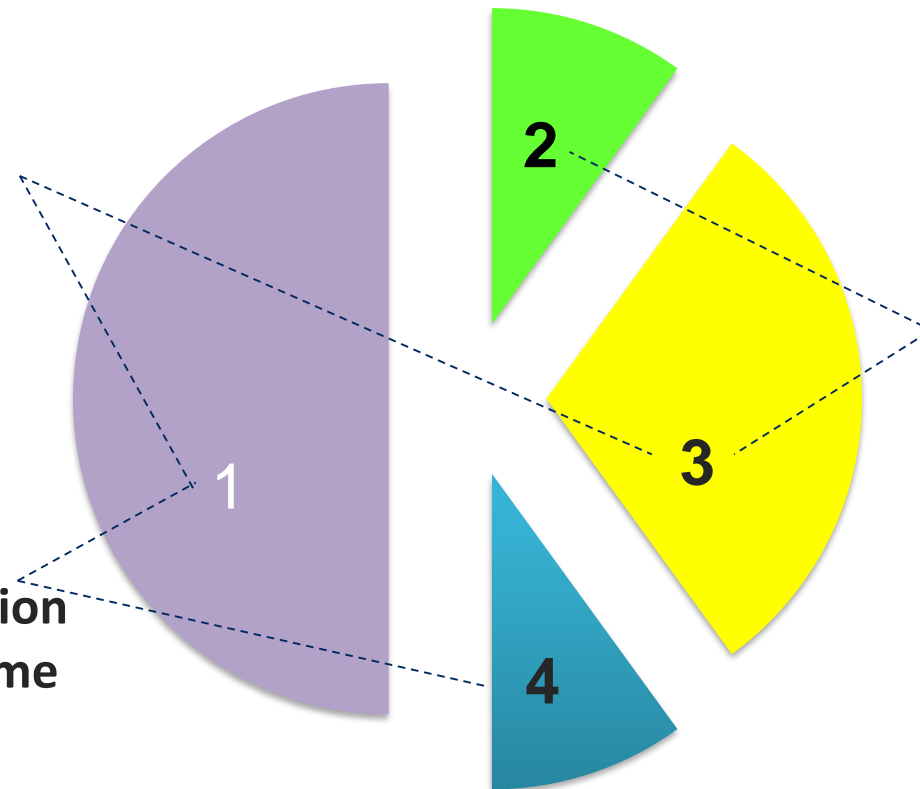


Cost structure for the supplier « Lambda »

1. Raw materials, components and consumables supply
2. Transformation (Payroll)
3. Transformation (Depreciation-Energy-Maintenance ...)
4. Expedition of finished goods

1st Level
Plant, SC & LC
Development

2nd Level
Logistics Optmisation
Cost & Delivrey time



3rd Level
Competences
Development

Dedicated training centers (IFMIA)
Needs identification and coordination with
OFPPT centers and Ministries



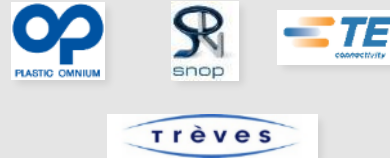
Subcontracting



Subcontracting needs identification and launch
of Automotive Subcontracting Event

DELPHI

Competency



Task force with the government to give
sector recommendations



Logistics



YAZAKI

Watch & Strategy



SOCALIX

Financing



Agreements signed with local banks

DEVELOPMENT STRATEGY

1.

Subcontracting Development
Tier 2&3 Suppliers
Development

2.

New suppliers
implementation

3.

Sourcing development
//
Implementation of new OEMs

Subcontracting

Tier 2&3 suppliers

Tier 1 suppliers

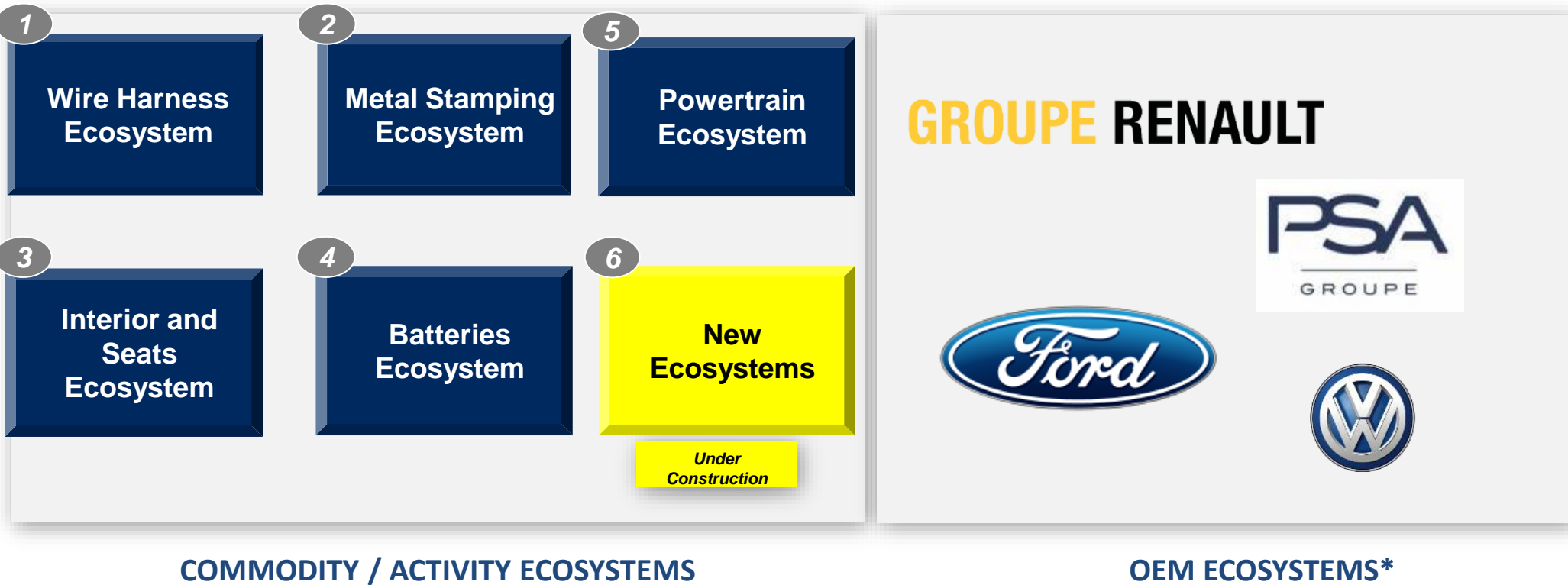
Renault
Tanger

SOMACA

22 sites
assembly
plants < 48h

PSA

STRUCTURING THE INDUSTRY IN ECOSYSTEMS





Commitment Targets for Industrial Companies – 2020 Horizon



Government Support Commitment Targets – 2020 Horizon

+ 66 500

Jobs created

+ 3 B€

TO added

+ 2,2 B€

Export TO added

+ 21 pp

Local integration
increase

+ 110 Ha

Rental land with
attractive price

~ 66500

Trained people
according
Ecosystems needs

8 mesures

Specific measures
to support local
integration

170 M€

Investment
subsidies

Chronology of automotive ecosystems

October, 29th 2014

Wiring

Interior /
SeatsMetal /
Stamping

Batteries

June, 19th 2015February, 23rd 2016

Powertrain

April, 8th 2016

RENAULT

July, 4th 2016

DELPHI

July, 6th 2017

LEONI

December, 11th 2017

Valeo

Sector Evolution

Cost Structure

Development
Strategy

**Automotive
Ecosystems**

AMICA Instances



1

200 000

Vehicles & Engines per year

2

1 B €

Sourcing per year

3

60%

Local content at SOP

4

1500

Engineers within a R&D center

Sector Evolution

Cost Structure

Development
Strategy

**Automotive
Ecosystems**

AMICA Instances



RENAULT

1

1,5 B €

Sourcing per year

2

900 M €

Investment

3

65%

local content

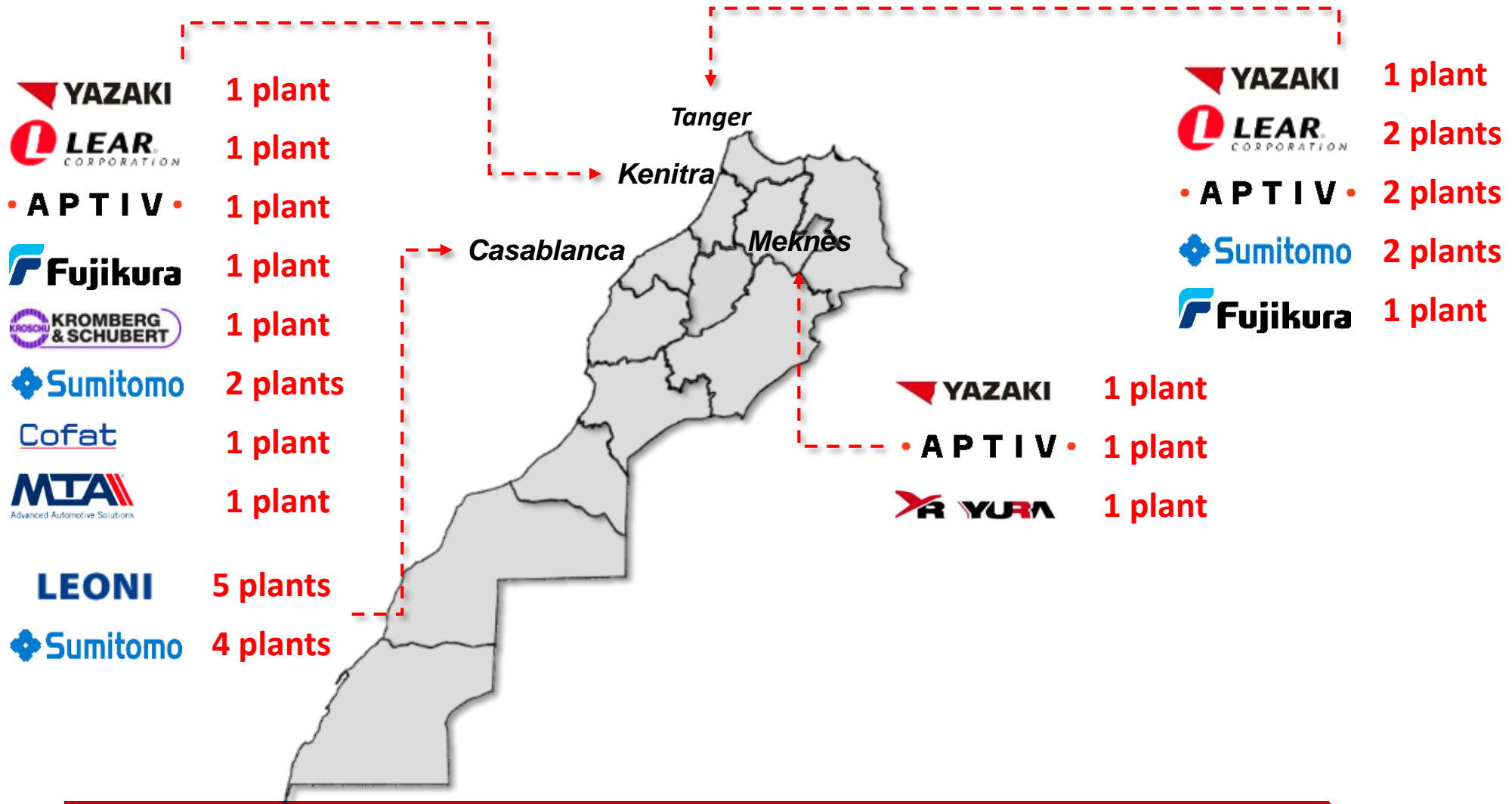
WIRE HARNESS

Engagement 2020

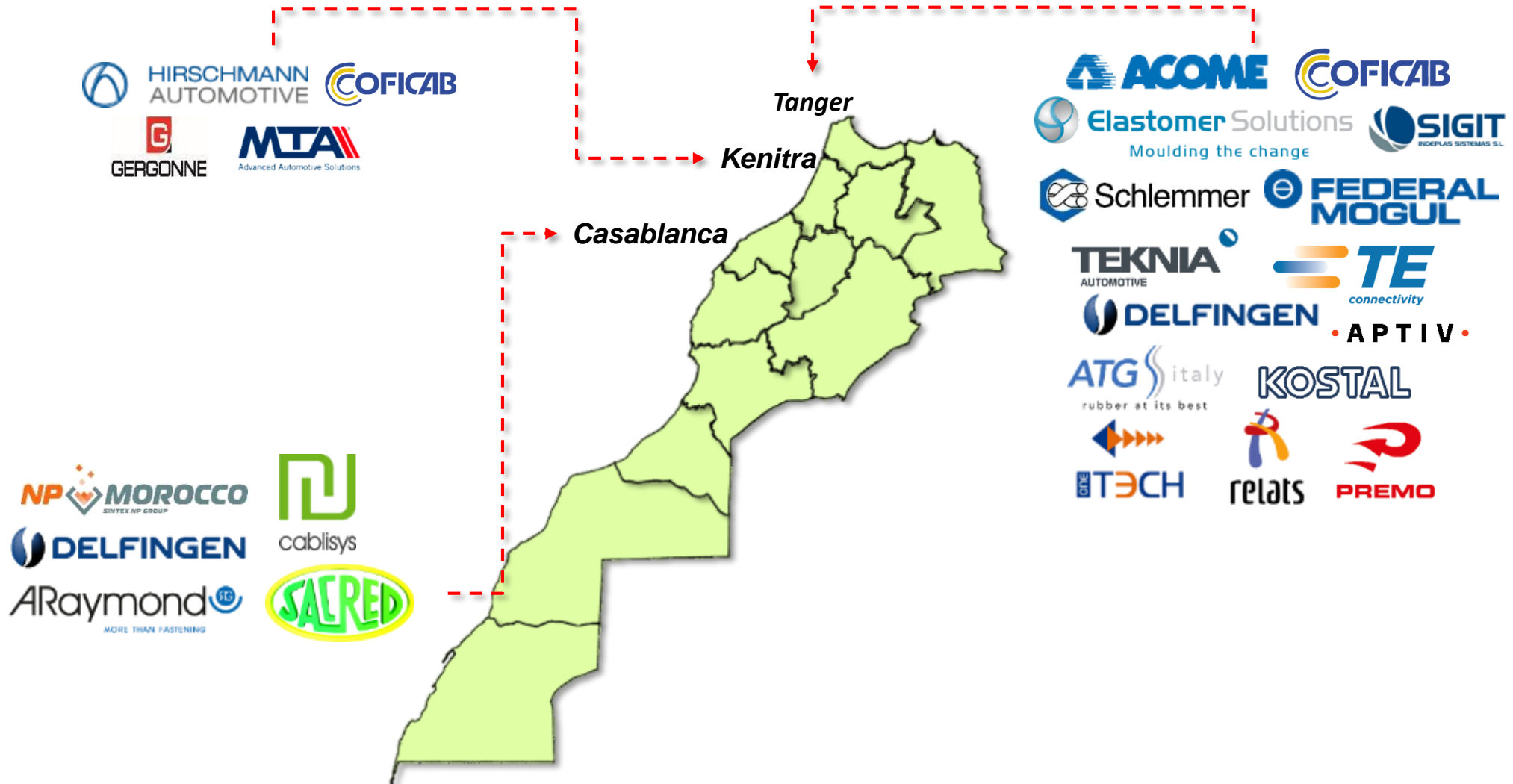
TO 2,5 B euros
Jobs 70.000
Local VA 66%



WIRE HARNESS – TIER1



WIRE HARNESS – TIER2



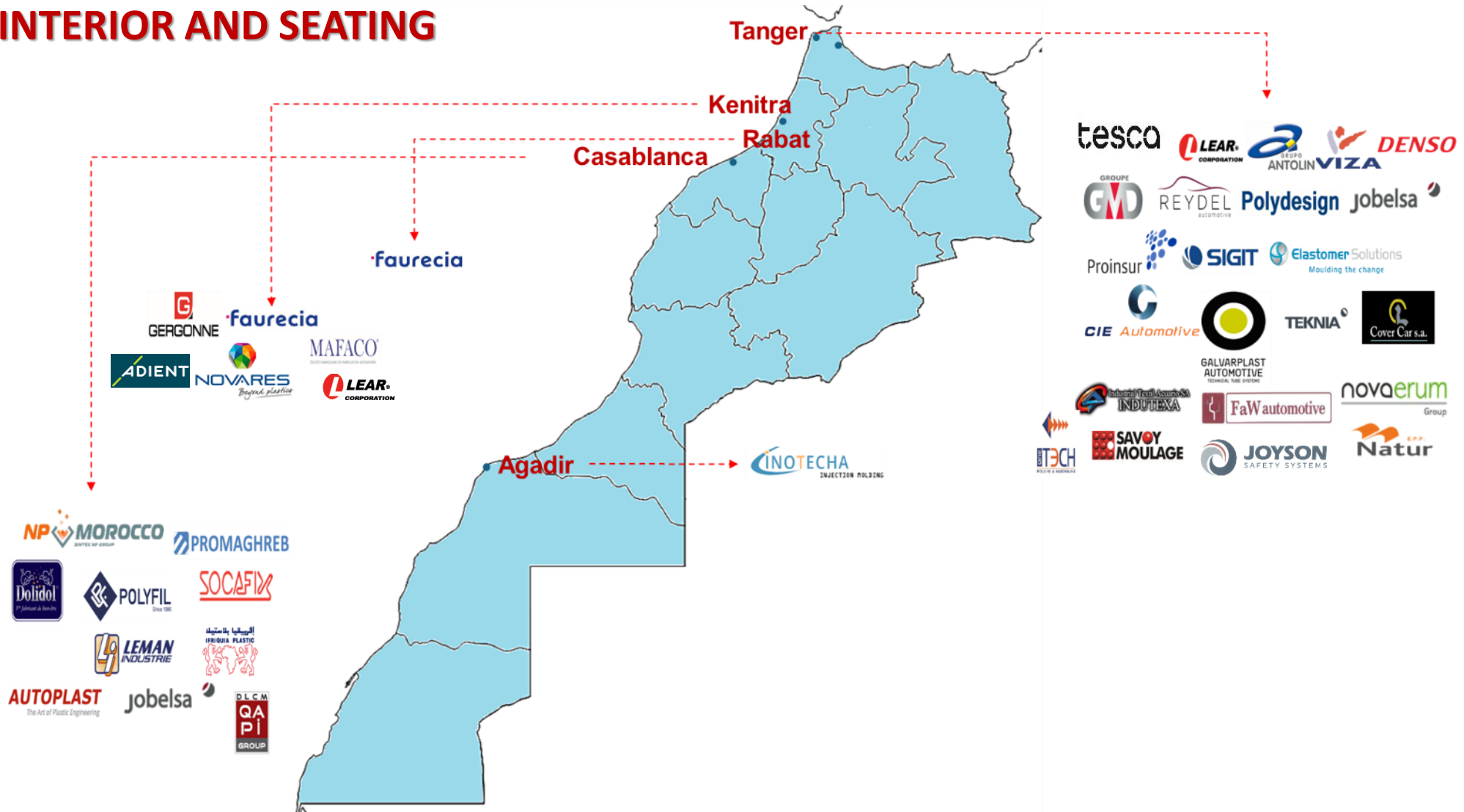
INTERIOR AND SEATING

Engagement 2020

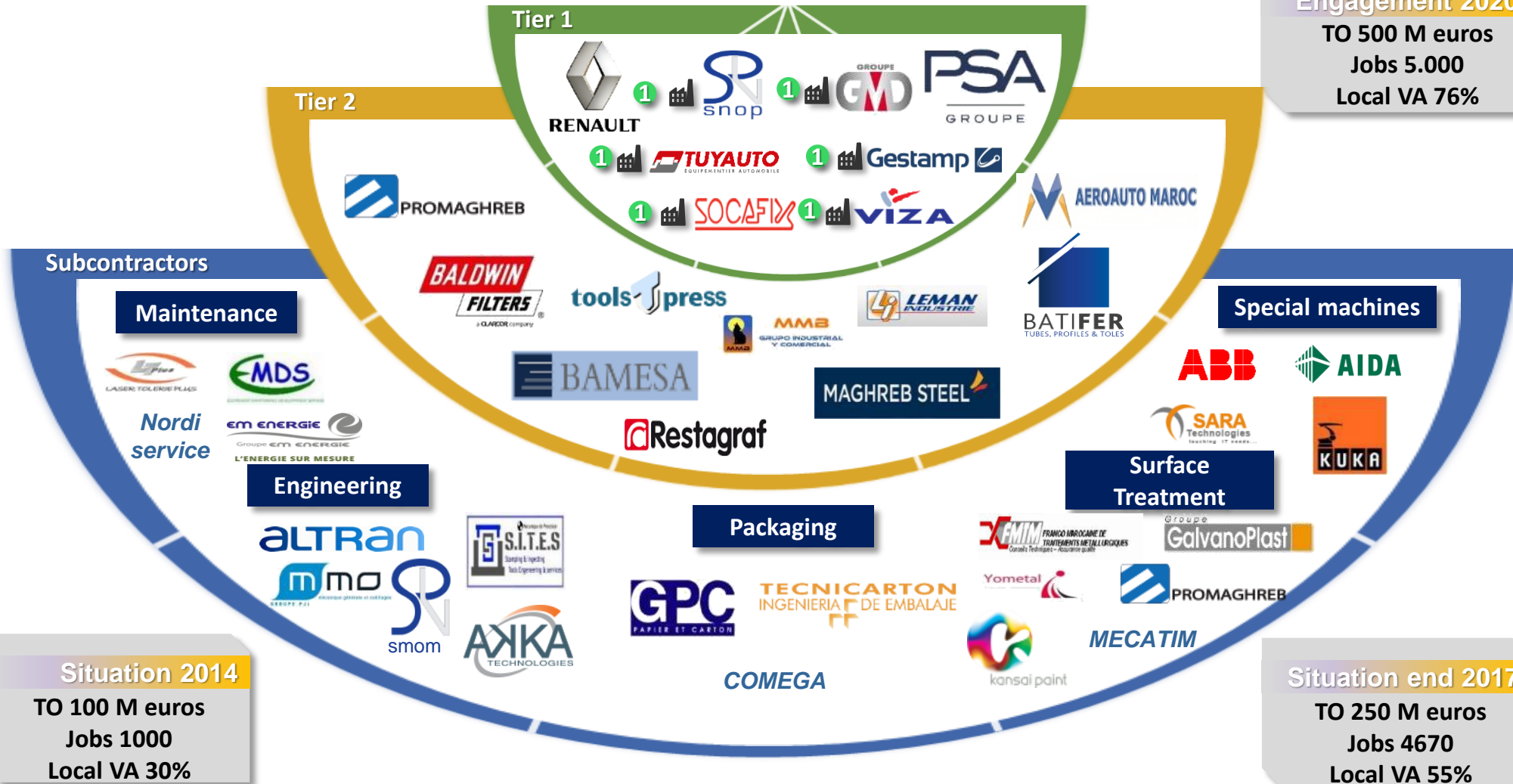
TO 1.000 M euros
Jobs 30.000
Local VA 65%



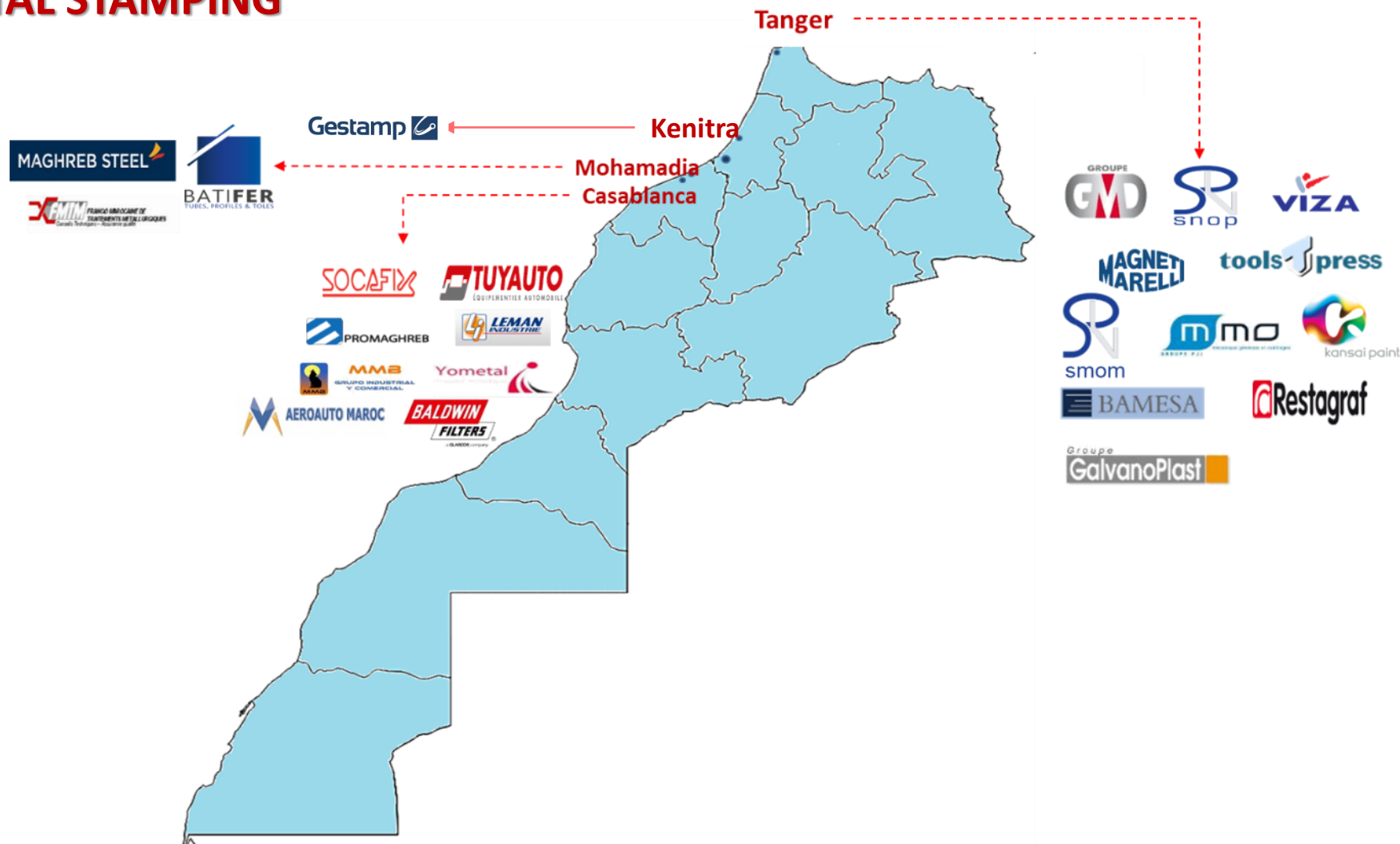
INTERIOR AND SEATING



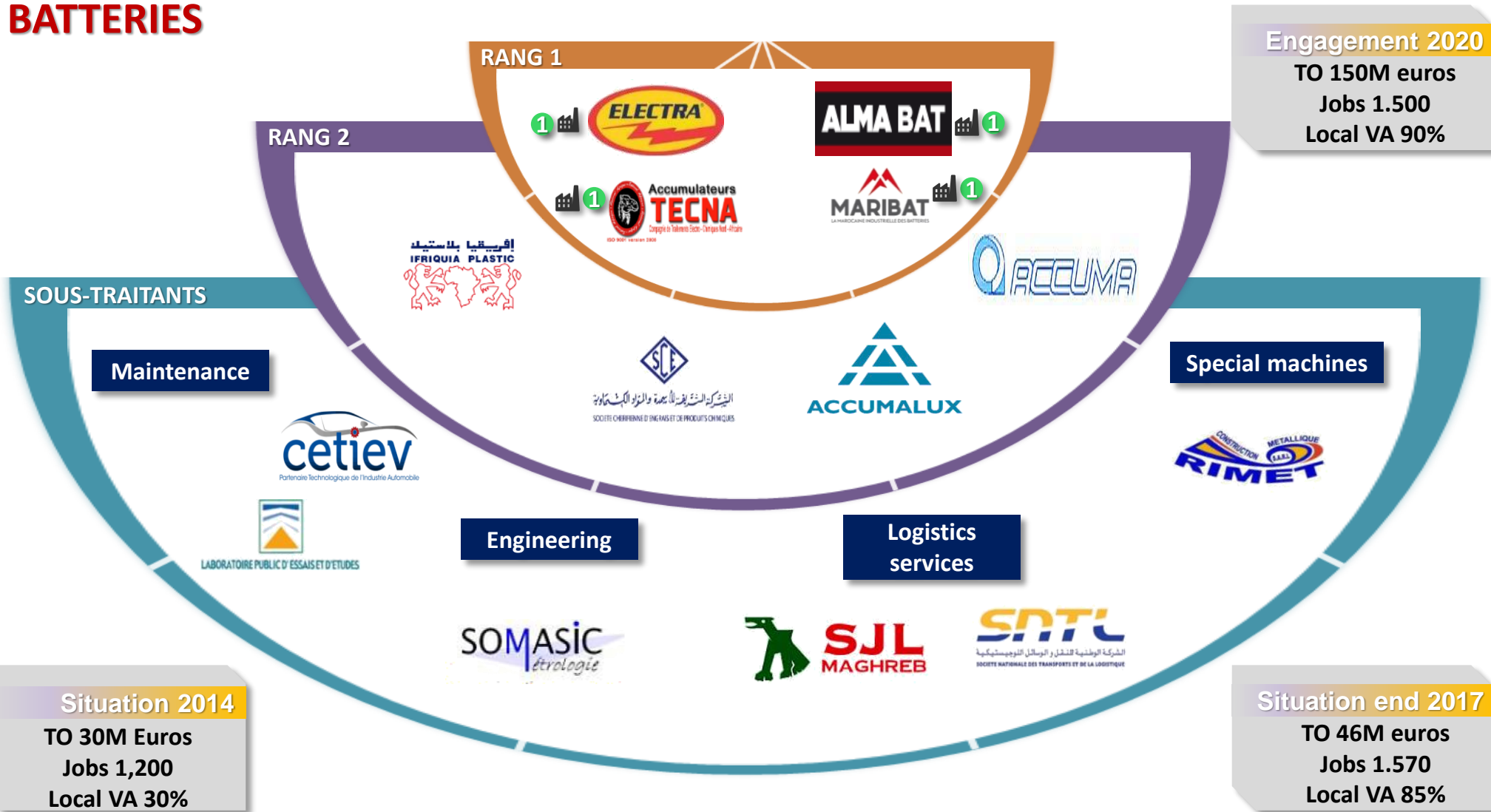
METAL STAMPING



METAL STAMPING



BATTERIES



BATTERIES



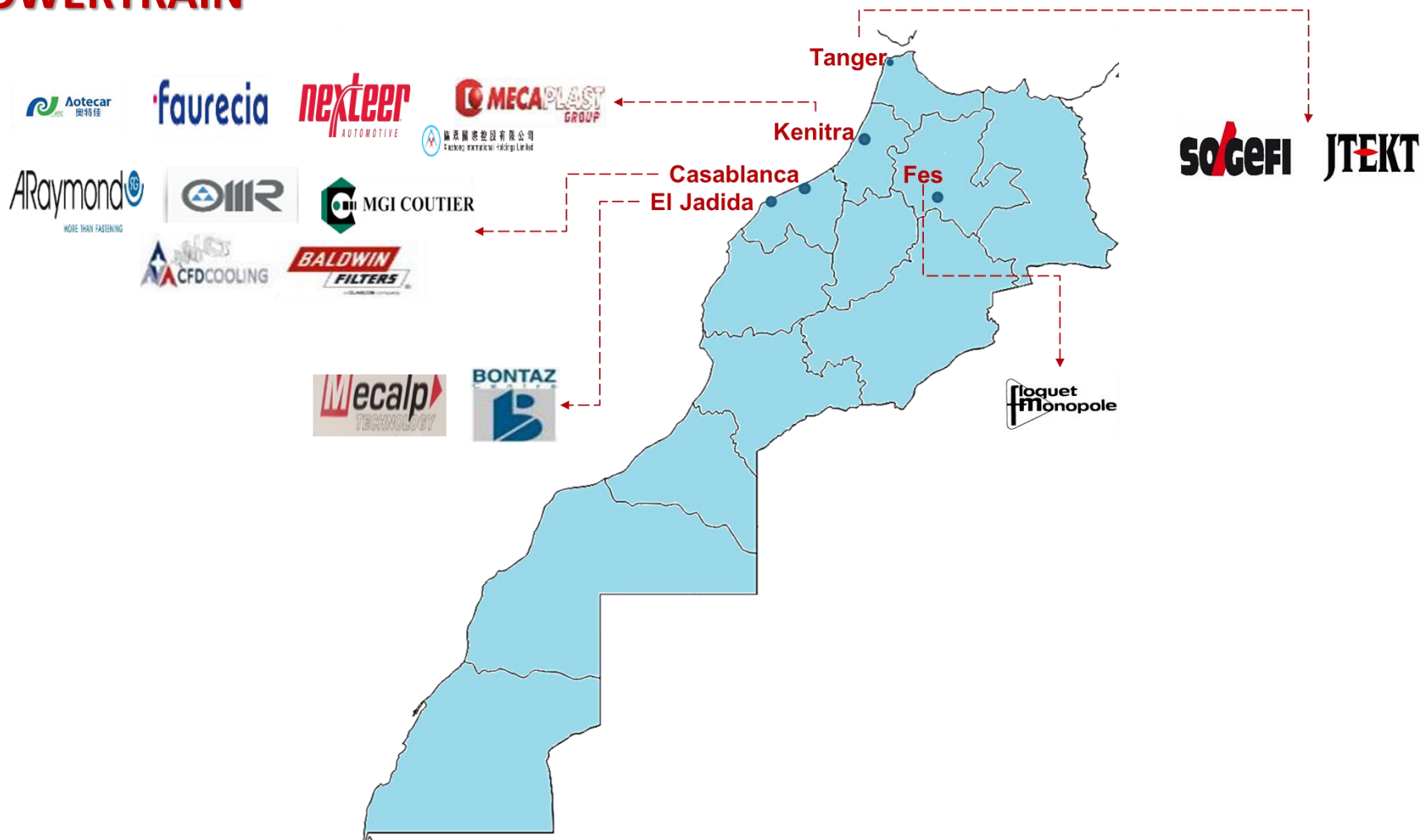
POWERTRAIN

Engagement 2020

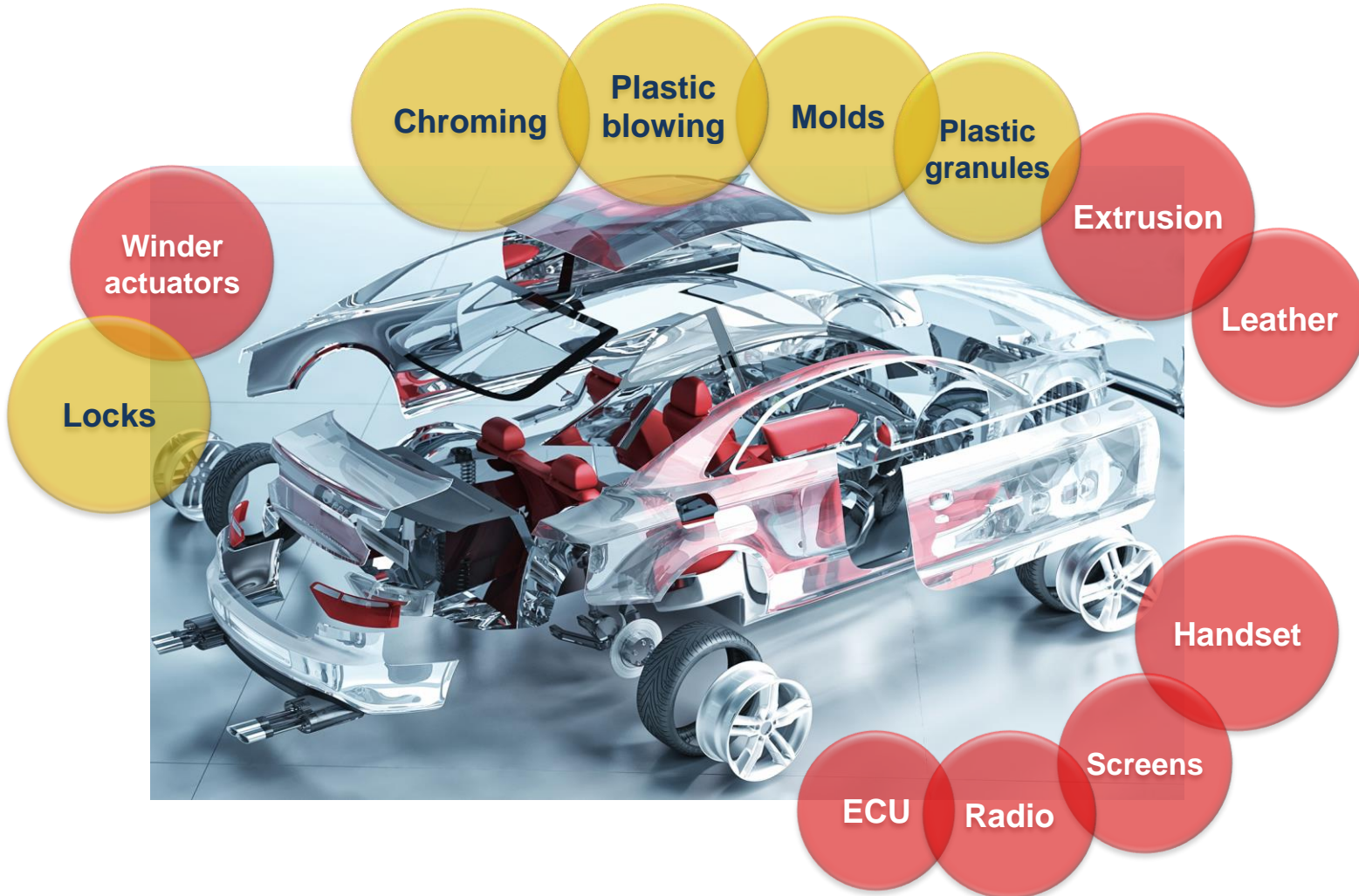
TO 600M euros
Jobs 10.000



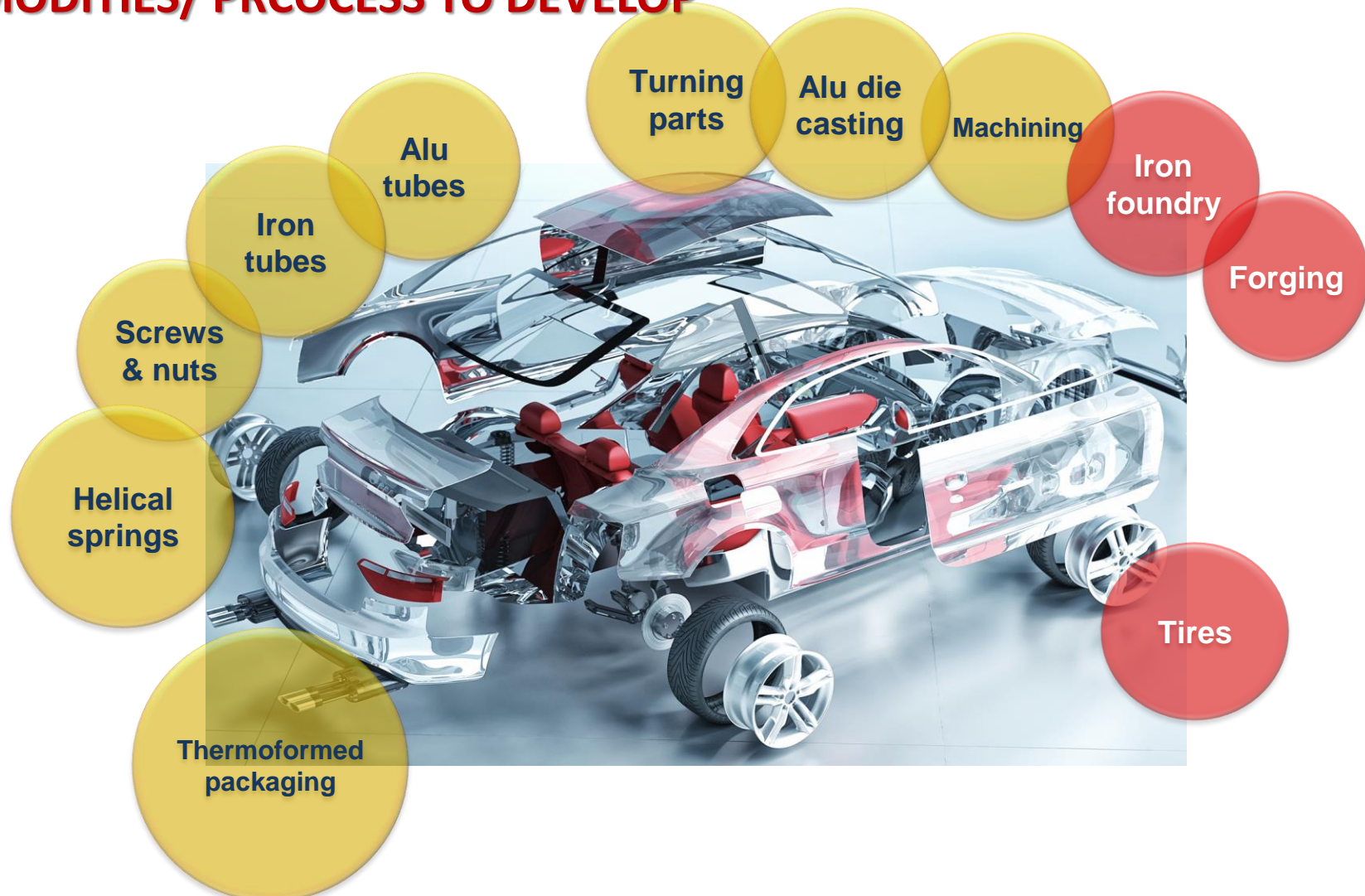
POWERTRAIN



COMMODITIES/ PROCOESS TO DEVELOP

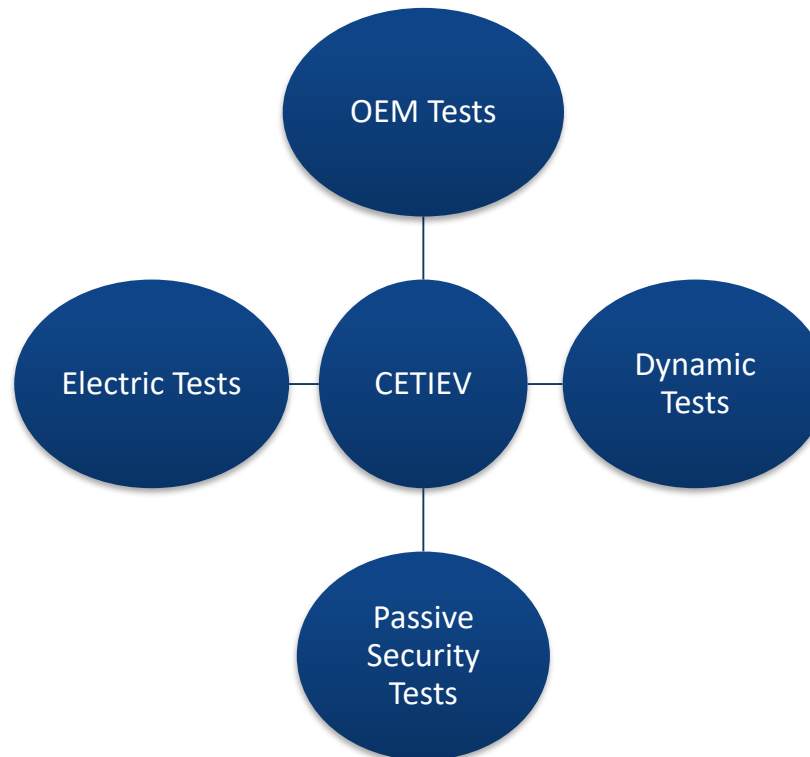


COMMODITIES/ PROCESS TO DEVELOP





Created in 2005, 8700 K€ Total Investment

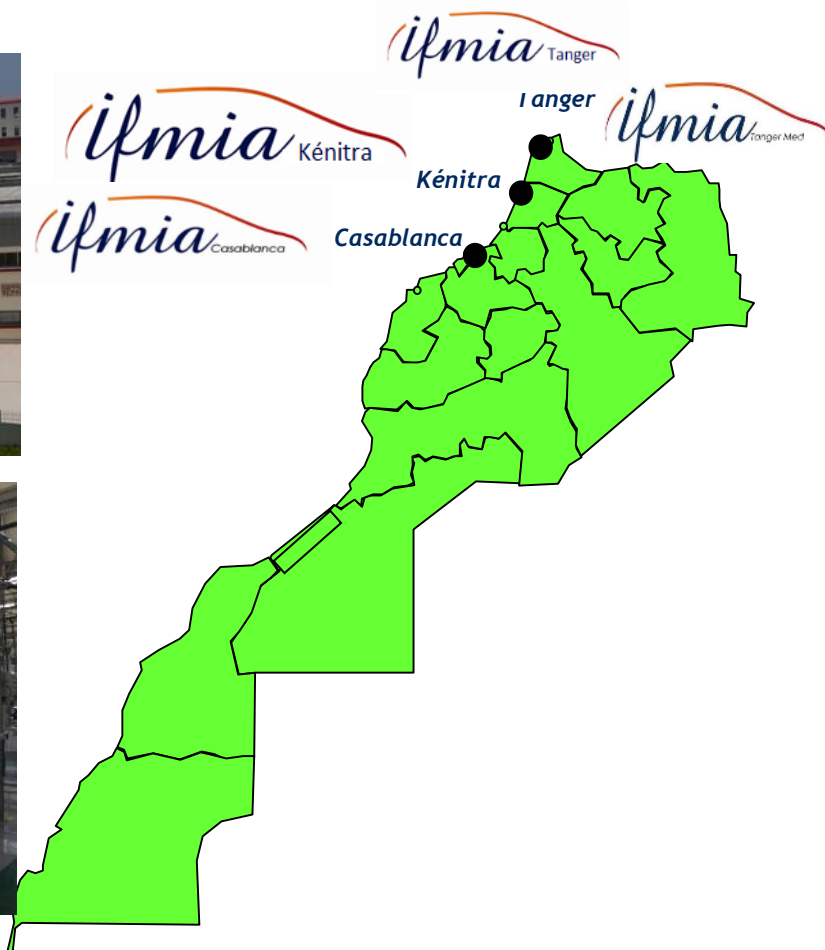


CEED

- Product validation center on project



IFMIA



THEY TRUSTED MOROCCO



Thank you.

Abdelaziz MEFTAH, Directeur général
E-mail: a.meftah@amica.org.ma
www.amica.org.ma



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