INFORMATION NOTE

Morocco's Aerospace and Defence Industries: Industrial Growth, Strategic Partnerships and Regional Positioning

Marrakech Air Show 2026: A New Stage in Morocco's Industrial Development

The 8th edition of the Marrakech Air Show, held from 7 to 10 October 2026, underscored Morocco's growing role in the international aerospace industry and its ambitions to establish a domestic defence-industrial base. The event brought together international manufacturers, investors and government delegations, resulting in 26 agreements and cooperation instruments covering aerospace manufacturing, advanced research, defence technologies and industrial development.

Among the main announcements were new investments in aircraft wiring, precision machining, surface treatment and engine-related systems, alongside the establishment of the Africa Center of Manufacturing Excellence (ACME) consortium, bringing together Moroccan institutions and international manufacturers including Airbus, Boeing, Lockheed Martin and Safran. In the defence sector, seven agreements were concluded to facilitate future industrial establishments involving companies such as France's Arquus, India's MKU and Canada's INKAS. The UAE-based EDGE Group also announced a defence procurement contract and cooperation to explore local manufacturing opportunities.

A particularly significant announcement was the unveiling of IRIFI, a long-range autonomous strike system, to be developed by Morocco's National Defence Administration in collaboration with Harmattan AI, a French defence-technology company specialising in artificial intelligence and autonomous systems. The system has a reported operational range of up to 2,000 kilometres and is intended to be manufactured in Morocco. A separate industrial investment agreement provides for the establishment of local technological and production capabilities, including research and development, engineering and cooperation with Moroccan academic institutions. The initiative remains at the development stage, but reflects Morocco's ambition to extend its industrial capabilities into advanced defence technologies.



Aerospace: A High-Growth Industry Driving Economic Diversification

Over the past two decades, Morocco has developed one of Africa's most established aerospace manufacturing ecosystems. The sector now comprises approximately **160 companies employing 25,000 people**, with exports reaching **USD 3 billion in 2025**. Annual exports could reach USD 5 billion within three years, supported by investments in increasingly sophisticated manufacturing activities.

The industry encompasses aircraft wiring, aerostructures, composite materials, precision engineering, electronics and maintenance services. Its expansion has been supported by Morocco's proximity to European markets, competitive industrial infrastructure, specialised workforce and integration into international supply chains. The Casablanca–Nouaceur industrial corridor, particularly the Midparc aerospace platform, has become the centre of this development.

Major international companies operating in Morocco include Safran, Airbus, Boeing, Collins Aerospace, Hexcel and Sweden's Trelleborg. Their continued investments have contributed to establishing Morocco as a manufacturing platform for international aircraft programmes.

Recent projects also illustrate the sector's progression towards higher-value activities. **In February 2026**, **Safran announced an investment exceeding USD 330 million** in a landing-gear manufacturing facility near the city of Casablanca, expected to create approximately 500 skilled jobs. This complements the group's investments in aircraft-engine assembly and maintenance facilities. Safran also announced a new industrial activity dedicated to aircraft-engine lubrication systems during the Marrakech Air Show.

Other industrial developments include the expansion of Hexcel's composite-material manufacturing operations, Trelleborg's specialised aerospace sealing facility and **Airbus's plans to expand its Moroccan industrial footprint and establish helicopter maintenance services for Morocco and West Africa.**

These investments reflect a shift from relatively labour-intensive subcontracting towards more sophisticated industrial processes. Beyond export revenues, the sector contributes to foreign investment, skilled workforce, supplier development and the diversification of Morocco's manufacturing economy.

The Moroccan government is also seeking to expand local sourcing and strengthen the participation of national SMEs in international aerospace programmes. This effort is supported by specialised institutions, including the Institute of Aeronautical Trades (IMA) and the Specialised Institute for Aeronautical Trades and Airport Logistics (ISMALA).



Developing a Domestic Defence Industry

Morocco's established aerospace ecosystem provided an industrial foundation for the development of its defence sector. Existing expertise in precision engineering, advanced manufacturing, technical training and international supply-chain integration offers potential synergies with defence production. However, expanding domestic defence manufacturing also requires sector-specific investment, specialised technologies and dedicated industrial capabilities.

This orientation reflects several complementary objectives: strengthening national security, improving industrial sovereignty, reducing dependence on foreign suppliers in selected areas and creating new opportunities for technological investment and skilled employment.

Law No. 10-20, promulgated on 25 July 2020, established a regulatory framework governing defence and security equipment, weapons and ammunition, including their manufacture and commercialisation. Subsequent implementing measures provided for the regulation of these activities and the establishment of dedicated industrial zones to support defence manufacturing.

Cooperation with India illustrates this transition from equipment procurement towards domestic manufacturing. In September 2025, Tata Advanced Systems, the defence and aerospace subsidiary of India's Tata Group and the first Indian facility in Africa, inaugurated an armoured-vehicle manufacturing facility in the city of Berrechid. The plant produces the WhAP 8×8 wheeled armoured vehicle, developed with India's Defence Research and Development Organisation.

This development is complemented by Moroccan Military Industry (MMI)**,** a Moroccan defence company working with international technology partners. MMI operates a weapons-systems facility near Casablanca and is developing ammunition-production capacity at Sidi Yahya El Gharb. The company plans to begin supplying locally manufactured turrets for Tata armoured vehicles in March 2027 and has expressed ambitions to access international markets.

The emergence of these projects reflects a gradual shift towards domestic manufacturing, maintenance and systems integration. Their longer-term economic significance will depend on the development of Moroccan suppliers, the acquisition of specialised expertise and the effective transfer of industrial capabilities.

Military Modernisation and International Partnerships

Morocco's defence-industrial ambitions accompany a broader modernisation of its armed forces and a diversification of international security partnerships. The United States remains a central defence partner, particularly in combat aviation, training and military equipment. **On 6 October 2026, US defence manufacturer Lockheed Martin announced the successful first flight of Morocco's first F-16 Block 72, the latest and most advanced production variant of the aircraft**. This milestone forms part of a programme involving 25 new aircraft, agreed on with the United States in 2019, alongside the planned modernisation of Morocco's existing F-16 fleet.

Beyond aircraft acquisition, cooperation with American manufacturers also supports the development of domestic maintenance capabilities, including the planned Maintenance Aero Maroc facility at Benslimane. Such activities contribute to technical employment and the long-term sustainability of Morocco's military aviation fleet.

Furthermore , France remains a major industrial partner through companies including Safran, Arquus and Harmattan AI. The bilateral defence cooperation agreement signed in September 2025 and the subsequent establishment of a Joint Defence Committee provide an institutional framework for further cooperation. Morocco has also diversified its partnerships with Turkey, notably in unmanned

aerial systems and the United Arab Emirates. Israel has also become an important partner in Morocco's defence sector, particularly in drones, surveillance and advanced defence technologies. Bilateral cooperation has expanded since 2020, with Israel Aerospace Industries (IAI) and its subsidiary BlueBird Aero Systems contributing to the development of local manufacturing capabilities. Eight Israeli defence companies also participated in the Marrakech Air Show 2026.

Canada has also strengthened its presence in Morocco's aerospace sector. In April 2026, Pratt & Whitney Canada inaugurated a new manufacturing facility at Midparc in Nouaceur, representing a USD 76 million investment and expected to create 200 jobs by 2030.

Regional Positioning and Economic Prospects

Morocco's industrial development is closely linked to its wider economic and diplomatic engagement with Africa. Its established aerospace ecosystem, industrial infrastructure, geographic connectivity and international partnerships provide a foundation for expanding manufacturing and specialised services towards African markets.

The planned Airbus helicopter maintenance operation serving Morocco and West Africa illustrates this regional dimension. Similarly, defence manufacturers establishing operations in Morocco have identified opportunities to serve international markets, although future exports will depend on production capacity, commercial demand and applicable export authorisations.

Morocco's defence cooperation with African countries also extends to military training, security partnerships and participation in international peacekeeping operations. These engagements reinforce its institutional relationships across the continent and provide a wider context for future industrial and technological cooperation.

Within the MENA region, Morocco's distinctive position rests on the combination of an established export-oriented aerospace industry, growing advanced-manufacturing capabilities and an emerging defence-industrial ecosystem. **The Kingdom's evolving aerospace and defence industries represent an increasingly important dimension of its economic transformation, combining industrial competitiveness, international cooperation and the gradual development of domestic technological capabilities.**

