

MACKAOUI CONSULTING · INDUSTRIAL POLICY REPORT

Pharmaceutical Free Zone Design

Special Economic Zones for Sovereign Pharma
Manufacturing

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Pharmaceutical Free Zone Design

6 PHARMA SEZS	~60 CHINESE PARTNER CANDIDATES	30-50% COST REDUCTION VIA SEZ	\$33B NATIONAL 25-YEAR CAPEX
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Morocco's pharmaceutical ecosystem designates **six special economic zones** for pharmaceutical manufacturing: Tangier Med, Kenitra Atlantic Free Zone, Casablanca CFC, Jorf Lasfar, Mohammed VI Tangier Tech, and Dakhla SEZ. Each zone offers fiscal incentives, regulatory carve-outs, shared utilities, and export-oriented frameworks — reducing entry barriers by 30–50% compared to standard industrial development.

Global Precedents

Suzhou Industrial Park (China-Singapore) — grew from empty land to \$120 billion in annual output within 25 years, hosting 100+ pharma and biotech enterprises. Key factors: single-window regulatory clearance, shared sterile water/waste treatment/power redundancy.

Hyderabad Pharma City (India) — 13 km² dedicated pharma zone with common effluent treatment, captive power, and shared logistics. Hosts 200+ manufacturing units producing 30% of India's pharma output.

Morocco's SEZ Framework

ZONE	SPECIALISATION	FISCAL REGIME
Tangier Med	Export logistics, cold chain, CDMO	5-year full holiday, 50% years 6-15
Kenitra AFZ	Finished formulations, medical devices	5-year full holiday, 50% years 6-15
Casablanca CFC	Sterile injectables, R&D	5-year full holiday, 50% years 6-15
Jorf Lasfar	API manufacturing, fine chemistry	5-year full holiday, 50% years 6-15
Mohammed VI Tangier Tech	Biologics, vaccines	5-year full holiday, 50% years 6-15
Dakhla SEZ	Green energy pharma, Africa gateway	8-year full holiday, reduced rate years 9-20

Anchor Investor Targeting

Priority targets are drawn from a systematic screening of ~60 Chinese pharmaceutical enterprises — scored across production scale, technology sophistication, Africa/MENA export footprint, willingness for JV structures, and technology transfer track record. First-wave target: 5 Chinese API manufacturers, 3 European mid-cap CDMOs, and 2 Gulf sovereign healthcare funds.

CAPEX Allocation

The SEZ infrastructure programme forms part of the \$33B national 25-year CAPEX (realistic scenario), with \$400M allocated to inter-hub regulatory, logistics, training, and data infrastructure in the first 5 years. Individual zone infrastructure is included in each hub's CAPEX line: Tangier corridor (\$1.3B years 1-5), Kenitra/Casablanca (\$1.1B), Jorf Lasfar (\$700M).