

MACKAOUI CONSULTING · STRATEGIC SECURITY REPORT

Supply Chain Resilience in North Africa

Strategic Stockpile, Cold Chain, and API Independence
Framework

JANUARY 2026

Supply Chain Resilience in North Africa

70-80% API IMPORT DEPENDENCE	68% GLOBAL API VOLUME (CHINA + INDIA)	<0.5% AFRICA'S API PRODUCTION SHARE	185K TARGET DIRECT JOBS BY 2050
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Morocco currently imports **70-80% of its active pharmaceutical ingredients**, creating acute supply chain vulnerability. The global pharmaceutical market is ~\$1.65 trillion in finished drugs, with an additional \$240 billion in APIs and intermediates. Critically, **68% of global API volume is produced in just two countries — China (~40%) and India (~20%)**. All of Africa produces less than 0.5% of global APIs.

Vulnerability Assessment

VULNERABILITY	SEVERITY	MITIGATION HORIZON
API import dependence (70-80%)	Critical	2026-2032
Cold chain gaps — ~40% national coverage	High	2026-2028
Reserve pharmaceutical stockpile — none exists	Critical	2026-2027
Regulatory capacity — ~120 DMP agents vs 3,000+ at reference agencies	High	2026-2035
Single-port logistics dependency on Casablanca	Medium	2026-2028
Vaccine manufacturing capacity — zero	Critical	2026-2032

Strategic Stockpile Design

Tier 1 — Buffer Stockpile (90-day). Essential medicines for chronic diseases. Estimated \$12M annual holding cost.

Tier 2 — Emergency Reserve (30-day surge). Antibiotics, anaesthetics, pandemic therapeutics. \$8M. Rotating 6-month expiry.

Tier 3 — Strategic API Reserve (180-day). 45 most critical molecules from single-source suppliers. \$25M. Climate-controlled storage at Jorf Lasfar API hub.

Resilience Targets (2030)

- **Import dependence:** 70-80% → 50%
- **Essential medicine stockpile:** 0 → 90 days
- **Cold chain coverage:** 40% → 90%
- **AMMPS staffing:** ~120 → 800 personnel
- **Vaccine manufacturing:** 0 → Rabat-Kénitra campus operational

- **Export revenue:** \$0 → \$0.9B/year (pharma exports by 2030)