

MONITORING REPORT

REGIONAL OBSERVATORY FOR STRATEGIC MONITORING
AND TERRITORIAL INTELLIGENCE OF TANGIER-TETOUAN-AL HOCEIMA

April 2026

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INTRODUCTORY

SYNTHESIS

The April 2026 news confirms that the **Tangier-Tétouan-Al Hoceima region** stands at a moment of strategic convergence. The publication of the PREED 2030 and the entry into force of the European CBAM anchor the energy transition in the daily reality of regional economic actors, well beyond national orientations. The CRI TTA's performance with MAD 80 billion in approved investments and Tanger **Med's 8%** growth in industrial turnover testify to a solid attractiveness dynamic, which the Anchois project could, if it comes to fruition, further reinforce in terms of energy sovereignty.

These positive signals nonetheless call for a nuanced reading: intra-regional imbalances tend to deepen, peripheral provinces remain behind the growth dynamics, and the advanced regionalization reform, **marked by a 20% increase in regional budgets**, opens an action framework whose effects will remain closely tied to the quality of territorial governance. They also highlight the need for the TTA Region to strengthen the articulation between economic development, social inclusion, and environmental sustainability.



The tools are taking shape, the financing is becoming clearer, the reforms are underway. The region's ability to capitalize on them will depend on the quality of its territorial governance in the months ahead.



offshore Gaz in Morocco: Chariot Confirms a Repositioned Anchois Project in Larache

The trajectory of the Anchois project is, in many respects, emblematic of the structural tensions that characterize offshore hydrocarbon development in Africa: promising discoveries, successive partnerships, bankability constraints, drilling setbacks, partner withdrawals and strategic repositioning. After concluding a partnership agreement in December 2023 with the Greek-British company Energean, which had taken 45% of the Lixus permit and 37.5% of Rissana by becoming operator, Chariot found itself sole master of the project from May 2025, Energean having retroceded the entirety of its shares following the relative failure of the Anchois-3 well, drilled in the second half of 2024, to deliver the additional volumes expected.

This withdrawal could have sounded the death knell for a project already marked by years of waiting. It seems instead to have opened the way for a more realistic and potentially more robust strategic reorientation. The recovery plan announced in July 2025 and confirmed on 8 April now rests on a development refocused on the proven resources of the first two wells, Anchois-1 and Anchois-2, with an EPCI proposal (engineering, procurement, construction and installation) making it possible to significantly contain investments while maintaining a production capacity of 105 million standard cubic feet per day, according to the development plan announced in April 2026, or approximately 2 million cubic meters per day.

The updated net present value of the project is estimated between 650 million and 1 billion dollars.

KEY FIGURES OF THE NEW ANCHOIS PROJECT

~2 Mm³

Daily
production
capacity

1 billion
USD

Maximum updated
gross value of the
project (with USD 650
million being the
minimum value)

For the region, where energy sovereignty issues are becoming increasingly acute, the stakes go beyond the simple commercial viability of an offshore field. Morocco imports almost all of its natural gas needs, remains one of the rare regions without commercial offshore production, and has nonetheless committed, as early as 2022, to signing a connection agreement to the Maghreb-Europe gas pipeline (GME) with Chariot and ONHYM, a strong signal of a national ambition to integrate Anchois gas into the country's energy shield. In this sense, the announcement of 8 April 2026 bears not only on the trajectory of a British junior oil company: it questions Morocco's capacity to take the step towards offshore gas production and to convert, finally, a certified discovery into economic and strategic value.

From the Anchois-3 Well to Repositioning: a Complex but Legible Trajectory

The signing of the agreement with Energean in December 2023 responded to a coherent industrial logic. Energean brought not only fresh capital and operator expertise, but also the credibility of a listed company, already active in the eastern Mediterranean, capable of running an ambitious drilling Program. The ambition was of a different order: not a minimal and sequenced development, but a large full-scale Mediterranean offshore project. The drilling of Anchois-3 was not a technical failure in the classic sense of the term: it produced results, but insufficient ones to support the broader development scenario that Energean envisaged.

Financial Viability and Partnership Governance: the Conditions for Crossing the FID (Final Investment Decision)

On the financial front, the update reveals ongoing negotiations with Moroccan investors and leading industrial players for offshore licences. This mention is significant: it indicates that Chariot is not seeking to reconstitute a partnership on the Energean model, with an international operator taking control, but rather to attract local capital likely to align national interests with the valorisation of the field. This positioning is strategically relevant in the Moroccan context, where ONHYM holds 25% of the permit and where the authorities have clearly expressed their interest in monetising offshore resources.

Dans cette perspective, trois axes d'action se

The Anchois project has real maturity assets: an environmental impact assessment approved by the National Environment Committee as early as October 2023, reserve data certified by independent experts (NSAI, Texas), and a formalised GME connection agreement. These elements constitute the prerequisites of a bankable file. The question remains that of financial closing in a market context where the financing conditions of offshore gas projects have evolved: higher cost of capital, increased ESG requirements, and the need to align the durations of gas sale contracts with the amortisation periods of offshore infrastructures.

IN THIS PERSPECTIVE, **THREE LINES OF ACTION EMERGE:**

1. Promoting the mobilisation of national investment for the territorial anchoring of strategic energy projects

Within the framework of its own competences in terms of attracting investment and strengthening the economic competitiveness of the territory, the Council can act as a federating body to encourage the structuring of a financial round table anchored in the national ecosystem. This approach aims to secure the financing of structuring projects through the mobilization of infrastructure funds and national institutional actors, thus reducing dependence on external capital markets.

This action falls within the mission of coordinating regional development and can be carried by the Regional Development Program (RDP), which sets out the development actions planned for the territory in harmony with State strategies. To this end, the Council is empowered to conclude partnership agreements with the public and private sector, making it possible to align the interests of financiers with local socio-economic priorities. Furthermore, the Council can rely on its pre-eminent role to issue opinions during consultations conducted by the public authorities on major projects planned by the State in the region.

2. Securing regional energy supply through long-term contractual mechanisms

The viability of major territorial energy projects and the competitiveness of the industrial fabric depend closely on the conclusion of long-term purchase contracts, guaranteeing price and volume stability. This securitisation requires a synergy between the major national energy operators, leading industrial actors and investors, in order to align production capacities with the needs of the territory. The integration of new infrastructures, such as liquefied natural gas terminals, reinforces this dynamic by creating a more fluid market, while imposing rigorous coordination to maintain the durable profitability of local assets.

In this perspective, public action is organised around several governance levers: integrated planning inscribing energy security as a major axis of the Regional Development Program; institutional consultation allowing the Regional Council to advocate, via its right of consultation, for contractual agreements in the service of territorial attractiveness; a contractual partnership framework associating public and private sectors to mobilise the resources necessary for activities of common interest; and technical support provided by the regional project execution agency, bringing the legal and technico-financial engineering indispensable to the structuring of such Programs.

3. Anchoring structuring energy projects in a strategic vision of territorial and national development

The development of offshore energy potential and the sustainability of major gas projects require the establishment of a coherent and voluntarist national doctrine. This ambition rests on coordinated action by the State and sectoral actors to stabilise the regulatory framework for PPPs and define incentives adapted to exploration risks. The success of these initiatives constitutes a determining market signal for attracting large-scale international operators, relaunching interest in the Moroccan energy basin and reinforcing the energy sovereignty of the Kingdom.

In this framework, regional action is organised around four complementary levers: integrated strategic planning inscribing support for energy poles as a major axis of the RDP; a territorial attractiveness policy favouring the domiciliation of upstream gas activities and the creation of local jobs; institutional consultation allowing the Council, via its right of consultation, to advocate for optimal integration of energy projects into the regional socio-economic fabric, notably through local content obligations; and a contractual partnership framework supported by the legal and technico-financial engineering of the regional project execution agency.



PREED 2030:

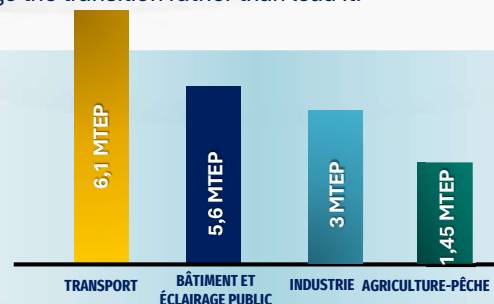
The Tangier-tétouan-al Hoceima Region At The Forefront Of The Energy Transition

The first National Energy Efficiency Day, held on 1 April 2026 in Rabat, was no ordinary institutional gathering. By unveiling the Regional Energy Efficiency and Decarbonization Plans (PREED) with a horizon of 2030, AMEE gave substance to a major inflection: the Moroccan energy transition is entering a phase of assumed territorialisation. This 18-month undertaking, mobilising 24 agreements, 43 experts, 36 workshops and 12 monitoring committees, identifies an energy savings potential of 2.8 Mtoe and a gain of 14 Mt of CO₂, for an estimated overall investment of 48.5 BMDH. For the Tangier-Tétouan-Al Hoceima region, 2nd national industrial hub and entrepreneurial locomotive in 2025, this initiative is not just one opportunity among others: it is a test of territorial maturity.

A national rebound that repositions the region

The PREED assessment reveals that three regions, Casablanca-Settat, Rabat-Salé-Kénitra and Tangier-Tétouan-Al Hoceima, concentrate between them more than 58% of national final energy consumption, estimated at 16 Mtoe (PREED 2030 reference data, base 2022-2023). This figure is not merely an indicator of economic weight: it translates a proportional responsibility in the national decarbonisation effort that these territories cannot avoid. The TTA region, driven by the intensity of its industrial basin, its logistics flows and its sustained demographic growth, figures among the territories most directly concerned, and most expected, in the concretisation of these objectives. The horizon of 2030 now constitutes the reference milestone for achieving the national

For the most industrialised regions, this deadline is as much a window of opportunity as a deadline: those who anticipate will transform their energy weight into a lasting competitive advantage; those who wait will undergo the transition rather than lead it.



Sectoral structure: the weight of transport and industry

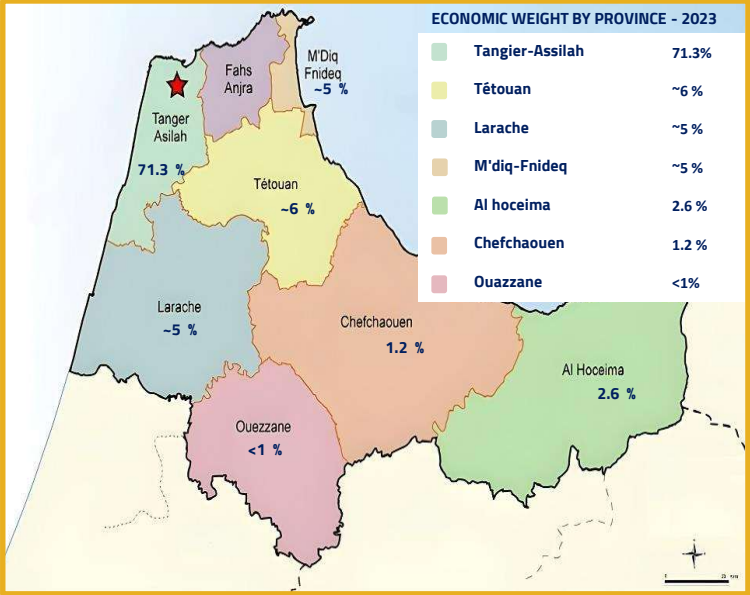
The sectoral breakdown of national consumption, transport (6.1 Mtoe), building and public lighting (5.6 Mtoe, of which 74% residential), industry (3 Mtoe), agriculture-fishing (1.45 Mtoe), finds in the TTA region an amplified and contrasted translation. Transport, the leading national consumption post, is also the one where the region is most exposed: driven by its port logistics flows and its expanding automotive park, it constitutes a significant contributor to this volume, with a savings potential that could reach 50% depending on the levers mobilised, substitution of thermal taxis, transition to hybrid and electric vehicles, decarbonisation of port logistics. Building and public lighting offer for their part particularly accessible savings gisements, with a potential exceeding 40% via the deployment of photovoltaics, solar water heaters and thermal insulation of roofs. Industry, though more complex to transform, has concrete levers: solar autoproduction, biomass substitution, motor modernisation. Finally, agriculture and fishing, via solar pumping and efficient thermal equipment, complete the spectrum of regional opportunities.

The regional industry presents in this regard a double paradox that must be clearly named: while it generates only 6.85% of new business creations in the region, it concentrates an electro-intensive energy consumption in the automotive and aeronautical ecosystems.

Paradox within the paradox: the major international-order donors who structure these sectors now impose growing carbon reporting requirements on their suppliers. This pressure, experienced as a constraint, is in reality the most powerful acceleration lever the region has at its disposal for bringing its subcontracting SMEs into the transition.

Intra-regional asymmetry: a Tanger transition, not yet a regional one

The PREEDs reveal a marked disparity in emission reduction potential across territories, ranging from 0.5% to 30.3% at the national scale. In the region, this asymmetry is not only in the figures; it is structurally inscribed in the economic geography of the territory. The prefecture of Tanger-Assilah already concentrated, in 2023, 71.3% of active moral persons companies and generated 88% of the regional turnover and added value. Tanger absorbs the bulk of industrial and logistics consumption, while Chefchaouen (1.2% of regional creations), Al Hoceima (2.6%) or Ouazzane remain well behind intense energy flows.



The observation imposes a clear reading: the energy transition of the region is, for now, a Tanger transition whose diffusion effects towards the hinterland remain to be built. If investments in energy efficiency follow the economic concentration logic already observed, they will reinforce intra-regional imbalances rather than correct them. Peripheral provinces could then find themselves doubly penalised: excluded from efficiency gains and exposed to the effects of climate change without the resources to face them. It is precisely this scenario that regional planning must strive to avoid.

**Structural catalysts favourable to the transition
Tanger Med: a green infrastructure in the making**

Tanger Med, with its 1,400 companies and more than 110,000 direct jobs, places Morocco in the global Top 10 for maritime connectivity. But beyond logistics performance, the port is becoming a vector of energy transformation for its entire ecosystem. The IMO 2030 standards (International Maritime Organization) on the reduction of vessel emissions will impose a progressive upgrade on all actors in the port and logistics chain. This is not a distant constraint: it is an ongoing restructuring that will position the region's companies that have anticipated as best placed to capture the flows of a maritime trade in the process of decarbonisation.

The Mohammed VI Tanger Tech City: an industrial decarbonisation hub

With 2.1 BMDH mobilised for development and 11 industrial projects confirmed in advanced electric batteries and materials, representing 12.22 BMDH in private investment, the Mohammed VI Tanger Tech City crossed a decisive milestone in 2025. These sectors are directly at the heart of the global energy transition value chain. They will create a structural demand in local subcontracting and technical skills, on the condition that the observatory monitors closely that regional SMEs effectively manage to cross the certification and technicality threshold required to integrate these value chains. The Tanger Technopark, quasi-saturated with its Green Tech and Logistic Tech priorities, constitutes the natural support ecosystem for this dynamic, but its limited capacity already raises the question of its extension.

Innovative financing mechanisms to lift the budgetary constraint

The budgetary constraint is often cited as the primary brake on energy efficiency in SMEs. The energy performance contracts and energy services companies (ESCO) presented at the National Day respond precisely to this obstacle: they make it possible to finance efficiency projects without immobilisation of own capital, by reimbursing investments on the savings realised. The acceleration dynamic of self-production authorisations, multiplied by five since 2023 at the national scale (AMEE, 2025), confirms that the regulatory conditions are joining up with the ambitions. This is a real asset, but one whose effective appropriation by the fabric of regional SMEs remains to be organised.

Four operational agreements: moving to action

The National Day was not a simple diagnostic forum. Four agreements were signed to trigger the operational phase of the PREEDs, and their scope for the TTA region deserves to be underlined:

- National energy performance label for residential buildings - Signed between the Ministry of Energy Transition, AMEE and the Ministry of Housing. Directly applicable to the dense residential fabric of Tanger and Tétouan, it constitutes the first concrete normative tool deployed at the scale of the built environment.
- Program-Contract for monitoring the PREEDs with the Association of Regions of Morocco - Formalises the engagement of Regional Councils in the steering of the plans. The next step, namely the specific agreements with each Regional Council, including that of TTA, will be the real test of political will at the local level.
- Energy performance label for public buildings (AMEE / ANEP) - Applicable to regional public equipment: hospitals, administrations and school establishments. A lever of public exemplarity whose training effect on the private sector should not be underestimated.
- AMEE / INEE (CDG subsidiary) partnership for regional decarbonisation - Opens the way to structured institutional financing. The presence of the CDG Group in this mechanism is a strong signal: it anchors the energy transition in the long-term financing circuits of territorial development.

DANS CETTE PERSPECTIVE, CINQ AXES D'ACTION SE DÉGAGENT :

1. Anticipating industrial decarbonisation requirements

The progressive entry into force of the European carbon border adjustment mechanism (CBAM, Carbon Border Adjustment Mechanism) does not represent a hypothetical threat: it is a structural risk already in the process of materialisation for the exporters of the TTA region, whose automotive and aeronautical sectors are directly exposed to European markets. Companies that will not have engaged their carbon transition in time will find themselves faced with export surcharges that will erode their margins and weaken their positioning in international value chains. The Regional Council can anticipate this slippage by orienting its support mechanisms towards energy self-consumption and carbon certification, in coherence with the axes of the Regional Development Program (RDP).

The technical implementation of this transition rests on formalised coordination with specialised State bodies, proceeding by contractual means, this being a domain of shared competence. This strategic partnership makes it possible to align regional incentives with national sectoral policies, thus guaranteeing the lasting competitiveness of the regional productive fabric.

2. Structuring the transition of industry towards energy efficiency

The strong presence of the automotive and aeronautical ecosystems constitutes a structural asset of the region, but it must not mask a more fragile reality: only 6.85% of regional business creations fall within industry, and peripheral provinces remain largely distant from the major industrial value chains. Building a regional energy efficiency policy that benefits only the already structured platforms would miss the essential. The challenge is to bring automotive subcontracting, industrial maintenance and agri-food SMEs into an energy upgrade founded on territorial solidarity and cooperation.

The identification of priority sectors and intermediation with the donors of Tanger Med and Tanger Tech falls within a concertation with the specialised bodies, while the associated professional training mobilises OFPPT and the Ministry of Industry and Trade. This contractual framework must be inscribed in the RDP so that energy efficiency projects articulate with national sectoral policies and produce a measurable training effect on the entire regional industrial fabric.

3. Rebalancing the geography of the energy transition

La transition énergétique régionale ne peut pas se résumer à une transition tangéroise. Les PREED révèlent une forte disparité territoriale dans le potentiel de décarbonation, et le risque est réel de voir les investissements se concentrer là où les acteurs économiques sont déjà structurés, à Tanger notamment, au détriment des provinces qui en ont le plus besoin.

The NORDEV fund, endowed with an envelope of 1 BMDH over five years (2022-2027), grants premiums that can reach 30% of eligible investment, with a differentiated territorial premium according to localisation - up to 10% additional bonus for projects located in the least endowed provinces (category 3: Chefchaouen, Al Hoceima, Ouazzane). This territorial differentiation mechanism lays the foundations of a rebalancing that the horizon of 2026 invites to deepen, by transforming this premium into a global mechanism associating industrial land, energy efficiency and local employment. The viability of these zones requires a contractual framework mobilising the State, urban agencies and the regional project execution agency, in order to guarantee the convergence of local initiatives towards the priorities of lasting regional development.

4. Valorising individual entrepreneurship leadership as a transition lever

The region displays the first national rate of individual entrepreneurship (21.5%) for the third consecutive year. A real entrepreneurial asset, a dense fabric of self-entrepreneurs and small traders in transition towards formalisation, whose articulation with the energy transition issues remains entirely to be organised. Residential building, craft trades and proximity services constitute as many segments where this fabric can become a vector for deploying energy efficiency measures, on condition of giving it concrete means: access to green credit, technical support and adapted digital tools.

The implementation of this Program rests on a contractual framework between the State, the Region and specialised actors such as Al Amana, Fondép and ANPME, in conformity with the execution mechanisms provided for by the RDP. It is on this condition that individual entrepreneurship will cease to be a dynamism indicator to become an effective lever of the territorial energy transition.

5. Exploiting the OMPIC barometer as a transition steering tool

One only steers what one measures. The monthly OMPIC barometer constitutes an observation lever whose optimal exploitation falls fully within the mission of diagnosing the needs and potentialities of the territory. The valorisation of this data, enriched with sectoral and provincial indicators on the energy consumption of companies, would make it possible to orient energy efficiency policies with a territorial precision today absent from regional planning mechanisms.

The production of a cross-cutting annual analysis of company demographics and energy performance rests on a strong partnership dimension, drawing on the transmission by administrations and public establishments of the information necessary for the exercise of regional missions. This synergy, formalised by a contractual framework with OMPIC and the High Commission for Planning, guarantees the coherence of socio-economic indicators within the RDP, while respecting the principles of cooperation and transparency of public action.

Sources :

[Link 1](#)

[Link 2](#)

[Link 3](#)

[Link 4](#)

[Link 5](#)



Regional actions related to energy efficiency

A strategic commitment anchored in the 2022-2027 Regional Development Plan

The Tanger-Tétouan-Al Hoceima region has made energy transition one of the structuring priorities of its 2022–2027 Regional Development Program. The program-contract concluded with the State covers 84 projects across 16 sectors, structured around four strategic pillars, for a total investment of MAD 5.84 billion, including MAD 2.26 billion as a direct contribution from the Regional Council. The energy and environmental component occupies a central place within this framework, which constitutes the region's operational roadmap through to 2027.

The PREED: an initiative driven by the region, not imposed upon it

The Regional Energy Efficiency and Decarbonisation Plan (PREED 2030), analysed in this report, is not the result of a national injunction. It stems from a framework agreement signed during MedCop Climate 2023 by the Regional Council, AMEE, the Wilaya and Junta de Andalucía, and is being prepared by the consulting firm Clean Tech. At national level, PREED plans identify potential energy savings ranging from 10% to 20% depending on the region, an estimated reduction in CO₂ emissions of around 15%, for an overall budget of approximately MAD 48.5 billion. As Morocco's second-largest industrial hub, the TTA region carries a significant share of this challenge.

Local Energy-Climate Services (SLEC): an unprecedented provincial rollout

Presented in August 2020 in response to the European Union's call for proposals on the partnership for sustainable cities, the SLEC project is co-financed by the European Union, with the Tanger-Tétouan-Al Hoceima region as lead partner and the Provence-Alpes-Côte d'Azur region as co-partner.

It aims to create eight centres in each of the region's provinces, designed as observatories for energy and climate, incubators for green jobs, and spaces for participatory urban governance.

In November 2024, a delegation of 36 members representing the region and the eight beneficiary municipalities took part in the Mediterranean Forum on Energy and Climate Transition, co-organised in Marseille with the Provence-Alpes-Côte d'Azur region. This international outreach reflects the maturity of the scheme and the recognition of the region as a Mediterranean reference in local energy governance.

At the same time, the Council strengthened its air-quality monitoring network by adding 10 new stations across five provinces and prefectures, to measure SO₂, PM2.5, O₃ and other environmental indicators.

High-value international strategic partnerships

Over the years, the region has built a network of partnerships that anchors its energy commitment within a structured international dynamic. During MedCop Climate 2023 in Tangier, organised under the High Patronage of His Majesty King Mohammed VI and bringing together more than 1,200 participants from 36 nationalities, six partnership agreements were signed involving the region, AMEE, UNCDF, the United Nations Capital Development Fund, CGLU Africa, United Cities and Local Governments of Africa, and seven cities in the region.

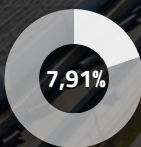
A memorandum of understanding was concluded with UNCDF to reduce energy consumption and establish energy efficiency in public lighting across the region's cities. The partnership with AMEE focuses on promoting energy efficiency and energy sobriety in the most energy-intensive sectors, strengthening the capacities of regional stakeholders, and raising awareness among economic and institutional operators.

KEY STATISTICS

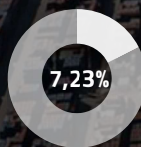
Air traffic: confirmed growth momentum in Tangier

At the end of February 2026, Moroccan airports recorded nearly 5.9 million passengers, representing a 7.91% increase compared with the previous year, mainly driven by international traffic to Europe and Africa. The region fully benefits from this momentum: Tangier Ibn Battouta Airport posted growth of 7.23%, in line with national performance and reflecting renewed attractiveness for the territory.

This growth confirms the region's key role as a connectivity hub at the crossroads of Euro African exchanges, alongside major national platforms such as Mohammed V, Marrakech Menara and Agadir Al Massira. It sends a positive signal for strengthening the regional economic fabric, supporting tourism growth and attracting investment, in a context where air connectivity is a decisive lever for territorial competitiveness.



Increase in passenger air traffic at the end of February, national level



Increase in passenger air traffic at the end of February, Tangier

Source: [Link](#)

Allocation of a 5.49 million dirham envelope for 28 film festivals

As part of the allocation of a national envelope of 5.49 million dirhams to 28 film festivals, the region stands out through the presence of several events supported by the Moroccan Cinematographic Centre, CCM. Chefchaouen receives double recognition, with MAD 200,000 granted to the International Environmental Film Festival and MAD 70,000 to the International Film Festival for Children and Youth. Tangier, for its part, sees two of its festivals awarded funding: the Cinema and School Festival, MAD 80,000, and the Cap Spartel Film Festival, MAD 40,000, reflecting the vitality of the territory's cultural and cinematographic ecosystem.

This national recognition strengthens the region's role as a space of cultural influence, in line with its tourism vocation and growing attractiveness.

For 28 festivals
5,49 million

Source : [Link](#)

Tétouan: the new airport terminal project exceeds the 40% completion threshold

The extension project for Tétouan Saniat R'mel Airport has reached a completion rate of more than 40% over an area of 5,000 m². The objective is to increase annual capacity to one million passengers in response to growing demand in the north of the country. The approach consists of building a terminal that meets international standards and includes modern logistics equipment. Delivery is scheduled for 2027, as part of preparations for the 2030 World Cup. Tétouan is eligible for this investment because of its status as a strategic air gateway for the northern region, marked by strong tourism and economic momentum.



Completion rate

5 000 m² Surface

Source : [Lien](#)



Tanger Med: 8% increase in industrial turnover in 2025

Industrial activity at the Tanger Med hub generated MAD 188 billion in revenue in 2025, marking an 8% increase year on year. The automotive sector accounts for most of the activity, with MAD 125 billion, up 6.8%, while logistics and the textile and aeronautics cluster recorded respective growth rates of 9.6% and 19%. The year was marked by MAD 17.13 billion in new private investments and the creation of 15,658 jobs through 95 new projects, including within the Mohammed VI Tanger Tech City. By the end of 2025, the industrial zone had more than 1,500 companies and employed around 145,000 people.



Industrial turnover

17,13 Billion
New investments

Source : [Link](#)

KEY STATISTICS

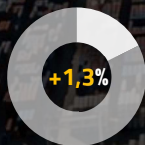
Inflation : une pression maîtrisée mais perceptible dans la région

In March 2026, the Consumer Price Index (CPI) increased by 0.9% year-on-year, driven by rising non-food prices (+1.1%) and food prices (+0.6%), according to the High Commission for Planning. On a monthly basis, the index rose by 1.2%, mainly due to higher vegetable prices (+9.7%) and fuel prices (+10.7%).

At the regional level, Tangier recorded a 1.3% increase, above the national average, while Tétouan posted a more moderate rise of 1%. Although these figures remain below the peaks observed in Guelmim and Al Hoceima (+2.7%), they call for particular attention regarding household purchasing power and the competitiveness of the local economic fabric.



CPI at the national level



CPI in Tangier

Source: [Link](#)

Al Hoceima: 32% Decline in Landing Volumes by the End of February 2026

Landings from coastal and artisanal fishing at the port of Al Hoceima reached approximately 550 tonnes by the end of February 2026, marking a 32% decline compared to the previous year. The market value of these products fell by 35%, amounting to MAD 31.92 million. This result was mainly driven by a 35% drop in shellfish catches (460 tonnes) and a 39% decline in pelagic fish catches, although crustaceans recorded a 69% increase. At the national level, while landing volumes decreased by 18%, the overall value of fishery products rose by 3%, exceeding MAD 2.36 billion.

Source : [Link](#)



Landing volumes

550

Tonnes

Tangier-Tétouan-Al Hoceima Regional Investment Center Reports MAD 80 Billion in Approved Investments in 2025

During the 15th session of its Board of Directors held on April 8, 2026, the Regional Investment Center of the Tangier-Tétouan-Al Hoceima region (CRI TTA) presented the results for 2025, highlighting a total investment volume of MAD 80 billion and more than 57,000 jobs. As a result, 83% of the projects reviewed by the Regional Unified Investment Commission (CRUI) received a favorable opinion. Industry, renewable energy, and tourism remained the leading sectors in terms of investment budgets.

80 BMAD

Source : [Link](#)

57 000

Jobs



NEWS IN BRIEF

BRIEF OVERVIEW OF THE MAJOR POLITICAL, ECONOMIC, SOCIAL, AND ENVIRONMENTAL DEVELOPMENTS

INFRASTRUCTURE AND CONNECTIVITY

Primary Healthcare: 127 Facilities Rehabilitated Across the Region for MAD 579 Million

As part of the national program to upgrade 1,400 primary healthcare centers, the Ministry of Health and Social Protection announced the completion of a total investment of MAD 6.4 billion, benefiting more than 20 million citizens across the Kingdom's 12 regions. The Tangier-Tétouan-Al Hoceima region is fully benefiting from this momentum, with 127 facilities rehabilitated through an investment envelope of MAD 579 million, focused on modernizing infrastructure, upgrading medical equipment, and deploying an integrated digital information system. This initiative strengthens the role of local healthcare facilities as the first link in the care pathway, in line with the ongoing reform of the national healthcare system.

Sources:

[Link](#)

Healthcare System Reform: The Tangier-Tétouan-Al Hoceima Region at the Forefront

During the steering committee meeting chaired by the Head of Government, major progress was confirmed, including the completion of 15 hospital projects in 2026, adding more than 3,000 beds, and the launch of a new MAD 7 billion program to upgrade 1,600 primary healthcare centers.

The region stands out as the host of the pilot project for Territorial Health Groups, whose positive results — including an increase in the number of beneficiaries, strengthened human resources, and improved coordination between healthcare facilities — have made it a model expected to be rolled out across the entire Kingdom.

Sources:

[Lien](#)

Launch of a Study for the Construction of a Highway Between Al Hoceima and Tétouan

The Ministry of Equipment and Water has launched a strategic study for the construction of a 250-kilometer highway linking Al Hoceima to Tétouan. This preliminary work aims to determine the optimal route, assess the project's economic viability and environmental impact, and estimate its overall cost.

The infrastructure project aims to reduce travel times along the Mediterranean coast, support tourism activity, and improve connectivity for the mountainous areas in the north of the country.

Source:

[Link](#)

ONCF Includes Tangier and Kenitra in the Scope of the Future Regional Express Network (RER)

The National Railway Office (ONCF) has expanded the geographical scope of its metropolitan rail transport project to include the Tangier corridor and the Kenitra industrial zone. As part of this initiative, a call for tenders has been launched to conduct market studies aimed at identifying the needs of future users of this mass transit network.

This initiative marks a new step in the planning of the future urban and regional transport network managed by the Office.

Sources: [Link](#)

Key Considerations for Regional Action

The extension of the Regional Express Network (RER) to the Tangier corridor and the Kenitra industrial zone represents a major step forward for metropolitan mobility in the region's economic capital. It is part of the preparations for the 2030 World Cup and aligns with efforts to strengthen the region's attractiveness. However, it also raises an issue that the Council cannot overlook: territorial equity in access to mobility infrastructure.

Risks to anticipate: concentrating mobility investments along the Tangier-Kenitra axis could deepen intra-regional disparities. The eastern and southern provinces of the region, particularly Al Hoceima, Chefchaouen, and Ouazzane, remain structurally isolated. An unregulated metropolitanization dynamic could intensify internal migration flows and drain peripheral territories of their human capital.

Opportunities to seize: the RER could become a strong asset in Tangier's industrial attractiveness strategy. The Council could use this project as leverage to negotiate parallel commitments from the State regarding intercity connections to isolated provinces, particularly the Al Hoceima-Tétouan highway project currently under study.

Stakeholders to mobilize: this issue requires close coordination between national rail transport operators, logistics and industrial stakeholders in northern Morocco, the relevant government departments responsible for infrastructure and equipment, and elected representatives from provinces that remain distant from investment flows.

Decisions to consider: placing inter-provincial mobility on the agenda of the next program contract, and making the Council's support for the RER conditional on parallel commitments aimed at improving connectivity in rural and mountainous areas.

Tangier: ONEE Launches Preparatory Phase for a Seawater Desalination Plant

The National Office of Electricity and Drinking Water (ONEE) has launched a call for tenders to recruit a strategic advisory firm responsible for structuring the Tangier desalination plant project. Developed under a public-private partnership framework, this infrastructure will have an annual capacity of 150 million m³ in order to secure the city's drinking water supply.

The support mission will cover the technical, legal, and financial aspects of the project to address the persistent water stress affecting the region's dam reserves.

Source: [Link](#)

Key Considerations for Regional Action

The launch of the call for tenders for strategic assistance on the Tangier desalination plant project, with an annual capacity of 150 million m³, represents a structural response to persistent water stress. However, the scale of the infrastructure and the chosen public-private partnership model require particular vigilance from the Council.

Risks to anticipate: a project of this scale may create crowding-out effects on other hydraulic investments in less well-equipped provinces. The structurally higher cost of desalinated water may weigh on the most vulnerable users and on agricultural sectors that depend on water resources. The impact on fishery resources along the Tangier coastline also warrants a preventive assessment.

Opportunities to seize: the project could serve as a lever to accelerate discussions on regional water governance, positioning the Council as a key stakeholder in the dialogue between ONEE, municipalities, and users. It also opens up prospects for training in water-related professions and for the development of related sectors.

Stakeholders to mobilize: the complexity of the project requires the involvement of public water and energy operators, managers of the relevant hydraulic basins, coastal municipalities directly exposed to the infrastructure's effects, artisanal fishing professionals whose activity zones overlap with the project area, as well as the private partners expected to participate in the public-private partnership structure.

Decisions to consider: requesting an independent environmental impact assessment on the effects of brine discharge along the coastline, and integrating the project into a broader reflection on the equitable distribution of water resources between Tangier and the northern provinces.



Ouazzane: Suspension of a Major Road Development Project in the City Center

Development works on Ouazzane's main avenue, a strategic road connecting several public administrations, have been suspended for six months following the withdrawal of the contractor company. This situation has led to deteriorating road conditions, traffic disruptions, and economic losses for local businesses.

Source: [Link](#)

Key Considerations for Regional Action

The six-month suspension of development works on Ouazzane's main avenue, following the withdrawal of the contractor company, highlights a structural vulnerability that goes beyond the case of this city alone. The deterioration of a central economic artery, the losses suffered by local businesses, and the resulting traffic difficulties constitute a warning sign that the Council cannot ignore in a province that is already fragile.

Risks to anticipate: the absence of a rapid restart mechanism may lead to a loss of confidence among local economic operators and citizens in the regional institution's ability to successfully deliver its projects. This precedent could also discourage future bids from local companies for similar contracts.

Opportunities to seize: the situation offers an opportunity to review the clauses of regional public procurement contracts in order to better manage the risks associated with contractor default, particularly through strengthened guarantee mechanisms and accelerated replacement procedures.

Stakeholders to mobilize: restarting the project requires the involvement of provincial authorities, the relevant regional technical departments, financial oversight bodies, and representatives of the local commercial and associative fabric whose situation continues to deteriorate as the inactivity persists.

Decisions to consider: initiating a mediation mission to identify the conditions for a rapid resumption of the works, and launching a review of the contractual clauses applicable to construction contracts across the region.



ECONOMIC DEVELOPMENT AND GOVERNANCE

Advanced Regionalization Reform: A New Legal Framework in the Making

The Council of Ministers, held in Rabat under the chairmanship of His Majesty King Mohammed VI, may God assist Him, adopted a draft organic law amending Law 111.14 with the aim of deepening advanced regionalization. Prepared by the Ministry of the Interior, the draft notably provides for a 20% increase in regional budgets, a minimum annual State transfer of MAD 12 billion starting in 2027, as well as the allocation of shares from national tax revenues.

From a governance perspective, the draft redefines the distribution of powers between the State and the regions and transforms Regional Project Implementation Agencies into private limited companies under private law, with the aim of accelerating the implementation of development programs. It also promotes interregional cooperation through the creation of regional groupings. For the region, this reform represents an opportunity to consolidate its development momentum and strengthen its position as one of the Kingdom's leading regions.

Source: [Link](#)

Opening of an Entrepreneur Support Center in Tangier

The BCP Group inaugurated the Al Moukawil Chaabi Ibn Batouta Center in Tangier, the second facility of its kind after the one established in Marrakech. This structure is intended to provide support to very small businesses, traders, and artisans in the Tangier-Tétouan-Al Hoceima region. The services offered include advisory support, non-financial assistance, and access to financing solutions. This opening is part of a national rollout plan aimed at establishing a center within each Regional People's Bank.

Source: [Link](#)

Risma and Accor Announce a New Hotel Development Program in Morocco

Risma and Accor are strengthening their longstanding partnership with the announcement of the opening of a 175-room Sofitel hotel in Tangier, scheduled for 2029. The partnership also includes a renovation plan for the existing hotel portfolio, as well as the creation of a co-financed training academy dedicated to tourism professions. This strategy is now based on a franchise development model and forms part of the preparation of national infrastructure for the 2030 World Cup.

Source: [Link](#)

LOGISTICS AND SUPPLY CHAINS



Tanger Med: Textile Imports Released Following Logistics Disruptions

Discussions between fabric importers, customs authorities, and port authorities at Tanger Med made it possible to release part of the goods immobilized due to disruptions in maritime transport. Following these exchanges, 52 containers were processed to address bottlenecks caused by geopolitical tensions and adverse weather conditions. The authorities also committed to simplifying administrative procedures in order to maintain the competitiveness of the national textile sector.

Source: [Link](#)

MAJOR STRUCTURING PROJECTS

Continuation of Feasibility Studies for the Undersea Tunnel Between Spain and Morocco

The 65-kilometer rail link project beneath the Strait of Gibraltar is entering a new phase following the release of funding by the Spanish government to deepen technical analyses. A bilateral agreement between Spain and Morocco has launched a three-year study period dedicated to seismic activity and seabed modeling. Although experts have confirmed the technical feasibility of the drilling works, the provisional timeline foresees the start of construction around 2030, at an estimated cost of more than EUR 8.5 billion for the Spanish section.

Source : [Link](#)



CULTURE AND HERITAGE



Creation of a Maritime Museum in Assilah to Promote Local Heritage

The city of Assilah will host a maritime museum representing an investment of MAD 13.5 million, financed by the Regional Council, the Ministry of Fisheries, and the Mediterranean Fisheries Chamber. Located in the medina on land provided by the municipality, the project aims to preserve traditional fishing tools and techniques while raising public awareness about the marine environment. The facility is intended to strengthen the area's tourism offering while encouraging scientific research related to maritime history.

Source : [Link](#)

Tangier: Boubana Animal Cemetery Classified as a Historic Monument

The Ministry of Youth, Culture and Communication has added the animal cemetery "The Animal Rest Home," located in the Boubana district of Tangier, to the list of historic monuments. Created in the 1940s by British expatriates during the city's international status period, the site now benefits from legal protection against real estate development.

This decision, formalized in the Official Gazette on March 23, 2026,



follows alerts raised by local associations regarding the site's historical and cultural significance.

Source : [Link](#)

Tétouan, Mediterranean Capital of Culture and Dialogue 2026: Launch of the Celebrations

The festivities for the "Mediterranean Capital of Culture and Dialogue 2026" were officially inaugurated on April 16 in Tétouan, in the presence of the Minister of Youth, Culture and Communication, Mohamed Mehdi Bensaid, Moroccan and foreign diplomatic figures, as well as artists, intellectuals, and representatives of civil society. This ceremony marks international recognition of the cultural vocation of a city whose heritage extends far beyond the shores of the Strait.

Supported through a partnership involving the Municipality of Tétouan, the Union for the Mediterranean, the Anna Lindh Foundation, and Abdelmalek Essaâdi University, the year-long program features exhibitions, musical evenings, intellectual gatherings, and artistic performances centered around the city's tangible and intangible heritage. Beyond its cultural influence, this designation represents a lever for tourism attractiveness and territorial soft power for the region, with long-term impacts expected.

REGULATIONS AND INTERNATIONAL STANDARDS

Publication of the First Certificate Price for the Carbon Border Adjustment Mechanism (CBAM)

The European Commission has set the first quarterly price for the Carbon Border Adjustment Mechanism (CBAM) at EUR 75.36 per tonne of CO₂ for the first quarter of 2026. This mechanism aims to ensure that products imported into the European Union bear a carbon cost equivalent to that imposed on local producers. The calculation methodology is based on the weighted average price of allowances under the EU Emissions Trading System (EU ETS).

The schedule provides for four quarterly publications in 2026, followed by weekly pricing and the obligation to purchase and surrender certificates starting in February 2027. The mechanism applies to all eligible goods — such as steel and aluminum — imported into the EU, meaning that export flows transiting through this logistics hub will be subject to these carbon costs.

For the Tangier-Tétouan-Al Hoceima region, which is highly integrated into European industrial value chains, the implications are particularly significant. On the one hand, exporting companies — particularly in the automotive, metallurgy, and construction materials sectors — may face higher costs for accessing the European market if their production processes remain carbon-intensive. This could affect their competitiveness compared with producers already engaged in decarbonization efforts. On the other hand, this constraint acts as a strategic investment lever, encouraging local industrial players to accelerate their energy transition through renewable energy, energy efficiency, and industrial innovation in order to reduce their carbon footprint and preserve their access to the European market.

Sources :[Link 1](#) [Link 2](#)

Q1 2026 – Effective

First quarterly price published EUR 75.36 / tonne of CO₂, — based on the weighted average of EU ETS prices

Q2–Q4 2026

Three subsequent quarterly publicationsA total of four prices to be published throughout 2026

February 2027

Obligation to purchase and surrender certificatesWeekly pricing · Effective application to steel, aluminum, and all eligible products entering the EU

Today – February 2027

Preparation period to initiate the industrial carbon transition and avoid additional competitive costs

Key Considerations for Regional Action

The effective implementation of the CBAM starting in February 2027 leaves only a limited window for action. For a region whose industrial fabric is deeply integrated into European value chains — particularly in the automotive, metallurgy, and construction materials sectors — the price of EUR 75.36 per tonne of CO₂ is not merely a regulatory abstraction: it will translate concretely into higher market access costs for local exporters that have not yet initiated their decarbonization efforts.

Risks to anticipate: medium-sized companies, which are less capitalized than major industrial groups, may struggle to absorb this competitiveness shock. Part of the regional industrial fabric could find itself in a vulnerable position before even gaining access to the tools and financing required for its transition. The risk of relocation to territories less exposed to the CBAM should also not be ruled out for certain sectors.

Opportunities to seize: the CBAM creates a strong incentive to invest in renewable energy and industrial energy efficiency. Companies that anticipate this transition today can transform a regulatory constraint into a lasting competitive advantage. The region, already equipped with a PREED 2030 and a structured partnership ecosystem built around AMEE, has the tools needed to support this momentum.

Stakeholders to mobilize: the response to the CBAM cannot be carried by companies alone. It requires coordinated mobilization of the industrial operators concerned, competitiveness support structures, training institutions specializing in green professions, and financial partners capable of structuring investment mechanisms accessible to medium-sized enterprises.

Decisions to consider: launching an assessment of regional exporting companies exposed to the CBAM in order to evaluate their level of preparedness, and considering the implementation of a regional support program for industrial decarbonization, aligned with the objectives of PREED 2030 and the financing mechanisms available at both the national and European levels.



RESOURCE MANAGEMENT AND ENVIRONMENTAL TRANSITION

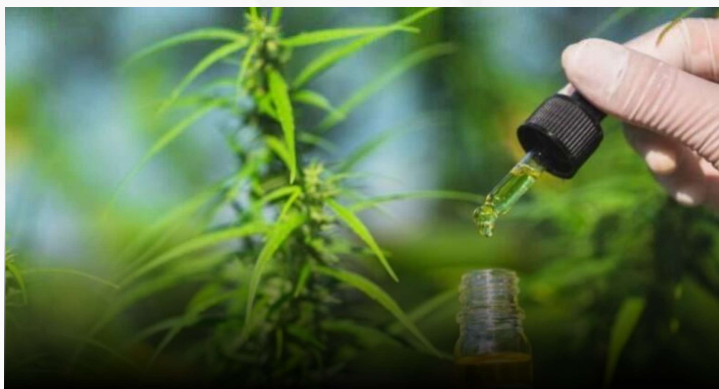
Study Highlights the Environmental Efficiency of Cannabis Cooperatives in Morocco

A scientific study published in the MDPI journal indicates that cannabis cooperatives in Morocco have a lower environmental impact compared to artisanal or industrial methods. Through the adoption of techniques such as drip irrigation and the promotion of the local “Beldia” variety — which represented more than 83% of harvested areas in 2025, or 2,622 hectares out of a total of 3,141 hectares — these structures optimize the use of natural resources and energy.

The integration of producers into a legal framework, under the supervision of the National Agency for the Regulation of Cannabis-Related Activities (ANRAC), promotes a fair distribution of revenues. In 2025, the Agency issued 4,147 new authorizations, bringing the operational total to 5,765, including 5,492 dedicated to cultivation activities benefiting 5,318 farmers. This rigorous framework is accompanied by extensive oversight, with 7,526 compliance operations carried out during the year.

In terms of value creation, five operators commissioned their processing units with a total capacity of 560 tonnes, while 110 products were registered with the Moroccan Agency for Medicines and Health Products, thereby strengthening the competitiveness of Moroccan products in the healthcare and cosmetics markets, which are now present in more than seven countries, including France, Switzerland, and Australia.

Source : [Link](#)



Key Considerations for Regional Action

The Tangier-Tétouan-Al Hoceima region accounts for the majority of Morocco’s legal cannabis production, particularly in the provinces of Chefchaouen and Al Hoceima. The findings of this study and ANRAC’s 2025 figures confirm that legalization is not merely a regulatory measure: it is structuring a fully-fledged agricultural sector with industrial, pharmaceutical, and cosmetic export opportunities. The Regional Council cannot remain a passive observer in the face of an economic and social transformation of such magnitude within its territory.

Risks to anticipate: the legalization dynamic is generating strong expectations among farmers, some of whom still remain outside the legal framework. An integration process that is too slow, or excessive administrative delays in granting authorizations, could fuel social tensions in already fragile rural areas. In addition, the concentration of processing facilities among a limited number of operators — five units for a total capacity of 560 tonnes — raises questions regarding the fair distribution of added value between industrial players and agricultural producers.

Opportunities to seize: with 83% of cultivated areas dedicated to the local Beldia variety and 110 products already registered with the Moroccan Agency for Medicines and Health Products, the sector has strong differentiation potential in international healthcare and cosmetics markets. The region can position itself as a center of agricultural and industrial excellence in this segment, provided that investments are made in training, applied research, and local processing infrastructure.

Stakeholders to mobilize: the growth of this sector requires coordination between national regulatory authorities, agricultural support and rural development structures, vocational and higher education institutions, and local economic operators capable of investing in processing and export commercialization.

Decisions to consider: identifying the Regional Council’s levers for supporting the integration of small farmers into the legal framework, particularly through technical and financial support programs, and exploring the possibility of making the development of the legal cannabis sector a dedicated pillar of the 2022–2027 Regional Development Program (PDR), aligned with the rural development objectives of the region’s provinces.

EVENTS



April 2–3, 2026

International Workshop on the Resilience of Mediterranean Territories to Climate Risks

On April 2 and 3, 2026, an international workshop on the resilience of Mediterranean territories to climate-related disasters was held in Tangier. Initiated by the Mediterranean Climate House, the event brought together institutional stakeholders and experts from across the Mediterranean basin to discuss anticipation and adaptation strategies for hydrometeorological crises.

The discussions focused on local risk management, multi-level governance, and climate financing mechanisms, with a view to preparing for the World Congress of United Cities and Local Governments as well as COP31.

Source : [Link](#)



April 7, 2026

Regional Workshop on Mapping Public Health Emergency Risks

A workshop dedicated to the regional mapping of public health emergency risks was held on Tuesday, April 7, 2026, in the region. Organized by the Tangier-Tétouan-Al Hoceima Territorial Health Group (GST), in collaboration with the Directorate of Epidemiology and Disease Control of the Ministry of Health and Social Protection, the workshop forms part of efforts to strengthen regional preparedness and response capacities for health emergencies.

The discussions focused on the development of a Regional Public Health Emergency Risk Profile (PRR-USP), aimed at better identifying the territory's health vulnerabilities and supporting the planning of prevention, alert, and public health crisis management mechanisms at the regional level.

Source: [Link](#)



April 15, 2026

Workshop on Regional Consultations for the National Strategy for Intermediate Cities (SNVI)

A workshop dedicated to regional consultations for the development of the National Strategy for Intermediate Cities (SNVI), organized by the Regional Inspectorate for Urban Planning, Architecture, and Spatial Planning of Tangier-Tétouan-Al Hoceima, was held on April 15, 2026, at the headquarters of the Chamber of Commerce, Industry and Services of the region, with the participation of the Council.

The proceedings began with a framing presentation delivered by the Director of Spatial Planning, followed by a roundtable during which the consulting firm presented the findings of the territorial diagnosis as well as the initial elements of the forward-looking vision relating to the region's intermediate cities.

Source: [Link](#)



March 31, 2026

Active Participation of the Tanger-Tétouan-Al Hoceima Region in the National Reflection on Maritime Clusters

On March 31, 2026, in Rabat, Regional Council President Omar Moro and Director General of Services Rabie El Khamlichi took part in the National Conference on the Role of Regions in the Development of Coastal Maritime Clusters, organized by the Association of Regions of Morocco in partnership with the WestMED initiative. Bringing together more than 150 participants, the event forms part of the national momentum aimed at positioning the blue economy as a strategic lever for sustainable development.

The Director General of Services presented the region's key strengths in the field of the maritime economy, high-impact regional projects, and operational proposals for the development of efficient clusters. This participation confirms the positioning of Tanger-Tétouan-Al Hoceima as a benchmark territory for maritime issues, supported by a strategically important coastline, world-class port infrastructure, and a fishing tradition deeply rooted in the identity of its coastal provinces.

Source: [Link](#)

ON THE REGIONAL AGENDA

July 4–12, 2026

Ministry of Foreign Affairs Initiative: Tanger to Host the 17th Summer University for Moroccans Living Abroad in July

From July 4 to 12, 2026, the Ministry of Foreign Affairs will organize in Tanger the 17th edition of the Summer University dedicated to Moroccans living abroad. The event will bring together around 300 students aged 18 to 25 pursuing their studies internationally for a program including conferences, thematic workshops, and cultural visits. This initiative aims to strengthen the ties between young talents from the diaspora and their country of origin, while also contributing to the preservation of the national cultural identity.

The choice of Tanger as the host city for this edition confirms the city's status as a space for dialogue between the region's ambitions and the trajectories of its citizens established abroad. It also creates a concrete opportunity for the region to mobilize diaspora skills and expertise in support of its economic and cultural development.

Source : [Link](#)

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MONITORING REPORT

REGIONAL OBSERVATORY FOR STRATEGIC MONITORING
AND TERRITORIAL INTELLIGENCE OF TANGIER-TETOUAN-AL HOCEIMA

المركز الجهوي للإقظة الاستراتيجية
والذكاء الترابي لمنطقة - تطوان - الحسيمة
Observatoire Régional de Veille Stratégique
et d'Intelligence Territoriale de Tanger-Tétouan-Al Hoceïma

