

# Sheet N° 64- 1/2- Decarbonated float glass production unit

## Description



Industrial production unit for decarbonated float glass using the most competitive sand and green hydrogen to serve the needs of combustion and reduction in melting furnaces and tin baths with a production capacity of around **150 kt**

**Main customers :** Construction, automotive industry, PV panels

**Sector and sub-sector:** Energy-intensive upstream industry / Glazing



**HS Code:** 7005

## Key facts

- Global float glass consumption concentrated in Asia Pacific, particularly China and India
- Potential to improve local integration and national competitiveness in strategic sectors with high added value for the Kingdom (e.g. automotive sector and construction)
- Development of green H2 in the Region at competitive cost that can improve competitiveness Morocco on decarbonated float glass

## Prerequisites <sup>(2)</sup>

- Need to secure premium purchase contracts upstream of the project
- Need for proximity of a green hydrogen production project

## Market indicators

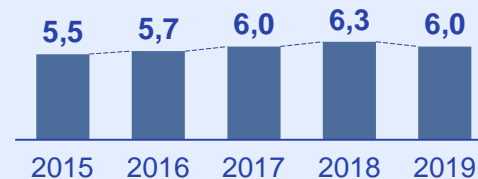
### Target market(s) :

#### Target market(s), (from highest to lowest priority) to be addressed :

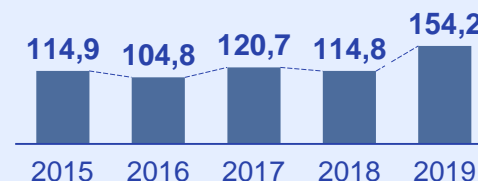
- +** Exports: Mainly to Europe and the United States (in connection with decarbonisation regulations)
- National: to replace imports from Turkey, South Africa and Belgium to meet the needs of the automotive industry

### Market size and development <sup>(3)</sup>

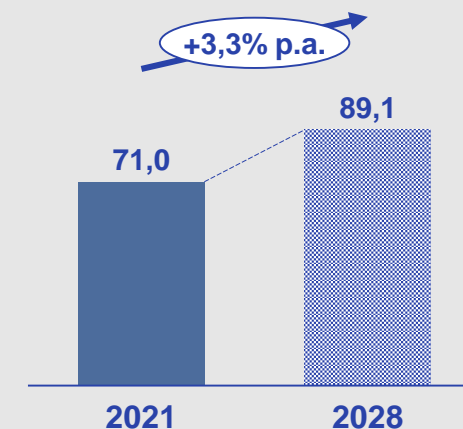
#### World float glass imports (USD billion)



#### Domestic imports of float glass (kT)

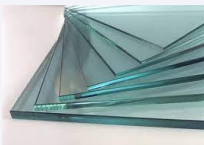


#### Growth prospects for the global float glass market (MT)



(1) Product Complexity Index: Diversity and sophistication of the know-how required to produce a product. The PCI is calculated according to the number of countries that produce the product and the economic complexity of these countries. The most complex products, those that only a few countries can produce, have the highest PCI (e.g. electronics, chemicals) vs. the least complex products (e.g. raw materials, agricultural products) - Source: TradeMap, Harvard economic complexity

(2) Sources: ITC, The Observatory of Economic Complexity, press articles



# Sheet N°64- 2/2- Decarbonated float glass production unit

## Financial indicators (indicative) :

<b>Potential investment</b>	1.8 billion MAD
<b>Turnover</b>	~1 billion MAD
<b>Estimated selling price</b>	7.5 - 8.5 MAD/kg
<b>ROI</b>	10 - 15 years
<b>EBITDA (as % of sales)</b>	5 - 9 %
<b>Jobs</b>	250

## Human resources

### HR skills needed

- Glazing,
- Robotization
- Digital steering

### Training offers

- EST (Agadir): automatism and local industrial networks
- ENSA (Agadir) : Industrial Engineering

## Raw materials and suppliers

### Main inputs

- Sand, soda ash, dolomite, limestone, syenite, green H2

### Main suppliers

- Morocco: Commodities (eg. Traspex Mining)

## Investment elements

### Potential land

#### Priority provinces

✓ Laayoune    ✓ Tarfaya

#### Type of land

Private domain of the State (e.g. National road Lâayoune - El marsa)

#### Area

3.5 ha

#### Average land price

Unified Regional Investment Commission (CRUI)

#### Mode of mobilisation

Unified Regional Investment Commission (CRUI)

### Main investment benefits

#### Grant

Investment Charter

#### Support for training

Solar cluster, greenh2 cluster, "Tatwir green growth", MorSEEF

#### Other

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