



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION



CHATHAM
HOUSE

Recycling in Morocco

A 2023 consumer survey



switch
to Circular Economy
Value Chains



Co-funded by
the European Union



Ministry for Foreign
Affairs of Finland

Acknowledgments

The authors of this report would like to extend heartfelt appreciation to all contributors who played a pivotal role in shaping this study. Firstly, to Janati Idrissi Rabia, Seloua Amaziane, Hafsa Lakhlifi, Hafsa Benbrahim, and Bahari Imad from the Moroccan Government for sharing their extensive knowledge on circular economy in Morocco. Then to UNIDO team (especially, Mark Draeck, Neil Coles, Malainin Mohamed Bouchraya, and Ana Dimovska) for all the support they have extended in completing this study and report. Lastly to the team at IPSOS for partnering with us on this study and bringing their expertise onboard. Also, it goes without saying but a big thank you to all the colleagues at Chatham House who supported in all big and small things on this study. Especially to Daksha Gupta and Nina Gillespie who spent their countless hours on it.

Sincere thanks also go to all the survey respondents who shared their valuable personal insights and experience to us. This report is a testament to the collective efforts and expertise.

Original title of publication: Recycling in Morocco: A 2023 consumer survey

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Publication date: October 2024

Graphic design: designbysoapbox.com

Cover image: Aerial view of recycling pile. Copyright © Walid Moujanni/iStock

This policy report was produced under the Switch to Circular Economy Value Chains, a project co-funded by the European Union and the Government of Finland, implemented by UNIDO, in collaboration with Chatham House, Circle Economy, and the European Investment Bank. For more information: www.switchtocircular.eu

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Introduction

For a circular economy to work, both production and consumption systems must change. Therefore, circular economy awareness and capabilities must be raised among consumers, as well as companies and other stakeholders directly involved in a value chain. The SWITCH2CE project survey of Moroccan consumers serves to benchmark current understanding, attitudes, and behaviours, and identifies potential levers for behaviour change. It is intended as a useful tool to guide capacity building activities among project beneficiaries and intermediaries. It provides critical information to guide the design of public engagement activities, both as part of the SWITCH2CE programme and by wider circular economy stakeholders.

It is important to note that any findings presented from a modest sample size should not be assumed to fully reflect the perceptions or habits of the wider population.

The information could, among other things, be used by policymakers to design effective waste collection systems, by NGOs to tailor citizen awareness campaigns, and by MNCs to design products for circularity.

Key takeaways

- Environmental concern surrounding plastic waste is high in Morocco.
- Exposure to messages around recycling, concern for the environment and a perception that companies aren't doing enough have a modest bearing on environmental attitudes and behaviours in Morocco at present. This suggests that there is great potential for messaging around sustainable lifestyles, and that more work could be done to support circular economy behaviours and make sustainable lifestyle choices more feasible and aspirational for all.
- Positive public attitudes to the role of waste pickers are more common than negative attitudes. This, alongside concern for their ongoing safety and livelihoods, indicates an opportunity for fair and equitable inclusion of waste pickers within any Deposit Return Scheme (DRS) and Extended Producer Responsibility (EPR) scheme.
- Lack of space in homes to separate and store waste and materials for recycling were perceived by some respondents to be an inhibitor to undertaking reuse and recycling actions. However, it should be noted that this may not reflect the common experience of the wider population when considering that the average home size exceeds 100 square metres – larger than many European countries.
- Familiarity with reusable food containers for takeaway suggests that DRS can be extended beyond beverage containers to takeaway food further reducing the production of contaminated plastic waste.

Detailed findings

Environmental and climate concern

Respondents are concerned about climate change, with 87% overall agreeing they are concerned (61% strongly and 26% 'somewhat'). Respondents are even more concerned about plastic pollution than they are about climate change.

87%



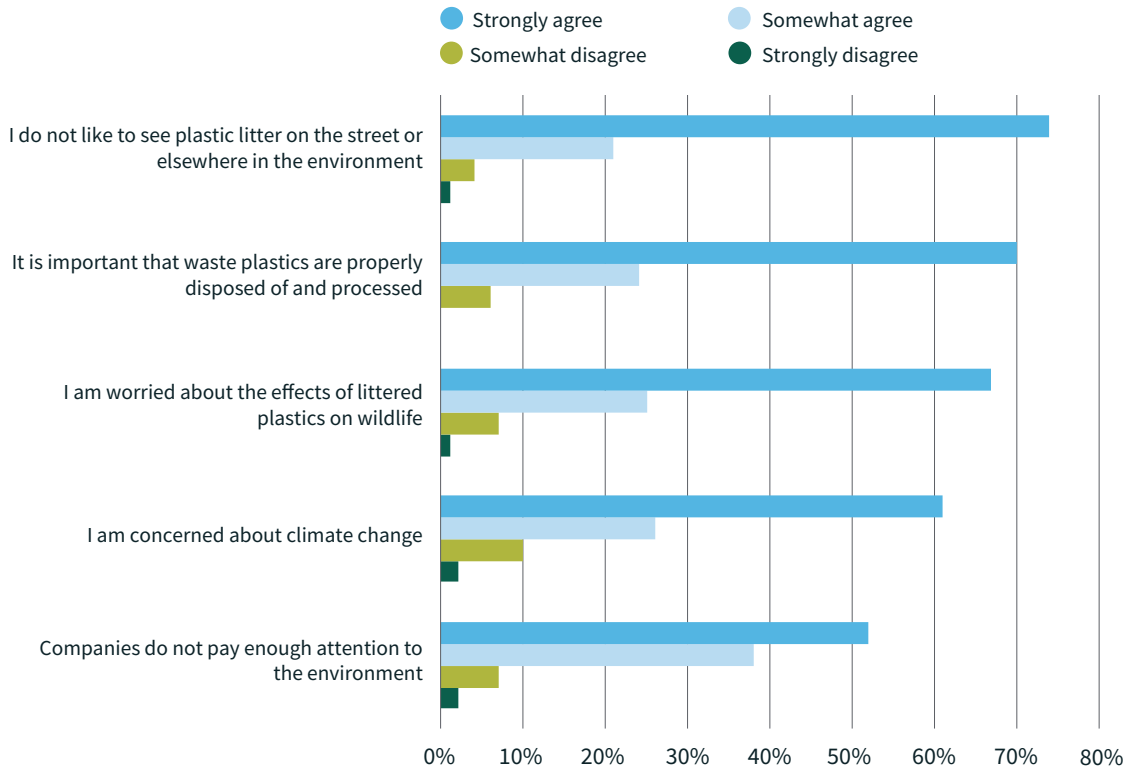
concerned about the climate

94% agree it is important that waste plastics are properly disposed of and processed, with 70% 'strongly agreeing' with this statement. Those who 'strongly agree' that companies do not pay enough attention to the environment are also more likely to 'strongly agree' that it is important that waste plastics are properly disposed of and processed (79%).

Concern about the effects of littered plastics on wildlife is almost as high, at 92%, with 67% 'strongly' agreeing this is a worry. 75% of respondents who strongly agree that companies do not pay enough attention to the environment also strongly agree that they are worried about the effects of littered plastics on wildlife.

95% overall agree they do not like to see plastic litter on the street or elsewhere in the environment, with 74% 'strongly' agreeing.

Figure 1. Attitudes of respondents towards the environment – To what extent do you agree or disagree with the following statements?”



Base: 1013 (all respondents)

Waste separation and recycling

Separation of waste is very uncommon in Morocco, with nearly 8 in 10 saying they have never separated their household waste.

80%



never separate waste

13% have separate bins in their home for different types of waste, while 7% have separated out materials for collection from their street or home by *Mikhala*¹/informal waste pickers/collectors/people who sort through waste for a living.

Those who have seen, heard, or sought recycling information are more likely to have separated waste. Only 66% in this group said they had ‘never’ separated waste, compared to the 83% of those who had not seen, heard, or sought recycling information have ‘never’ done this.

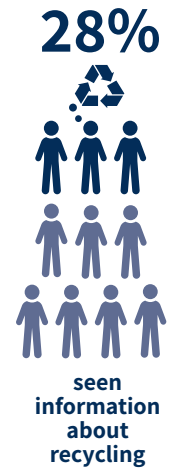
Glass was the most commonly separated, with three quarters (76%) who have separated waste having separated glass. Just over half had separated plastic (55%) and around a quarter (27%) had separated paper or cardboard.

¹ Waste pickers are locally known as “Mikhala” in Moroccan Darija.

Those who had seen, heard, or sought recycling information were more likely to have separated glass (84% vs 71% who hadn't seen recycling information) and metal (26% vs 10%).

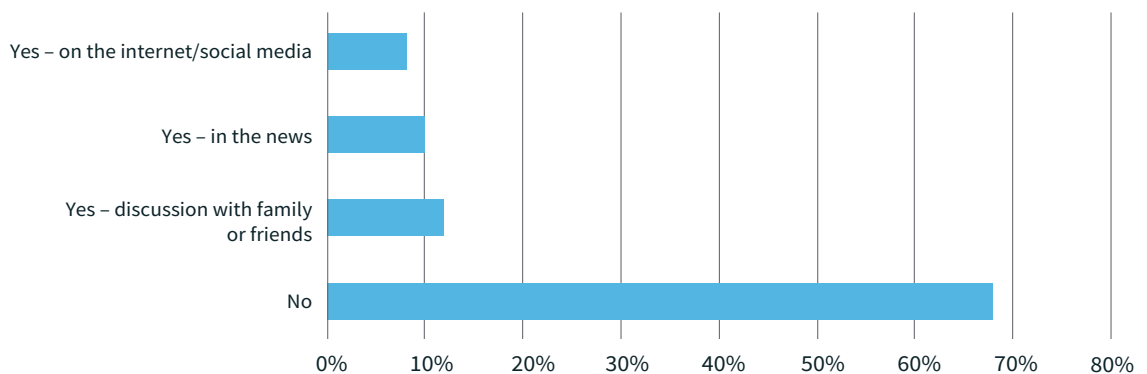
Understanding the circular economy

Over a quarter (28%) of respondents had seen, heard, or sought information on recycling and one in ten have heard the term 'circular economy'. Awareness of the term 'circular economy' was substantially higher for respondents who had heard, seen or sought information on recycling at nearly a quarter (24%). This indicates that while the broader concept of the circular economy may not yet be widely known by name, the fundamental activities that support it, such as recycling, are already increasingly becoming part of public awareness.



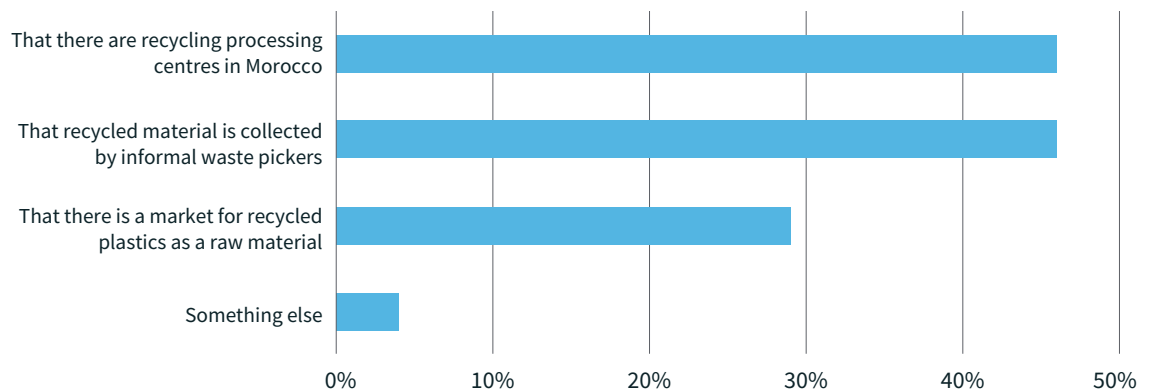
Overall, over a quarter (28%) of respondents have seen, heard, or sought information on recycling, while 68% have not. Friends and family (12%), news (10%) and social media (8%) were all sources, but less than 1% said they had seen public information from government or a charity. Of these, most learned that recycled material is collected by informal waste pickers (46%) or that there are recycling processing centres in Morocco (46%). Nearly three in ten (29%) learned that there is a market for recycled plastics as a raw material in Morocco.

Figure 2. “Have you seen, heard or sought information on recycling?”



Base: 1013 (all respondents)

Figure 3. “What did you learn?”



Base: 286 (those who had seen, heard or sought recycling information)

53% of females learned that recycled material is collected by informal waste pickers, compared to only 40% of males. However, males were more likely to have learned that there are recycling processing centres in Morocco (52% male to 39% female) and that there is a market for recycled plastics as a raw material (35% male to 22% female).

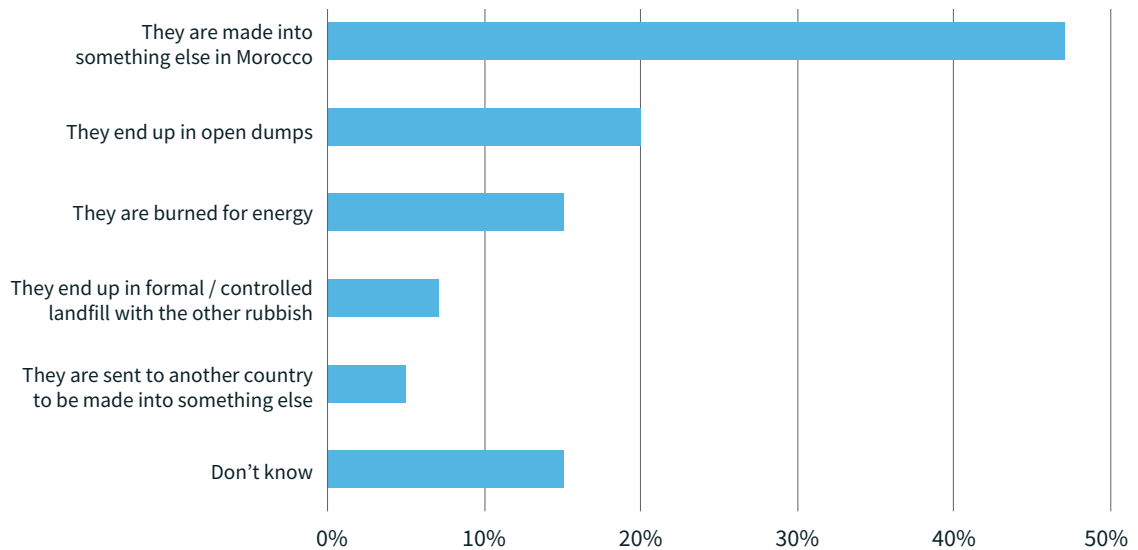
Overall, around half of respondents (47%) think that materials separated from household rubbish are made into something else in Morocco.

Perceptions of recycling differ with demographics: 52% of males think separated materials are made into something else in Morocco, compared to 43% of women. The same is true of younger people, with 56% aged 18–24 thinking this, compared to just 35% of those aged 60+.

Low-income householders (less than 2000 MAD per month) are more likely to think separated materials end up in open dumps (34% vs 9–20% in other income groups) and less likely to think they are made into something else in Morocco (29% vs 47–51% across other income groups). Perceptions that such materials end up in formal/controlled landfill with other rubbish increases with income, with 1% in the lowest income group thinking this, and 19% in the highest income group.

Respondents who have had recycling information are much more likely to believe that separated materials are made into something else in Morocco (68% vs 47% overall). Those who think companies do not pay enough attention to the environment are more likely to believe separated materials are burned for energy (17% of those who strongly agree, and 15% of those who tend to, compared to only 5% of people who disagree companies pay insufficient attention to the environment).

Figure 4. “What do you think happens to the materials which are separated from household rubbish?”



Base: 1013 (all respondents)

Attitudes to waste pickers

Many are aware of waste pickers, and hold positive attitudes towards them, or at least concern for their welfare. One in five feel they do good and useful work.

17%



concerned for waste pickers' safety

Nearly three quarters of respondents (73%) know of Mikhala/informal waste pickers/collectors/people who sort through waste for a living. Two fifths (40%) know they collect specific types of waste from the rubbish. Young people are slightly more aware of waste pickers (80% of 18–24-year-olds, 71% of 25–39 year olds, and 68% of those aged 60+).

When asked what they thought of informal Mikhala/informal waste pickers, 21% of respondents identified that they are useful and doing a good job. Just under a fifth of respondents (17%) were also concerned for waste pickers, suggesting pickers are putting themselves in danger. The same proportion of respondents believed their job should be formalised, and that they should be supported with better working standards or protections (also 17%).

Only 8% of respondents believed it is good waste is collected, but that this isn't the right way to go about it. Those who are more educated, having finished high school or above, are more likely to express this view (13%). 8% overall said they are a nuisance, and that they do not like to see people rummaging about in the rubbish. 4% expressed concerns that this role is illegal and there should not be any informal economy.

Shopping habits

Most households shop multiple times a week, or daily. The market, local shops and supermarkets are the most common locations, with lower income households more likely to use markets.

Half of people are personally responsible for buying the food and drink and other household items for their household. Just under 3 in 10 (28%) rely on their mother or father, while a fifth (18%) rely on their spouse. Men were more likely to rely on a parent (33%) than women (23%). Nearly three quarters (73%) of 18–24-year-olds rely on their mother or father to buy the groceries.

Just over half of respondents (52%) said that someone from their household shops one or more times a week, but not every day, and just under half (45%) shop daily or almost every day.

The most common places to shop are the market, the local shop, and the supermarket, respectively. Nearly half (48%) rank a local shop as the first place their household would go for their shopping, while 37% rank markets as the first place. Low and lower-middle income households (under 6000 MAD per month) were more likely to rank a market as first place for their household shopping (44%), than higher-middle income households (26% earning 6000–10000 MAD per month).



rank a local shop as the first place for their household shopping

Plastic purchasing habits

Plastic drinks bottles are the most frequent plastic purchased by Moroccan consumers. Plastic bottles or tubs for household cleaning products, food items wrapped in plastic and plastic bottles or tubs for toiletries were also regular purchases, with substantial proportions purchasing these on a weekly or monthly basis (see Table 1 below).

Nearly all surveyed purchased plastic drinks bottles at least once per week (94%), with equal proportions purchasing such products ‘every day or almost every day’ (47%) and ‘one or more times a week but not every day’ (47%).



purchased plastic drinks bottles at least once per week

Table 1. Heat map of plastic purchasing behaviour

	Plastic drinks bottles	Plastic bottles or tubs for household cleaning products	Food items wrapped in plastic	Plastic bottles or tubs for toiletries	Packs of disposable wipes	Plastic ready-meal containers	Takeaway cups containing hot drinks	Plastic wrapping on non-food items
Every day or almost every day	47%	2%	6%	1%	1%	2%	3%	0%
One or more times a week but not every day	47%	43%	41%	36%	18%	12%	9%	5%
One or more times a month but not every week	5%	52%	35%	58%	47%	31%	22%	21%
One or more times a year but not every month	1%	2%	10%	4%	19%	27%	35%	50%
Never	0%	0%	8%	0%	15%	28%	30%	23%

Plastic bags

Shoppers take their own bags when shopping, though less frequently than using those provided by shopkeepers. Use of shopkeeper provided plastic bags continues to remain a habit.



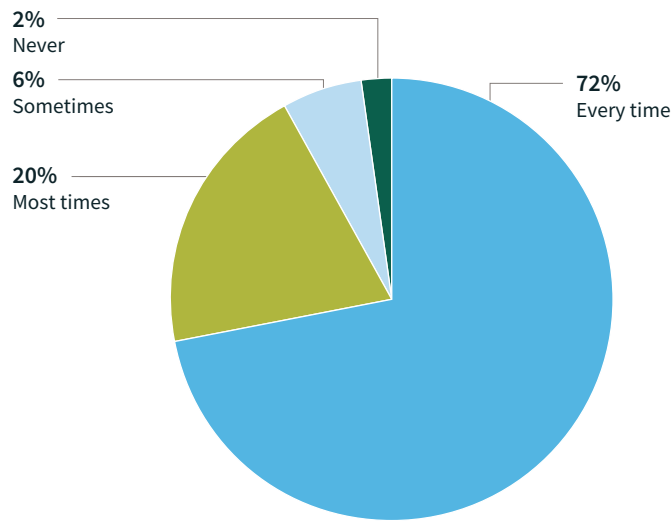
use of reusable bags is increasing

Two thirds of respondents (67%) claimed that they take their own reusable bags with them to carry shopping home ‘every time’ (32%) or ‘most times’ (36%). A further 28% do this ‘sometimes’. 44% of the lowest income householders carried their own reusable bags for shopping most times as compared to 25% with higher-middle income (6001–10000 MAD). The relatively high rates of use of reusable bags is suggestive of the impact of the plastic bag ban².

Conversely, 72% of respondents claim to use plastic bags that are provided by the shopkeeper ‘every time’ they shop for groceries or household items, with a further 20% using them ‘most times’. 6% only ‘sometimes’ use bags provided by the shopkeeper, while just 2% say they ‘never’ do this.

² Further research is required to demonstrate causation.

Figure 5. How often do you “Use plastic bags that are provided by the shopkeeper when buying groceries / household items.”



Base: 1013

There was a very slight reduction in use of plastic bags among those who had seen, heard, or sought recycling information, with 63% using shopkeeper-provided plastic bags every time compared to 76% of those who had not had recycling information. Moroccans’ concern that companies do not pay enough attention to the environment, however, inversely rather than positively correlated with plastic-bag avoidance: 79% of those who ‘strongly agree’ that companies do not pay enough attention to the environment used plastic bags provided by the shopkeeper every time they went shopping, compared to 65% of those who ‘tend to agree.’ This suggests environmental concern and individual action do not necessarily go hand in hand, as yet, in Morocco.

The results of this survey suggest that respondents used a mixture of reusable bags that they bring themselves combined with accepting plastic bags from shopkeepers at point of sale. Further exploration into how these behaviours coexist within the consumer population in Morocco would be helpful to understand the real impact of environmental awareness on consumer behavior.

78% use bin bags made from plastic in the bins in their home ‘every time’ (49%) or ‘most times’ (28%). Those with higher middle-income (6001–10000 MAD) are more likely to use plastic binbags ‘every time’ (57%) than those with low income (below 2000 MAD) 44% of whom used plastic bin bags ‘every time’. Bin bags made from paper or compostable bags are far less common, with just 13% using these ‘every time’ (3%) or ‘most times’ (11%).

Plastic containers

Occasional use of reusable containers for takeaway is fairly common in Morocco, with those who have not had recycling information more likely to 'never' do this.

63%



sometimes
use reusable
containers

63% report using a reusable dish, cup, bottle, and cutlery when buying takeaway food and drinks rather than use disposable take-away dishes/cups/bottles/cutlery, with 5% doing this 'every time' and 18% 'most times'.

Those who have not seen, heard or sought recycling information are more likely to 'never' employ reusable containers and cutlery for takeaways. 39% who hadn't had recycling information 'never' do this, compared to 29% who had seen recycling information.

Reusable, recyclable, or packaging free options

Almost three quarters (72%) buy products that they know are packaged in reusable or recyclable containers at least 'sometimes'.

Over a quarter of respondents (26%) buy products that they know are packaged in reusable or recyclable containers 'every time' (4%) or 'most times' (22%). 46% 'sometimes' do this. The same proportion (26%) purposefully buy groceries and household products loose to avoid buying products with packaging 'every time' (6%) or 'most times' (20%).

Those who have had recycling information are more likely to say they buy products that they know are packaged in reusable or recyclable containers 'most times' (28%) compared to those who have not (20%).

Repair and sharing economy

Repair and sharing behaviours are fairly common in Morocco, though these behaviours are not strongly linked to environmental concern.

75%



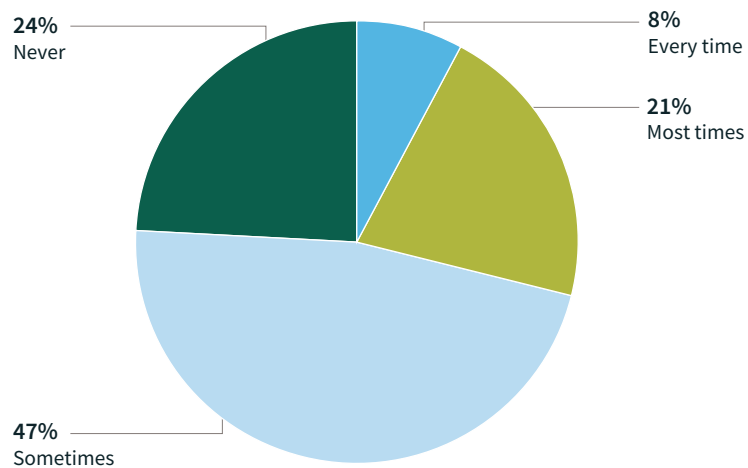
repair items

Three quarters of people (75%) repair items that have broken or stopped working at least sometimes, with 8% doing this 'every time' and 21% 'most times'. Repair behaviours are not strongly linked to environmental concern, with 30% of those

who ‘strongly agree’ companies do not pay enough attention to the environment saying they ‘never’ do this, compared to 18% of both those who ‘tend to agree’ and who ‘disagree.’

Seven in ten (69%) report lending an item to a neighbour, friend, or family member for a short amount of time so that they do not have to buy their own. Slightly fewer people say they borrow at least ‘sometimes’ (62%) than say they lend at least ‘sometimes’ (69%). This might suggest that some may lend an item to multiple neighbours or family members.

Figure 6. How often do you “Repair items which have broken or stopped working. This includes repairing them yourself or having someone else to repair them for you.”



Base: 1013

Paying to access or renting certain items rather than buying that item is still less common in Morocco than borrowing, with just over half of people (54%) saying they at least sometimes do this. Again, this was affected by household income, with just under half (45%) of those with a middle household income (2000–10000 MAD) saying they ‘never’ paid to access/rent certain items rather than buying that item as opposed to 30% of lowest income earners (less than 2000 MAD).

Environmental purchasing behaviour and willingness to pay for more environmentally sound products

Two thirds of respondents (67%) reported avoiding buying a product which is harmful to the environment.

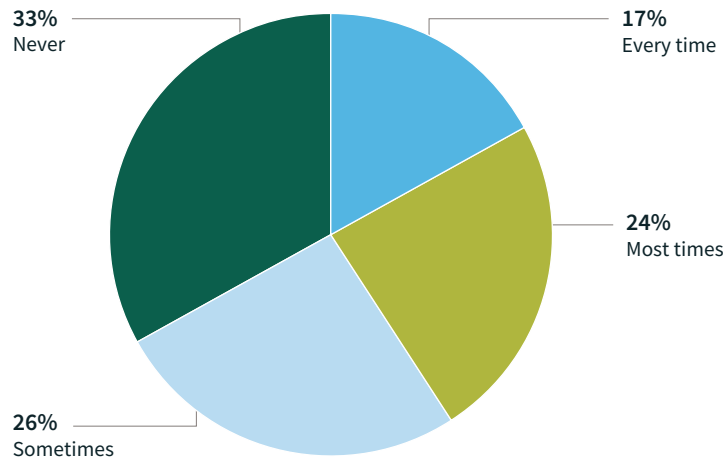
67%

 at least sometimes avoid buying a product which is harmful to the environment

People who had seen, heard, or sought recycling information were more likely to say they avoided buying products that were particularly harmful to the environment. 52% said they did this ‘every time’ or ‘most times’ compared to those who had not had recycling information, 34% of whom avoided environmentally harmful purchases ‘every time’ or ‘most times.’

Those who ‘strongly agree’ or ‘tend to agree’ that companies do not pay enough attention to the environment are twice as likely to avoid environmentally harmful purchases every time as those who think companies do enough (18% vs 8%).

Figure 7. Personal sustainable actions: “I consider how harmful a product is. If something is particularly harmful to the environment, I do not purchase it.”



Base: 1013

Overall, one in five respondents state that they pay more ‘every time’ for environmentally friendly products, even if there is a cheaper alternative which is less environmentally friendly. Only one third (33%) say they ‘never’ do this.

Conversely, nearly two thirds of respondents say that, when deciding to buy something, price and quality were more important than whether a product is environmentally friendly (64%), with 44% saying this is the case ‘every time’ and 20% saying ‘most times’. 18% said price and quality were ‘never’ more important than a product being environmentally friendly.

Despite higher overall environmental concern, younger respondents were more likely to prioritise price and quality over environmental impact. 69% of 18–24-year-old respondents said price and quality are more important ‘every’ or ‘most’ times, compared to 60% of 25–39-year-olds, and 64% of 40–59-year-olds.

Separating plastics

Respondents are generally willing to undertake reuse and recycling actions. They were most willing to separate plastics, return plastic bottles for a reward, clean plastics before disposing of them, and take packaging back to stores.

94%

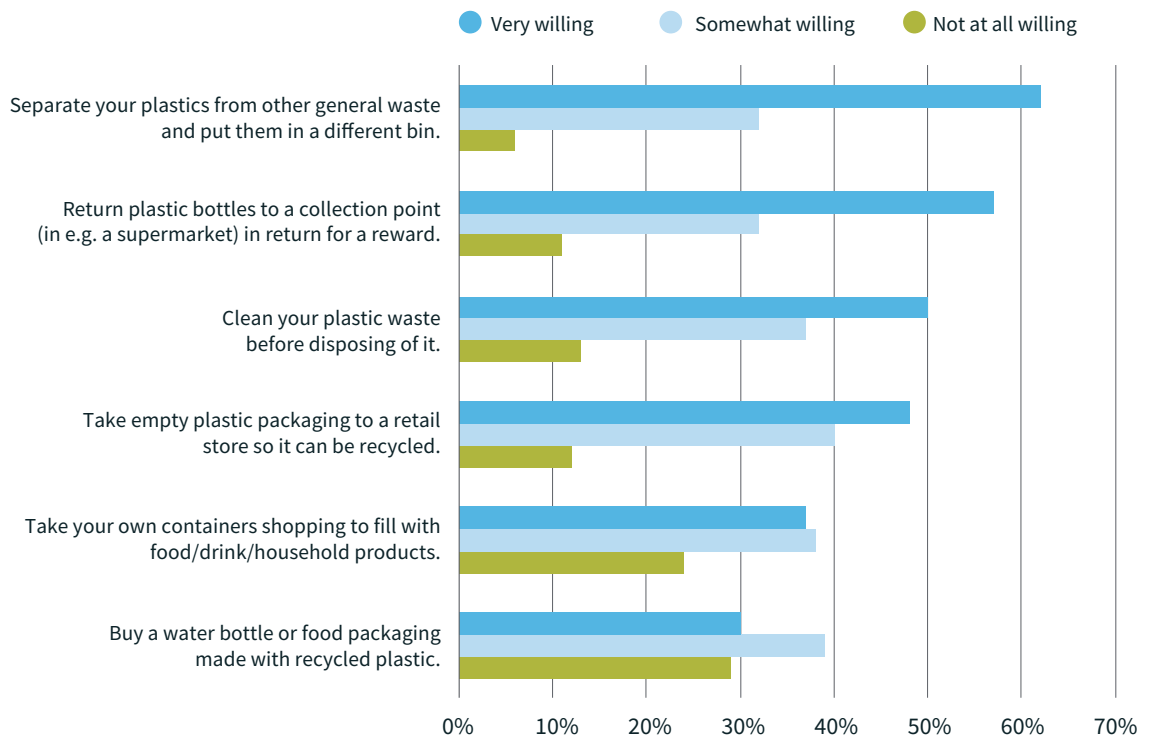


willing to separate waste

Overall, 94% would be willing to separate plastics from other general waste and put them in a different bin. 62% would be ‘very willing’ to do this. Responses were evenly distributed by gender, age and income.

Overall willingness was high for all actions, including bringing takeaway containers to be filled and buying food with recycled packaging. Respondents were most ambivalent on buying food in recycled plastic packaging, with 30% very willing, and 29% unwilling to do this, and the remainder, 39%, being ‘somewhat willing’.

Figure 8. “To what extent would you be willing to do each of the following things?”



Base: 1013

Unwillingness to clean plastic waste before disposing it is highest amongst those who have not had recycling information (16% vs just 8% of those who have had recycling information). This group were also less willing to return plastic packaging to a store for recycling (15% ‘not at all willing’ vs 6%).

Those who strongly agree companies do not pay enough attention to the environment were more likely to be ‘very willing’ to take action for a range of behaviours. The biggest differences were for cleaning plastic waste before disposing of it (53% ‘very willing’ to do this, vs 34% of those who think companies pay enough attention), taking containers to fill at the shops (41% vs 33% of those who think companies pay enough attention) and returning plastics in exchange for a reward (61% vs 50% of those who think companies pay enough attention).

Respondents aged 18–24 were more likely to be ‘very willing’ to buy a water bottle or food packaging made with recycled plastic (37%) than the oldest respondents (26% of those aged 60+).

Barriers and enablers

Lack of space, lack of time, and lack of understanding are key barriers to recycling in Morocco.

The most common barrier to recycling was lack of spare time (44%). Lack of space in the home was also a concern, with around a third citing this as a barrier (34%). Not knowing what to do was an issue for around a quarter of respondents (23%).

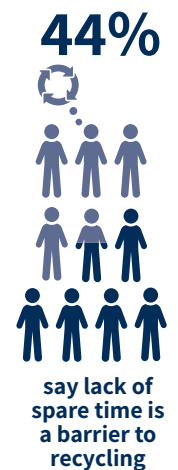
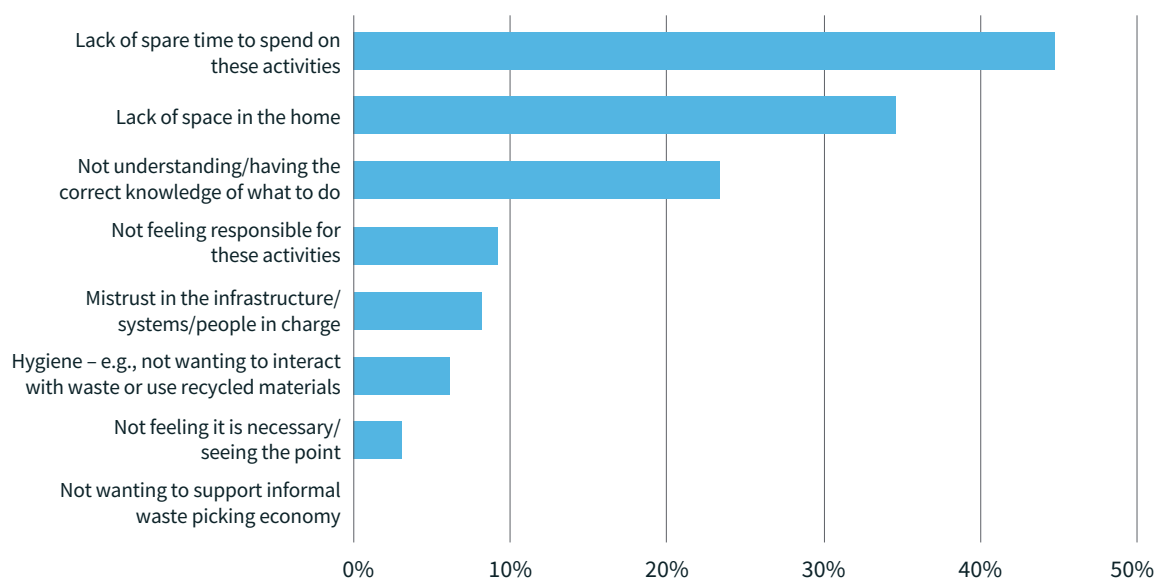


Figure 9. “What might prevent you from carrying out these activities?”



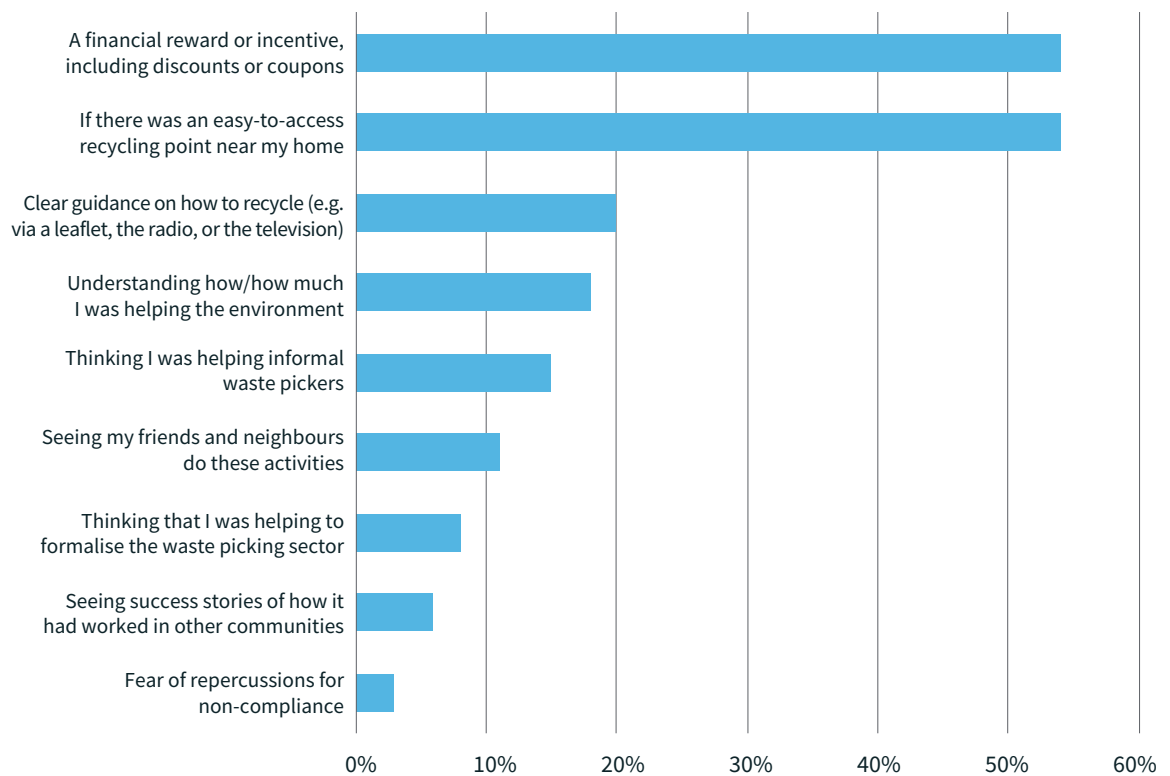
Base: 1013

Only 3% cite ‘not feeling it is necessary/seeing the point’ as a reason for not doing these activities, and less than 1% said they did not want to support the informal waste picking economy.

Infrastructure and incentives featured highly as enablers of recycling action, with over half of respondents (54%) saying an easy-to-access recycling point near home would help, and the same proportion saying that a financial reward or incentive, including discounts or coupons, would help. Ease of access was a bigger incentive for those earning more than 10000 MAD, 66% of whom said this would be helpful to them.

Recycling information had a bearing on the factors enabling action. Those that have had recycling information were less likely to say a reward or incentive would help them recycle (45%), compared to those who had not had recycling information (57%). Those who have had recycling information were also more likely feel they would be helped by an easy-to-access recycling point near home (62% vs 50% of those who hadn’t had recycling information).

Figure 10. “And what might encourage you to do this more?”



Base: 1013

Technical information

The SWITCH2CE Consumer Survey was commissioned by Chatham House as part of the SWITCH to circular economy value chains project. Research was conducted with 1,013 respondents across six regions in Morocco. The target population was all individuals aged 18 or older, who had purchased any plastic product in the last 12 months. Quotas were set on age, gender and education to ensure a representative sample. The survey was carried out in key regions in Morocco (Agadir, Casablanca, Fes, Marrakesh, Rabat and Tangiers) and in urban and rural areas within these regions. Fieldwork was conducted by Ipsos Morocco, and a quota sampling approach was applied with a CAPI (Computer-Assisted Personal Interviews) methodology. The Ipsos iField software was used to collect the data during fieldwork, with fieldwork taking place over 6 weeks, between 8th June and 20th July 2023. Data has been weighted on age, region and education to represent the population, based on the available population statistics.