

1. Executive snapshot

Item	Kenya assessment
Ease of importing from Europe	CE documentation helps, but Kenya requires KEBS PVoC/CoC before shipment, Import Standardization Mark where applicable, customs clearance through a Kenyan importer, and EPRA registration for regulated appliances.
Best-fit EPIC sectors	Type I: hospitals, universities, public facilities, hospitality and commercial buildings. Type II: horticulture, dairy, fisheries, pharmaceutical cold chain, airports/ports, logistics and refrigerated storage.
Regulatory clarity	Systems are established, but multiple approvals may apply KEBS/PVoC, EPRA MEPS/labels, KRA customs, NEMA refrigerants, and electrical contractor licensing.
Best-fit technologies	High-efficiency ACs, chillers, cold rooms, pre-cooling, commercial refrigeration, refrigerated storage, temperature monitoring, PV-hybrid cooling, resilient controls and backup-power interfaces.
Primary opportunities	Cold-chain solutions for ports, horticulture, dairy, fisheries and pharmaceuticals; resilient cooling for healthcare/public buildings; efficient appliances aligned with Kenya's NCAP and MEPS agenda.
Primary barriers	PVoC/CoC before shipment, EPRA model registration, import duties/VAT/IDF/RDL, and the need for reliable local O&M capacity, especially outside Nairobi, Mombasa and Kisumu.
Recommended EPIC approach	Require KEBS PVoC plan, EPRA registration plan, Kenyan importer/service partner, EPRA-licensed electrical contractor, refrigerant plan, spare-parts stock and post-pilot maintenance budget.

2. Market demand and commercial opportunity

In Kenya cooling demand is rising across agriculture, health services and the built environment. Kenya's National Cooling Action Plan (NCAP 2023-2027), launched by the Ministry of Environment, Climate Change and Forestry in June 2023, explicitly aims to expand access to efficient cooling appliances, transition toward lower-GWP refrigerants and increase access to agricultural cold chains. Market demand is driven

by economic growth, urbanization, grid expansion, higher temperatures, commercial real estate, healthcare, hospitality, horticulture exports, pharmaceuticals and modern retail.

The baseline figures from the NCAP illustrate how early-stage the market remains. Only 12.85% of Kenyan households currently own a refrigerator, whilst 15% of residential and 30% of commercial

buildings are equipped with air conditioning. At the same time, 9.6 million people in Kenya's hottest regions the Coast, Eastern, Northeastern and Rift Valley provinces are at high risk due to lack of access to cooling, according to SEforAll's Chilling Prospects analysis.

For Type I - tertiary sector, the most relevant pilots are hospitals, universities, public facilities, hotels and commercial buildings. These sites need reliable comfort cooling, vaccine or medical refrigeration, power resilience, service response and energy-efficient systems with strong service backup. studies of public health facilities in Kenya find that maintenance plans for cold chain equipment are below average at most sites and power backup is nearly absent, creating significant unmet demand for reliable, monitored medical refrigeration particularly as Kenya scales national immunization programmes and private hospital networks expand into secondary cities. Reliable refrigeration to preserve vaccines and medical supplies is one of the four core development aspirations of the NCAP, signaling government prioritization of this segment.

For Type II - industrial and cold chain, the strongest opportunities are horticulture, flowers, dairy, fisheries, pharmaceuticals, pre-cooling, refrigerated storage, refrigerated transport and logistics nodes around Nairobi, Mombasa and export corridors. The export agriculture sector

anchors commercial demand. Horticulture was Kenya's single largest export category in 2024, generating KSh 203.6 billion, ahead of tea, according to KNBS. Cut flowers are the leading revenue earner within this, with Europe the primary market. This export dependence creates a direct commercial case for temperature-controlled infrastructure: supply chain failures translate immediately into lost export revenue and market access. FAO estimates post-harvest losses for fruit and vegetables in the region at up to 40%, while a 2018 IFPRI study found horticultural losses in Kenya as high as 50%, mainly due to poor storage and handling. Kenya's Ministry of Agriculture estimates losses across all crop production at 30-40%. Agriculture experts involved in the NCAP development process point to the need for sustainable cold chains to manage perishable products.

Priority segment	Commercial opportunity
Hospitals and public facilities	Reliable HVAC, vaccine/medical cold chain, power resilience, controls, energy efficiency and service response.
Universities, hotels and commercial buildings	Efficient ACs, chillers, heat pumps, BMS, passive cooling, retrofit packages and maintenance contracts.
Horticulture and flowers	Pre-cooling, cold rooms, refrigerated transport, export-quality temperature control and monitoring.
Dairy, fisheries and food value chains	Scalable cold storage, ice systems, pack-house refrigeration, refrigerated handling and local technician training.

3. Import and regulatory matrix by EPIC application

Kenya applies EAC Common External Tariff classifications. CE documents are supporting evidence, not a substitute for KEBS PVoC/CoC or EPRA registration where applicable.

Sectors	Application / equipment package	Import duty	Certification / standards issue
Type I - Tertiary	Passive cooling / retrofit: insulation, cool roofs, shading, glazing, ventilation components	EAC CET rate varies by material	KEBS/PVoC depending on product; building/electrical standards may apply
Type I - Tertiary	Room ACs / split ACs / packaged ACs	Often 25% for ACs; parts 10-25%, confirm	KEBS PVoC/CoC; ISM where applicable; EPRA MEPS/label and model registration
Type I - Tertiary	Chillers / central HVAC / heat pumps	0-25% depending on sub-heading; confirm via KRA	KEBS PVoC/CoC; EPRA if appliance category covered; electrical contractor licensing
Type I / II	Smart controls, BMS, sensors, monitoring	10-25% depending on classification	KEBS/PVoC; telecom/radio approvals if wireless; electrical conformity
Type I / II	PV-hybrid cooling / resilience package	Solar cells/modules may qualify for duty/VAT relief; assembled systems may differ	Energy/electrical rules; mini-grid/grid interface if applicable

Sectors	Application / equipment package	Import duty	Certification / standards issue
Type II - Cold chain	Pre-cooling equipment: forced-air, hydro-cooling, ice machines, heat exchangers	0-25% depending on sub-heading	KEBS PVoC/CoC; food/water-contact requirements where relevant
Type II - Cold chain	Cold storage: cold rooms, evaporators, condensers, commercial refrigerators/freezers	0-25%; consumer appliances often higher than industrial equipment	KEBS PVoC/CoC; EPRA registration if appliance category covered
Type II - Industrial refrigeration	Compressors, condensers, evaporators, valves, pressure equipment, controls	10-25%; confirm by sub-heading	KEBS PVoC/CoC; refrigerant safety; electrical contractor licensing; NEMA if refrigerants involved
Type II - Refrigerated transport	Transport refrigeration units, reefer bodies, loggers	Depends on equipment-only vs vehicle/trailer import	KEBS/PVoC; vehicle/transport rules if complete vehicle

4. Duties, levies and exemptions

Kenya's tariff framework is based primarily on the EAC Common External Tariff. The EU-Kenya EPA entered into force in July 2024, but Kenya's opening to EU goods is gradual and its implementation was reportedly suspended by the East African Court of Justice in late 2025 pending the main case.

Charge	Kenya working assumption
Import duty	Generally 0%, 10%, 25% or 35% under the EAC CET; HVAC&R items may range from 0-25% depending on sub-heading. Air conditioners under HS 8415 are often treated around 25%; industrial refrigeration may be lower. Confirm through KRA.
VAT	Standard import VAT is 16%, generally applied on CIF plus duty and other applicable taxes.
Import Declaration Fee (IDF)	KRA currently states 3.5% of import value. Received inputs cite 2.5%; confirm current applicable rate before budgeting.
Railway Development Levy (RDL)	2% of customs value, used to fund railway infrastructure.

Charge	Kenya working assumption
Port / customs / broker costs	Budget for port handling, clearing agent fees, storage/demurrage, PVoC agent fees, inspections and inland transport.
Exemptions	No automatic exemption for donor-funded cooling equipment. Waivers may be possible case-by-case through the Ministry of Finance/line ministry, Government national-interest projects, or Cabinet Secretary waivers for PVoC.
Solar / renewable incentives	Solar cells/modules and some specialized solar/wind equipment can receive duty/VAT relief, but bundled systems with batteries, inverters or appliances may be treated differently. Cooling equipment does not automatically qualify as renewable-energy equipment.

5. Key authorities

CE, EN and ISO documentation can support market access, but they do not bypass Kenyan requirements. Regulated imports need a KEBS Certificate of Conformity through the Pre-Export Verification of Conformity process before shipment, and imported products intended for sale may require the Import Standardization Mark. For HVAC appliances, EPRA energy-performance registration is an additional layer.

Authority / body	Role for EPIC cooling pilots
KEBS	National standards body; PVoC/CoC system; Import Standardization Mark; product standards, testing and certification.
EPRA	MEPS and appliance energy labelling; model registration; electrical contractor licensing and electrical installation oversight under the Energy Act.
KRA / Customs	Import Declaration Form, customs duties, VAT, IDF, RDL and clearance procedures.
NEMA / National Ozone Unit	Montreal Protocol implementation; HCFC controls; Kigali/HFC transition and refrigerant notifications.
Electrical Inspectorate / State Department for Energy	Electrical wiring and installation standards.
Kenya Power / KPLC	Distribution-level grid connection for project sites.
KETRACO	High-voltage transmission connections where relevant.

Authority / body	Role for EPIC cooling pilots
PPRA / public procurement bodies	Public procurement rules, local preference and AGPO reservations.

6. MEPS, energy labels and product registration

Kenya has mandatory appliance energy performance and labelling rules. The Energy (Appliances' Energy Performance and Labelling) Regulations 2016 apply to specified appliances and require testing by accredited laboratories to applicable Kenyan standards, followed by EPRA model registration. Room ACs, refrigerators, motors and lighting products are key covered categories.

Product category	Kenya requirement
Room ACs	MEPS and EPRA five-star label/model registration required before sale or supply. Equipment containing R-22 should not be specified and is unlikely to be registrable.
Refrigerators/freezers	MEPS/energy label/model registration apply to regulated appliance categories; confirm treatment for commercial/industrial units.
Motors, lighting and some electrical equipment	Covered by Kenya's energy labelling/performance framework where specified.
EU test reports	May support the process, but whether they are accepted directly for EPRA registration is unclear and should be confirmed.

7. Import documents and timelines

Core import and conformity documents likely required:

- Certificate of Conformity from a KEBS-authorized PVoC agent before shipment;
- Import Standards Mark where applicable;
- commercial invoice, pro-forma invoice, packing list, bill of lading or airway bill;
- Import Declaration Form (IDF);

- EPRA model registration certificate for regulated ACs/refrigerators;
- Technical datasheet with model, capacity, refrigerant type/charge and power data;
- CE Declaration of Conformity and test reports as supporting evidence for PVoC;
- Insurance certificate from a company licensed in Kenya;
- Refrigerant notification/authorization through NEMA/National Ozone Unit for HCFCs or controlled substances where applicable.

8. Local content, O&M and refrigerants

Kenya does not impose a strict local-content percentage for private HVAC&R imports, but public procurement favors local suppliers and reserves 30% of government procurement opportunities for youth, women and persons with disabilities. In practice, donor-funded or public-facility pilots should include Kenyan installation, maintenance and training firms.

Local HVAC&R and cold-chain capacity is relatively strong in Nairobi, Mombasa and Kisumu, supported by commercial real estate, hospitality, healthcare, horticulture exports and pharmaceuticals. Rural and remote sites face weaker service coverage. European technicians can support commissioning, but long-term maintenance must be Kenyan based.

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Section 2 - Market demand and commercial opportunity

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Section 3 - Import and regulatory matrix by EPIC application

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Section 4 - Duties, levies and exemptions

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Section 6 - MEPS, energy labels and product registration

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Section 8 - Local content, O&M and refrigerants

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