

1. Executive snapshot

Item	Morocco assessment
Ease of importing from Europe	If EU preferential origin is documented and Moroccan conformity requirements are handled correctly.
Best-fit sectors	Type I: hospitals, universities, public facilities and hotels. Type II: cold chain in ports, food value chains, agro-processing, refrigerated logistics and pharmaceutical cold chain.
Regulatory clarity	Medium. Morocco has an established standards/conformity system, but CE marking is not sufficient where Moroccan CMIM marking or CoC requirements apply.
Main opportunity	Growing cooling demand, proximity to Europe, strong logistics links, a developed HVAC&R ecosystem, and rising cold-chain needs.
Primary barrier	Moroccan conformity assessment, CMIM marking, CoC via PortNet, energy labelling/MEPS, and product-specific import classification.
Best-fit technologies	Chillers, heat pumps, efficient HVAC for large buildings, cold rooms, industrial refrigeration, pre-cooling, refrigerated logistics, smart controls, monitoring, PV-hybrid cooling and retrofit/passive cooling packages.
Recommended approach	Require dual compliance: European/EN/ISO technical quality plus Moroccan conformity, energy-label and import documentation. Require local O&M and spare-parts arrangements before award.

2. Market demand and commercial opportunity

Morocco is a strong candidate because cooling demand is rising across both buildings and cold-chain applications. The Morocco NCAP process is intended to address growing cooling demand driven by climate change, urbanization and population growth, and covers space cooling in buildings,

healthcare, food security, mobile air conditioning and industrial process cooling. The NCAP explicitly targets energy efficiency improvements in cooling systems, the adoption of climate-friendly refrigerants, passive cooling methods, and coordinated public-private policy frameworks. At the

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regional level, air conditioning consumes up to 70% of total residential and commercial electricity in the MENA region, with AC stock forecast to reach 210 million units by 2050 and energy demand for air conditioning expected to increase by 50% by 2040.

Type I - Tertiary sector. The strongest opportunities are hospitals, universities, public facilities and hotels. Morocco's NCAP process explicitly covers healthcare cooling as a priority sub-sector and the buildings energy efficiency regulatory framework (Law 47-09) creates the conditions for integrated energy efficiency pilots.

For Type II - industrial sector and cold chain. Morocco is attractive because of agro-food exports, fisheries, ports, logistics corridors and

pharmaceutical/healthcare cold chain. There is a consolidated EU market, representing more than 35% of export values. Thus, Moroccan exporters face EU food safety and pharma standards that require certified cold chain infrastructure and traceability systems. Despite advancements, cold chain infrastructure remains underdeveloped, with only around 25% of required cold storage facilities in place, a gap that leads to significant post-harvest losses and hampers competitiveness in international markets.

A major cold storage facility is being developed near Casablanca (LOTRAF cold storage facility), transforming two outdated warehouses into modern, climate-smart logistics hub that will handle up to third of the city's cold storage capacity. The project involved Italian and Moroccan institutional partners.

Priority segment	Opportunity
Hospitals and healthcare facilities	Efficient HVAC, pharmaceutical/vaccine cold chain, redundancy, monitoring, backup/resilience packages.
Universities and public facilities	Passive cooling, envelope retrofits, central HVAC, heat pumps, controls and demonstration projects.
Hotels and tourism facilities	Comfort cooling retrofits, heat pumps, BMS, efficiency upgrades and water-conscious design.
Agro-food, fisheries and logistics	Pre-cooling, cold rooms, industrial refrigeration, refrigerated logistics, monitoring and export-quality preservation.

3. Import and regulatory matrix by EPIC application

EUROPEAN track	Application / equipment package	Import duty from Europe/EU	Certification / standards issue
Type I - Tertiary	Passive cooling / building retrofit: insulation, shading, reflective materials, ventilation	Likely preferential if EU-origin; confirm by HS code	Building products may require conformity assessment depending on product
Type I - Tertiary	Room ACs / packaged AC / VRF	Likely 0% if EU-origin and origin proof accepted	CMIM or CoC may apply; AC energy label/MEPS likely applicable
Type I - Tertiary	Chillers, heat pumps, central cooling systems	Likely 0% if EU-origin and origin proof accepted	Product-by-product conformity; pressure/electrical/refrigerant safety checks
Type I / II	Smart controls, BMS, sensors, meters, monitoring	Likely 0% if EU-origin; confirm	Electrical/EMC conformity; telecom approval if wireless
Type I / II	PV-hybrid cooling / resilience package	Product-specific; confirm by HS code	Electrical/grid safety; battery documentation
Type II - Cold chain	Pre-cooling equipment: forced-air, hydro-cooling, ice machines, heat exchangers	Likely 0% if EU-origin; confirm	CoC/CMIM depending on equipment; water/food-contact checks where relevant
Type II - Cold chain	Cold storage: cold rooms, evaporators, condensers, commercial refrigerators/freezers	Likely 0% if EU-origin; confirm	CoC/CMIM; energy label/MEPS may apply to refrigerators and AC/refrigeration appliances
Type II - Industrial refrigeration	Compressors, condensers, evaporators, valves, pressure vessels, controls	Likely 0% if EU-origin; confirm	Pressure, refrigerant, electrical and conformity checks
Type II - Refrigerated transport	Transport refrigeration units, insulated bodies, reefer containers, temperature loggers	Highly product-specific	Vehicle/homologation rules may apply if importing complete vehicles
Type II - Ports/logistics	Port/logistics cold-chain infrastructure	Product-specific	Electrical, port safety, CoC/CMIM and operator requirements

4. Duties, VAT, levies and exemptions

For EU/European-origin industrial goods, Morocco is likely to offer a favourable customs-duty position under the EU-Morocco Association Agreement, but applicants must prove preferential origin and confirm the exact Moroccan tariff line. Rules of origin and product classification remain critical.

Charge	Working assumption for costing
Customs duty	Likely 0% for qualifying EU-origin industrial goods, but confirm by HS code and origin proof.
VAT	Standard import VAT: 20%.
TPI	Taxe Parafiscale a l'Importation: 0.25% on imported goods.
Other costs	Customs broker, PortNet/DUM processing, CoC/conformity assessment, port handling, storage, translation/labelling, possible testing.
Exemptions	No automatic donor-funded exemption identified. VAT/customs relief may exist under specific customs regimes, investment agreements or project structures, but must be confirmed with ADII, Ministry of Finance and the project host.

If EU-origin proof is not accepted, or if the equipment is not EU-origin, duty could be materially higher.

5. Standards, certification and key authorities

CE/EN/ISO documentation is useful but not sufficient where Moroccan regulation applies. Moroccan requirements may include CMIM marking, Certificates of Conformity, energy labelling and product-specific technical regulations. Imported industrial products may be verified at origin or destination depending on the product category.

Authority / body	Role for cooling pilots
Ministry of Industry and Trade	Technical regulations, CMIM marking and industrial product conformity controls.
IMANOR	Moroccan standards, certification and standards references.

Authority / body	Role for cooling pilots
AMEE	Energy efficiency, appliance energy labelling, MEPS and energy management policy.
ADII / Customs	Customs classification, duties, VAT, DUM and clearance.
PortNet	Import formalities, CoC platform and digital import documentation.
National Ozone Unit / environmental authorities	HCFC/HFC controls and Montreal Protocol/Kigali implementation.
AMPF	Sector association for refrigeration and air-conditioning professionals; useful for identifying distributors, installers and technicians.
Local inspection bodies	SGS, Bureau Veritas, TUV, Applus and others may be involved depending on product category.

6. MEPS, energy labels and product registration

Morocco has mandatory energy-efficiency and labelling requirements for air conditioners under Moroccan standard NM 14.2.302. Energy labelling for air conditioners and refrigerators became mandatory from March 2025, but the extent should be confirmed directly with AMEE/IMANOR before the call is issued.

Product category	Morocco requirement
Air conditioners	Mandatory energy label/MEPS under NM 14.2.302.
Refrigerators / freezers	Energy labelling appears to apply from 2025; confirm scope for commercial vs household equipment.
Chillers / large heat pumps	Product-specific; confirm whether covered by MEPS, energy labelling, or only general conformity assessment.
Cold rooms / industrial refrigeration	Likely product-specific conformity rather than simple household appliance labelling; confirm with AMEE/IMANOR.
Smart controls / wireless monitoring	Electrical/EMC/telecom conformity may apply; confirm with competent authority.

7. Import licensing, documents and timelines

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Moroccan imports are processed through customs systems including DUM and PortNet. For first European imports, applicants should assume conformity assessment and PortNet processing could add several weeks if not prepared before shipment. The CoC system may require verification at origin or destination depending on product.

Core documents likely required:

- commercial invoice;
- packing list;
- bill of lading, airway bill or CMR;
- import commitment;
- DUM / Single Goods Declaration;
- PortNet tracking sheet;
- certificate of origin / proof of preferential EU origin;
- Certificate of Conformity, where applicable;
- CMIM documentation, where applicable;
- CE declaration and EN/ISO technical file as supporting evidence;
- technical datasheets;
- lab reports or test reports;
- energy-label/MEPS documentation, where applicable;
- refrigerant and pressure-equipment documentation, where applicable.

8. Exemptions and incentives

No automatic customs/VAT exemption was identified for donor-funded cooling projects. Exemptions or VAT suspension should therefore be treated as case-by-case and confirmed with ADII, the Ministry of Finance and the project host. For scale-up beyond the pilot, green finance may be more relevant than import-tax relief.

Mechanism	Relevance to Europe
EU preferential origin	May reduce customs duty for EU-origin equipment.

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VAT/customs exemptions	Possible only if a specific legal basis or project arrangement exists; do not assume.
GEFF / MorSEFF	Useful for private-sector replication, especially cold chain, industrial efficiency and green buildings.
ESCO / energy-efficiency finance	Emerging pathway for hotels, public buildings and industrial facilities.
Renewable/PV integration	May be bankable through green finance channels, but import-tax treatment must be checked by HS code.

9. Local content, partnerships and O&M

There is no clear blanket local-content requirement for imported HVAC&R equipment. However, Moroccan public procurement includes national-preference mechanisms, and European applicants should include a Moroccan partner for import, installation, commissioning, warranty, spare parts and O&M.

O&M issue	Morocco assessment	Potential mitigation
Technical skills	Available in major cities and industrial corridors; more limited in remote regions.	Require named Moroccan service partner and manufacturer training.
Spare parts	Likely available for mainstream systems; specialised European components may need stocking.	Require 2-3 year critical spare-parts stock in Morocco.
Low-GWP refrigerants	Capacity exists in specialist firms but is uneven.	Require refrigerant-specific technician training and safety protocol.
Water constraints	Important for evaporative/adiabatic systems.	Require site water-risk screening; prefer air-cooled systems where water is constrained.
Digital monitoring	Feasible in urban/logistics settings, but not a substitute for local O&M.	Require offline-capable controls and local data logging.

10. Refrigerants and technology choice

Morocco is advancing through HCFC phase-out and Kigali-related implementation. Should not specify R-22 or HCFC-based systems. R-410A may be familiar but is a high-GWP transitional option. R-32 may be suitable for some AC/heat-pump applications if local A2L competence exists. CO₂, ammonia or hydrocarbons may be attractive for industrial cold chain, but only with a qualified Moroccan service partner.

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- do not specify R-22 or HCFC-based systems;
- require refrigerant recovery, safety tools and technician training before handover;
- confirm availability of low-GWP refrigerants and spare parts before award;
- use natural refrigerants only where local technical and safety capacity is demonstrated.

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