Conditions and Barriers for Vehicle Energy Efficiency Regulation in Morocco

Reference Study Morocco – September 2026

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CHANGING TRANSPORT

وزارة النقل واللوجيستيك
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Ministry of Transport and Logistics

Supported by:

Federal Ministry for Economic Affairs and Climate Action

IKI INTERNATIONAL CLIMATE INITIATIVE

on the basis of a decision by the German Bundestag

Project Background

The IMPROVE project is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and is funded through the International Climate Initiative (IKI) of the German Federal Ministry for Environment, Climate Action, Nature Conservation and Nuclear Safety (BMUKN).

About Changing Transport

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Disclaimer

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Exchange Rates

MAD	EUR	USD	Date
1 MAD	0.0923 EUR	0.10904 USD	01.03.2026

List of Acronyms and Abbreviations

A2Z	Accelerating to Zero Coalition
ADII	Customs and Indirect Tax Administration
ADIL	Online Import Customs Clearance Assistant
AfCFTA	African Continental Free Trade Area
AIVAM	Association of Vehicle Importers in Morocco
AMDIE	Moroccan Agency for Investment and Export Development
AMEE	Moroccan Agency for Energy Efficiency
ANRE	National Energy Regulatory Authority
BMUKN	German Federal Ministry for the Environment, Climate Action, Nature Conservation and Nuclear Safety
BMWE	German Federal Ministry for Economic Affairs and Energy
CBAM	Carbon Border Adjustment Mechanism
CBU	Fully assembled
CCN-RTB1	5th National Communication on Climate Change combined with the First Biennial Transparency Report in Morocco
CMVSS	Canada Motor Vehicle Safety Standards
CNEH	National Centre for Testing and Homologation
CNEDD	National Charter for the Environment and Sustainable Development
CO2	Carbon dioxide
DGI	General Tax Directorate
EC	European Commission
EFTA	European Free Trade Association
EU	European Union
EV	Electric Vehicle
FP	Fiscal power
FMVSS	Federal Motor Vehicle Safety Standards of the United States of America
FTA	Free Trade Agreement
GCC	Gulf Cooperation Council Standardization Organization
GDP	Gross domestic product
GHG	Greenhouse gases
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GTW	Gross Train Weight
GVW	Gross Vehicle Weight

GW	Gigawatt
HP	Horsepower
HCP	High Commission for Planning
HDV	Heavy Duty Vehicle
IEA	International Energy Agency
IKI	International Climate Initiative
Ktoe	Kilotonne of oil equivalent
LCV	Light Commercial Vehicles
LDV	Light Duty Vehicles
LULUCF	Land Use, Land Use Change and Forestry
MAD	Moroccan Dirham
MCV	Release for consumption of vehicles
MENA	Middle East and North Africa
MRE	Moroccan residing abroad
MRV	Measurement, Reporting and Verification
Mt CO2e	Million tonnes of CO2 equivalent
MTL	Ministry of Transport and Logistics in Morocco
MTEDD	Ministry of Energy Transition and Sustainable Development
MW	Megawatt
NARSA	National Road Safety Agency of Morocco
NDC	Nationally Determined Contribution
NEDC	New European Driving Cycle
ONCF	National Railway Office
PCN 30	National Climate Plan 2030
PCT	Territorial Climate Plan
PF	Fiscal power
PV	Passenger Vehicle
RE	Renewable energies
RTI	Individual vehicle approval
RPT	Type approval
SNBC	Long-Term National Low-Carbon Strategy Morocco 2050
SNDD	National Strategy for Sustainable Development
SNEE	National Energy Efficiency Strategy 2030
SNTL	National Company of Transport and Logistics
TIC	Domestic consumption tax

TJ	Terajoule
T/Km	Tonne-kilometre
TRACS	Advancing Transport Climate Strategies in Rapidly Motorizing Countries
TSAV	Annual special tax on motor vehicles
TVMU	Multi-user Vehicle Terminal
TVR	Renault Vehicle Terminal
UN	United Nations
UNECE	United Nations Economic Commission for Europe
UNFCCC	United Nations Framework Convention on Climate Change
USD	US Dollar
VAT	Value Added Tax
WLTP	Worldwide Harmonized Light Vehicle Test Procedure
WW	Provisional vehicle registration

Executive Summary

Climate Change and Transport

- In 2023, the transport sector in Morocco accounted for **28 % of total CO_2 emissions** and **36 % of final energy consumption**. Since 2010, **emissions have increased by an average of 2 % per year and by 26 % over the entire period**, while the sector remains dependent on **more than 99 % oil**.

- **Road transport is the second largest source of CO_2 emissions** in Morocco in 2022, accounting for **17.5 %** of total emissions**,** after electricity and heat generation. It accounts for **99 % of emissions compared with other modes of transport**.

- In **2022, passenger vehicles** (up to nine seats) were responsible for 51 % of greenhouse gas (GHG) emissions from land transport (road and rail) in Morocco.

- The 2025 Nationally Determined Contribution (NDC) sets a target of **53 % reduction in total GHG emissions by 2035 compared with** the "Business as usual" scenario, subject to international support. The unconditional reduction target is 21.6 %.

- The transport sector is expected to contribute **9 % to Morocco's emission reduction efforts by 2035**, with **a potential reduction of 7.48 Mt CO2e over the 2026-2035 period**. This will be achieved through the implementation of thirteen mitigation measures, including a **bonus-malus system** and **CO_2 emission standards**.

- Morocco is a signatory to the **"COP26 declaration on accelerating the transition to 100% zero-emission passenger cars and vans"** (Zero Emission Vehicles Declaration; ZEV Declaration) of the Accelerating to Zero (A2Z) Coalition. Through this declaration, signatory countries from emerging markets and developing economies commit to scaling up efforts to accelerate the uptake of zero-emission vehicles.

Transport Sector Developments

- Between 2015 and 2023, the **total number of vehicles registered in Morocco**, including **motorcycles** (two- and three-wheelers above 50 cc), passenger vehicles (PVs), light commercial vehicles (LCVs) and heavy-duty vehicles (HDVs), **increased from about 2.68 million to 4.47 million**, with an **average annual growth rate of 6.5 %**. This trend is consistent with the country's economic growth and rising GDP per capita.

- Between 2015 and 2023, the **motorisation rate** increased from 55 vehicles per 1,000 inhabitants to 88 in 2023. Considering only "tourism vehicles"[1], this rate rose from 54 to 79 over the same period.

- In 2023, **"tourism vehicles" accounted for 65.6 %** of the vehicle fleet, followed by LCVs and HDVs for 27.5 %, and two-and three-wheelers above 50 cc at 6.9 %.

- In 2022, **the average age of PVs was 13 years.** Trucks (3.5 to 12 tonnes) were older on average, at 16.5 years, but accounted for only 0.5 % of the active vehicle fleet, while urban buses above 5 tonnes (0.07 % of the fleet) were the newest category (7.7 years).

Automotive Industry

- In 2024, the automotive industry accounted for **23 % of Morocco's industrial value added and 23 % of national production**. It has a total of 280,000 jobs, 230 suppliers and generated **MAD 154.49 billion in exports in 2025,** equal to **33 %** of the country's total exports**,** making it Morocco's **leading export sector** ahead of the mining sector.

- In 2025, Morocco produced more than 500,000 vehicles of all types and reached a production capacity of **1 million vehicles. By 2030, the country aims to reach a production capacity of 2 million vehicles.**

- Production is mainly export-oriented**: Since 2024, Morocco has been the largest producer of PVs on the African continent and the fourth largest supplier by volume of vehicles exported to the European Union (EU),** with the share of exports to the EU increasing by 9.1 % between 2023 and 2024. Exports from the sector rose significantly by 27.4 % in 2023 compared with 2022, an increase of MAD 30.48 billion.

- Two European manufacturers, **Renault and Stellantis groups**, dominate the Moroccan automotive sector, but new players are emerging, including the **Moroccan manufacturer NEO Motors** whose capital is 100% Moroccan and the leading Asian electric vehicle manufacturers attracted by investment opportunities, Morocco's mining resources, the Kingdom's strategic geographical anchoring and its industrial choices.

- Morocco aims to become a **leader in electric mobility** by developing fully decarbonized automotive supply chains. In **2025**, it reached a production capacity of **100,000 electric vehicles (EVs)**, accounting for between **4 % and 5 % of total exports** and it aims to supply between **400,000 and 500,000 EVs per year from the end of 2026 onward**. Thanks to its industrial diversification strategy and free trade agreements, major projects have been launched in recent years in cooperation with Asian companies for battery materials and assembly, including

[1] Tourism vehicles are designed as motor vehicles intended for the transport of people, with a maximum capacity of nine seats, including the driver. This category includes not only standard passenger cars, but also vehicles such as vans with seats, mini-buses, vans and minivans, which are often used by large families.

the manufacture of electric batteries supported by Moroccan investment fund Al Mada and CNGR Advanced Material Co. Ltd., the construction of the first electric battery gigafactory by Gotion High-Tech Co. Ltd., and BTR New Material Group Co., Ltd.'s cathode material project in Tangier and its planned anode plant in Morocco.

- In 2024, the Moroccan automotive market recorded sales of **176,401 new vehicles (PVs and LCVs),** up to **9.2 %** compared with **2023**.

- The **local used vehicle market remains** limited, with **14,589 vehicles sold in 2024**, accounting for **8.3 % of total vehicle sales**. This is due to restrictions on the import of vehicles older than 5 years and customs duties.

Vehicle Data Management

- Vehicle fleet data in Morocco is managed by **the National Road Safety Agency (NARSA).** It centralises all the data collected on vehicle homologation and registration, including technical specifications, such as commercial year, EURO standard, and CO_2 values. The data are stored in five different databases. Fuel consumption data are not collected but can be inferred from emission values.

- Homologation procedures are managed by NARSA, data collection is carried out by the **National Centre for Testing and Homologation (CNEH)** or the **provincial and prefectural registration centres that report to NARSA**.
- Although Morocco has extensive experience in data collection and analysis, compared with similar economies, technical difficulties remain in determining average annual CO_2 emissions, notably because of the absence of driving-cycle[2] information in the database and imprecise EURO standard entries.

Homologation

- The **EURO 6b standard applies to new passenger vehicles** (M1) at the approval stage since January 2023 and to all new registrations since January 2024. For the other vehicle categories (M2, M3, N1, N2, N3), its application has been postponed to January 2027 for homologation and 2028 for registration.

- There are two types of approval:
  - **Type approval**: the act by which the homologation authority certifies that a vehicle type, component or accessory complies with the applicable administrative provisions and technical requirements.
  - **Individual vehicle approval:** the act by which the homologation authority certifies that a specific vehicle, whether unique or not, complies with the applicable administrative provisions and technical requirements, in

[2] The driving cycle, or standard test procedure, refers to a protocol used to measure vehicle's pollutant emissions and fuel consumption under simulated and repeatable driving conditions. There are different test procedures in the world such as NEDC, WLTP, RDE, FTP-75, JC O8 or China 6.

accordance with the EU regulatory framework on the approval and market surveillance of motor vehicles (Regulation (EU) 2018/858).

- **Imported vehicles** undergo a customs clearance procedure carried out by the customs clearance office. **Only vehicles less than 5 years old are eligible for approval**, although exemptions apply to Moroccans residing abroad, special vehicles and donated vehicles.

Vehicle Efficiency Efforts

- To date, Morocco has **not** adopted **mandatory fuel economy standards** or **fuel economy labelling**. There is also **no ZEV mandate** requiring manufacturers to produce and supply a certain quota of zero-emission vehicles for the Moroccan market.

- However, **CO_2 emission standards for new PVs and LCVs, as well as the feebate system or "Bonus-Malus system", are part of Morocco's 2021 and 2025 NDC**'s measures identified for the transport sector.

- The progressive **annual tax** based on fiscal horsepower and the engine type (petrol or diesel) specifically targets combustion engine vehicles, while **electric and hybrid vehicles are exempt.** These vehicles also benefit from a reduced import duty of **2.5 %** instead of **17.5 %,** as well as an **exemption from the luxury vehicle tax (proportional stamp duty).**

- Measures such as **the scrappage premium for the renewal of large and small taxis** contribute to reducing the average age of Morocco's vehicle fleet, but they remain insufficient for a systemic transformation.

- Direct and indirect external factors such as Morocco's attractiveness to Chinese EVs investors, the EU's decision, albeit softened, to ban the sale of internal combustion vehicles in 2035, and a possible expansion of the Carbon Border Adjustment Mechanism (CBAM) could help accelerate the transition of the Moroccan automotive industry toward integrated and decarbonized electric mobility value chains, increasing the number of EVs on Moroccan roads.

- For an overview of taxes, regulatory measures and incentives relating to vehicle efficiency and homologation processes, and whether they are implemented in Morocco (indicated by a "Yes" or "No"), see Table 1 below.

Table 1: Overview of fiscal policies and incentives for PVs and LCVs in Morocco

Policy	Implemented [yes/no]	Short description
Fuel economy / efficiency labelling	No	_

Import duties	Yes	Depends on the powertrain: combustion engine 17.5 %, hybrid 2.5 % and electric 2.5 %.
Parafiscal tax on imports	Yes	0,25 %
Import restrictions	Yes	Restriction on used vehicles: the age of the vehicle must not exceed 5 years.
Purchase tax / VAT	Yes	10 % to economy cars 20 % to standard and luxury vehicles
Luxury vehicle tax (Proportional stamp duty)	Yes	From 5 % to 20 % depending on the vehicle's value; Calculated on the vehicle's total value, including the purchase price, import duty and import parafiscal tax. Hybrid and electric vehicles are exempt.
Registration tax	Yes	Applied at the time of first registration.
Probate Fees	Yes	Applied at the time of homologation.
Renewal fee	Yes	The tax rate is set according to the vehicle's fiscal power and engine type (petrol or diesel). Electric and hybrid vehicles are exempt from this tax.
CO_2 tax	No	_
Fuel tax	Yes	Import duty: 2.5 % Parafiscal import tax: 0.25 % TIC[3]: MAD 376.40 per hectolitre for petrol and MAD 242.20 per hectolitre for diesel Import VAT: 10 %
Subsidy for clean vehicles	No	_
Fuel economy standard	No	_

[3] Domestic consumption tax

1. Introduction and Context

1.1 Objective of the Study

The project "*Introducing Measures, Pathways and Roadmaps for Optimizing Vehicle Efficiency and Electrification*; IMPROVE) is funded by the International Climate Initiative (IKI) and commissioned by the German Federal Ministry for the Environment, Climate Action, Nature Conservation and Nuclear Safety (BMUKN).

Over a period of more than three years, from January 2023 to May[4] 2026, the project supports four partner countries – Morocco, Kenya, Colombia and Thailand – in establishing regulatory frameworks aimed at improving the energy efficiency of vehicles and accelerating the electrification of road transport. In Morocco, it is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, in partnership with the Ministry of Transport and Logistics in Morocco (MTL).

The project addresses some of today's most pressing mobility challenges: the need to accelerate the phase-out of internal combustion engines, the transition to zero-emission vehicles, and the improvement of energy efficiency to reduce emissions and fuel consumption.

In this context, this study aims to identify the most effective regulatory instruments, adapted to the national context, in order to improve the efficiency of the vehicle fleet and support the transition to clean vehicles in Morocco.

The study reviews the existing regulations and taxes applicable to vehicles and analyses existing policies, highlighting institutional responsibilities as well as vehicle homologation and registration processes. It also focuses on data collection, in particular how CO_2 emissions are collected and analysed in Morocco, in order to identify existing gaps and improve monitoring and regulation mechanisms.

Based on this analysis, the study proposes recommendations and concrete regulatory options to improve the vehicle energy efficiency in Morocco, providing a reference framework for policymakers and stakeholders. It thus provides a strategic basis for the development of measures aligned with Morocco's climate objectives and the integration of ambitious standards to promote sustainable mobility.

1.2 Context Overview

Located in the northwest of Africa, Morocco is a constitutional, democratic and social monarchy whose official language is Arabic, alongside the Amazigh language. It belongs to the Greater Maghreb and the Arab world. Its geographical position, at the intersection of Africa and Europe, makes Morocco a convergence point and a strategic crossroads for international trade and investment.

According to the High Commission for Planning (HCP), the Moroccan institution in charge of statistical production and planning, the Kingdom had a population of **36.8**

4 The BMUKN has granted Morocco an extension of the project until the end of 2026.

million inhabitants in 2024, including 23.1 million living in urban areas, representing 62.8 % of the population. The country also has 9.27 million households nationwide. By 2050, the total population could reach 43.6 million (HCP, 2025a, 2025b).

The national economy recorded a current-price Gross Domestic Product (GDP) of MAD 1,596.83 billion in 2024, an increase of 7 % compared with 2023 (see Figure 1). GDP per capita, which has been growing steadily over the past decade, with the exception of 2020 (due to the Covid-19 pandemic), reached MAD 43,408 in 2024 (see Figure 2). Over the past decade, annual GDP growth in volume terms has been volatile: After moderate fluctuations between 2015 and 2019, averaging around 3 %, the economy recorded a sharp contraction in 2020 (-7.2 %), followed by a significant rebound in 2021 (8.2 %). Growth then slowed in 2022 (1.8 %), before recovering to 3.7 % in 2023 and improving further in 2024 to 3.8 % (see Figure 3) (HCP, 2025c, 2025d).

Figure 1: GDP at current prices in billions of dirhams (HCP, compiled by the authors)

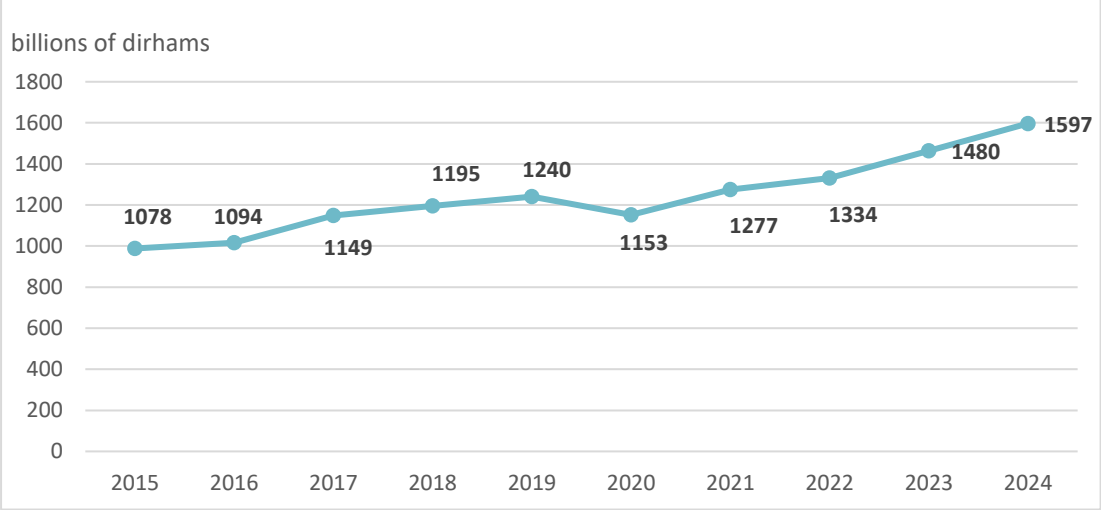


Figure 2: GDP per capita in MAD since 2014 (HCP, compiled by the authors)

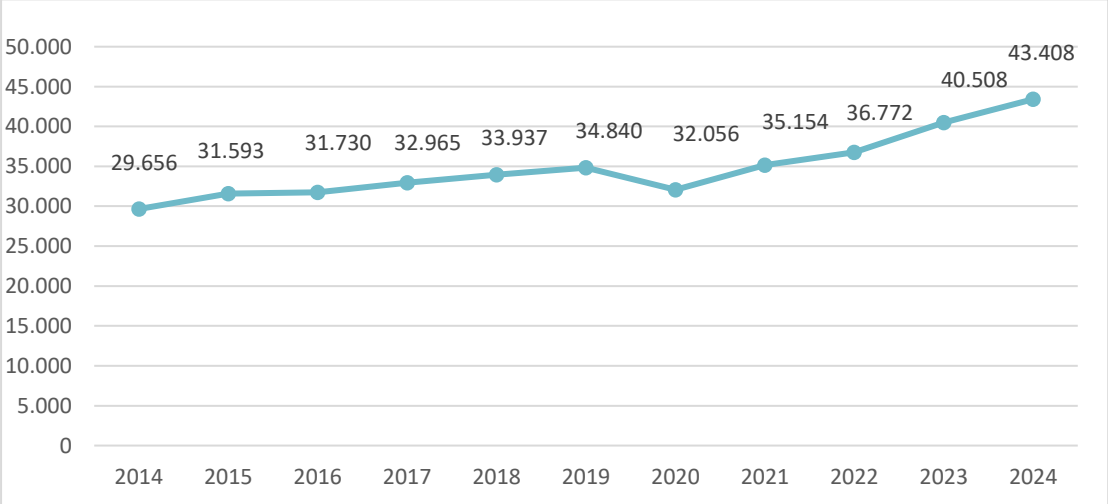
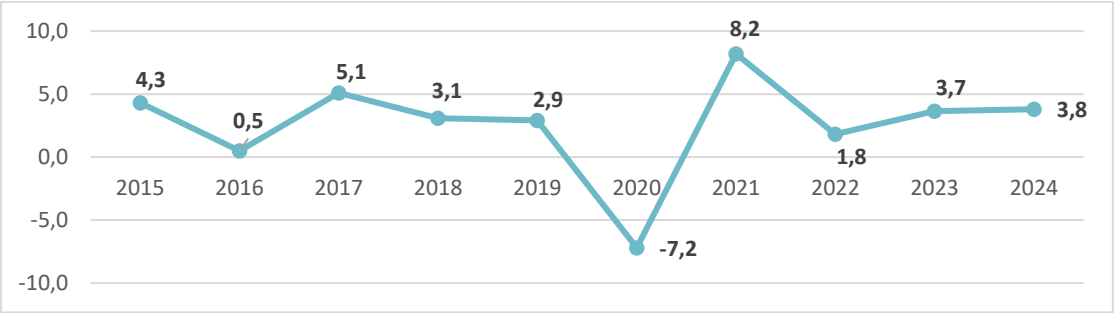


Figure 3: Annual GDP in volume - Economic growth rate in % (HCP, compiled by the authors)



According to the national survey on the standard of living of households conducted between March 2022 and March 2023 by the HCP, the average annual household income amounts to MAD 89,170 at the national level, MAD 103,520 in urban areas, and MAD 56,047 in rural areas. Per person, the average annual income is MAD 21,949 in 2022. It is 2.1 times higher in urban areas (MAD 26,988) than in rural areas (MAD 12,862).

At the national level, 71.8 % of households have an annual income below the average, with disparities observed between urban (65.9 %) and rural (85.4 %) (HCP, 2024).

1.2.1 Motorisation Trends

The NARSA estimated that about 4.5 million vehicles were circulating in Morocco in 2023. PVs made up the largest share of the vehicle fleet at **65.64 %**, while commercial vehicles, which include LCVs and HDVs, accounted for **27.45 %** and motorcycles above 50 cc represented only **6.91 % of the fleet** (see Figure 4 and Table 2).

"Tourism vehicles" are designed as motor vehicles intended for the transport of people, with a maximum capacity of nine seats, including the driver. This category includes not only standard passenger cars, but also vehicles such as vans with seats, mini-buses, vans and minivans, which are often used by large families.

Commercial vehicles (LCVs and HDVs) are vehicles designed to perform a variety of professional and personal functions. They may include models such as vans, pick-ups, trucks, vans or refrigerated vehicles. Their main use is the transport of goods, which defines their category.

Figure 4: Distribution of the Moroccan vehicle fleet in 2023 (NARSA, compiled by the authors)

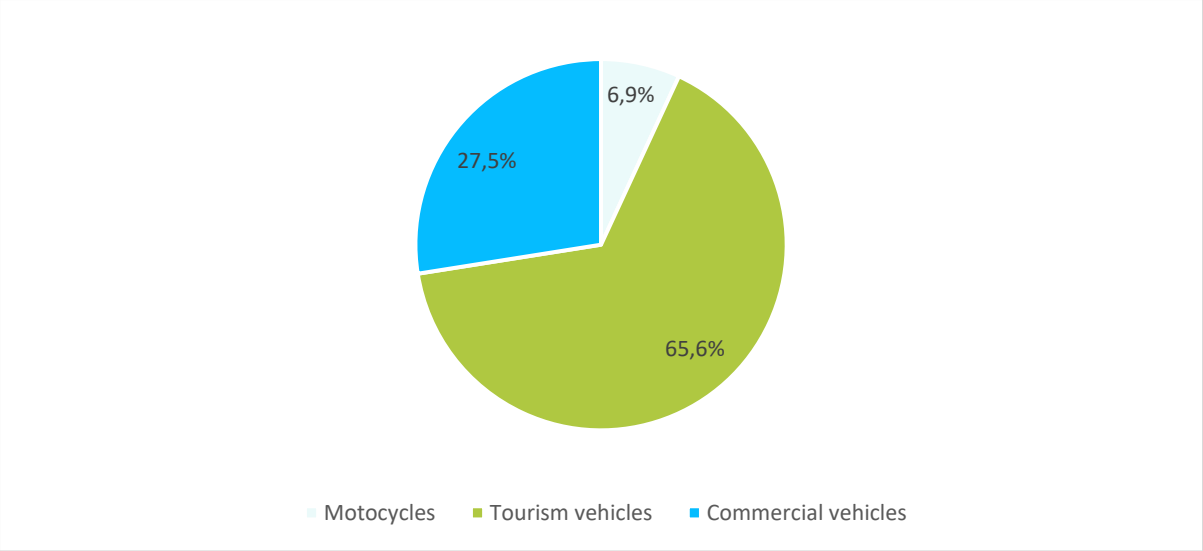
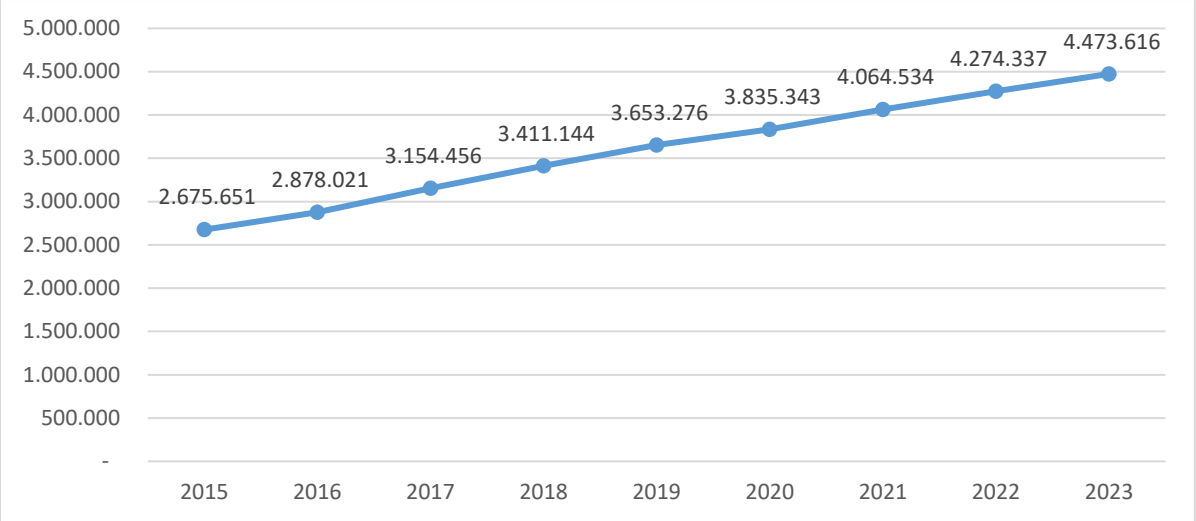


Table 2: Evolution of the number of motorcycles, tourism vehicles and commercial vehicles from 2015 to 2023 (NARSA)

Year	Motocycles	Tourism vehicles	Commercial vehicles	Total
2015	18,413	1,843,043	814,196	2,675,651
2016	30,710	1,982,940	864,372	2,878,021
2017	105,464	2,131,474	917,519	3,154,456
2018	166,818	2,273,999	970,328	3,411,144
2019	211,722	2,415,315	1,026,240	3,653,276
2020	241,492	2,521,523	1,072,329	3,835,343
2021	267,314	2,663,078	1,134,143	4,064,534
2022	288,087	2,802,830	1,183,421	4,274,337
2023	309,074	2,936,528	1,228,014	4,473,616

Figure 5: Annual evolution of the vehicle fleet in Morocco (NARSA, compiled by the authors)

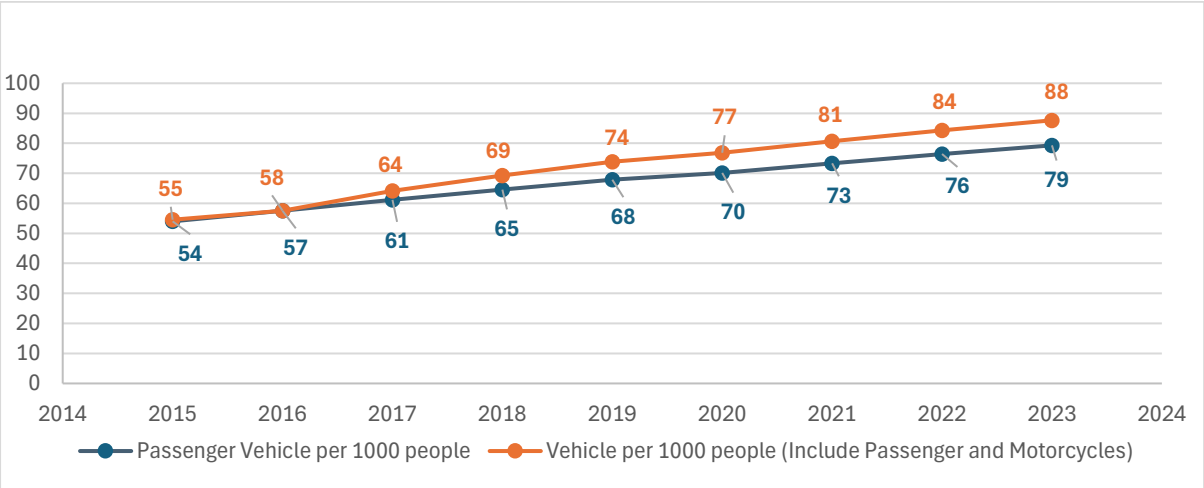


Over the past eight years, Morocco has experienced a steady increase in its motorisation rate[5]. Figure 6 below shows the number of vehicles per 1,000 population between 2015 and 2023. Including motorcycles, the motorisation rate has increased from 55 vehicles per 1,000 inhabitants in 2015 to 88 in 2023. Considering PVs only, the rate rose from 54 to 79 over the same period.

This sustained growth reflects expanding vehicle ownership in the country and a growing demand for motorised transport. The increase in the rate of motorisation can be attributed to several factors, including improved purchasing power, the expansion of road infrastructure, and greater availability of new and used vehicles. The slight acceleration observed between 2019 and 2022 may also reflect the economic recovery following the Covid-19 pandemic.

5 The motorisation rate is calculated from the total number of vehicles divided by the total population.

Figure 6: Motorisation rate in Morocco - number of vehicles per 1,000 inhabitants (calculated by the authors)



Finally, according to the internal report "*Inventory of greenhouse gas emissions from Moroccan land transport and establishment of an MRV system"* (Colson and Spathelf, 2023)[6], the average age of PVs in circulation is estimated at 13 years. HDVs (3.5 - 12 tonnes), which account for only 0.5 % of the fleet, are on average the oldest vehicle category at 16.5 years), while urban buses above 5 tonnes (0.07 % of the fleet) are the newest category (7.7 years).

1.2.2 Climate Objectives and Strategies

Total GHG Emissions in Morocco

In the framework of Morocco's Fifth National Communication on Climate Change combined with the First Biennial Transparency Report (CCN-RTB1) to the United Nations Framework Convention on Climate Change (UNFCCC) submitted in 2025, Morocco estimated its total net GHG emissions, including land use, land-use change and forestry (LULUCF) sector at 98.87 Mt CO2e in 2022. The average annual growth rate between 2010 and 2022 is estimated at 2.6 % (MTEDD, 2025a).

Gross CO_2 emissions rose from 50.14 Mt to 71.66 Mt CO2 between 2010 and 2022, representing an average annual growth of 3 % (MTEDD, 2025a). According to the International Energy Agency (IEA), Morocco's total fossil-fuel CO_2 emissions represent **about 0.2 % of global CO_2 emissions, placing Morocco 47th in the world and 5th among emitting countries on the African continent** (IEA, 2025).

Per capita GHG emissions increased from 1.43 t CO2e in 2010 to 1.79 t CO2e in 2022. The IEA ranks Morocco 97th in the world and 9th on the African continent. **CO_2 emissions per capita increased by 73% between 2000 and 2022** (IEA, 2025).

[6] This report was prepared within the project " Advancing Transport Climate Strategies in Rapidly Motorizing Countries" (TraCS), commissioned by the German Federal Ministry for Economic Affairs and Energy (BMWE) and implemented by GIZ in partnership with the MTL.

In accordance with its international commitments, the Kingdom of Morocco intends to drastically reduce its emissions by 2035. In its updated Nationally Determined Contribution (NDC) submitted to the UNFCCC in 2025, the Kingdom raised its target to **53 % reduction in total GHG emissions by 2035 compared with the business-as-usual reference scenario**, equivalent to 88.23 Mt CO2e, including an **unconditional target of 21.6 %** or 36.02 Mt CO2e. In the previous NDC in 2021, the overall target had been 45.5 %, of which 18.3 % was unconditional. **For the transport sector, total emissions reductions by 2035 could reach 7.48 Mt CO2e equivalent to 9 % of total mitigation efforts by 2035 and 6 % over the period 2026 – 2035** (MTEDD, 2025b). As part of the quantitative report of the Morocco Long-Term National Low-Carbon Strategy 2050 (SNBC), whose main outlines were unveiled in 2023 and which Morocco voluntarily submitted to the UNFCCC, projections of GHG emission up to 2060 were developed. Under the Net Zero scenario, avoided emissions in 2050 would amount to 173 Mt CO2e, representing a 65 % reduction compared with current GHG emissions (MTEDD, 2025b).

Morocco's Energy Mix

Morocco's energy supply in 2023 relied mainly on fossil fuels, especially oil (56.6 %) and coal (29.5 %), used for electricity generation and for powering vehicles and machinery (IEA, 2024a). Other energy sources included biofuels and waste (5.6 %) and renewable energy (RE) with 4.8 %. Unlike other MENA countries, natural gas contributes only marginally to Morocco's energy mix, at 3.4 %.

Nearly 94 % of fossil fuels were imported in 2023 (IEA, 2024a), exposing the Kingdom to price volatility, geopolitical crises, and oil shocks, which weigh heavily on its energy bill. In 2024, these imports amounted to MAD 113,827 million, or 15 % of total imports (Foreign Exchange Office, 2025a). Between 2000 and 2023, energy imports increased by 87 % (IEA, 2024a).

Due to its heavy dependence on hydrocarbons, Morocco ranks 41st among importing countries in the IEA's international ranking and is the **4th largest importer in Africa**, after South Africa, Egypt and Nigeria.

Domestic energy production relies mainly on biofuels and waste (52.3 %), followed by **RE (44.8 %)**. Local gas production accounts for nearly 1.6 % of national energy production (IEA, 2024a).

The predominance of fossil fuels in energy consumption has significant consequences for the country's CO_2 emissions. According to the IEA, nearly 57 % of CO_2 emissions in 2023 came from oil (37.0 Mt CO2e), 40 % from coal (26.2 Mt CO2e), and 2.7 % from gas (1.8 Mt CO2e) (IEA, 2025).

However, Morocco has committed to increasing its energy self-sufficiency by raising the share of RE in the electricity mix. It intends to **triple its installed RE capacity by 2030 to cover 52 % of the electricity produced, reaching more than 15 GW, and to achieve 96 % of decarbonised electricity by 2050** (MTEDD, 2025b). According to the latest report by the National Energy Regulatory Authority (ANRE), total installed RE capacity in operation reached 5,438 MW at the end of 2024, representing 45 % of the country's total installed capacity, an increase of 18 % compared with 2023 (ANRE, 2025).

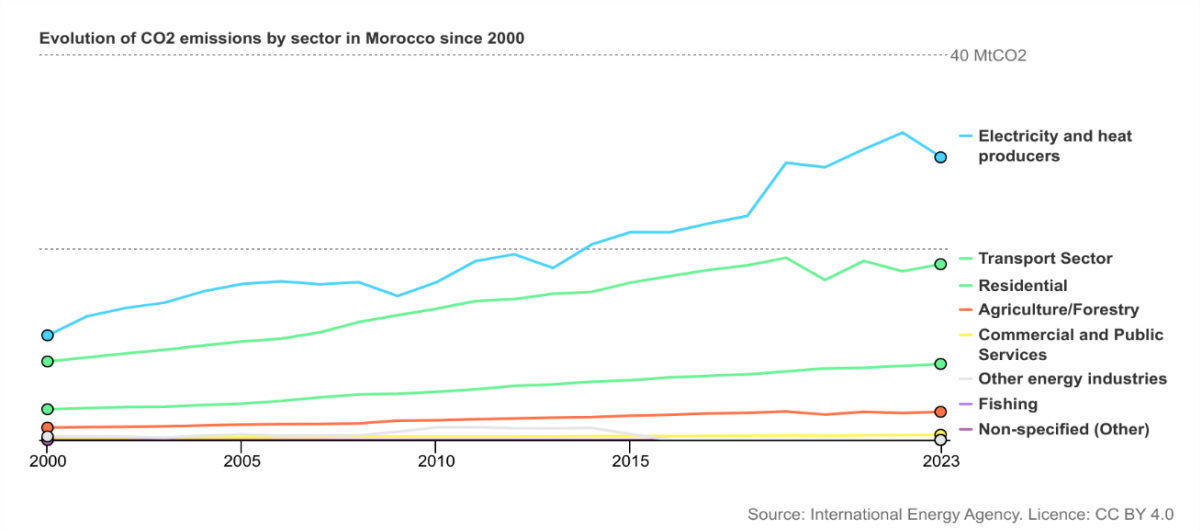
Transport GHG Emissions and Energy Consumption

According to the CCN-RTB1, GHG emissions from the energy sector, which mainly includes industry, transport, residential and agriculture, rose from 47.7 Mt CO2e in 2010 to 68.5 Mt CO2e in 2022, an overall increase of 43.5 % and an average annual growth rate of 3.1 %. The energy sector remains the main source of GHG emissions, accounting for nearly 70 %, ahead of other sectors (MTEDD, 2025a).

Within the energy sector, transport is the second largest source of GHG emissions after electricity generation, due to its almost **exclusive dependence on hydrocarbons (99.5 %)** (IEA, 2024b). **From 2010 to 2022, transport emissions increased by 26.2 %,** from 14.2 Mt CO2e to 17.9 Mt CO2e, despite a slight decline observed at the start of the Covid-19 pandemic and again in 2022. The **average annual growth is estimated at 2 %** (MTEDD, 2025a).

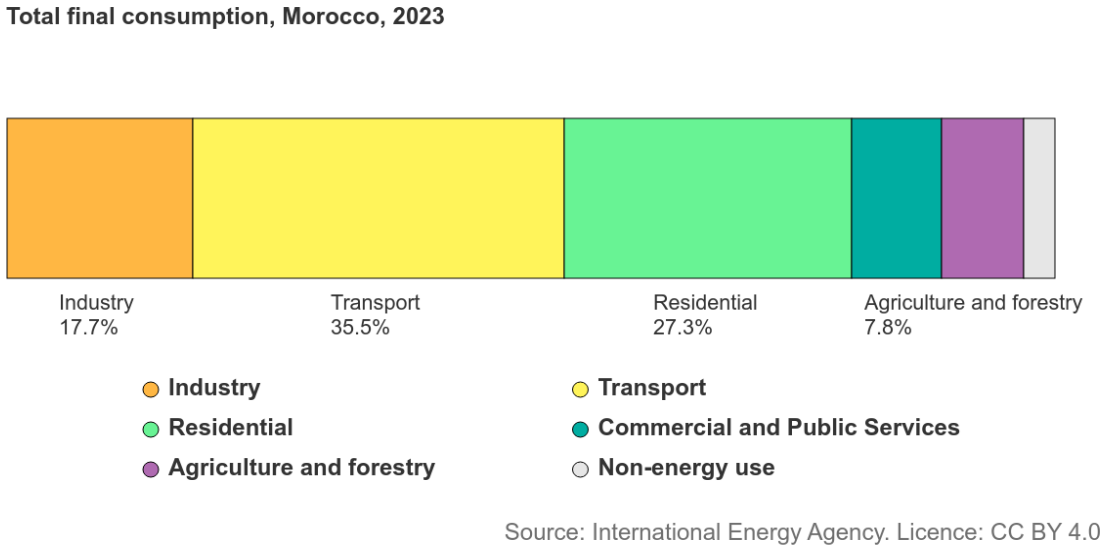
According to the IEA, **transport-sector CO_2 emissions account for more than 28 % of Morocco's total emissions in 2023** (see Figure 7).

Figure 7: Evolution of CO2 emissions by sector in Morocco between 2000 and 2023 (IEA, 2025, license: CC BY 4.0)



The **transport sector is the largest consumer of final energy, with an estimated share of 35.5 % (250,409 TJ) in 2023**, surpassing the residential sector (27.3 %) and industry (17.7 %; Figure 8).

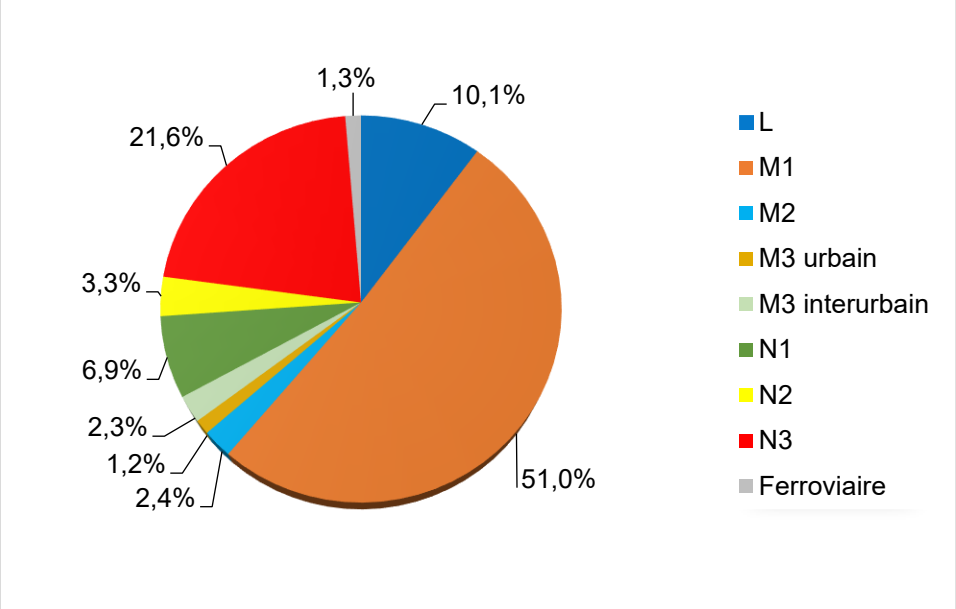
Figure 8: Total final consumption in Morocco in 2023 (IEA, 2025, license: CC BY 4.0)



It should be noted that **road transport is the second largest source of CO_2 emissions after electricity and heat generation, accounting for 17.4 Mt CO2e, or 17.5 % in 2022** (MTEDD, 2025a). According to Morocco's National Inventory Report submitted to the UNFCCC in 2024, **road transport accounted for 99 % of CO_2 emissions** compared with other transport modes in 2022. Between 2010 and 2022, GHG emissions from road transportation increased by 28 % (MTEDD, 2024).

According to the internal report *"Inventory of greenhouse gas emissions from Moroccan land transport and the establishment of an MRV system" (*Colson and Spathelf, 2023), GHG emissions in 2022 came mainly from PVs (51 %), followed by trucks and buses (31 %), and then vehicles in category L, such as motorcycles and three-wheelers (10 %).

Figure 9: GHG emissions from land transport in Morocco in 2022 in WTW[7] (ifeu)



The National Inventory Report also confirms that road transport is the largest consumer of fossil fuels among all transport modes. In 2022, **road transport consumed nearly 98 % of total fuel use** (237,302.56 TJ) (MTEDD, 2024).

Finally, it is worth noting that in Morocco, **vehicles run predominantly on diesel**. Indeed, the MTEDD stated in its 2021 energy balance[8] (unpublished) that road consumption of petroleum products relied almost exclusively on diesel (5,232 ktoe) and to a much lesser extent on petrol (798 ktoe).

Climate Strategies

Table 3: Summary of the main climate strategies mentioning the transport sector (authors)

Publication	Objective	Transport-relevant measures	Responsible entity
National Energy Strategy (2009, updated in 2021)	▪ Security of energy supply. ▪ Universal access at competitive prices. ▪ Demand management. ▪ Environmental protection.	Reduce energy consumption in buildings, industry and transport by 5 % by 2020 and 20 % by 2030, i.e. 24.5 % energy saving for transport in 2030. Increase renewables to 42 % of installed in 2020 and 52 % by 2030.	MTEDD

[7] Well to wheel

[8] Internal assessment.

National Priority Action Plan (2009-2013)	▪ Reduced energy consumption. ▪ Energy efficiency in energy-intensive sectors, including transportation.	RE and energy efficiency programmes.	MTEDD
National Strategy for the Development of Logistics Competitiveness (2010)	▪ Reduce CO_2 emissions from road freight transport by 35 %. ▪ Reduce tonne-kilometres by 30 % by 2015.	Optimise road transport to reduce its energy impact.	MTL/SNTL
Law No. 47-09 on Energy Efficiency (2011)	Establish the principles and foundations for promoting energy efficiency.	Regulation and promotion of energy conservation across sectors, including transport.	MTEDD
National Strategy for Sustainable Development (2017)	Integrate sustainable development into all priority sectors, including transport.	▪ Strategic axis 5: accelerate the energy transition ▪ Improve energy efficiency in buildings, industry and transport (Target 45.1). ▪ Strategic axis 8: Promote sustainable mobility. ▪ Improve transport energy efficiency (Objective 55) including the introduction of the bonus-malus mechanism for passenger vehicles (Objective 55.3) and the creation of an agency to control vehicle emissions (Objective 55.4). ▪ Objectives 56 to 58: Renew the road transport fleet, improve logistics competitiveness and	MTEDD

		promote multimodal transport.	
Pact for the exemplarity of the Administration (2019)	Promote electric and hybrid vehicles in the public sector.	▪ Replace old vehicles with clean vehicles. ▪ Eco-driving training.	MTEDD
National Climate Plan 2030 (NCP 30) (2019)	▪ Climate change adaptation. ▪ Reduce emissions in transport and logistics.	▪ Renew road transport fleet to improve energy efficiency.	MTEDD
National Energy Efficiency Strategy 2030 (2020)	▪ Achieve 20 % energy savings by 2030. ▪ Reduce transport energy consumption by 24 %	16 energy efficiency measures, including: ▪ Mandatory disclosure of vehicle energy consumption. ▪ Energy performance standards for motorcycles and scooters. ▪ Classification and labelling of vehicles according to their energy consumption. ▪ Tyre energy-performance labelling. ▪ Renewal of the state vehicle fleet based on energy efficiency.	MTEDD
Nationally Determined Contribution (NDC) (2021)	Reduce GHG emissions by 45.5 % by 2030 including an unconditional target of 18.3 %.	7 measures including: ▪ Implementation of a bonus-malus system for vehicles. ▪ CO_2 emission standards for PVs and LCVs. ▪ Improve environmental standards for vehicles. ▪ Eco-driving. ▪ Renewal and scrappage programmes.	MTEDD

Long-Term Low Carbon Strategy Morocco 2050 (qualitative component) (2021)	▪ Transition to a decarbonised economic model. ▪ Development of sustainable transport infrastructure.	▪ Promote transport electrification and assess the development potential of green hydrogen to decarbonise road freight. ▪ Invest in multimodal infrastructure and low-carbon freight.	MTEDD
Nationally Determined Contribution (NDC) (2025)	Reduce GHG emissions by 53 % by 2035, including an unconditional target of 21.6 %.	13 measures including : ▪ Improved vehicle emission standards ▪ Eco-driving ▪ Bonus-Malus system ▪ CO_2 emission standards for new PVs and LCVs ▪ Promotion of electric two- and three-wheelers mobility ▪ Renewal programme for Low-GHG emission vehicles (EVs or other alternatives)	MTEDD

Faced with climate challenges and increasing energy demand, Morocco launched a **national energy strategy in 2009** around four objectives: strengthening energy security of supply and availability; ensuring universal access to energy at competitive prices; managing demand and protecting the environment. To achieve these objectives, Morocco diversified its energy production by increasing the share of RE to 42 % of electricity capacity in 2020 and 52 % in 2030 (20 % wind, 20 % solar and 12 % hydropower), with a **long-term target of 80 % decarbonised electricity by 2050** (MTEDD, 2021b).

This strategy led to the implementation of RE and energy efficiency programmes in key energy-intensive sectors such as transport, agriculture, fisheries, construction, industry and public lighting, within the framework of the **National Priority Action Plan for the period 2009-2013**. In addition, the 2011 Law 47-09 on Energy Efficiency established the foundations and basic principles for the promotion of energy efficiency at the national level.

Meanwhile, Morocco incorporated the right of citizens to sustainable development into the new Constitution of 2011 (Article 31) and adopted **Framework Law 99-12 on the National Charter for the Environment and Sustainable Development (CNEDD) in 2014**. This law requires the country to adopt a National Strategy for Sustainable Development (Article 14) and classifies the energy sectors water, agriculture, marine

fisheries, transport, tourism, urban planning, construction and building, waste management and industry in general as sectors and activities *"with a high potential for sustainability and presenting a priority in terms of the requirement to respect sustainable development"* (Article 12).

This framework law resulted in the **National Strategy for Sustainable Development** (SNDD),[9] published in 2017, which sets out a series of objectives and measures specifically targeting transport and **mentions the bonus-malus mechanism** for the first time **(objective 55.3).**

Thus, over the past decade, the momentum initiated by Morocco has been marked the multiplication of programmes and measures aimed at raising climate and environmental ambitions across all sectors, including transport.

Among the strategies and roadmaps providing more detailed guidance on mitigation measures for the transport sector, the following are noteworthy:

- The **2010 National Strategy for the Development of Logistics Competitiveness**, which set the objective of reducing CO_2 emissions from road freight transport by 35 % and reducing the tonnes-kilometres by 30 % by 2015;
- The **Pact for the Exemplarity of the Administration in 2019**, which promotes the use of electric and hybrid vehicles by public bodies, encourages the replacement of old vehicles with clean vehicles, and calls for eco-driving training for staff;
- The **National Climate Plan for 2030 (PCN 30) published in 2019** and implemented at the regional level through Territorial Climate Plans (PCTs), which diagnoses the country's vulnerabilities to climate change and underlines the need to adapt basic infrastructure, especially the transport and logistics sector, to the effects of climate change, including improving transport energy efficiency and renewing the road transport fleet.

However, the **National Energy Efficiency Strategy for 2030 (SNEE),** published in 2020, is the most detailed in terms of transport-related GHG reduction requirements. It sets a target of 20 % overall energy savings by 2030 and 24 % reduction in transport **energy consumption (2.3 Mtoe) by 2030**[10]. This sector is in fact a major lever of the strategy, as it represents about 40 % of the total energy savings expected by 2030, nearly 70 % of which is attributed to road transport (HDVs and PVs).

To achieve this, the strategy defines 16 regulatory, financial and standard-setting measures which could save about **19.2 Mt of CO_2 by 2030**.

Several of these measures aim to improve vehicle energy efficiency by focusing on technological improvements through binding standards and consumer information:

- Measure 4 on mandatory information about vehicle energy consumption;

[9] This strategy is currently being updated to align with the recommendations of the 2021 New Development Model and the 2030 Agenda for Sustainable Development.

[10] 22 % for industry, 14 % for buildings and 13 % for agriculture.

- Measure 7 on energy performance standards for motorcycles and three-wheelers;
- Measure 8 on the classification and labelling of commercial vehicles according to their energy consumption;
- Measure 9 on the classification and labelling of tyres according to their energy performance;
- Measure 11 on the renewal of the government vehicle fleet based on energy efficiency criteria.

Improving vehicle technology as a driver of energy efficiency is presented as one of the seven action levers[11] identified by Morocco.

In 2021, Morocco published the **Long-Term National Low-Carbon Strategy Morocco 2050 (SNBC)** which advocates transforming the Moroccan economic and social model towards a low-carbon growth model that will ensure the country's economic competitiveness and positive social spillovers. The quantitative component, whose main outlines were unveiled in 2023, has not yet been published.

Morocco's SNBC is structured around seven strategic orientations. These include expanding the electrification of industry, construction and transport, while assessing the **potential of green hydrogen to decarbonise industry and road freight**. In addition, the strategy focuses on implementing transport and logistics plans that promote multimodality and lead to significant investment in new transport infrastructure.

More specifically for the road transport sector, the strategy identifies five essential conditions that must be met to encourage user behaviour and investment, particularly in infrastructure and technologies, in favour of low-carbon transport:

1. The development of **urban infrastructure** conducive to good accessibility to public and commercial services;
2. **Policies to improve performance**, intensify vehicle use (intermodality, taxis, private hire vehicles, carpooling, car-sharing), and promote the uptake of zero-emission vehicles;
3. The development **of industrial capacity** for the production of future vehicles and their components;
4. Incentive **systems** combining **information-raising and economic incentives** (fuel pricing policy);
5. The consideration of households' **budget constraints** and the implementation of measures to **reduce the investment burden**.

In addition, the strategy describes the stages of the transition of road transport towards a more sustainable model: In the short term, i.e. before 2030, the priority would be to

[11] Improved vehicle technology; promotion of public transport; promotion of clean mobility; local production of competitive biofuels; eco-driving; intermodal and multimodal transport; sustainable transport and eco-mobility.

introduce new standards for the consumption and emissions of vehicles placed on the market, whether new or used, as well as to enforce existing regulations (tyre management, scrappage of old vehicles). In the medium term (2030-2035), the objective would be to invest heavily in the development of new infrastructure. In the long term, the country would focus on the large-scale deployment of zero-emission vehicles[12] (initially electric, then potentially hydrogen-powered) while strengthening industrial value chains so that they can meet both domestic demand and export markets. The strategy envisages a sequencing of priorities over time, first replacing public fleets, then public transport systems and finally private vehicles.

The strategy nevertheless acknowledges the challenge of finding *"a dynamic balance [...] between policies to increase the price of fossil fuels (e.g. carbon taxation) and support for investments in new vehicles (scrappage premiums, ecological conversion bonus)"* and raises uncertainties linked to the roll-out of zero-emission vehicles (development of technical solutions, energy prices and economic incentives, conversion grants, infrastructure deployment and industrial capacity).

Finally, in the latest NDC submitted to the UNFCCC in September 2025, Morocco raised its ambition compared with the 2021 NDC by setting a **conditional target, subject to international support, of a 53 % reduction in total GHG emissions by 2035** (88.23 Mt CO2e) relative to the 2010 baseline scenario (76.28 Mt CO2e). Morocco also set an **unconditional target of 21.6 %** (36.02 Mt CO2e). By comparison, the 2021 conditional target for reducing total GHG emissions was 45.5 % by 2030, and the unconditional target was 18.3 %. **The transport sector's share of the overall mitigation effort will be 9 % in 2035 and 6 % cumulatively over the period 2026-2035.**

To achieve these goals, Morocco estimates project financing needs for the mitigation component at USD 60 billion.

With regard more specifically to the transport sector, the NDC identifies **thirteen measures, including six measures conditional on external financial support and accompanying assistance. The financing needs are estimated at USD 13.9 billion, including USD 2.7 billion for conditional measures and USD 11.2 billion for unconditional measures**.

Among these thirteen actions, several contribute directly or indirectly to improving fuel energy efficiency in road transport and to the transition to electric mobility:

- Implementation of the Bonus-Malus system: this conditional measure was already included in the 2021 NDC. Its mitigation potential is estimated at 3.29 Mt CO2 between 2026 and 2035, compared with 1.5 Mt CO2 between 2020 and 2030 and 0.47 Mt CO2 in 2035.
- Application of CO2 emission standards for new passenger vehicles and new light commercial vehicles: a conditional measure already included in the 2021 NDC, with an estimated mitigation potential of 12.5 Mt CO2 between 2026 and 2035, compared with 11 Mt CO2 between 2020 and 2030.

[12] The following vehicle types are listed: scooters, passenger vehicles, light commercial vehicles, buses.

- Improvement of vehicle emission standards: an unconditional measure already included in the 2021 NDC, with an estimated mitigation potential of 7 Mt CO2 over the period 2026-2035 and 1.3 Mt CO2 in 2035
- Promotion of electric mobility for two- and three-wheelers: a new unconditional measure with an estimated mitigation potential of 0.7 Mt CO2 over the period 2026-2035 and 0.1 Mt CO2 in 2035.
- Renewal programme for low-GHG emission vehicles (EVs or other alternatives): a new unconditional measure with an estimated mitigation potential of 4.6 Mt CO2 over the period 2026-2035 and 0.8 Mt CO2 in 2035.

Within its international commitments, Morocco also signed at COP26, the **Declaration on Accelerating the Transition to 100 % Zero-Emission Cars and Vans** (the Zero-Emission Vehicle Declaration; ZEV Declaration), led by the Accelerating to Zero Coalition (A2Z). Through this declaration, signatory countries from emerging markets and developing economies commit to intensifying efforts to accelerate the uptake and adoption of zero-emission vehicles.

Finally, it should be noted that the Ministry of Transport and Logistics is currently working on a **National Charter for Inclusive and Sustainable Mobility in Morocco by 2035,** which will set out the guiding principles, objectives and different levels of governance needed to consolidate the country's sustainable mobility strategy across all transport modes, in line with its international commitments.

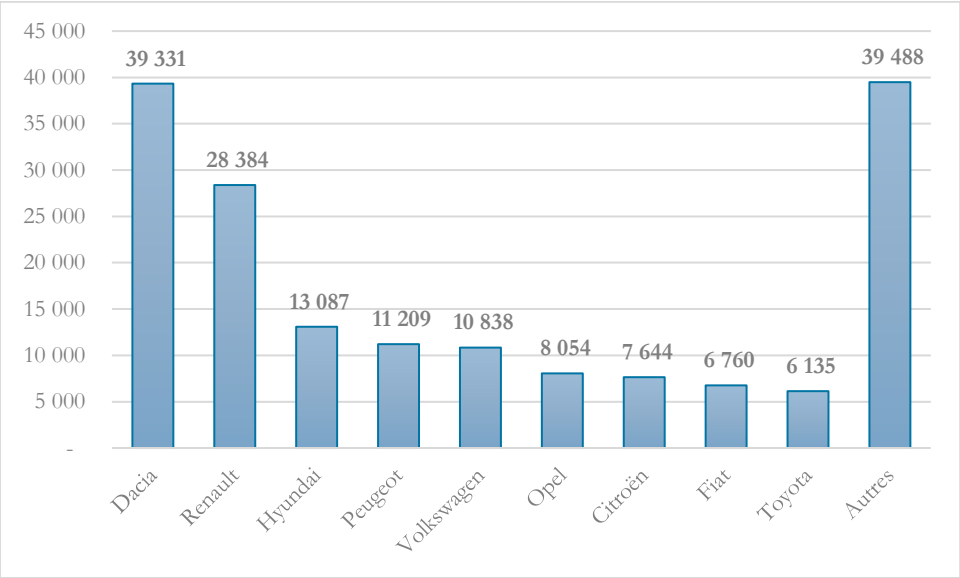
1.3 Automobile Market Overview

Since the 2000s, the automotive industry has held a strategic place in national industrial policy. According to the Ministry of Industry and Trade (MCI) in 2024, the sector contributed more than **23 % of industrial value added and accounted for 23 % of national production**. It is also distinguished by its significant contribution to job creation, with steady annual growth. Between 2014 and 2019, the automotive industry created more than 147,000 jobs, strengthening its positive impact on the labour market, and it now employs, according to the MCI, more than **280,000 people**.

Beyond its essential contribution to the country's economic growth, the automotive sector is a strategic lever for Morocco’s international competitiveness: it is the country's leading export sector, the **largest producer of PVs in Africa since 2024**, and, according to the European Automobile Manufacturers' Association (ACEA), the **fourth-largest exporter by volume of vehicles to the EU in 2024**, with the share of exports to Europe rising by 9.1 % between 2023 and 2024 (ACEA, 2026).

By contrast, according to the Association of Vehicle Importers in Morocco (AIVAM), the Moroccan market is heavily dependent on imports. Sales of PVs, whether locally produced or imported, are dominated by the Dacia brand from the Renault group (22.3 % of total sales in 2024), followed by the Renault itself (around 16.1 % market share) and the South Korean brand Hyundai (7.4 %) (Figure 10) (AIVAM, 2025).

Figure 10: Ranking of the top 10 brands on the Moroccan market in 2024 (AIVAM, compiled by the authors)



1.3.1 Vehicle Import

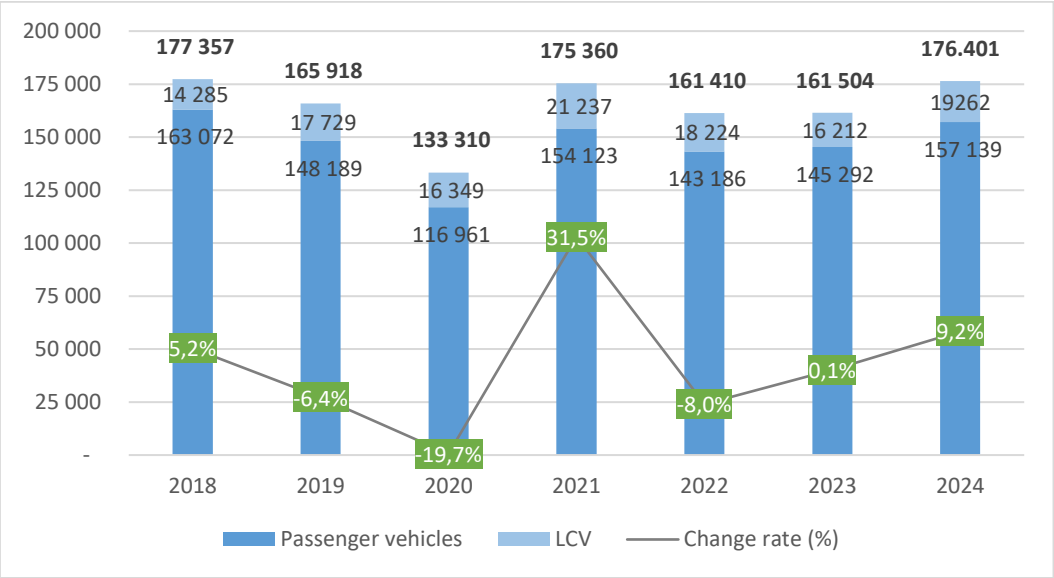
According to AIVAM, which brings together almost all official brand distributors in Morocco, the Moroccan automotive market recorded **sales of 176,401 new vehicles in 2024**, including PVs and LCVs, an increase of 9.2 % compared with 2023 (Figure 11), (AIVAM, 2025).

For sales in 2023, AIVAM reported that **138,207 vehicles** were **imported**, representing **nearly 85.6 % of sales**. This difference shows a strong reliance on imports to meet domestic demand.

According to the Morocco's Foreign Exchange Office, imports of **commercial vehicles** reached **MAD 10.82 billion in 2025**, an increase of **MAD 4.32 billion** compared with 2024. At the same time, imports of "tourism vehicles" **reached MAD 39.44 billion**, up by **37.7 %,** or an increase of **MAD 10.81 billion** compared with the previous year (Foreign Exchange Office, 2026).

Vehicle imports in Morocco are mainly carried out in **CBU form** (Completely Built-Up), meaning that vehicles are imported fully assembled and ready for market. Regardless of the country of origin, all imported models must comply with Moroccan homologation regulations. Morocco recognises European, UN, US, Canadian and Gulf homologation standards.

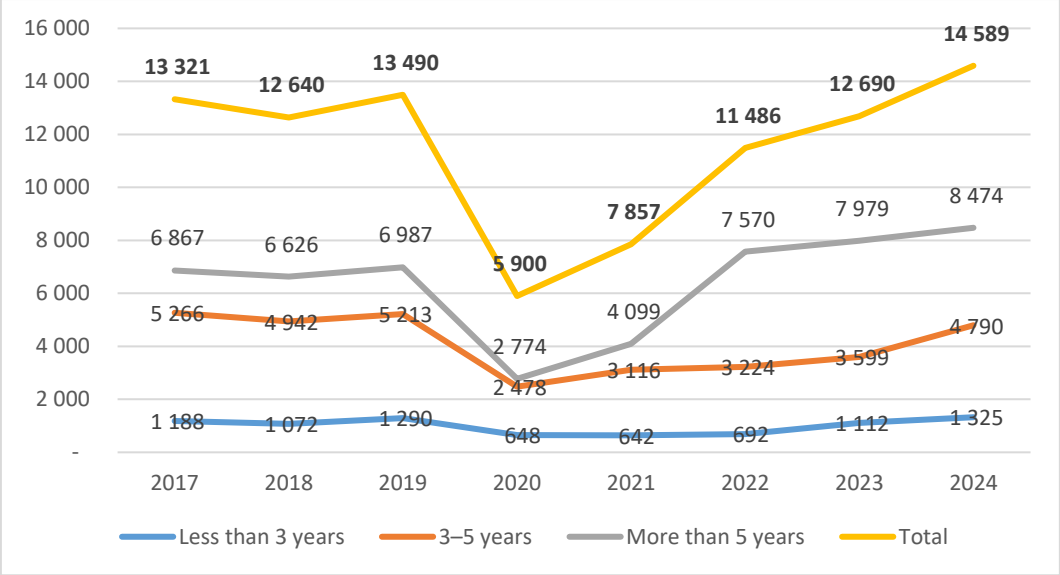
Figure 11: Evolution of the new vehicle sales market in Morocco in 2024 (AIVAM, compiled by the authors)



In 2024, the number of **used vehicles imported** reached 14,589, compared with 12,690 in 2023, representing an increase of about **15 %** (Figure 12). **Used-vehicle imports** accounted for only **8.27 %** of total vehicle sales in 2024. The low share of used vehicles in sales can be explained by the fact that the maximum age for importing used vehicles into Morocco is five years, and they are subject to **customs duties**.

Although **the import of vehicles older than five years** is generally restricted and subject to strict conditions, Figure 12 shows a notable import trend. This can be explained by exemptions applying to certain categories of people, including Moroccans residing abroad (MRE), who may import such vehicles under specific conditions for personal use (and not for resale purposes), as well as certain specific vehicle types, such as special-purpose vehicles and donated vehicles, which are detailed in Section 2.2 on import regulations in this report.

Figure 12: Used vehicles imported into Morocco in 2024 (AIVAM, compiled by the authors)



1.3.2 Local Production and Vehicle Export

Capacity and Production

The Moroccan automotive industry has undergone a profound transformation over the last decade. Driven by the Industrial Acceleration Plan2014-2020 [13], Morocco succeeded in building an ecosystem structured around three major hubs: Casablanca, Kenitra and Tangier. This network now includes two global manufacturers, the Renault and Stellantis groups, as well as an industrial base of more than 260 equipment suppliers, and employs nearly 280,000 people, according to the MCI.

Annual production capacity, which stood at less than 60,000 units in 2010, passed the symbolic threshold of **one million vehicles in 2025**. Projections to 2030 expect this capacity to double to two million units, supported by a continued rise in the **local integration rate**, which is expected to increase from **69 % in 2025 to 80 % in 2030** (Kingdom of Morocco, 2025a).

According to the MCI, automotive production reached **500,000 vehicles in 2025**, driven by Renault, Stellantis but also Neo Motors, a manufacturer with fully Moroccan capital. Renault's models include the Dacia Lodgy, Dacia Sandero 3 and Renault Express at the Tangier plant, as well as the Logan 3, Dacia Sandero 3, Sandero 2 and Renault Kardian at the Casablanca plant. Stellantis offers models such as the Peugeot 208, Citroën Ami, Opel Rocks-e and Fiat Topolino, and launched in February 2026, the new vehicles on the 'Smart car' platform that will double the initial production capacity from 200,000 to 400,000 vehicles per year[14] (Stellantis, 2025a).

Driven by the "Made in Morocco" vision, Neo Motors has gained visibility thanks to its flagship vehicle, the NEO, manufactured near capital city, Rabat. Despite a still modest

[13] The new National Industrial Strategy 2030 is currently being developed.

production capacity of 5,000 units, the manufacturer embodies local know-how with more than 65 % of components produced in Morocco (Neo Motors, 2024).

Export Dynamics

The automotive sector is the country's leading export item, ahead of mining. According to the Foreign Exchange Office, **exports reached MAD 154.49 billion in 2025**, slightly down from the previous year (MAD 157.59 billion in 2024) but higher than in 2023 (MAD 148.20 billion). This contraction is mainly due to the decline in the automotive manufacturing exports, which fell by MAD 9.66 billion compared with 2024, to MAD 61.30 billion in 2025. By contrast, automotive wiring exports increased by MAD 4.13 billion, while exports of vehicles and seats rose by MAD 609 million compared with 2024 (Foreign Exchange Office 2025b, 2026).

Morocco is leveraging its unique geostrategic position, strengthened by numerous free trade agreements (EU, UK, USA, Turkey, GAFTA) and its accession to the African Continental Free Trade Area (AfCFTA) (AMDIE, 2026). These agreements provide access to a market of 2.5 billion consumers across 55 countries.

In this context, Morocco became in 2024 the leading producer of PVs in Africa, ahead of South Africa, and the fourth largest exporter by volume of vehicles to the European Union. Its exports to the EU rose by 9.1 % between 2023 and 2024 (ACEA, 2026), as the Kingdom adapted to changes in the European regulatory framework, notably the gradual transition to "zero emission" by 2035.

New Electric Mobility Hub

Although initially dictated by European market constraints, the transition to electric mobility is now a major pillar of the country's industrial diversification and a strategic asset in strengthening its position in global competition.

Morocco is one of the few countries able to produce all the key components for EV manufacturing (L'Economiste, 2025) and it aims to become a leader in this revolution on both continental and global level. From the extraction of critical minerals – Morocco holds the world's largest phosphate reserves – to the design and production of EV batteries, components and the vehicles themselves, Morocco, in the words of the Minister of Industry and Trade, Mr. Ryad Mezzour, will be "*the only country in the Euro-African region capable of producing an electric vehicle, from mine to car*", which would allow the country to "*triple [its] exports by 2030-2032*" (Désy, 2025).

This shift towards electric mobility is based on a value-chain integration strategy that aims to be largely decarbonised thanks to the growing share of renewable energies in the national electricity mix. This ambition is being reflected in major investments, particularly by Asian companies, in chemical components and assembly:

- In 2025, inauguration of a more than 200-hectares electric battery production site in Jorf Lasfar, financed by the Moroccan investment fund Al Mada and the Chinese company specializing in the production of materials for electric batteries, CNGR Advanced Material Co., Ltd., involving an investment of MAD 20 billion (COBCO, 2025).
- From 2024, construction of the Morocco's first EV battery gigafactory, with an initial capacity of 20 GW, financed by the Chinese EV battery manufacturer and

technology partner of the Volkswagen Group, Gotion High-Tech Co., Ltd. for an estimated amount of MAD 12.8 billion. The aim is to increase total capacity to 100 GWh for a total investment of MAD 65 billion (MICEPP, 2024).

- From 2024, development of a cathode material project in Tangier Tech and planned anode plant in Morocco by Chinese world leader BTR New Material Group Co., Ltd., for €370 million (BTR, 2024).

According to MCI, the **local production of EVs**, mainly intended for export, reached **capacity of 100,000 units in 2025,** with its share of total exports standing at **between 4 % and 5 %**. With this strategy, Morocco could supply between "*400,000 and 500,000 cars annually, potentially by the third or fourth quarter of 2026*" (Sadden, 2025).

This momentum is largely driven by Stellantis, whose fully electric models - Citroën Ami, Opel Rocks-e and Fiat Topolino - are fully in line with the objectives of the Group's 2030 strategic plan. Since January 2025, production capacity for these vehicles has increased from 20,000 to 70,000 units per year (Stellantis, 2025a) and the Group has stepped up initiatives to encourage consumers to buy electric and hybrid vehicles (Eco Bonus for scrapping a vehicle older than 15 years old) (Stellantis 2026a). In its 2025-2030 development plan, Renault has also committed to launching a new range of electric vehicles manufactured in Morocco in the coming years (Kingdom of Morocco, 2025b).

The production of two- and three-wheelers is following the same trend. In 2025, Stellantis launched the production of the FIAT TRIS, an electric three-wheeler manufactured in Morocco and designed for urban logistics and local services (Stellantis, 2025b). The Group is promoting it through complementary initiatives (micro-credit, insurance cover) (Stellantis 2026b, 2026c). Moroccan companies such as eMove Vehicles Company and Voltamotors, are also positioning themselves in this segment.

Finally, Morocco is not focusing solely on the European market but is also strengthening its presence on the African continent. The Kingdom could thus offer its regional partners alternative solutions to Asian supply in the event of excess battery production capacity (Sadden, 2025). It is also establishing itself as a leading actor in the transition by partnering with the Democratic Republic of Congo (DRC) and Zambia as part of a regional value-chain development project (CEA, 2024) in the automotive and electric mobility sectors, linking Central Africa's strategic mineral resources (cobalt, copper, lithium) with Moroccan industrial and technological expertise.

Logistics Infrastructure

Morocco has invested heavily in developing its logistics infrastructure to support its ambition to become a regional industrial and export hub, particularly in the automotive sector, and to strengthen its logistics sovereignty.

The **Tanger Med multimodal complex** is the cornerstone of this strategy. As the leading container port in the Mediterranean and Africa, it is **connected to more than 180 international ports in 70 countries worldwide**. Thanks to its strategic geographical position, Tanger Med Port enables access to southern **Europe within 24 hours and Germany within 72 hours**, thereby facilitating rapid access to European markets. In addition, its proximity to the African continent opens important

opportunities in a market with strong population growth, where demand for vehicles is expected to increase significantly.

The Tanger Med port has a new vehicle terminal, or car carrier, with a capacity of around 1 million units per year, divided into two terminals: the Renault Vehicle Terminal (TVR) and the Multi-User Vehicle Terminal (TVMU). According to Tanger Med Port Authority, 600,872 vehicles transited through these terminals in 2024, up 4 % compared with 2023 (Tanger Med Port Authority, 2025).

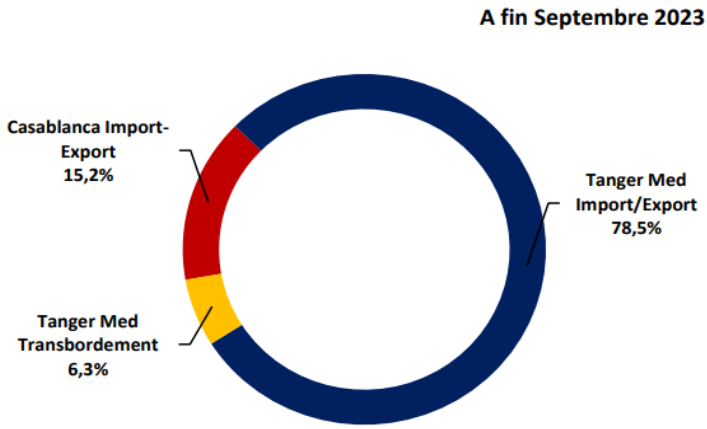
Both terminals offer substantial storage capacity, accommodating up to 6,000 vehicles at TVR and 3,000 TVMU. They feature berths designed to handle the latest generation of roll-on/roll-off vessels and provide access to the rail terminal which streamlines the transfer of export-bound vehicles from Renault and Stellantis manufacturing plants. Each vehicle train can carry up to 280 vehicles.

The car carrier terminal is connected to 35 ports including Le Havre, Antwerp, Valencia, Southampton, Abu Dhabi, La Goulette, Alexandria, Durban, and offers a dozen regular weekly services. A project to build a multi-storey car park providing an additional 2,400 additional spaces is set to further increase storage capacity and support the continued growth of Morocco’s vehicle exports.

The Logistics network is also reinforced by the modern rail connection developed by the National Railway Office (ONCF), linking the main industrial centres along the Tangier-Kenitra-Casablanca axis, complemented by dry ports, as well as by the Kenitra Free Zone (Atlantic Free Zone), which benefits from optimised logistics access to Tanger Med and strengthens the integration of automotive value chains.

This port network also includes the ports of Nador West Med, located on 280 hectares and designed as a strategic energy and industrial hub, and Dakhla Atlantique, a deep-water port with a 1,650-hectare industrial-logistics zone, which is expected to contribute to the economic development of the southern provinces and serve as a logistics gateway to Africa and the Americas within the framework of the AfCFTA. These two ports are managed by the National Ports Agency (ANP) whose role is to oversee the management and development of 35 ports, excluding Tanger Med, while ensuring their specialisation according to the flows handled (containers, bulk cargo, automotive, and so on). Each port is therefore equipped with specific export capacities, meeting the needs of the various industrial sectors, particularly the automotive industry.

Figure 13: Distribution of new vehicle traffic by port and type of flow (ANP, 2023)



Vehicle Fleet and GHG Data

The National Road Safety Agency (NARSA) is the lead agency responsible for vehicle fleet data management. As public body dedicated to road safety, NARSA is administratively responsible for managing vehicle fleet data, including information relating to vehicle approval and registration. The agency collects, analyses and disseminates this information to support road safety policies and transport regulation in general.

Data are collected primarily by the National Centre for Testing and Homologation (CNEH) or by NARSA's provincial and prefectural centres offices.

Vehicle-related data are gathered at several stages of the vehicle lifecycle:

- Customs clearance (for imported vehicles);
- Homologation (prior to the vehicle being placed on the market or following significant modifications to its technical characteristics);
- Registration; and
- Technical inspection

These data are stored in five separate databases (Table 4):

- Vehicle homologation database;
- Vehicle registration database (including two- and three-wheelers with an engine capacity of 50 cc or more);
- Moped registration database (two- and three-wheelers with an engine capacity below 50 cc);
- Technical inspection database; and
- Customs clearance database.

Table 4: Vehicle databases and responsible entities

Database	Managing entity
Homologation	NARSA
Vehicle registration (including two- and three-wheelers with an engine capacity of 50 cc or more)	NARSA
Registration of government vehicles	National Company of Transport and Logistics (SNTL)
Moped registration (two- and three-wheelers with an engine capacity below 50 cc)	NARSA (through an external service provider)
Technical inspections	NARSA
Customs clearance	Customs and Indirect Tax Administration (ADII) under the Ministry of Economy and Finance

The databases managed by NARSA contain technical information on vehicles registered in Morocco, including environmental data such as the applicable EURO standard, certified CO_2 emissions emission values (in new condition). However, these data are not available for all vehicles currently in circulation. Due to technical constraints, CO_2 emissions data are only systematically available for new vehicles registered since 2020 and supplied through authorised dealers.

Although fuel consumption data are not recorded directly in the databases described above, they can be derived from the available emissions data.

Compared with other similar countries, Morocco has developed significant expertise in vehicle fleet data collection and analysis. Under the TraCS project, a working group comprising representatives of MTL and NARSA successfully collected, consolidated and analysed millions of lines of data to determine the active vehicle fleet composition in 2022. Despite challenges arising from the fragmentation of data across different entities (NARSA, SNTL) and data gaps, particularly regarding average fuel consumption in road transport, the working group was able to estimate vehicle shares by category, average annual distance travelled, average vehicle age, and, ultimately, GHG emissions from the road transport. This work has since then institutionalised through formal cooperation agreements between MTL and its partners, facilitating the annual replication of the exercise and ensuring greater continuity in fleet and emissions monitoring.

Nevertheless, despite the availability of relatively comprehensive databases, technical challenges continue to hinder detailed fleet analysis and the calculation of average annual CO_2 emissions. For example, while the NARSA database records three CO_2 emission values (urban, extra-urban and combined) associated with the New European Driving Cycle (NEDC), detailed analysis revealed that the recorded emission values may in practice correspond either to the NEDC test cycle or to the

Worldwide Harmonised Light Vehicle Test Procedure (WLTP), which provides a more representative measurement of vehicle CO_2 emissions.

In addition, Morocco has applied the EURO 6b standard to new light passenger vehicles (category M1) at the approval phase since 1 January 2023. For new vehicle registrations, compliance has been mandatory since January 2024. For other vehicle categories (M2, M3, N1, N2 and N3), compliance will become mandatory for new approvals from January 2027 and for new registrations from January 2028. However, given the recent implementation of these requirements, errors or inconsistencies have occasionally been identified in the recording of EURO 6 subcategories (6b, 6c or 6d) in the NARSA database. This information is important because it can help determine the correct driving cycle. NARSA is already taking steps to address these issues, although training and awareness-raising among data entry officers could further reduce the incidence of errors.

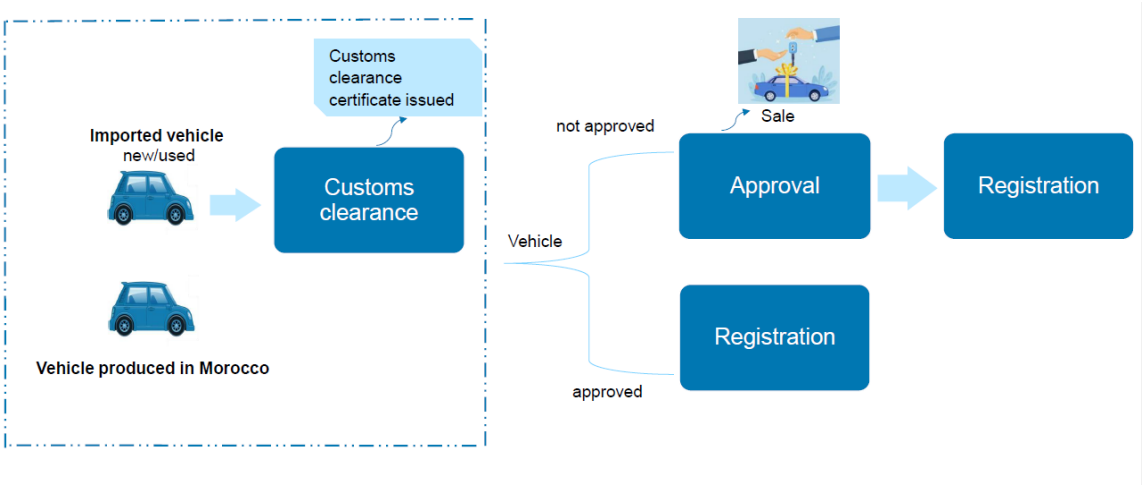
The representative of vehicle importers in Morocco, AIVAM, also produces valuable data on the Moroccan automotive market, including vehicle sales statistics. These data are publicly available through AIVAM's website, which regularly publishes market and sales reports and analytical studies providing insights into trends in the automative sector. AIVAM also maintains an internal database containing detailed technical specifications for vehicles sold each year, including vehicle weight, fuel consumption and CO_2 emissions values.

2. Regulatory Status in Morocco

A new or imported used vehicle goes through several stages before it is allowed to circulate on the country's roads (Figure 14). If imported, it must first be cleared through customs, then undergo type approval to ensure compliance with local safety and environmental regulatory requirements. Finally, it is registered under a unique registration number that remains linked to the vehicle throughout its lifecycle unless there is a change in the registration series to which it belongs (normal series, diplomatic series, etc.).

If the vehicle has undergone significant modifications, it must be submitted for a new approval procedure (on an individual basis).

Figure 14: Vehicle authorisation process in Morocco (authors)



2.1 Vehicle Approval

2.1.1 Regulatory Framework

In order to harmonise with international regulations, Morocco adopted, in 2010, a regulatory framework for vehicle approval through the Highway Code and its implementing texts. This framework is aligned with the international rules of the United Nations and the European Union.

It has adopted 102 technical decrees corresponding to specific versions of the technical regulations annexed to the UN 1958 Agreement on the Approval of Vehicles or to a Directive or Regulation of the Technical Reference Framework of the European Community. The list of these 102 decrees appears in Annex II of Decree No. 2730-10 (see Annex 2).

In 2013, through Decree No. 711-13 amending and supplementing Decree No. 2730-10 relating to the approval of vehicles, Morocco also recognised several regional and international standards and frameworks:

- The technical framework of the United Nations Economic Commission for Europe (UNECE)
- The European Union technical framework (EC Regulation and Directives)
- The Federal Motor Vehicle Safety Standards (FMVSS) of the United States of America
- The Canadian Motor Vehicle Safety Standards (CMVSS)
- The standards of the Gulf Cooperation Council (GCC) Standardization Organization

The above-mentioned approval reference framework, based on 102 technical decrees, consists of:

- 84 decrees relating to vehicle safety;
- 11 decrees relating to environmental aspects;
- 7 decrees applicable to accessories.

It should be noted that each vehicle category must comply with a set of requirements during the approval process, based on tests carried out by laboratories recognised by Morocco.

Table 5: Summary of technical decrees and UN regulatory frameworks relating to emissions and energy consumption

Applicable national legislation	UN reference framework
Decree No. 3280.10 on the approval of vehicles of categories L1 and L2 equipped with a positive-ignition engine with regard to the emission of gaseous pollutants from the engine	UN Regulation No. 47
Decree No. 2835 on the approval of vehicles with regard to the emission of pollutants according to the fuel requirements of the engine	UN Regulation No. 83
Decree No. 2838 on the approval of vehicles of categories M1 and N1 powered solely by an internal combustion engine or driven by a hybrid electric powertrain with regard to the measurement of carbon dioxide emissions and fuel consumption and/or the measurement of electrical energy consumption and range in electric mode, and vehicles powered solely by an electric powertrain with regard to the measurement of electrical energy consumption and range	UN Regulation No. 101
Decree No. 2916.10 on the approval of internal combustion engines for agricultural and forestry tractors and non-road mobile machinery with regard to net power, net torque and specific consumption	UN Regulation No. 120

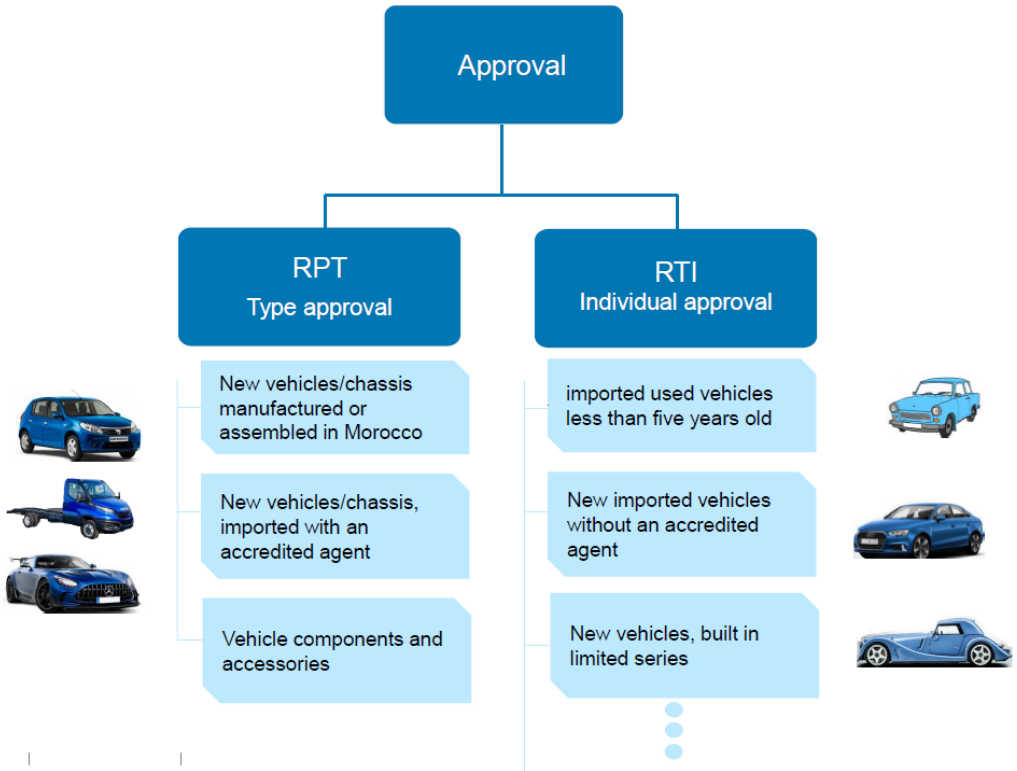
Decree No. 2836 on the approval of compression-ignition engines for agricultural and forestry tractors and non-road mobile machinery with regard to pollutant emissions from the engine	UN Regulation No. 96

2.1.2 Vehicle Approval Process

Any vehicle intended for use on public roads must be approved by the approval services under NARSA, in order to ensure compliance with the regulations in force concerning safety and environmental protection. As defined in Article 89 of Decree 2-10-421, there are two types of vehicle approvals (Figure 15):

- **Type approval (RPT)**: this applies to a type of vehicle or component manufactured identically and in series. The type-approval application is submitted by the manufacturer or by its authorised representative accredited by NARSA (CNEH).
- **Individual vehicle approval (RTI)**: this applies to any new or used vehicle, whether imported or modified in a significant way (for example, in terms of category, number of seats, weight). The application may be submitted by the vehicle owner or their representative.

Figure 15: Type of approvals in Morocco (Authors)



Type Approval

The following are subject to type approval:

- New vehicles or chassis manufactured or assembled in Morocco;
- New imported vehicles or chassis imported where the manufacturer has an accredited representative in Morocco;
- Vehicle components and accessories.

The procedure consists of:

1. Submit an accreditation request by make and vehicle to the National Centre for Testing and Homologation (CNEH), including a document proving that the manufacturer has mandated a representative in Morocco.
2. Once accreditation has been granted, the manufacturer or its accredited representative may submit a type-approval application to the CNEH and provide the required documents:
    - Three copies of the vehicle's description notice - containing all technical characteristics of the vehicle (powertrain, bodywork, level of pollution control, tyre, weight and dimensions) - drawn up according to the model set out in Annex III of Decree 2730-10 (see Annex 2);
    - All documents and test reports demonstrating compliance of the technical characteristics of the vehicle type, components and accessories with the applicable technical regulations.
3. Present the vehicle prototype for identification and inspection at the CNEH.
4. Once the documents have been examined and the vehicle identified and checked, and if it complies with the applicable technical standards, the CNEH issues a type approval certificate.

Once a vehicle has received type approval, any vehicle conforming with the established type approval certificate may be sold and registered directly, provided the regulations have not changed.

Individual Type Approval

Individual approval applies to both new and used vehicles, whether imported or significantly modified, and is carried out at the request of the vehicle owner or their representative. Vehicles subject to individual approval are defined in Article 96 of Decree No. 2-10-421 on vehicles, as amended and supplemented (see Annex 1).

The procedure consists of:

Submit an approval application to the CNEH or to the provincial or prefectural centres of NARSA, as applicable, and present the required documents in accordance with the applicable regulations (see Annex 2).

The vehicle must then be presented for identification and inspection. If the examination of the documents and the vehicle inspection of the vehicle are satisfactory, the CNEH or the relevant provincial or prefectural NARSA centre issues a report granting the title of approval.

2.2 Import Regulations

To clear a vehicle through customs in Morocco, the applicant must first submit all required documents to the customs clearance office.

The customs clearance office is part of the Customs and Indirect Tax Administration (ADII) which falls under the Ministry of Economy and Finance. Once the duties and taxes have been paid, the customs service issues the holder a receipt and a customs clearance certificate.

The procedure varies according to the type of user and the place of customs clearance, whether at a border customs office or an inland office within the Kingdom, and applies to motor vehicles as well as motorcycles above 80 cc.

The applicant must then pay the applicable duties and taxes to the customs cashier at the same office. The amount due can be calculated using the customs administration's ADII MCV online platform[15] (see Figure 16) and includes:

- **Import duty** (depending on the powertrain type: internal combustion engine 17.5 %, hybrid 2.5 %, electric 2.5 %);
- **VAT** at 20 %;
- The **parafiscal tax** at 0.25 %;
- The **proportional stamp duty**, also referred to as the "luxury vehicle tax" (see section 2.4.4 – Purchase tax).

The total amount also depends on factors such as:

- The vehicle category (passenger car, commercial vehicle, etc.),
- The make and model,
- The value of the vehicle,
- The age of the vehicle,
- The clearance status (Customs clearance under ordinary regime[16], MREs[17] aged over 60, MREs returning permanently to Morocco, Customs clearance for vehicles adapted for persons with specific needs) (ADII, 2025a).

[15] The MCV application (Release for consumption of vehicles) is an online simulation tool accessible through the "Vehicle Customs Clearance with MCV" section of the Customs Administration website. It allows users to estimate the customs duties and taxes payable upon the import clearance of a motor vehicle or a two-wheeled motorcycle with an engine capacity greater than 80 cc (ADII, 2025b).

[16] Under the ordinary regime, the duties and taxes payable for the customs clearance of a passenger motor vehicle or motorcycle registered abroad are calculated according to the vehicle's characteristics in line with the tariff in force.

[17] MRE: Moroccan residing abroad.

Figure 16: Examples of duty and tax calculations for the Customs Clearance of a combustion, electric and hybrid vehicle (ADII 2025b)

INFORMATIONS SUR LE VÉHICULE

Genre du véhicule	Tourisme non hybride
Marque	RENAULT
Modèle	CLIO 1.1
Type du véhicule	B57104
Date de 1ère mise en circulation	02/03/2022
Valeur à l'état neuf	66 600 DH
Valeur taxable	49 950 DH

DÉTAIL DES DROITS ET TAXES EXIGIBLES

Droits d'importation (17.5%)	8 742 DH
TVA (20.0%)	11 764 DH
Taxe parafiscale (0.25%)	125 DH
Droit de timbre proportionnel *	0 DH
Montant total des droits et des taxes	20 631 DH

INFORMATIONS SUR LE VÉHICULE

Genre du véhicule	Electrique
Marque	TESLA
Modèle	MODEL Y GRANDE AUTONOMIE/LONG RANGE/DUALMOTOR
Type du véhicule	YGCEK
Date de 1ère mise en circulation	17/12/2024
Valeur à l'état neuf	514 300 DH
Valeur taxable	462 870 DH

DÉTAIL DES DROITS ET TAXES EXIGIBLES

Droits d'importation (2.5%)	11 572 DH
TVA (20.0%)	99 876 DH
Taxe parafiscale (0.25%)	1 158 DH
Droit de timbre proportionnel *	23 780 DH
Montant total des droits et des taxes	136 386 DH

INFORMATIONS SUR LE VÉHICULE

Genre du véhicule	Hybride
Marque	TOYOTA
Modèle	YARIS 1.5 HYBRID (116CH)
Type du véhicule	KBAC3
Date de 1ère mise en circulation	13/03/2025
Valeur à l'état neuf	274 800 DH
Valeur taxable	274 800 DH

DÉTAIL DES DROITS ET TAXES EXIGIBLES

Droits d'importation (2.5%)	6 870 DH
TVA (20.0%)	56 472 DH
Taxe parafiscale (0.25%)	687 DH
Droit de timbre proportionnel *	0 DH
Montant total des droits et des taxes	64 029 DH

Table 6: Vehicle import process (ADII 2025a; compiled by authors)

Required documents	Procedure
1. Identity document. 2. Original purchase invoice for motor vehicles less than 90 days old. 3. Notarial power of attorney duly legalised by the competent authorities abroad, issued by the owner of the motor vehicle or motorcycle, if imported by a person other than the owner. 4. Registration certificate for registered motor vehicles or motorcycles, or proof of ownership for motorcycles with an engine capacity of less than 50 cc. Moroccans Residing Abroad (MRE) may also import, under the temporary admission regime, a vehicle belonging to a company established abroad or to a person not resident in Morocco. In such cases, in addition to the usual vehicle documents, notably the registration certificate,	1. **Submission of documents -** The applicant submits all the required documents to the customs clearance office. 2. **Verification of documents -** The customs authorities verify the accuracy and compliance of the documents submitted. 3. **Assessment of duties and taxes -** The customs authorities assess the duties and taxes payable. 4. **Payment of duties and taxes -** The applicant pays the assessed duties and taxes to the customs cashier of the customs clearance office. Payment may be made through several digitised channels (multi-channel payment). **Issuance of official documents -** Upon payment, the customs authorities issue the applicant with a receipt and a customs clearance certificate. The customs clearance certificate is then transmitted to NARSA.

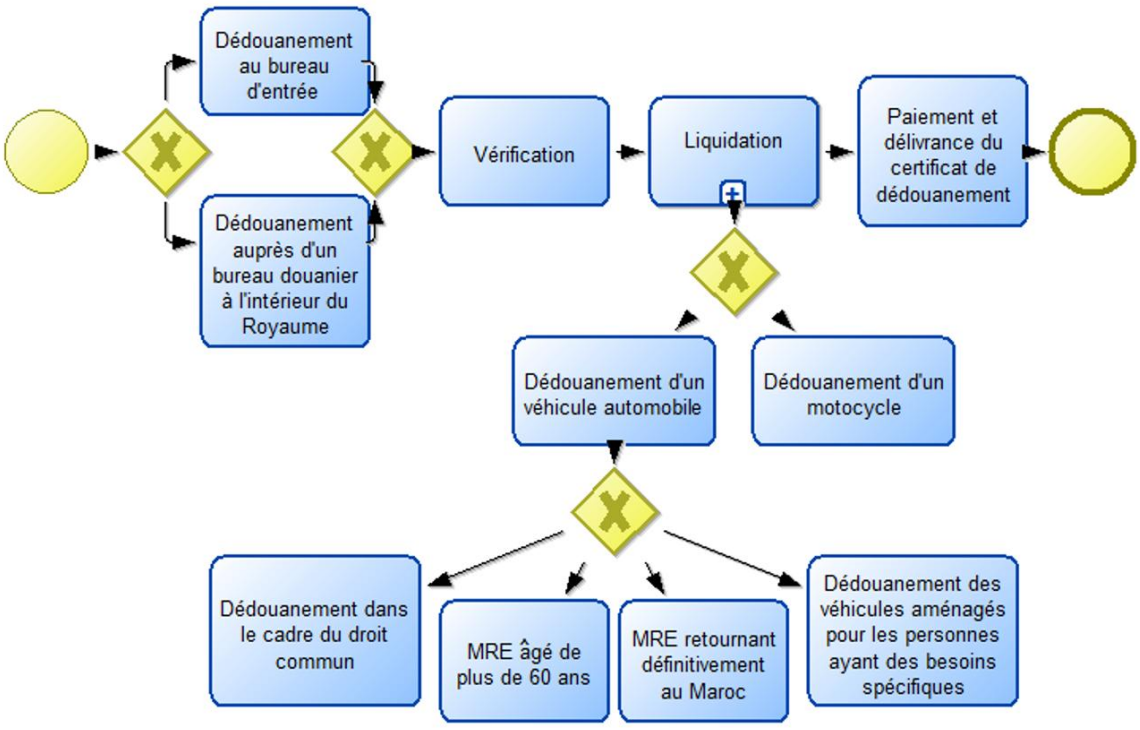
the individual concerned must provide a power of attorney issued by the vehicle owner or by the relevant company where it concerns a company vehicle. In this respect, it should be noted that Moroccan customs regulations do not require powers of attorney to be legalised. These documents may be supplemented by additional administrative documents, depending on the circumstances (customs clearance at an inland customs office, application by MREs aged over 60, or cases involving MREs permanently returning to Morocco).	

In principle, only vehicles that are less than five years old can be approved.

There are however exceptions:

- Vehicles up to ten years, internal driving and with a maximum of 9 seats including the driver, imported by retired Moroccans residing abroad (MRE) who can prove at least 10 years of effective residence abroad.
- Used passenger vehicles less than 10 years old with a maximum of 9 seats, including the driver's seat, imported by Moroccans residing who are returning to Morocco permanently.
- Imported used motor vehicles less than 10 years old that have been specially adapted abroad for persons with special needs.

Figure 17: Vehicle clearance process (ADII 2025a)



2.3 Vehicle Registration

When registering a vehicle in Morocco, several pieces of information must be provided and recorded. These data are essential for issuing the registration certificate (vehicle logbook). They are divided into two main categories: technical data and administrative data.

Technical data include:

- Vehicle make and type
- Type and use of the vehicle
- Number of seats
- Engine displacement (cc)
- Fiscal horsepower
- Type of fuel used (petrol, diesel, electric and so on)
- Chassis number
- Curb weight (P.A.)
- Gross vehicle weight (GVW)

Vehicle registration is managed by NARSA. This agency is responsible for vehicle registration, issuing registration certificates, and managing driving licences. The data collected during the registration process include the vehicle's technical characteristics and information about the owner. These data are used for administrative and control purposes by the authorities and are not published in detail for the general public.

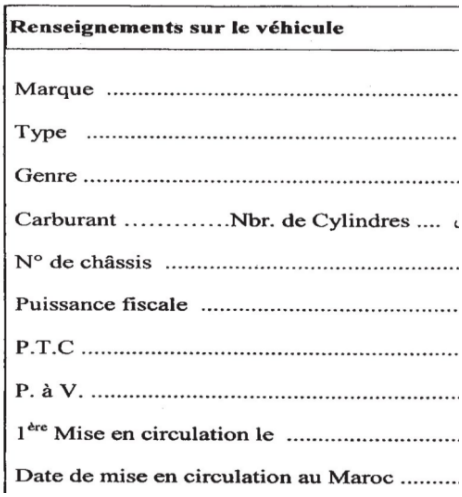
Registration in Morocco is unique and permanent. In the event of a transfer of ownership, the change of owner must be recorded by NARSA. The transfer application must be submitted by the buyer via the portal and also at the registration office in the buyer's place of residence. It should be noted that a regulatory change has been introduced to allow the transfer file to be submitted at the registration office in the seller's place of residence as well; the regulatory text is currently in the official publication process.

Table 7: Vehicle registration process (NARSA, compiled by the authors)

Required documents	Procedure
1. **Application form** completed and signed by all parties involved. 2. **Proof of address**. 3. **Certificate of conformity** and approval, or individual approval certificate, issued by the CNEH. 4. **Provisional vehicle registration declaration** (WW plate), signed by the dealer and the buyer. 5. **Customs clearance certificate** (for imported vehicles).	The registration file must be submitted within 30 days. If the vehicle is purchased outright, this responsibility falls to the seller (dealer). In the case of a credit purchase, it is handled by the financing institution. The deposit is made with the relevant NARSA provincial or prefectural centre, depending on the buyer's jurisdiction, with the issuance of a deposit receipt valid for 30 days.

6. **Valid W18 card** from the selling dealer (sales card formalising the transaction between the seller and the buyer). 7. **Credit sales contract** (in case of financing) or acquisition contract. 8. **Receipt of payment of registration fees**. 9. **Proof of professional use,** where applicable. 10. **Receipt of payment of any late penalty**, where applicable.	This procedure can also be carried out via an online platform enabling dealers to enter the data and transmit it to the relevant services. Once this period has elapsed, the NARSA provincial/prefectural centre issues the **registration certificate** to the applicant.

Figure 18: Example of the special application form (NARSA)



Renseignements sur le véhicule

Marque .....

Type .....

Genre .....

Carburant .....Nbr. de Cylindres ....

N° de châssis .....

Puissance fiscale .....

P.T.C .....

P. à V. .....

1ère Mise en circulation le .....

Date de mise en circulation au Maroc .....

2.4 Taxation

In Morocco, the three main directorates responsible for tax collection within the Ministry of Economy and Finance are the General Treasury of the Kingdom (TGR), the General Tax Directorate (DGI), and the Customs and Indirect Tax Administration (ADII). Each carries out this function from a different perspective, in line with its remit and responsibilities.

2.4.1 Purchase Fax Applicable upon the First Registration of the Vehicle

The purchase of a new vehicle is subject to Value Added Tax **(VAT).** VAT is collected by the General Tax Directorate (DGI) for vehicles purchased on the domestic market, or by the Customs and Indirect Taxes Administration (ADII) in the case of imported vehicles.

For imported vehicles, the purchase is also subject **to import duty** and the **parafiscal tax**.

In addition, **vehicles with a value of MAD 400,000 or more**, whether purchased on the domestic market upon first registration or imported, may be subject to **the proportional stamp duty**, also known as the **luxury vehicle tax.**

2.4.2 Value Added Tax (VAT)

As of January 2024, the Finance Law amended Articles 99 and 121 of the Moroccan General Tax Code apply a VAT rate of 10 % instead of 7 %, to so-called “economy cars”[18] , and to all products and materials used in their manufacture (MEF, 2025).

“Luxury vehicles” are defined as vehicles whose customs value exceeds MAD 400,000, while “standard vehicles” are those whose customs value is below that threshold.

The VAT rates now apply as follows:

- Economy vehicles: **10 %**
- Standard and luxury vehicles: **20 %**

2.4.3 Import Duty

According to the information provided by ADIL, the online Import customs clearance assistant, a platform operated by the ADII that provides all the information prior to a commercial operation (customs duties and taxes, mandatory documents, applicable standards), **import duty** is applied according to the vehicle’s powertrain: **17.5 %** for internal combustion vehicles, **2.5 %** for hybrid vehicles, and **2.5 %** for electric vehicles (ADII, 2025c).

2.4.4 Parafiscal Import Tax

The parafiscal import tax is a levy applied to imported goods, separate from VAT and ordinary customs duties. It finances economic promotion activities and export inspection services, and amounts to **0.25 %.** It is also collected by the ADII on vehicles imports.

2.4.5 Proportional Stamp Duty or Luxury Vehicle Tax

Motor vehicles with a value of MAD 400,000 or more, excluding VAT, are subject to the proportional stamp duty, as follows:

- Upon the first registration of vehicles **purchased in Morocco;**
- Upon **the customs clearance of new or used vehicles imported** by their owners or on behalf of third parties, with the exception of vehicles imported by authorized dealers.

This proportional stamp duty is levied at the rates indicated in the table below:

[18] At the time of writing, no official definition of the terms "economy vehicle" and "standard vehicle" was found in the available official sources.

Table 8: Customs value threshold and applicable rates (IID 2025d)

Customs value of the vehicle (MAD)	Rate
400,000 to 600,000	5 %
600,001 to 800,000	10 %
800,001 to 1,000,000	15 %
Above 1,000,000	20 %

The proportional stamp duty is calculated on the vehicle's total value, including the purchase price as well as the import duty and the parafiscal import tax (ADII, 2025d).

Vehicles subject to the special annual tax on vehicles are also subject to this stamp duty upon their first registration in Morocco, in the case of vehicles acquired in Morocco.

However, pursuant to Article 252-I-C of the General Tax Code, the following categories are not subject to the above provisions:

- Electric vehicles and hybrid vehicles (electric and combustion)
- Vehicles with a Gross Vehicle Weight (GVW) or Gross Train Weight (GTW) exceeding 3,000 kilogrammes, excluding four-wheel drive (4x4) vehicles, which remain subject to the rates set out in the above table (MEF, 2025).

2.4.6 Approval Fees

Type Approval

For type approval, approval fees are charged, along with a one-off approval fee that varies according to the vehicle's GVW. These fees amount to MAD 50,000 for a GVW up to 3.5 tonnes, and MAD 75,000 for a GVW above 3.5 tonnes.

Individual Approval

For individual approvals, an approval fee is required per vehicle and varies according to the vehicle classification. They amount to MAD 600 for category L vehicles (motor vehicles with fewer than four wheels), MAD 1,000 for light vehicles with a gross weight up to 3.5 tonnes, and MAD 2,500 for heavy goods vehicles (HDVs) exceeding 3.5 tonnes.

2.4.7 Registration Tax

Registration taxes and fees vary according to several criteria, such as the vehicle category, fiscal horsepower and its intended use, whether personal or commercial. At

first registration, a range of charges must be paid, including fixed fees and, in some cases, specific taxes applicable to certain categories of vehicles.

Taxes and Stamp Duties Applicable to First Registration

Table 9: Taxes and stamp duties applicable to first registration

Tax / Duty	Amount (MAD)	Legal reference
Additional Motor Vehicle Registration Tax	MAD 200 × FP[19]	Article 22 of the 1989 Finance Law
Stamp duty	MAD 50 × FP	Article 252-II-G-3° of the CGI[20]
Parafiscal tax	MAD 300	Decree No. 2.19.971 NARSA
Stamp duty based on fiscal horsepower (HP)	See Table 8	Article 252-II-L of the CGI

Table 10: Stamp duty according to fiscal horsepower (NARSA)

	Fiscal power (FP) in HP			
	Less than 8	**8 to 10**	**11 to 14**	**15 or above**
Stamp duty (MAD)	2,500	4,500	10,000	20,000

Taxes / Stamp Duty on Vehicle Transfer

Transfer of ownerships refers to the mandatory administrative procedure applicable when the owner of a vehicle registered in Morocco changes. It is carried out via the NARSA (www.mutationvehicule.ma) electronic portal, which is dedicated to processing transfer requests. This procedure is conditional on the prior payment of the applicable taxes and duties, the details of which are presented in Table 11.

[19] Fiscal horsepower is a unit used for vehicle taxation purposes in Morocco and in some EU countries. It is a calculated value based on engine characteristics (engine displacement and emissions), rather than the vehicle's actual engine power.

[20] General Tax Code

Table 11: Taxes and duties applicable to the transfer

Tax / Duty	Amount (MAD)	Legal reference
Stamp duty	MAD 50 × FP	Article 252-II-G-3° of the CGI
Parafiscal tax	MAD 300	Decree No. 2.19.971 NARSA
Stamp duty	MAD 5	Article 252-II-L of the CGI

2.4.8 Annual Tax

The annual special tax on motor vehicles (TSAV), commonly referred to as the "car sticker", is an annual tax applicable to motor vehicles. The tax period runs from January 1 to December 31 each year and payment must be paid during January of the relevant tax year. **Electric and hybrid vehicles are exempt from this tax.**

The annual tax rate (Table 12) is determined according to the following criteria, pursuant to Article 262-I-A of the General Tax Code (CGI):

Vehicles with gross vehicle weight (GVW) or gross train weight (GTW) of 3,000 kilogrammes or less, as well as four-wheel-drive (4x4) vehicles not intended for professional use, regardless of their weight.

Table 12: Vehicle categories by fiscal power and fuel type (DGI, 2025)

	Fiscal power in HP			
Vehicle category	**Less than 8**	**8 to 10**	**11 to 14**	**15 or above**
Petrol vehicle	MAD 350	MAD 650	MAD 3,000	MAD 8,000
Diesel vehicle	MAD 700	MAD 1,500	MAD 6,000	MAD 20,000

However, commercial vehicles (pick-ups) with diesel engines owned by private individuals are subject to the tax at the same rate as petrol vehicles.

Pursuant to Article 262-I-B of the GGI, different tax rates apply (Table 13) to vehicles with a GVW weight exceeding 3,000 kilogrammes, as stated on the vehicle registration certificate concerned, as well as to vehicle combinations consisting of a tractor unit and a trailer or semi-trailer where the maximum GTW indicated on the tractor vehicle registration certificate (logbook) exceeds 3,000 kilogrammes:

Table 13: Tax rates according to gross vehicle weight / gross train weight

Gross vehicle weight (kg) / Maximum Gross train weight (kg)	Rate
Over 3,000 and up to 5,000	800
Over 5,000 and up to 9,000	1,350
Over 9,000 and up to 15,000	2,750
Over 15,000 and up to 20,000	4,500
Over 20,000 and up to 33,000	7,300
Over 33,000 and up to 40,000	7,500
Over 40,000	11,000

2.4.9 Fuel Taxes

In Morocco, road fuels, especially petrol and diesel, are subject to duties and taxes when imported. These fuels are classified in Chapter 27 of the Harmonised System[21], relating to mineral fuels, mineral oils and products of their distillation, bituminous materials and mineral waxes (ADII, 2026).

The authorised petrol fuel is premium unleaded fuel, while the authorised diesel fuel is diesel 10 ppm of sulphur, in accordance with Decree No. 1948-21 of the Minister of Energy and Energy Transition dated 16 July 2021 on the specifications of major petroleum products (see Annex 3).

The taxes applicable to the import of these fuels, as defined on the ADIL platform, are as follows:

- Import duty: 2.5 %
- Parafiscal import tax: 0.25 %
- **Domestic consumption tax (TIC)**: MAD 376.40 per hectolitre for petrol and MAD 242.20 per hectolitre for diesel (ADII, 2026).
- VAT on imports: 10 %

2.5 Subsidies / Incentive Programmes

To renew its road fleet without placing excessive pressure on small businesses and professional road transport operators, Morocco has introduced several incentive programmes in recent years, including a scrappage scheme for taxis, a vehicle

[21] The Harmonized System is an international product nomenclature developed by the World Customs Organization. This nomenclature generally organizes goods according to their degree of elaboration. It is composed of 6-digit codes and contains about 5000 headings.

renewal programme for professional transport services, and the "Mouakaba" programme for road transport professionals.

2.5.1 Scrappage Scheme for Large and Small Taxis

The initiative was introduced in 2014 as part of a government programme aimed at modernising the country's taxi fleet. Its primary objective was to replace older vehicles (more than 10 years old) with newer and less polluting models.

The programme has been extended several times due to its success and has contributed to the modernisation of urban transport and the reduction of pollutant emissions in Morocco's major cities.

However, there is currently no equivalent mechanism targeting the entire national vehicle fleet.

2.5.2 Vehicle Renewal Program for Road Transport Services

The Ministry of Transport and Logistics, in collaboration with NARSA, oversees a vehicle renewal programme for road transport services aimed at modernising the fleet, improving road safety and supporting transport professionals. The programme was launched in 2024 and covers the period 2024-2026 (MTL, 2025).

The program is based on two pillars:

1. The 'Safe Autocar' programme, providing subsidies for the renewal of vehicles used in collective public passenger transport by bus.

2. The Road transport fleet renewal programme, which includes:
    - A subsidy for the renewal of vehicles used for public passenger transport services in rural areas;
    - A subsidy for the renewal and scrapping of road freight transport vehicles operated for hire or reward;
    - A subsidy for the renewal of vehicles used for towing services;
    - A subsidy for the renewal of light goods trucks with a GVW between 3 tonnes and 3.5 tonnes;
    - A subsidy for the renewal of driving school vehicles in categories C, D and E(C).

Eligible vehicles must be registered through the dedicated NARSA online portal: *tajdid-hadira.narsa.gov.ma*. The process is carried out in two stages:

- Registration of companies (account creation or update);
- Submission of official applications for financial support

Vehicles must meet the age and type criteria established in the programme regulations and specified in the calls for applications published on the platform.

Detailed information regarding the exact amount of programme subsidies is not officially published. They are generally specified in the regulatory texts (ministerial decrees or instructions issued by NARSA) available on the official portal (https://tajdid-hadira.narsa.gov.ma/login) during the opening of application periods.

2.5.3 The 'Mouakaba' Program

In March 2022, the government launched an exceptional support programme (Head of Government, 2022) dedicated to road transport professionals through the platform: https://mouakaba.transport.gov.ma, with the objective of mitigating the impact of rising fuel prices on the domestic market resulting from sustained increases in international fuel prices. Through this support scheme, the government aims to provide grants for the renewal of approximately 180,000 vehicles operated by road transport professionals. The subsidy amounts by category are shown below:

Table 14: Subsidies for road transport professionals

Category	Subsidy (MAD)
Large Taxis	2,200
Small Taxis	1,600
Mixed transport vehicles in rural areas	1,800
Intercity coaches	7,000
Urban buses	6,200
Tourist transport: first-series coaches	2,800
Tourist transport: second-series minibuses	1,400
Tourist transport: third-series vehicles	1,000
Freight transport: recovery vehicles	1,000
Freight transport: trucks with a GVW between 3.5 and 14 tonnes	2,600
Freight transport: trucks with a GVW between 14 and 19 tonnes	3,400
Freight transport: trucks with a GVW above 19 tonnes	4,200
Freight transport: road tractors.	6,000
Transport of personnel for hire or reward	1,200
School transport for hire or reward	1,000

The subsidy granted through the Mouakaba platform is not a permanent or regular monthly payment. It is rather distributed in successive instalments introduced by the government in response to changing economic conditions, particularly increases in fuel prices and pressures affecting the transport sector.

2.6 Fuel Economy / Fuel Efficiency Labelling

In Morocco, vehicle dealerships are not required to affix a standardized label to new vehicles on display, indicating fuel consumption and CO_2 emissions.

2.7 Fuel Economy and CO2 Emission Standards

To date, Morocco has not adopted fuel economy standards, nor specific CO_2 emission standards for vehicles. However, Morocco's 2025 NDC explicitly refers to a measure concerning the application of CO_2 emission standards for new PVs and new light commercial vehicles by 2035.

This remains a conditional measure that has not yet been implemented, although it has been referenced in several policy documents, including the 2021 NDC and the January 2025 CCN-RTB1.

This measure is expected to deliver cumulative emissions reduction of 12.5 Mt CO_2 over the period 2026 - 2035 and approximately 3.5 Mt CO_2 in 2035 alone. The implementation cost is estimated at USD 5 million.

2.8 Zero-emission Vehicle (ZEV) Mandates

Several countries and jurisdictions worldwide (UK, Canada, China, California in the US) have introduced regulations requiring manufacturers to ensure that a minimum proportion of their annual vehicle sales consists of electric vehicles. These quotas are imposed on each manufacturer and must represent a proportion of total annual sales. They are accompanied by a credit system where credits are awarded to manufacturers for every electric vehicle sold, which can then be resold to manufacturers failing to meet their quotas.

Since COP26, Morocco has been a signatory of the ZEV Declaration, led by the A2Z. Through this declaration, signatory countries from emerging markets and developing economies commit to intensifying efforts to accelerate the uptake of zero-emission vehicles.

In its Long-Term Low National Carbon Strategy Morocco 2050 (SNBC) published in 2021, Morocco advocates for the long-term roll-out of zero-emission vehicles.

However, Morocco has not yet introduced any regulatory requirement obliging vehicle manufacturers to meet annual electric vehicle sales targets.

3. Cooperation Stakeholder Analysis

3.1 Stakeholder mapping

Figure 19: IMPROVE project stakeholder map

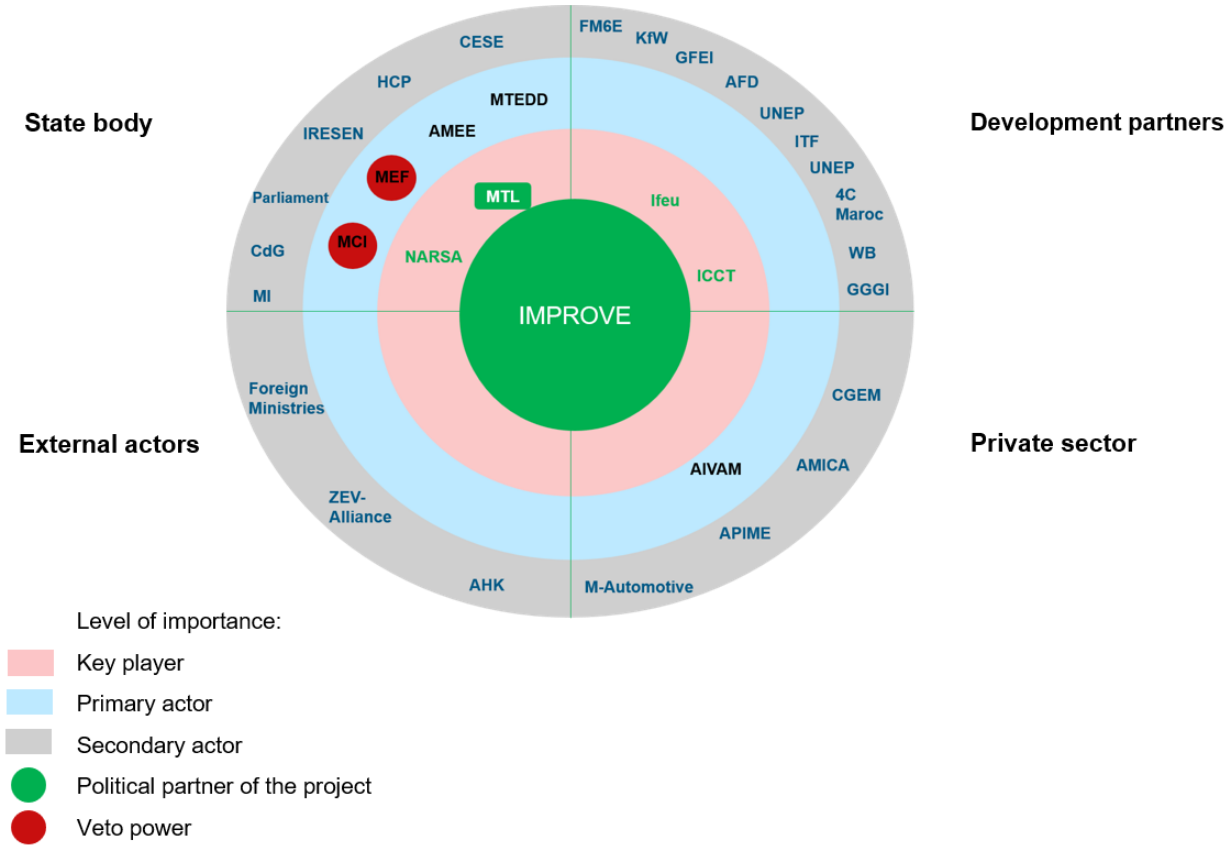


Table 15: Glossary of acronyms used in the stakeholder map

Acronym	Organisation	Sector
4C Maroc	Climate Change Competence Centre of Morocco	Development partner
AFD	French Development Agency	Development Partner
AHK	German Chamber of Commerce and Industry in Morocco	External actors
AIVAM	Association of Vehicle Importers in Morocco	Private sector
AMEE	Moroccan Agency for Energy Efficiency	State body

AMICA	Moroccan Association for the Automotive Industry and Construction	Private sector
APIME	Intersectoral Professional Association for Electric Mobility	Private sector
CdG	Government Council	State body
CESE	Economic, Social and Environmental Council of the Kingdom	State body
CGEM	General Confederation of Moroccan Enterprises	Private sector
ITF	International Transport Forum	Development partner
FM6E	Mohammed VI Foundation for Environmental Protection	Development partner
GFEI	Global Fuel Economy Initiative	Development partner
GGGI	Global Green Growth Institute	Development partner
HCP	High Commission for Planning	State body
ICCT	International Council on Clean Transportation	Development partner
IFEU	Institute for Energy and Environmental Research	Development partner
IRESEN	Institute for Solar Energy Research and New Energies	State body
KFW	German Credit Institution for reconstruction	Development partner
M-Automotive	Car distributor for Renault and Dacia brands in Morocco	Private sector
MCI	Ministry of Industry and Trade	State body
MEF	Ministry of Economy and Finance	State body
MI	Ministry of the Interior	State body
MTEDD	Ministry of Energy Transition and Sustainable Development	State body
MTL	Ministry of Transport and Logistics	State body
NARSA	National Road Safety Agency of Morocco	State body

Parliament	House of Representatives	State body
UNDP	United Nations Development Programme	
UNEP	United Nations Environment Programme	
WB	World Bank	
ZEV-Alliance	International Zero-Emission Vehicle Alliance	

3.2 Stakeholder Interests, Relationships and Networks

The development and implementation of vehicle efficiency regulations in Morocco require the involvement of a range of stakeholders, which can be grouped into three categories: public authorities, the private sector, and development partners.

For the purpose of this analysis, a fourth category has been added. This category includes external stakeholders (such as the ZEV-Alliance, foreign ministries and the German Chamber of Commerce – AHK) that play an indirect role and could, where appropriate, be consulted to share their experience or adopt measures likely to influence the project's trajectory. However, the present analysis focuses on the first three categories.

The stakeholders identified above can be classified according to three levels of involvement: key actors, primary actors and secondary actors.

Key actors are those whose explicit approval is essential to the project, as well as those who have a veto power in the sense that *"they can create key impetus and scope, or they can obstruct the project" (GIZ GmbH, 2015).* Key actors are also characterised by the resources they mobilise (knowledge, skills and expertise) to influence the project and by the strength of their networks. Through their expertise and advisory role, they can contribute to the implementation of the project without necessarily exercising formal approval or veto powers.

In this context, the development of regulations aimed at improving vehicle efficiency and reducing CO_2 emissions, whether through a feebate mechanism or "bonus-malus system", CO_2 emission standards or vehicle efficiency labelling, depends mainly on the MTL and NARSA. While the former, as a political partner, steers the project, champions and defends the idea of regulation, mobilises human resources and contributes to all stages of preparation, planning, analysis and regulatory design, the latter contributes to the project's success by sharing its data on the Moroccan vehicle fleet, expertise relating to vehicle homologation and registration procedures, and by making human resources available.

The MTL and NARSA are supported in this process by the Institute for Energy and Environmental Research (Ifeu) and the International Council on Clean Transportation (ICCT), two non-governmental organisations based in Germany and the United States respectively. Under contractual arrangements, these organisations provide technical expertise through data collection and analysis, the preparation of studies, and the

development of policy scenarios based on which key and primary actors will reach agreement prior to the drafting of the regulatory proposal.

Primary actors are those who are directly affected by the proposed regulations, either because they benefit from them or because they may be adversely affected. In certain circumstances, they may also exercise veto power.

Among the primary actors are mainly state authorities: the Ministry of Energy Transition and Sustainable Development (MTEDD) and its supervisory agency, the Moroccan Agency for Energy Efficiency (AMEE), the Ministry of Industry and Trade (MCI) and the Ministry of Economy and Finance (MEF). The MTEDD is responsible for updating the national energy efficiency strategy in the transport sector, the targets set, and reporting on the implementation of Morocco's climate strategies and the achievement of its indicators and objectives to international organisations. They are therefore two key players in aligning national policies with the Kingdom's international commitments on climate objectives.

The MCI, for its part, oversees industrial policy in Morocco, including the development of the automotive sector. It will therefore seek to ensure that the regulatory project does not hinder the development of the automotive market and that, on the contrary, contributes to the growth of a strategic, innovative sector conducive to job creation and the development of new partnerships. In this sense, it will have veto power.

The MEF is responsible for the design and implementation of the Kingdom's economic and fiscal policies. It will therefore seek to ensure that any new regulation contributes to the balance of public finances, does not represent an excessive financial burden for households or create a budgetary constraint for the State at the time of its implementation or during the administration of this instrument, that it is properly aligned with existing fiscal policies and that it does not hinder the country's economic development. It therefore has significant veto power.

Finally, with regard to the private sector, AIVAM, which brings together vehicle importers in Morocco and almost all official brand distributors, is a major interlocutor that must be considered. It holds essential data for the design of a regulation affecting vehicles and can mobilise private sector actors if it concludes that the regulatory project could affect the functioning of its business model and undermine the sector’s competitiveness.

Lastly, the actors in the third circle, considered as secondary actors, are those who are only indirectly or temporarily involved in the project. They may nonetheless play an important role in the project’s impact after the phase of defining the energy efficiency regulations, be involved in capacity building activities, simply be informed, or represent potential funding sources in the event of an extension.

These actors therefore include most national and international development partners (the Mohammed VI Foundation for Environmental Protection, 4C Maroc, UNEP, UNDP, WB, KfW, ITF, GFEI, GGGI and AFD), as well as ministries and state agencies that should be informed in order to complement their indicators or align their policies, such as the Ministry of the Interior which is responsible for urban transport, IRESEN, HCP and the ESEC, but also more peripheral private actors involved in transport-related activities, such as CGEM, which represents businesses including those in the automotive sector, APIME, the voice of electric mobility, AMICA, which represents the interests of the Moroccan automotive industry, and M-Automotive, the main distributor of Renault, Dacia and Alpine brands in Morocco. At the time of preparation of the

selected regulation, the Government Council and the Parliament are secondary actors but they will become major stakeholders, once the regulatory project is ready to be endorsed by the Government and enters the legislative review phase.

3.3 Obstacles and Challenges

Obstacles and challenges may slow down the progress of the project and, in turn, hinder the stakeholder cooperation in the adoption of vehicle efficiency regulations in Morocco, in both public and private sectors.

In the public sector, the change in government mandate scheduled for 2026, could slow the implementation of energy efficiency policies, due to the difficulties inherent in the transition period between two administrations. The implementation of CO_2 emission standards may also face resistance from some ministries. The effective application of such a standard requires close collaboration among all relevant stakeholders. However, the lack of automatic and institutionalised interministerial consultation during the preparatory phase of draft regulations may hamper the development of a unified approach to vehicle efficiency policy. Early consultation with the Ministry of Economy and Finance, which is responsible for defining tax policy and collecting taxes, will therefore be essential when discussing the introduction of a bonus-malus system or any other vehicle efficiency policy.

In the private sector, the implementation of the vehicle efficiency policy related to fuel consumption and CO_2 emissions could affect Morocco's automotive industry, particularly by influencing demand. Manufacturers exporting to Morocco will, if they have not already done so, need to adapt their production sites and vehicle ranges to offer more technologically efficient models, and, during a transition phase, find new markets for their most polluting vehicles. This will inevitably require additional investments and an adjustment of business strategies. It could also intensify competition between manufacturers, encouraging the entry of new players, such as Chinese electric vehicle manufacturers. Distributors will likewise need to broaden their offering or establish new partnerships with these new entrants. These adjustments could also lead to lower sales if the prices of the most polluting vehicles were to rise. As a result, the financial and policy constraints associated with implementing this policy could generate strong resistance from the private sector.

4. Analysis of Findings

4.1 Summary Table

Table 16: Summary table of fiscal policies and incentives for PVs and LCVs

Policy	Implemented [yes/no]	Short description
Fuel economy / efficiency labelling	No	_
Import duties	Yes	Depends on the powertrain: combustion engine 17.5 %, hybrid 2.5 % and electric 2.5 %.
Parafiscal tax on imports	Yes	0,25 %
Import restrictions	Yes	Restriction on used vehicles: the age of the vehicle must not exceed 5 years.
Purchase tax / VAT	Yes	10 % to economy cars 20 % to standard and luxury vehicles
Luxury vehicle tax (Proportional stamp duty)	Yes	From 5 % to 20 % depending on the vehicle's value; Calculated on the vehicle's total value, including the purchase price, import duty and import parafiscal tax. Hybrid and electric vehicles are exempt.
Registration tax	Yes	Applied at the time of first registration.
Probate Fees	Yes	Applied at the time of homologation.
Renewal fee	Yes	The tax rate is set according to the vehicle's fiscal power and engine type (petrol or diesel). Electric and hybrid vehicles are exempt from this tax.
CO_2 tax	No	_
Fuel tax	Yes	Import duty: 2.5 %

		Parafiscal import tax: 0.25 % TIC22: MAD 376.40 per hectolitre for petrol and MAD 242.20 per hectolitre for diesel Import VAT: 10 %
Subsidy for clean vehicles	No	_
Fuel economy standard	No	_

4.2 SWOT Analysis

The implementation of regulatory instruments to reduce vehicle fuel consumption and CO_2 emissions can only be achieved through a precise analysis of the political, institutional, economic and technical opportunities, challenges and obstacles throughout the project. The SWOT analysis helps to summarise and clarify these factors:

Strengths

- **Favourable climate, resources, and strategic commitment to the twin transitions of transport and energy**: Morocco benefits from optimal climatic conditions for expanding RE capacity, which is in its interest given its high dependence on imported fossil fuels. It also has abundant mineral resources needed for battery electric vehicle, such as cobalt and phosphate. This places the country in an ideally position to accelerate the transition to EVs as part of the twin transitions of the transport and energy sectors.
- **Increasing electricity production from RE:** Morocco is already actively accelerating its energy transition, with the aim of generating a large share of its electricity from renewable sources, the share of which is constantly increasing (45 % of installed capacity in 2024). Its ambition is to become self-sufficient and reduce its dependence on coal and oil.
- **Growing role in the global automotive market:** Thanks to its geographical position, mineral resources (cobalt, phosphate) and strategic position in the global economy, Morocco has established itself as a major automotive producer, the leading exporter of PVs to the African continent and the fourth largest exporter (by value) to the EU. It has also become a catalyst for foreign investment, particularly from China, which dominates the battery and EV market.
- **Clear climate ambitions in the transport sector:** Regulatory measures such as bonus-malus system, CO_2 emission standards are already mentioned in the SNDD and in the 2021 and 2025 NDCs. Their emission reduction potential and financial requirements are quantified, thereby strengthening their legitimacy and credibility. Other cross-cutting strategies also set ambitious targets for emissions reduction, fleet renewal and the development of sustainable mobility.

[22] Domestic consumption tax

- **Clear mandate to develop a bonus-malus system:** Within the framework of the IMPROVE project and at several conferences, including the project launch event on 30 April 2024 and the conference on decarbonisation during the Green Impact Expo from 11 to 13 February 2025, the MTL reiterated its ambition to introduce a bonus-malus system, an incentive mechanism designed to encourage the purchase of clean vehicles and penalise the most polluting ones.
- **Measures already in place for fleet renewal:** Some existing measures already demonstrate Morocco's willingness to renew its vehicle fleet. The country does not allow the import of used vehicles older than 5 years, with a few exceptions, and offers professional transport fleet renewal programmes that help reduce the average age of the fleet.
- **Data availability and quality:** NARSA and its registration centres already collect data that is essential for the analysing the automotive market and designing regulatory instruments.

Opportunities

- **Major contribution to GHG reduction**: Morocco has set ambitious emission reduction targets. Implementing the NDC measures would make a significant contribution to the national GHG emissions reduction target (53 % by 2035, including 21.6 % unconditional compared with the baseline scenario).
- **Proximity to the European Union:** For the EU, Morocco is a strategic partner with which it has established close and multifaceted cooperation. Sharing European experience in implementing CO_2 emission standards or the French experience with the implementation of a Bonus-Malus system, could be facilitated by this proximity. Despite the EU's reversal on the decision to ban the sale of internal combustion vehicles in 2035 and the possible future expansion of the Carbon Border Adjustment Mechanism, EU strategic orientations could work in Morocco's favour, as the country has already begun transitioning its automotive industry towards integrated and decarbonised electric mobility value chains. This, in turn, could increase the availability of zero-emission vehicles in its own market.
- **A national automotive market in transition:** By implementing regulatory instruments to reduce fuel consumption and encouraging the adoption of zero-emission vehicles, Morocco could strengthen the long-term resilience of its domestic market in the face of the global transition to EVs. Morocco is already moving towards becoming a central player in the EV value chain. By driving this transition domestically, as motorisation rates steadily increase, the Moroccan automotive market could leverage its EV production capabilities to prepare for the future.

Weaknesses

- **Barriers to access to data:** Although most of the required data exist, their use is difficult in the case of used vehicles and certain categories of vehicles on the road, due to the lack of interoperability between databases held by different entities (e.g., data on taxis, government vehicles and mopeds below 50 cc) as well as restrictions on access linked to the sensitivity and confidentiality of these data.

- **Data quality could be improved**: NARSA collects data on CO_2 emission values. These refer in principle to the phases of the NEDC driving cycle (urban cycle, extra-urban cycle and combined cycles). However, analyses showed that some emissions may correspond to the WLTP driving cycle. In addition, when the EURO 6 standard is mentioned, it is not systematically specified which phase (6b, 6c or 6d) it refers to. This complicates the estimation of the average CO_2 emissions of the Moroccan car fleet as well as the development of a baseline. Fuel consumption data are also not collected.
- **Local market dominated by imports:** Although Morocco has a well-established automotive industry, dominated by two international manufacturers, the Stellantis and Renault groups, most vehicles sold on the local market are imported (85,6 % in 2023). However, this dependence on imports could become an opportunity insofar as imports come from countries, particularly in, that already apply fuel economy standards, which could provide a favourable basis for a regulatory change in Morocco.
- **Low incentives for the purchase of zero-emission vehicles and fleet renewal:** With the exception of the exemption from the annual tax and the luxury vehicle tax for electric and hybrid vehicles, there is no subsidy programme or tax incentive for households or companies to encourage the purchase of such vehicles, unlike in other countries (e.g. the ecological bonus in France, VAT exemption in Norway or exemption from purchase tax in China). There is also no scrappage premium or conversion bonus for the general public. On the other hand, EVs and hybrids benefit from preferential customs duties of 2.5 % compared with 17.5 % for combustion engine vehicles.
- **Lack of regulations requiring vehicle manufacturers and importers to sell more energy-efficient vehicles:** Despite Morocco's strong ambition to produce and deploy zero-emission vehicles, there are no regulations requiring manufacturers to transform their fleets.
- **High acquisition costs of low- or zero-emission vehicles:** Although the supply of electric vehicles is starting to diversify, the acquisition price of these vehicles, as hybrids, remains high compared with conventional combustion vehicles, given the purchasing power of Moroccans.
- **Lack of infrastructure:** Although the development of sustainable infrastructure is one of the Kingdom's priorities, charging stations remain insufficient and still need to be deployed more widely at national level.

Threats

- **The need to build a unified ministerial approach to vehicle efficiency regulations**: The MTL strongly and publicly advocates for the introduction of a bonus-malus system in Morocco. There could also be consideration of introducing CO_2 emission standards at a later stage. However, early interministerial consultation during the regulatory design phase is a key factor in securing broad ministerial support and presenting a unified front in the face of possible criticism of this new regulatory instrument.
- **Lack of consumer information and incentives:** The lack of consumer information and awareness campaigns for zero-emission vehicles, together with

the lack of subsidy programmes for low-emission vehicles, could hinder public uptake of these regulatory instruments, especially if used vehicles were covered by the measures.

- **Private sector reluctance:** If the proposed regulations are perceived as a risk to the manufacturers' competitiveness by imposing obligations on them while limiting consumer choice, the private sector could mobilize to slow down or delay the adoption of ambitious regulations.

5. Summary and Conclusion

Morocco is at a strategic turning point for the decarbonisation of the transport sector. This preliminary study for the IMPROVE project highlights the main characteristics of, and challenges facing, the road transport sector in Morocco, and identifies a strategic opportunity to improve vehicle efficiency and reduce emissions.

As the SWOT analysis shows, Morocco has the potential to lead this transformation successfully. Driven by its climate commitments and ambitions, as well as its growing role and rapidly expanding production capacity in the EV segment of the global automotive sector, Morocco is ideally positioned to lead the decarbonisation of its transport sector in parallel with its energy transition. In this regard, Morocco is particularly well equipped for the development and implementation of regulatory mechanisms that improve vehicle efficiency and accelerate electrification, as reflected in its commitments under the NDCs and other strategies.

Morocco's main strengths lie first and foremost in its particularly favourable climate for the expansion of renewable energies, the increase in electricity production from these sources, as well as its clear ambition and mandate to develop measures to decarbonise the transport sector. Some of these measures such as the bonus-malus system and CO_2 emission standards already have quantified estimates of their emissions reduction potential and financial requirements. In addition, institutions such as NARSA are already collecting the data needed to design such instruments.

Opportunities also arise from Morocco's strategic relations with the European Union and its geographical proximity, both of which foster mutually beneficial market development and know-how transfer to support the transition to sustainable mobility. Morocco's growing role in the global automotive and EV value chains, coupled with its potential for “well-to-wheel” EV production, is an important lever for accelerating the transition to EVs both globally and in its own market. Vehicle ownership in the country is also increasing, although combustion engine vehicles still dominate.

However, the decarbonisation of the transport sector, and more specifically the implementation of regulatory instruments in this regard, is not without challenges. The Moroccan domestic market remains dominated by imports (mostly fully built vehicles – CBUs), the implementation of EURO 6b standards has been delayed, and incentives for the adoption of zero-emission vehicles remain weak. Most of the necessary data exists and is collected, but gaps remain, including the absence of fuel consumption data, CO_2 emission values recorded on the basis of uncertain driving cycles (NEDC or WLTP), as well as barriers to data access and limited consultation among key public stakeholders, which create governance and data management challenges. Other obstacles could be added, such as lack of consumer awareness, possible resistance from the private sector, and insufficient charging infrastructure.

Despite its international commitments, Morocco has not yet implemented vehicle efficiency policies (fuel consumption labelling, bonus-malus system, CO_2 emission standards, ZEV mandate). Existing measures are either too targeted (scrappage bonus scheme for taxis, see section 2.5.1) or insufficient (ban on importing used vehicles more than 5 years old with numerous derogations, exemption from the annual tax and the luxury vehicle tax for electric and hybrid vehicles and preferential customs

duties, see sections 2.2 and 2.4) to enable a rapid and systematic transition to a cleaner and more sustainable vehicle fleet.

The MTL, the IMPROVE project's political partner, has publicly stated its intention to implement a bonus-malus system and is currently working on its development. However, successful implementation will also depend on strong and early consultation with other ministries, in particular the Ministry of Economy and Finance, and on the development of a unified approach to vehicle efficiency policies. For example, access to key information for this study could have been improved if a consultation mechanism with other departments had already been in place at the time of writing.

To address these challenges and **accelerate the development of new coherent and effective regulations for vehicle efficiency and transport decarbonisation**, several priority actions are needed:

1. **Improving data access and quality**:
    - Deploy an MRV system to improve the collection and monitoring of data on vehicles on the road, fuel consumption, imports of new and used vehicles, and new registrations, broken down by category.
    - Develop forward-looking scenarios to guide decarbonisation policy and support an informed choice of measures.
    - Increase transparency by making automotive data (processes, fleet data, emissions) accessible so that universities and research institutes can work on it.
    - Implement of a standardised methodology for calculating the motorisation rate.
2. **Strengthening expertise and governance:**
    - Raise awareness among CNEH staff and staff in NARSA provincial and prefectural registration centres on the collection of CO_2 emission values and EURO standards.
    - Train stakeholders involved in the regulation and monitoring of the automotive sector.
    - Develop a unified approach to vehicle efficiency policies within ministries.
    - Improve coordination between the various institutional and industrial stakeholders.
3. **Implementing measures identified in national and international strategies:**
    - Introduce a bonus-malus system to encourage the purchase of clean vehicles and penalise the most polluting ones.
    - Integrate fuel economy/fuel efficiency labelling in line with international standards.
    - Accelerate investments in charging infrastructure to support the adoption of electric vehicles.
    - Adopt CO_2 emission standards for new PVs and LCVs.

4. **Integration of socio-economic dimensions and incentives for change in consumer behaviour:**
    - Assess the social impact of regulatory measures on consumers.
    - Support households and road transport professionals in the transition through financial support schemes and subsidy programmes.
    - Inform consumers about the benefits, including cost savings, of zero- and low-emission vehicles.
    - Establish dialogue with private sector stakeholders on the development, impacts and potential benefits of regulatory instruments for vehicle efficiency and electrification, in order to anticipate and address their concerns.

By capitalizing on its climate commitments, growing automotive industry, and institutional capabilities, Morocco has the potential to become a regional model for transport decarbonisation and to position itself as a leading player in the emerging electric vehicle industry. Swift and coordinated implementation of the recommended actions will ensure a sustainable transition that benefiting all stakeholders and citizens across the Kingdom.

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7. Annexes

Annex 1: Cases of Vehicles Subject to Individual Approval

According to Article 96 of Decree No. 2-10-421 (Moroccan legislation) the following vehicles are subject to individual approval:

- New imported vehicles whose manufacturer does not have an accredited representative in Morocco;
- New vehicles that have not been granted type approval;
- Imported used vehicles that are less than five (5) years old; however, specific provisions may apply to Moroccans residing abroad;
- New vehicles manufactured in limited series;
- Newly completed vehicles whose chassis has previously been granted type approval;
- Vehicles sold at public auctions;
- Vehicles specially adapted for persons with specific needs;
- Vehicles intended for driver training;
- Vehicles that have already been approved but have undergone one or more significant modifications;
- Vehicles subject to registration that have been severely damaged in an accident and subsequently repaired for re-entry into service.

The Minister of Equipment and Transport shall determine the procedures for implementing this Article.

Annex 2: Decree Number 2730-10

Decree of the Minister of Equipment and Transport No. 2730-10 of 25 December 2010 of 5 of 19 Moharrem 1432) relating to the approval of vehicles, their components and accessories.

Official Bulletin No. 5910 of 20 January 2011: https://ltexpertise.ma/wp-content/docs/Automobile/Homologtion-vehicue-automobile/lien16.pdf

Annex 3: Decree Number 1948-21

Decree of the Minister of Energy, Mines and Environment No. 1948-21 of 5 Hija 1442 (July 16, 2021) on the characteristics of major petroleum products.

https://www.mem.gov.ma/Lists/Lst_Textes_Reglementaires/Attachments/207/BO_7022_Fr.pdf

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