

Driving the Future of Mobility

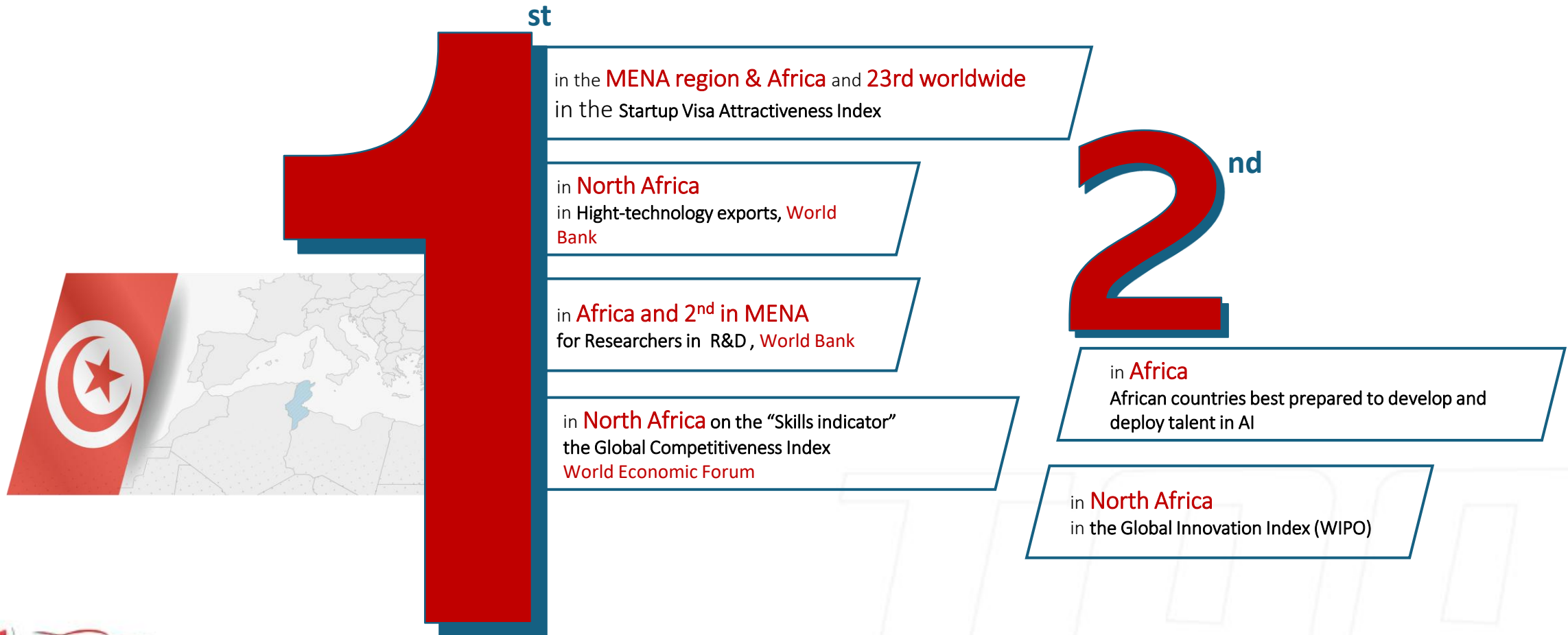
A GLIMPSE OF THE AUTOMOTIVE
INDUSTRY IN TUNISIA

February 2026



ONE OF THE MOST ATTRACTIVE COUNTRIES IN AFRICA

Tunisia ranks **first in Africa** in the most prestigious international index covering **entrepreneurship, innovation, technology capabilities and skills**

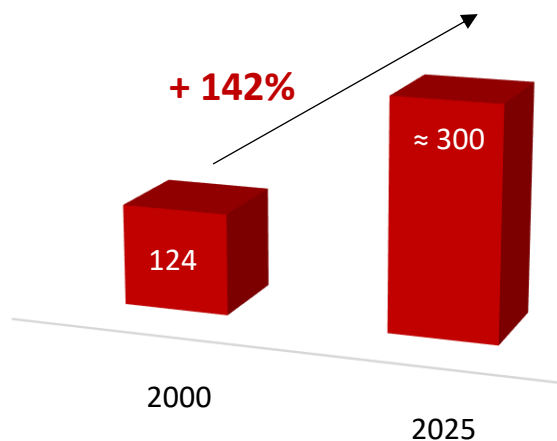




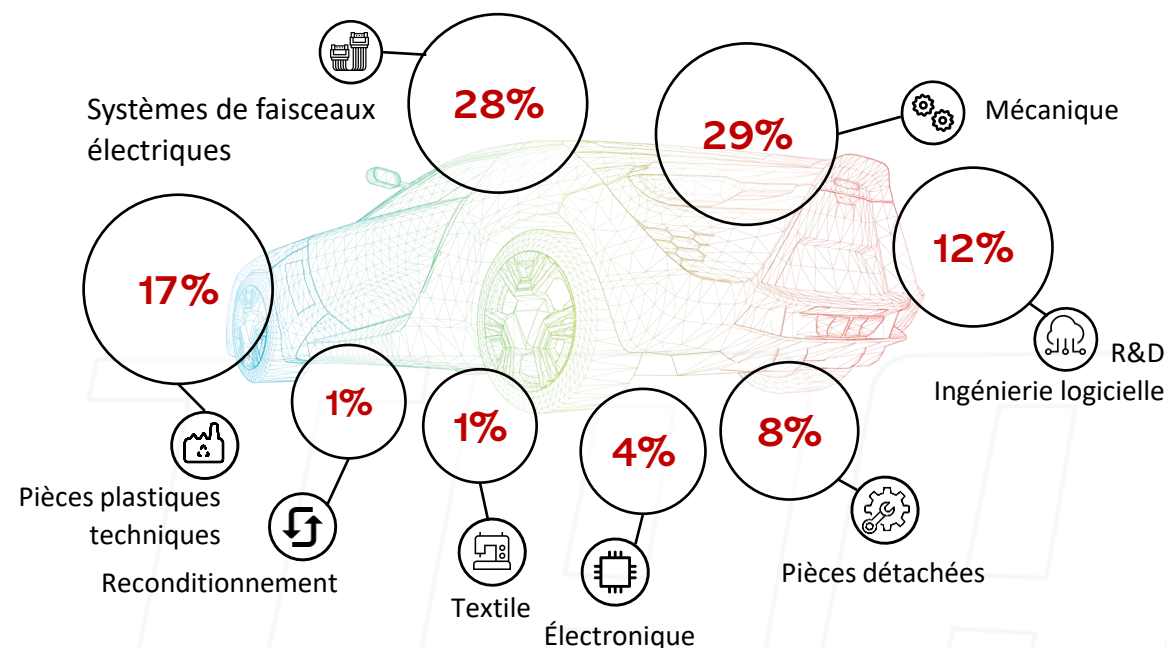
A thriving and diversified ecosystem serving every key application of the automotive industry.

With approximately **300 companies** active across all major subsectors, the Tunisian automotive industry has seen remarkable growth — + 142% increase since 2000.

Évolution du nombre d'entreprises
(2000 – 2025)



Répartition des entreprises par segment



CONSISTENT EXPANSION IN THE AUTOMOTIVE INDUSTRY HAS BEEN PROPELLED BY THE STRATEGIC ENTRY OF SEVERAL LEADING FOREIGN MANUFACTURERS & SUPPLIERS



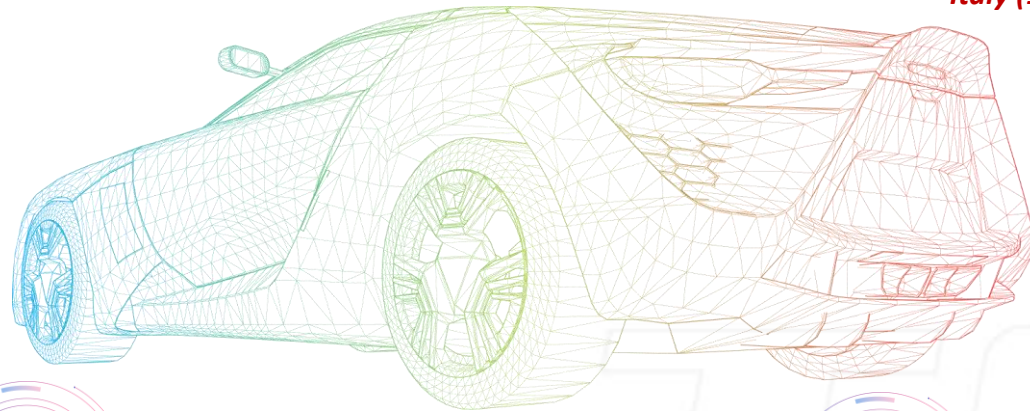
THE SECTOR REPRESENTS $\approx 7\%$ OF THE INDUSTRIAL VALUE ADDED AND 4 % OF GDP



$\approx \text{€}4$ Billions of exports
in 2025 with an average growth
rate of 16% since 2018



67% operating exclusively on
international markets, with **Germany** as a
destination for **37%** of the total exports,
followed by **France (21%)**, **Romania (12%)** and
Italy (11%)



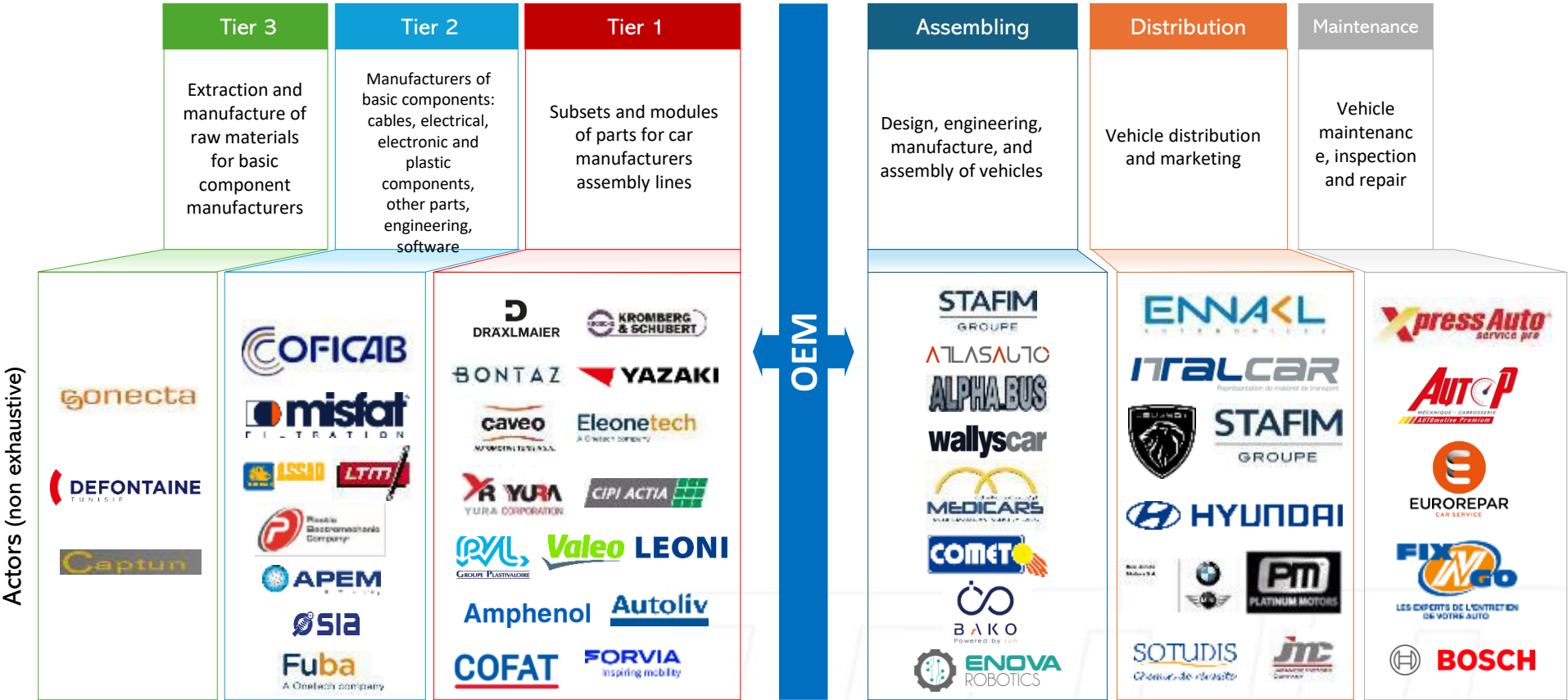
300 +
Companies operating in the
sector in 2025



120 000 + employees



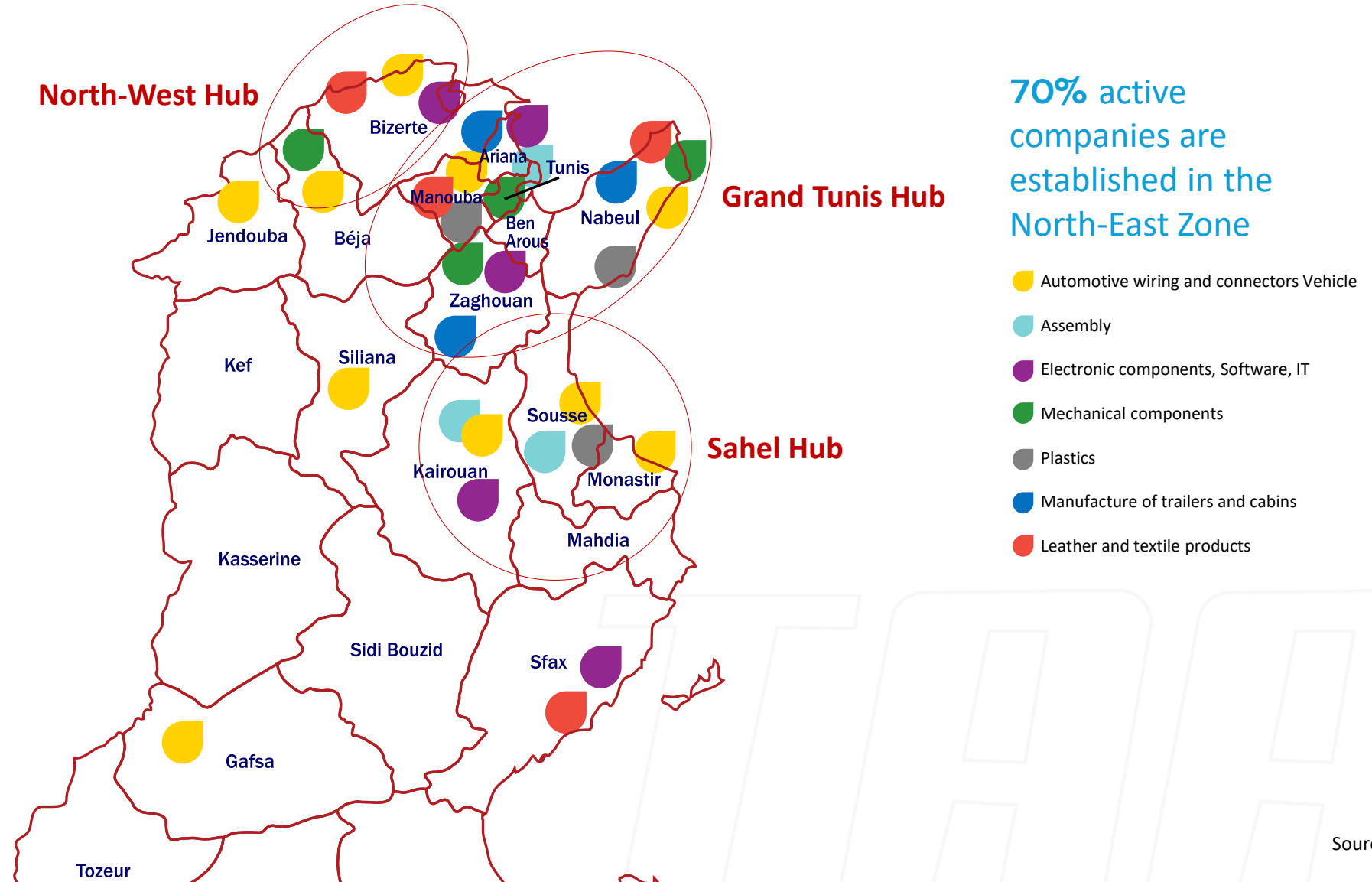
AN EXTENSIVELY DEVELOPED ECOSYSTEM POWERED BY A COMPLETE VALUE CHAIN, SPANNING 5 STRATEGIC LINKS — FROM INITIAL SUPPLY TO AFTER-SALES MAINTENANCE



Around 42% local integration rate



A mature and well-established ecosystem, backed by a dense industrial fabric and proven expertise in the automotive sector.

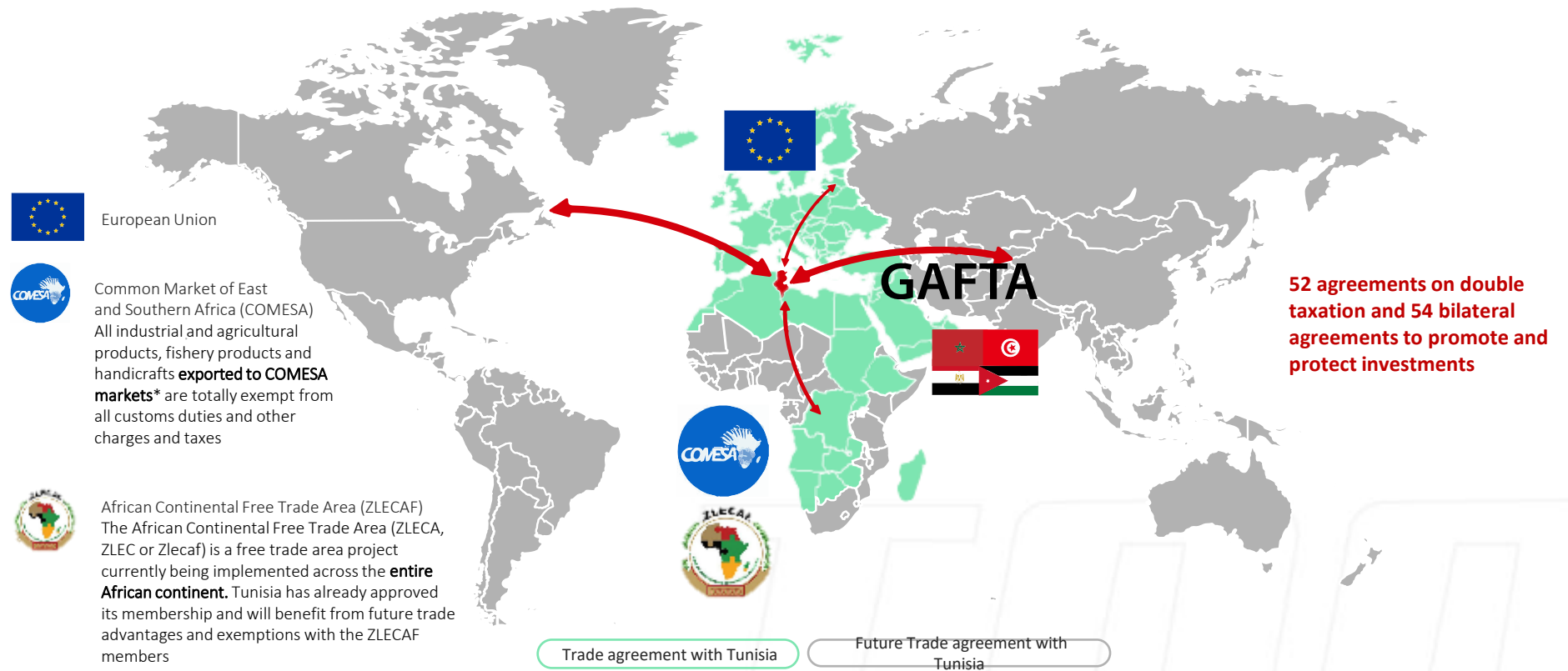




A GATEWAY TO EUROPE AND SUB-SAHARIAN AFRICA

Tunisia gives investors preferential market access through several trade agreements to nearly 100 countries with more than 2 billion consumers

A major manufacturing hub for exports to European, Middle East and African markets



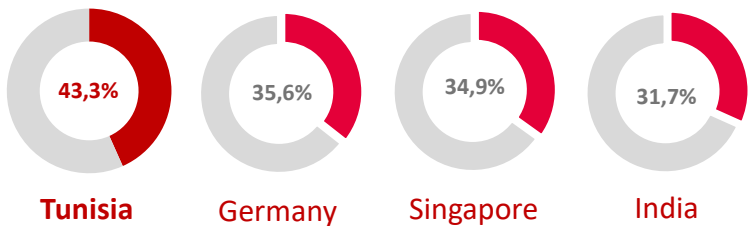
GAFTA Greater Arab Free Trade Area

Arab-Mediterranean Free Trade Agreement (AGADIR)



A SKILLED TALENT POOL BACKED BY RENOWNED HIGHER EDUCATION

Tunisia leverages a large pool of highly skilled professionals, with **over 10 000 engineers and 30,000 bachelors graduating each year**, to meet the evolving needs of the automotive industry.



QUALIFIED POOL OF TALENT WITH STEM FOCUS

According to the UNESCO Institute for Statistics, tertiary students in Tunisia are most likely to graduate in a STEM field (science, technology, engineering mathematics), with more than 43% students receiving a degree in those subjects



EDUCATIONAL HUBS



BIZERTE

- 1 Engineering school
- 1 Technical school



TUNIS HUB

- 19 Engineering schools
- 3 Technical schools



SAHEL HUB

- 8 Engineering schools
- 2 Technical schools



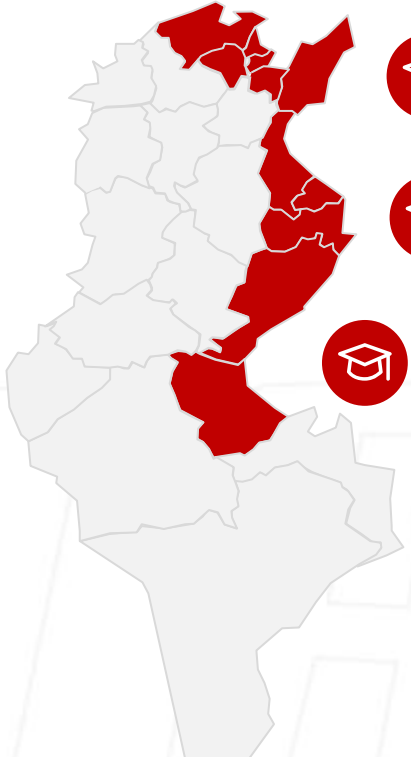
SFAX

- 4 Engineering schools
- 1 Technical schools



GABES

- 2 Engineering schools

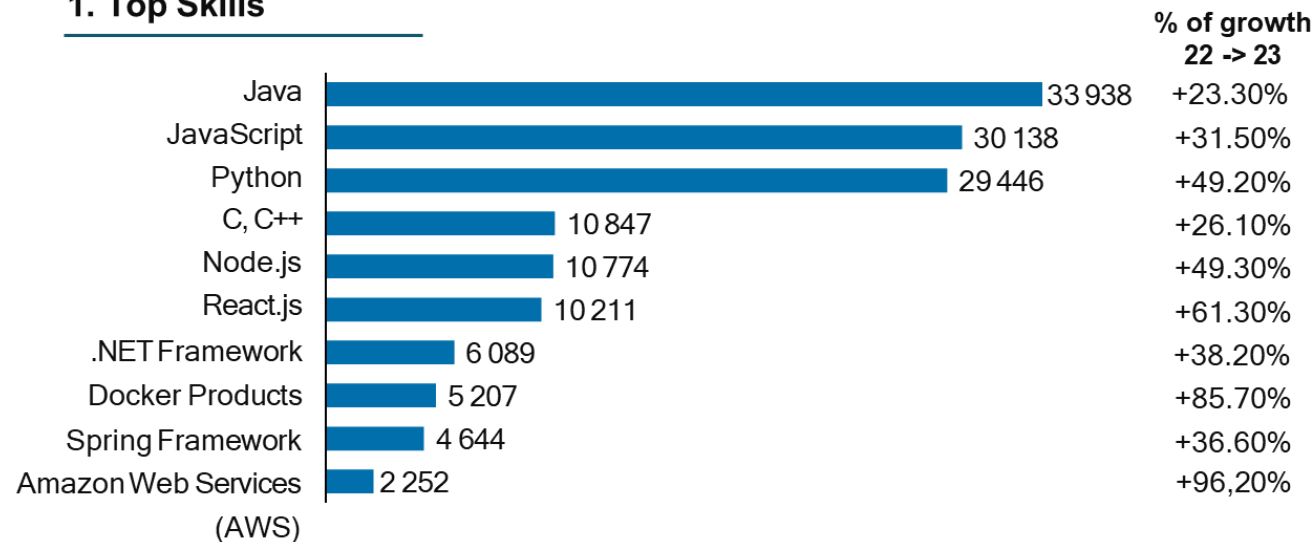




A SKILLED TALENT POOL BACKED BY RENOWNED HIGHER EDUCATION

Graduating in relevant software and technological fields

1. Top Skills



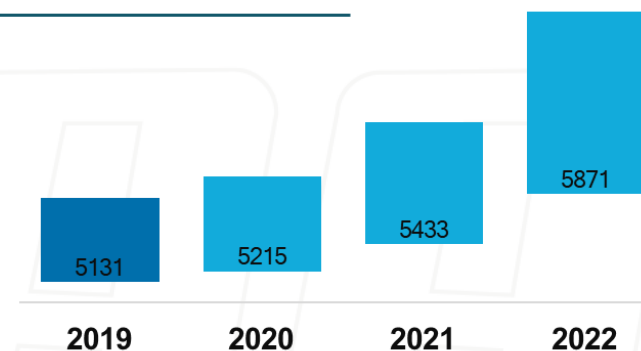
2. Selection of top Universities

Ecole Supérieure Privée d'Ingénierie et de Technologies - ESPRIT
Faculté des Sciences Mathématiques, Physiques et Naturelles de Tunis
École Nationale d'Electronique et des Télécommunications de Sfax
INSAT - Institut National des Sciences Appliquées et de Technologie
ISSAT Sousse

Engineers % of Total

7,186	12%
2,265	4%
1,536	2%
1,351	2%
1,349	2%

3. Number graduates with relevant skills



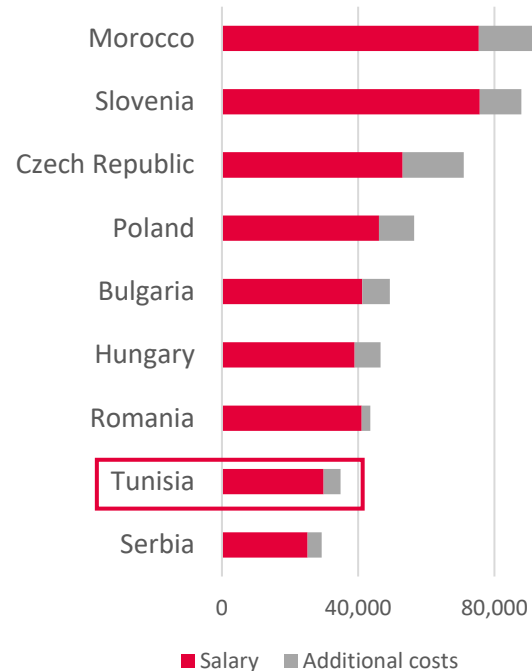
Source : Capgemini



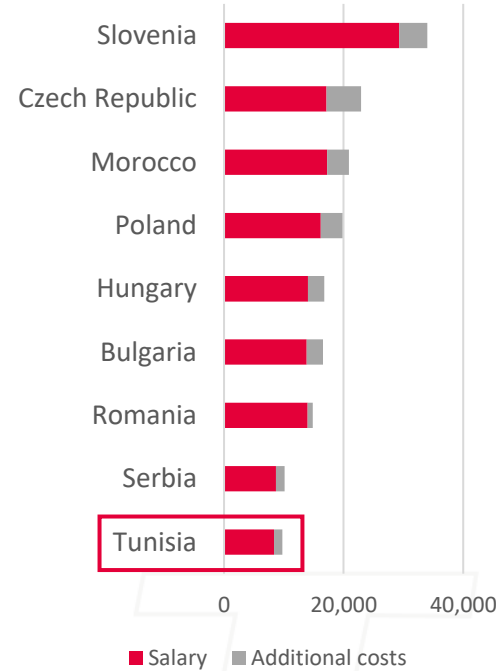
ONE OF THE MOST **COMPETITIVE** LABOR FORCE WORLDWIDE

Tunisia ranks **1st in North Africa** for workforce and stands out as a globally competitive labor market, according to leading international indices.

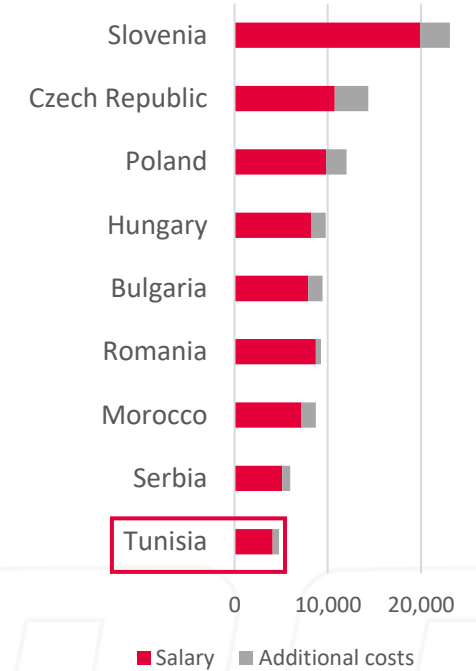
Labor Costs: Head of Manufacturing (Euro)



Labor Costs: Automotive Engineer (Euro)



Labor Costs: skilled operator (Euro)



Labor costs are **50%-80%** lower than all countries in the EU and compared to other North African countries.

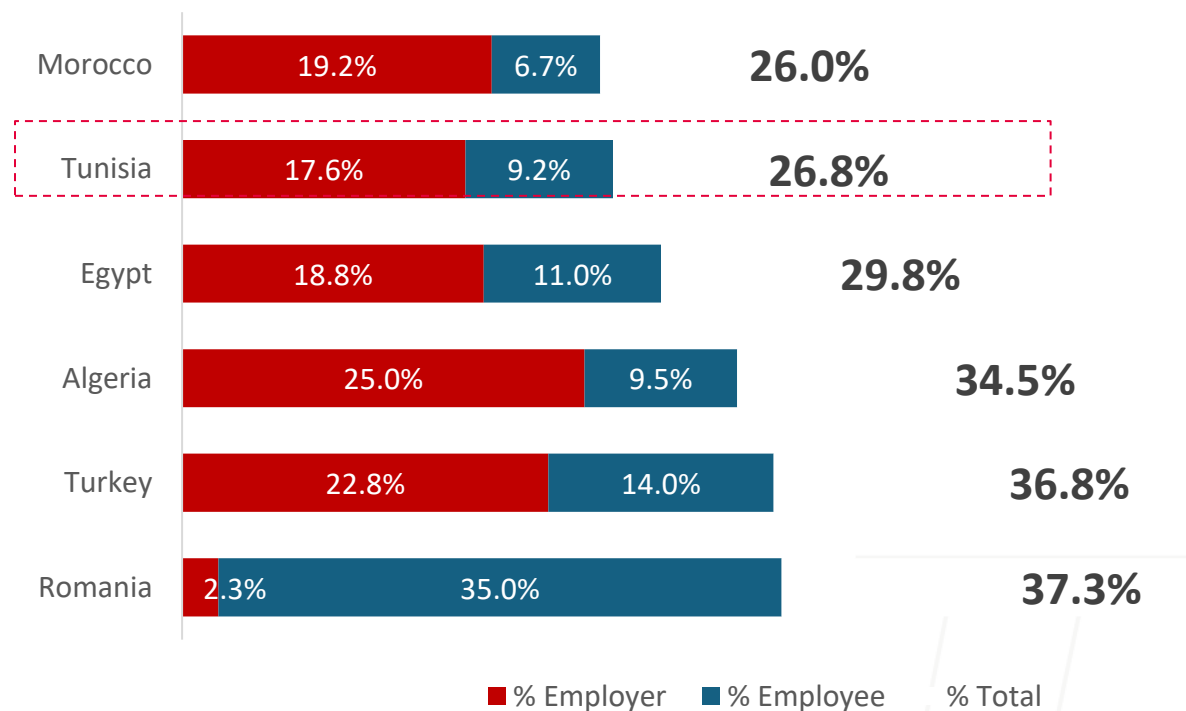
The annual labor cost for automotive workers varies from **€5,980** (skilled production operative) to **€12,223** (automotive engineer)



AMONGST THE LOWEST SOCIAL CONTRIBUTIONS IN THE REGION

The social contributions in Tunisia remain low compared to similar countries, with free health care and education systems

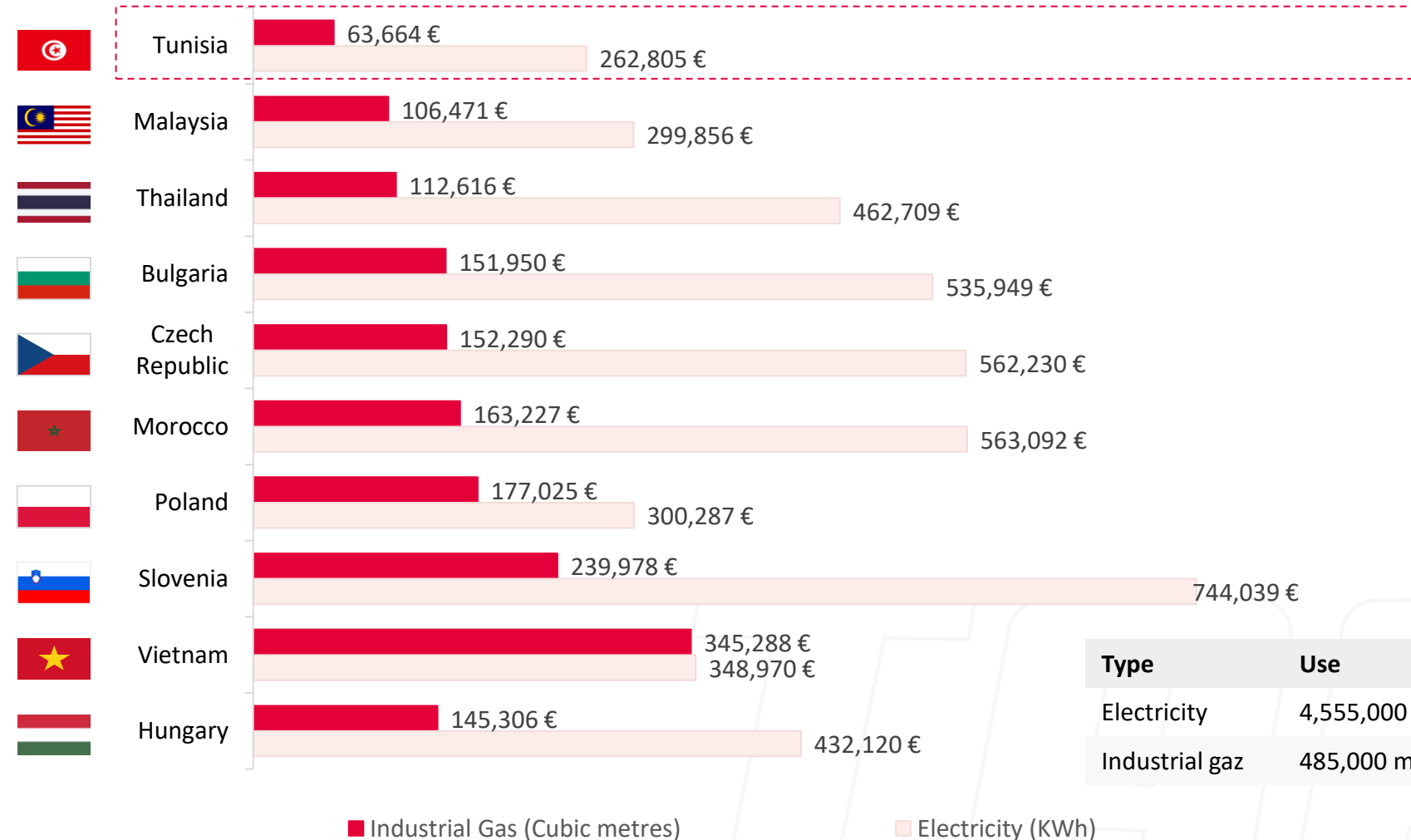
Private sector social contributions - prior to any incentive





AS WELL AS COMPETITIVE UTILITY COSTS

Utility costs overview in Euros (Electricity & Gas)



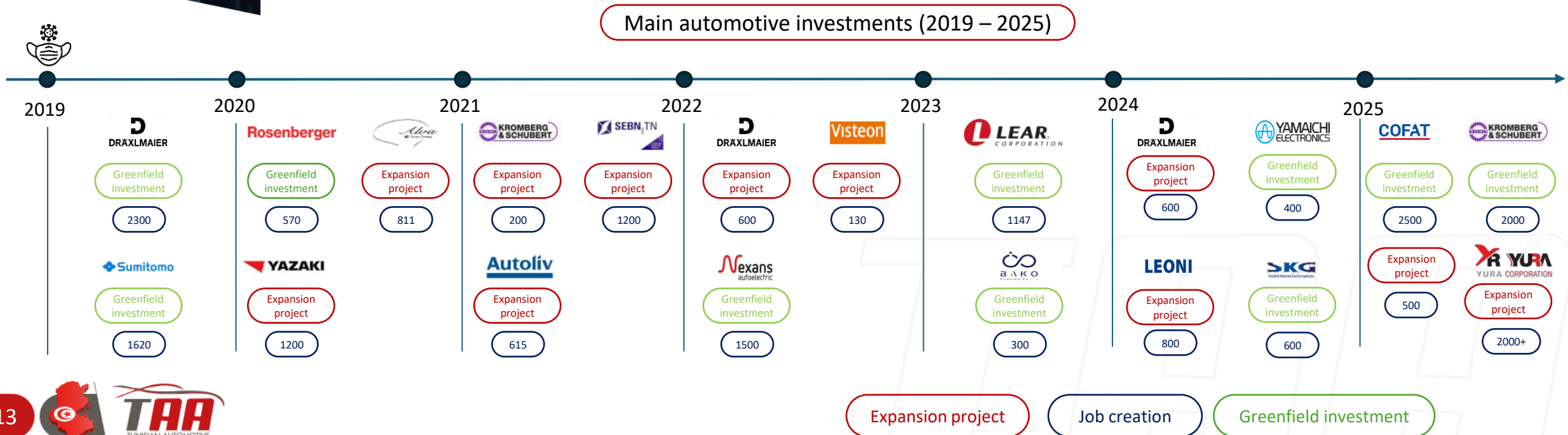
Type	Use
Electricity	4,555,000 Kilowatt hours
Industrial gaz	485,000 m ³

Source : FDI Benchmark 2024, Annual costs in Euro



TUNISIA: AN **AGILE** DESTINATION RECOGNIZED BY GLOBAL AUTOMOTIVE LEADERS

Tunisia has long been a preferred destination for foreign direct investment, hosting over 3,741 active foreign-capital companies across sectors. Despite the global pandemic and the war in Ukraine, the Tunisian automotive sector demonstrated remarkable resilience and agility, attracting several new investments between 2019 and 2025.

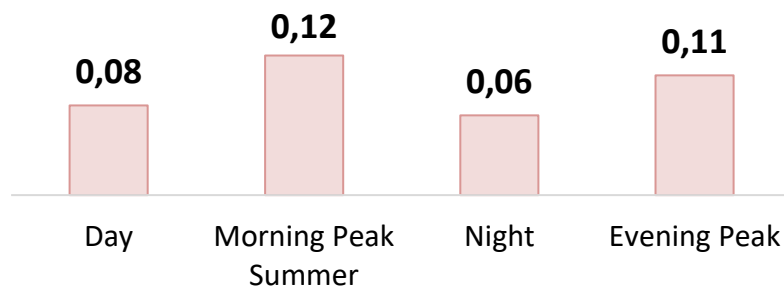




AS WELL AS **COMPETITIVE** UTILITY COSTS

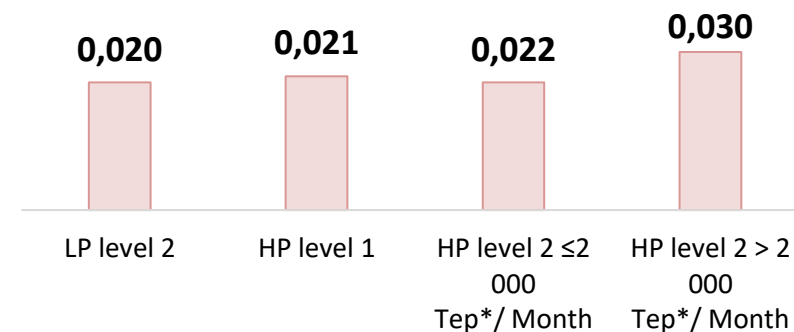
Main industry related production costs

ELECTRICITY FOR INDUSTRIAL USE – USD / kWh ()**



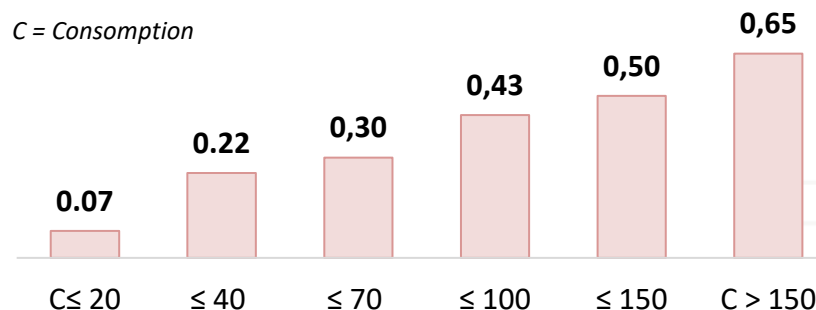
Source : STEG as of May 1st, 2022

GAS FOR INDUSTRIAL USE – USD / Tep* ()**



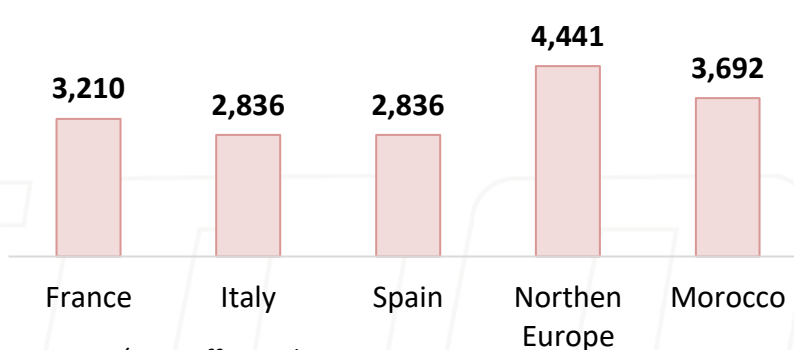
Source : STEG as of May 1st, 2022

WATER FOR INDUSTRIAL USE – USD / m³ ()**



Source : JORT (Official Journal of Tunisia) No. 139, dated 20th December 2022

MARITIME TRANSPORT – USD



Source : Ro/Ro tariffs, April 2022

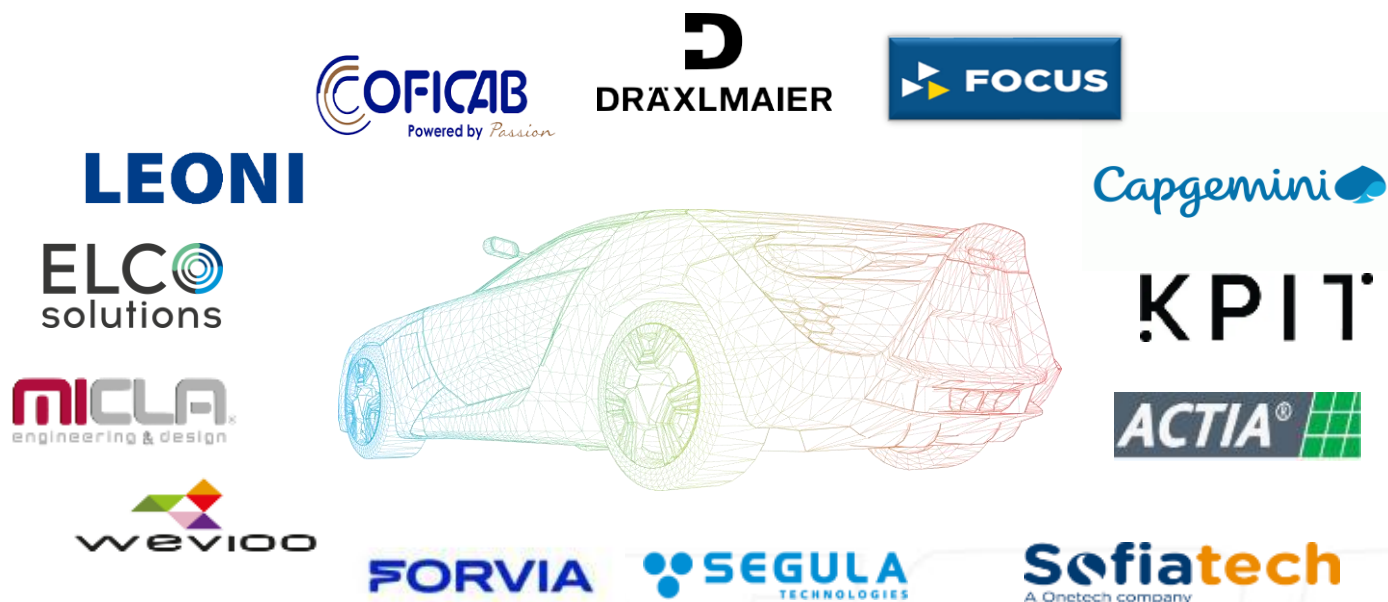
* Tep : 10 000 Therm (**) excluding taxes

Source : FDI Benchmark 2024, Annual costs in Euro



AN EMERGING HUB FOR R&D IN THE AUTOMOTIVE INDUSTRY

Tunisia's automotive sector is rapidly evolving into a hub for **innovation and technology**. With a strong **tech ecosystem, skilled engineers, and global partnerships**, the country is emerging as a leader in **mechatronic and software development**—from ADAS to electromobility—driving digital transformation through **advanced engineering and embedded solutions**.



Automotive R&D
centers



SEVERAL EXAMPLES OF SUCCESSFUL IMPLANTATIONS



In February 2018, **Dräxlmaier** inaugurated its **design office** in Sousse to develop **on-board wiring systems** and electrical components.



Visteon opened a **TECH Center** focused on interior design technologies, cybersecurity, connected vehicles with 350 engineering jobs by 2026.



KPIT's Software Engineering Center in Sfax opened in May 2025 with 500+ Tunisian engineers in propulsion software, vehicle network development, and testing.



ACTIA Engineering Services employs 500+ engineers and is responsible for the **design and development of embedded products and systems**, with 50% of its engineers in Tunisia.



Ampere, Renault Group's EV and software subsidiary, hosts a team of 200 engineers specialized in **embedded systems, software development, and architecture design**.

TUNISIAN COMPANIES' OFFER COVERS A WIDE RANGE OF HIGHLY DEMANDED EXPERTISE

Processes, Methods & Tools

Connected Apps

- Car functions Mobile App development (Android, IOS)
- In-App infotainment

ADAS/HAD

- ADAS/HAD SW Features
- System Testing

Cloud & Analytics

- Data harvesting & ingestion
- Data Analysis
- HIL/SIL reprocessing (automatic)
- Machine Learning

Braking system

Instrument Clusters

- Cross Domain/Full Digital Cluster
- Embedded SW
- OEM component integration
- Head-up-Display integration

Powertrain ECU

- Modeling / control laws/ MIL Embedded SW / MBD
- Integration
- HIL/SIL Testing

In-Vehicle Infotainment

- IVI Embedded SW
- In-vehicle app development
- Middleware development

Connectivity/ Telematics

- Device & Telephony Manager
- BT, WiFi, LTE Stack integration
- V2V/V2X

Platform SW/HW

- Early HW sample bring-up
- Boot loader customization
- Peripherals validation
- Operational Services

Vehicle Motion / Electrification

- Highly-automated steering
- Simulation / simulation validation
- High-voltage charger control device

Integration layer CI/CD



THE TUNISIAN AUTOMOTIVE ASSOCIATION

The TAA is a **key professional organization** that brings together stakeholders in the country’s automotive components industry. We enhance the automotive sector by **facilitating support and networking for new investors, promoting innovation, and collaborating with authorities to drive growth and development.**

KEY PROFESSIONAL ORGANIZATION

CREATION

2016

FUNDING MEMBERS

11

ACTIVE MEMBERS

+80

OUR PURPOSE

INVESTMENT SUPPORT



DEVELOPMENT



NETWORKING



VISIBILITY



OUR ENGAGEMENT

ENHANCING INNOVATION



DEVELOPING COMPETENCIES



FOCUSING ON SUSTAINABILITY





Myriam Elloumi
President



THE TAA BOARD OF DIRECTORS FOR 2024-2027

12 dedicated members from prestigious Tunisian and international companies



LAMIA FOURATI
Vice-President



Imed CHARFEDDINE
Vice-President



Wissem Badri
Treasurer



Karim BENNA
Member



Bechir DARDOUR
Member



Nabhen Bouchaala
Honorary President



Issam Jemli
Member



Sabri Brahem
Member



Riadh BEN AYED
Member



Chekib DEBBABI
Member



Safouane HAKIRI
Member



80 MEMBERS REPRESENTING 80% OF TOTAL EMPLOYMENT IN THE SECTOR : WW PARTS AUTO MAKERS



OUR NATIONAL AND INTERNATIONAL PARTNERS (examples)

National Partners



International Partners



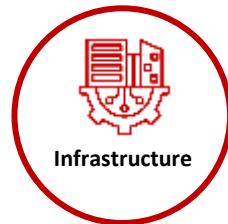


PACT FOR THE COMPETITIVENESS OF THE AUTOMOBILE INDUSTRY IN TUNISIA

TAA had signed in 2022 an **agreement with the government** to drive growth and stability in the sector. It sets **measurable goals and actions** for collaboration between the public and private sectors.



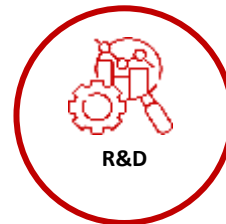
**The Pact for the Competitiveness of the Automotive Industry in Tunisia
is built around five key pillars.**



Infrastructure



Regulatory
Framework



R&D



Employment
& Training



Marketing
& Visibility



Sustainability

TAA CAPACITY BUILDING: TAMA TRAINING AND CERTIFYING CATALOG

Since 2019, the **Tunisian Automotive Management Academy** has focused on advancing professional training in Tunisia's automotive sector. In collaboration with **VDA QMC** and other partners, we identify needs, develop tailored programs, and deliver impactful training.



VDA QMC

German Association of the Automotive Industry
Quality Management Center

+1000
Participants

+50
Specialized
courses

30
Certified
trainers

3
Languages
Practical modules
and training



95%
Satisfaction

24/7
E-learning
platform



Examples of topics covered by our pool of trained experts

Méthodes & outils Qualité

- ID01 VDA 6.3 – Auditeur de Processus – Qualification
- ID02 VDA 6.5 – Auditeur de Produit – Qualification
- ID03 Formation VDA 2 (Validation des Pièces de Production)
- ID04 MLA – La Gestion de Projet dans l'Industrie Automobile Allemande selon le VDA
- ID05 Formula Q
- ID06 Automotive Core Tools – Training for Process and System Auditors
- ID07 VDA 6.3 – Certified Process Auditor – Examination Certificate

Amélioration continue et CORE TOOLS

- ID08 Méthode 8D (Eight Disciplines)
- ID09 QRQC (Quick Response Quality Control)
- ID10 GAMBA (Gestion et Amélioration par la Mobilisation des Acteurs)
- ID11 Hoshin
- ID12 MRPG (Méthodes de Résolution des Problèmes en Groupes)
- ID13 Kaizen
- ID14 VSM (Value Stream Mapping)
- ID15 Étalonnage

Excellence opérationnelle

- ID16 LEAN Initiation
- ID17 LEAN Approfondissement
- ID18 LEAN Démarche Globale
- ID19 LEAN Engineering
- ID20 LEAN Logistique et Flux
- ID21 LEAN Maintenance
- ID22 LEAN Maintenance - Chantier Performance Équipement
- ID23 LEAN Qualité
- ID24 LEAN Service
- ID25 LEAN Supply chain et son rôle stratégique dans l'entreprise
- ID26 Lean Six Sigma dans le Secteur Automobile

VDA QMC

German Association of the Automotive Industry
Quality Management Center

New:

VDA 2 PPA

VDA 19.1/19.2

VDA 6.8 Process Auditor
Qualification

TAA



Examples of topics covered by our pool of trained experts

ESG

Environnement

- ID49** Empreinte carbone et développement durable: La comptabilité carbone
- ID50** La gestion responsable des produits chimiques
- ID51** Exigence de la norme ISO 50001 V2018

Social

- ID52** Démarche Ethique Entreprise
- ID53** La communication interne et le marketing RH
- ID54** La Gestion prévisionnelle des emplois et des compétences (GPEC)

Gouvernance

- ID55** ISO 22301: Sécurité et résilience — Systèmes de management de la continuité d'activité (SMCA)
- ID56** Risk Management - ISO 31000 & ISO 31010
- ID57** Ethique des Affaires
- ID58** Confidentialité des données
- ID59** Achat responsable ISO 20400 et conception de la charte de l'achat responsable

ESG

- ID60** CSRD - Corporate Sustainability Reporting Directive
- ID61** CSDDD - Corporate Sustainability Due Diligence Directive
- ID62** Accompagnement à l'utilisation du Référentiel ESG version digitale

TAA

INVEST IN THE FUTURE OF MOBILITY
THANK YOU

