



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**



st

in the **MENA region & Africa** and **23rd worldwide**
in the Startup Visa Attractiveness Index

in **North Africa**
in High-technology exports, **World Bank**

in **Africa and 2nd in MENA**
for Researchers in R&D, **World Bank**

in **North Africa** on the “Skills indicator”
the Global Competitiveness Index
World Economic Forum

2nd

in **Africa**
African countries best prepared to develop and
deploy talent in AI

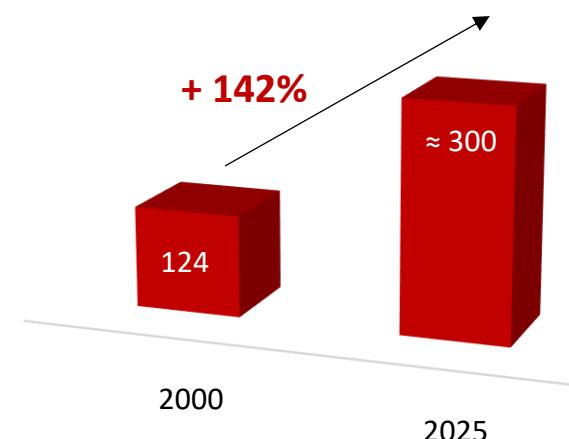
in **North Africa**
in the Global Innovation Index (WIPO)



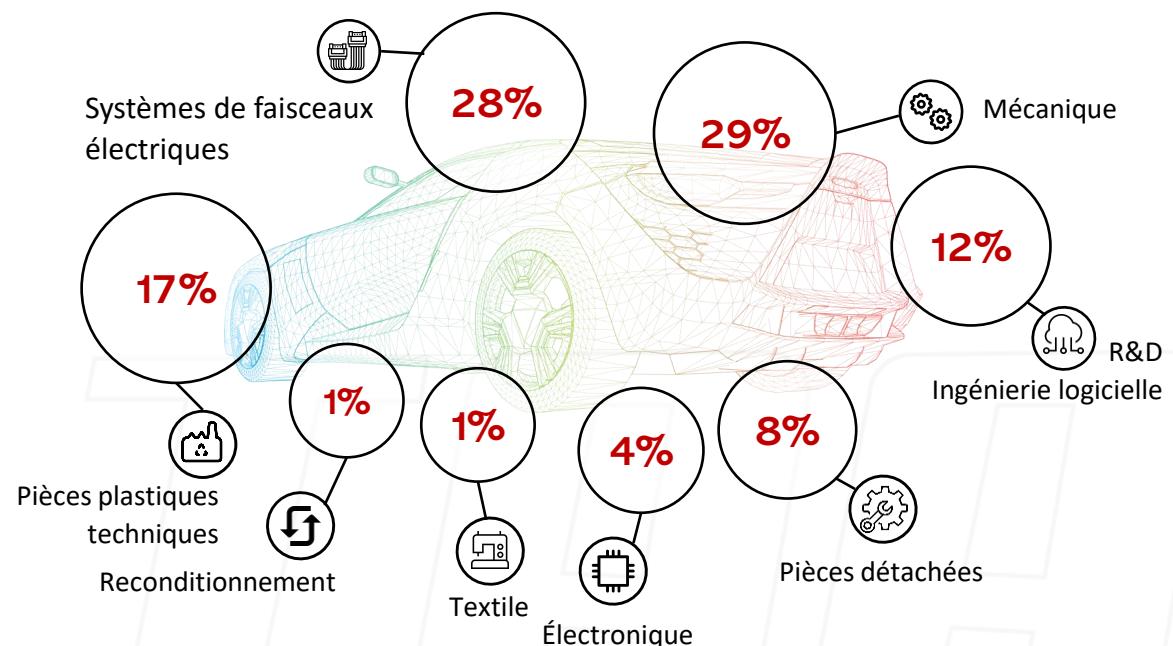
A thriving and diversified ecosystem serving every key application of the automotive industry.

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

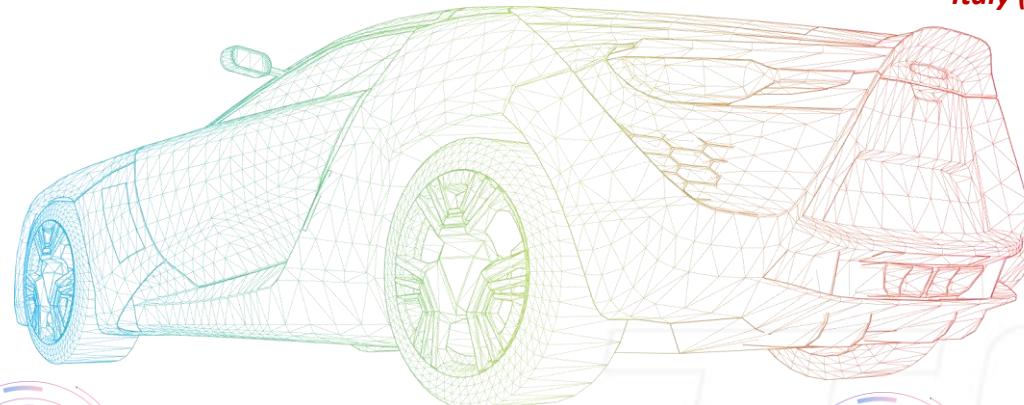


$\approx \text{€4 Billions}$ of exports

in 2025 with an average growth rate of 16% since 2018



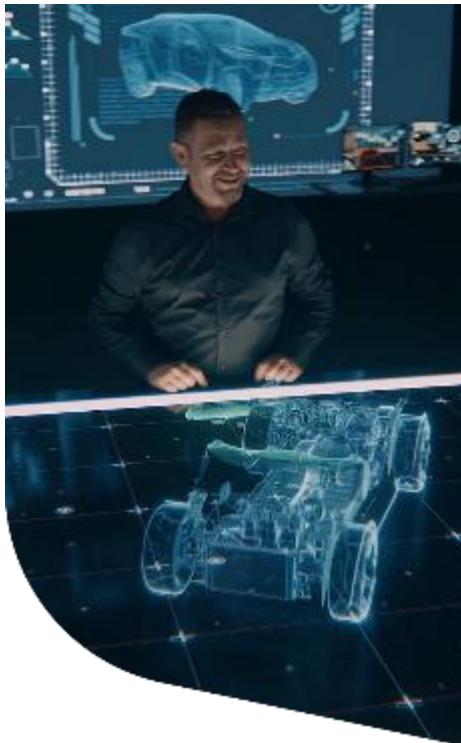
67% operating exclusively on **international markets**, with **Germany** as a destination for **37%** of the total exports, followed by **France (21%)**, **Romania (12%)** and **Italy (11%)**



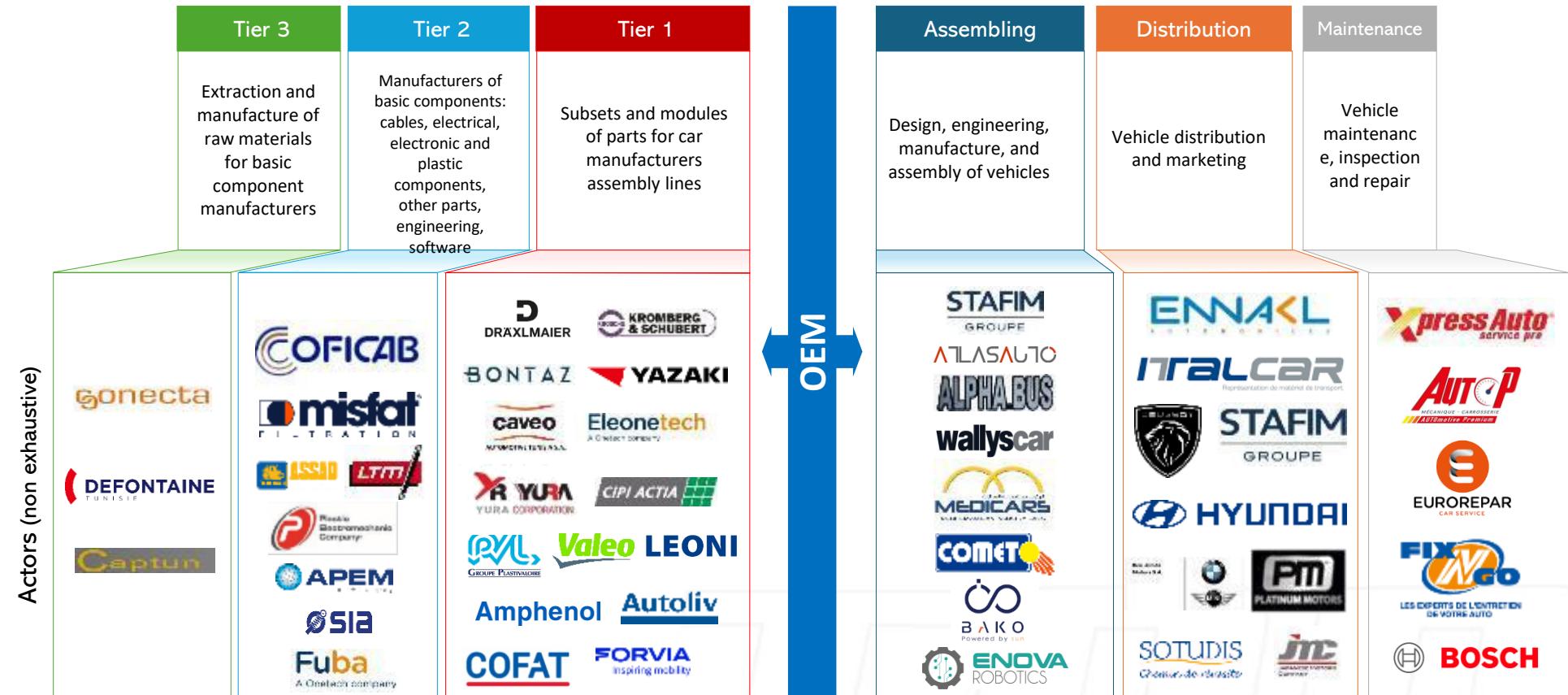
300 +
Companies operating in the sector in 2025



120 000 + employees



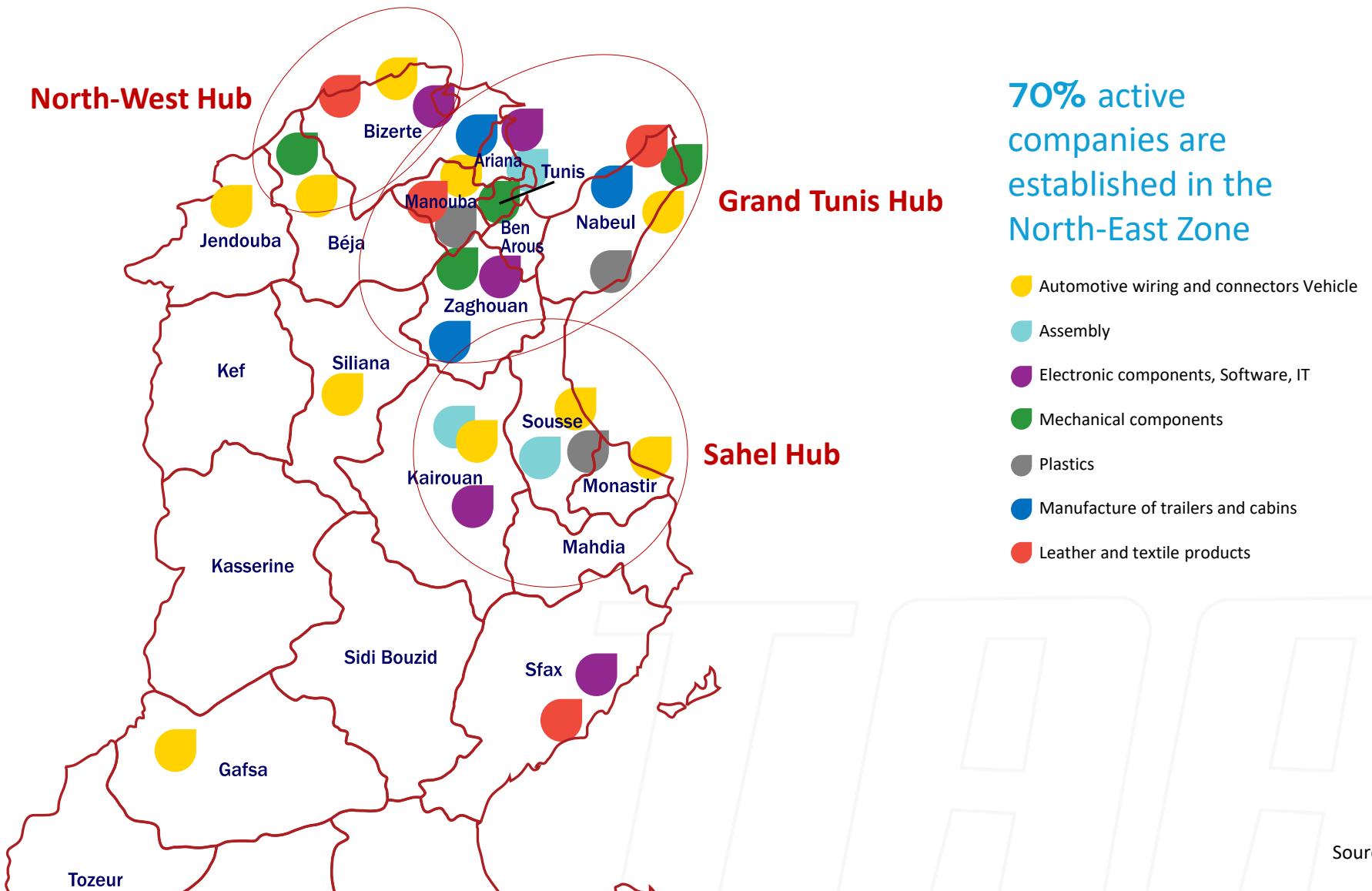
AN EXTENSIVELY DEVELOPED ECOSYSTEM POWERED BY A COMPLETE VALUE CHAIN, SPANNING 5 STRATEGIC LINKS — FROM INITIAL SUPPLY TO AFTER-SALES MAINTENANCE



Around 42% local integration rate



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

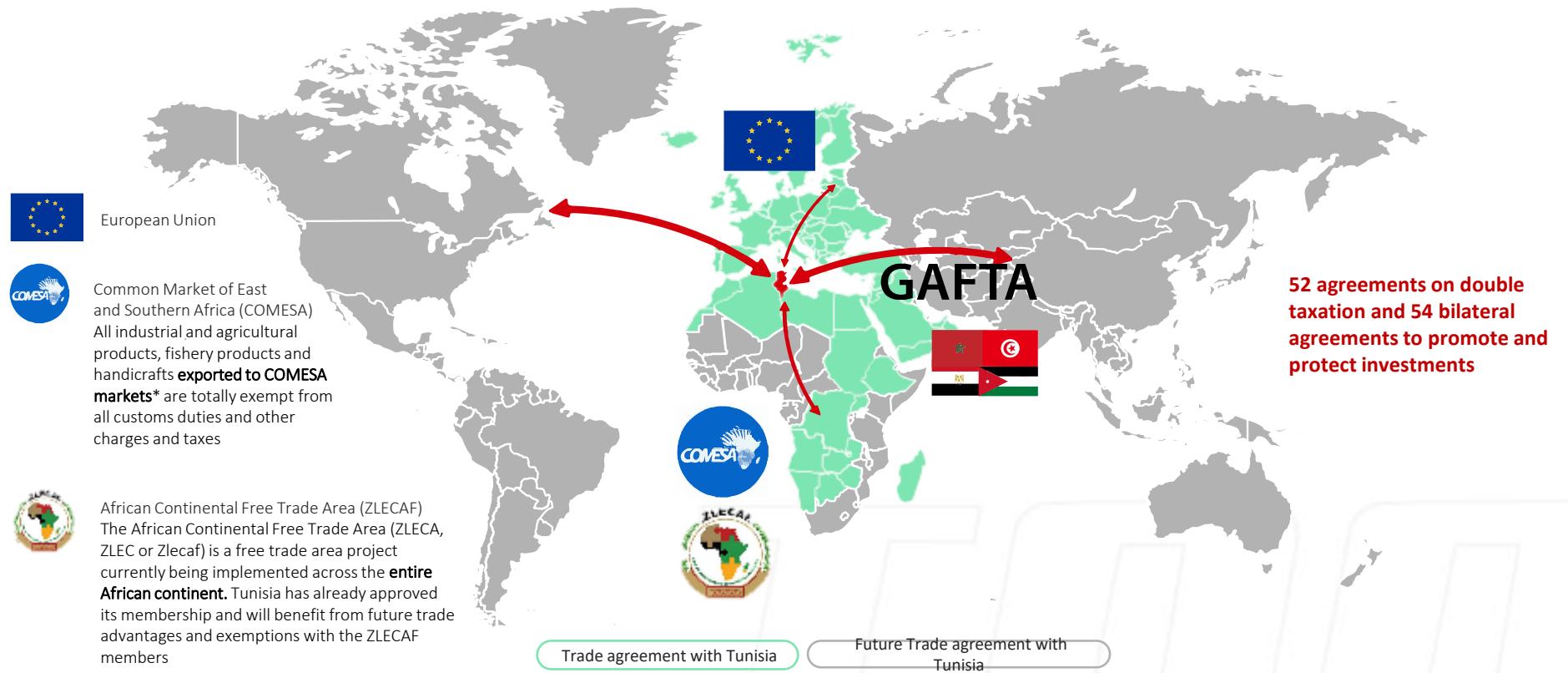




A GATEWAY TO EUROPE AND SUB-SAHARIAN AFRICA

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

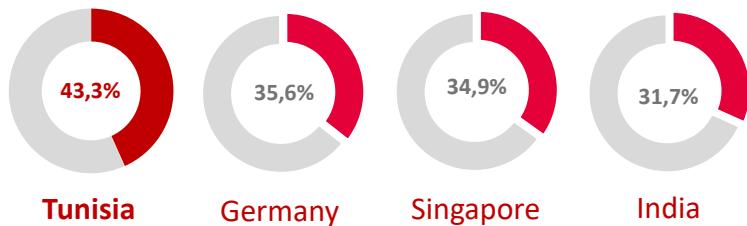
A major manufacturing hub for exports to European, Middle East and African markets





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



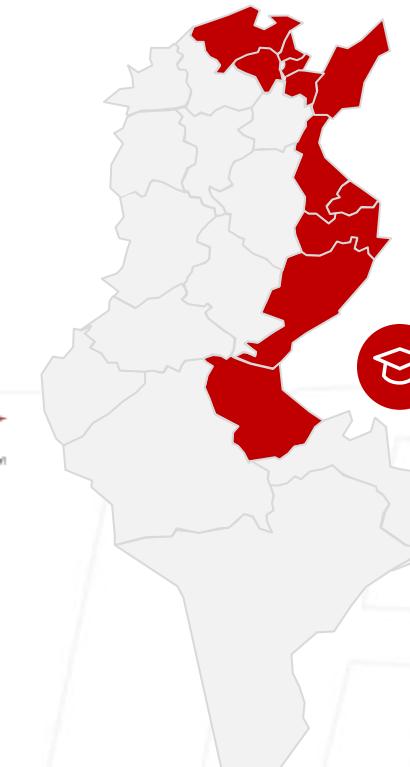
SFAX

4 Engineering schools
1 Technical school



GABES

2 Engineering schools

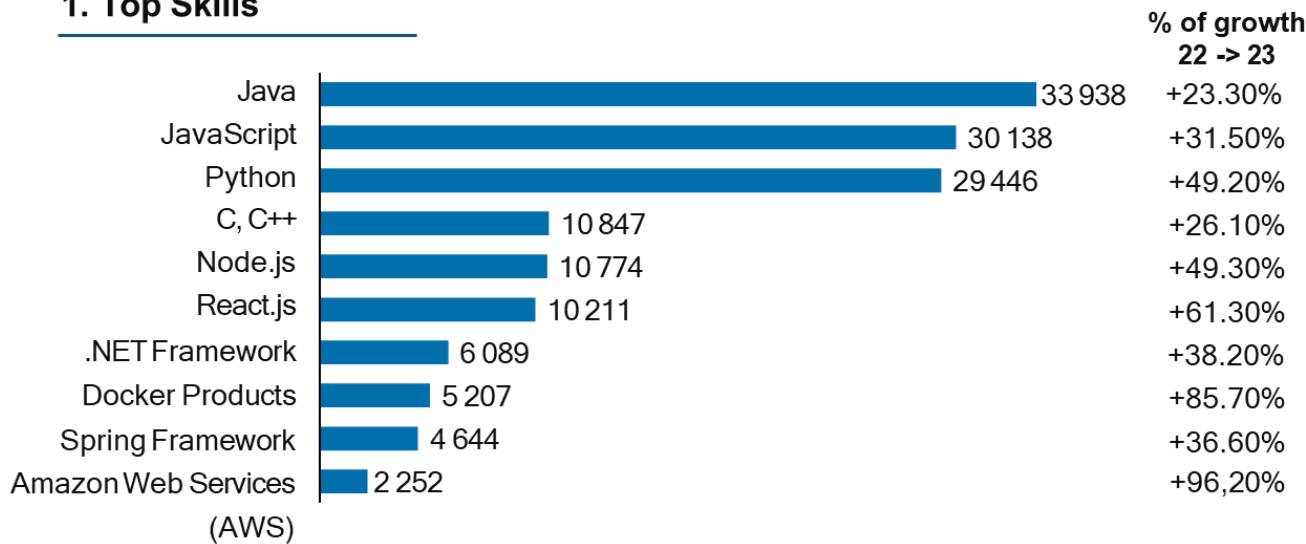




A SKILLED TALENT POOL BACKED BY RENOWNED HIGHER EDUCATION

Graduating in relevant software and technological fields

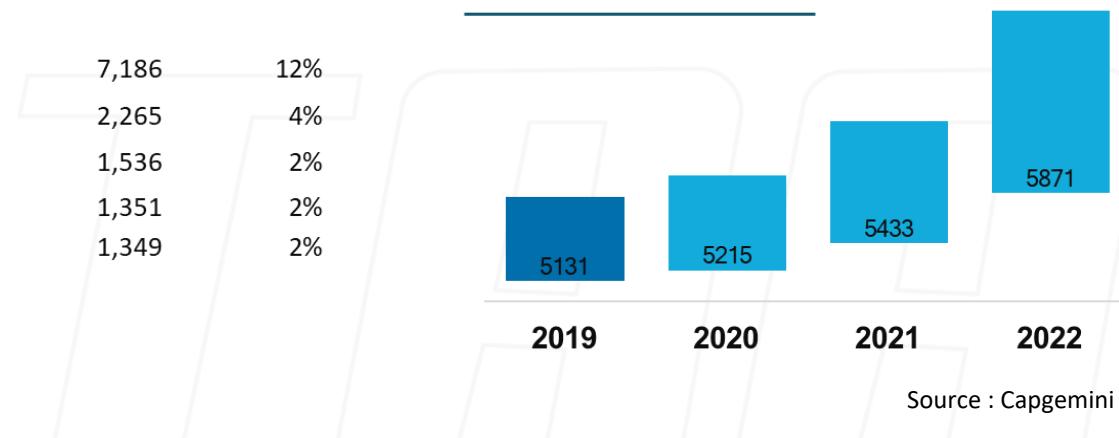
1. Top Skills



2. Selection of top Universities

	# Engineers	% of Total
Ecole Supérieure Privée d'Ingénierie et de Technologies - ESPRIT	7,186	12%
Faculté des Sciences Mathématiques, Physiques et Naturelles de Tunis	2,265	4%
École Nationale d'Electronique et des Télécommunications de Sfax	1,536	2%
INSAT - Institut National des Sciences Appliquées et de Technologie	1,351	2%
ISSAT Sousse	1,349	2%

3. Number graduates with relevant skills

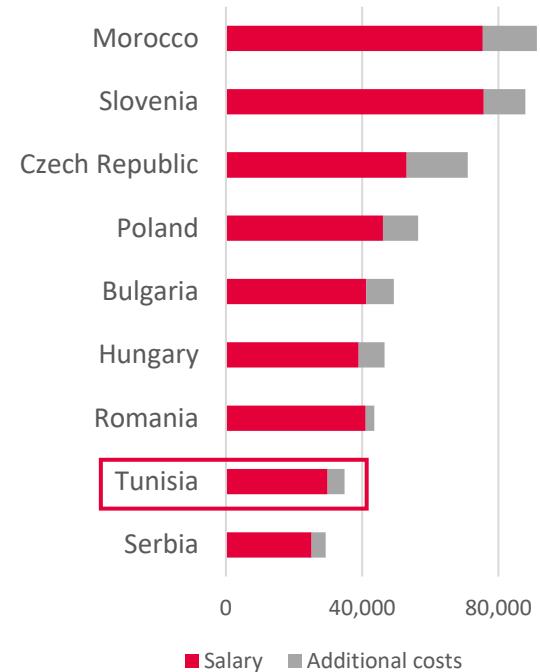




ONE OF THE MOST COMPETITIVE LABOR FORCE WORLDWIDE

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

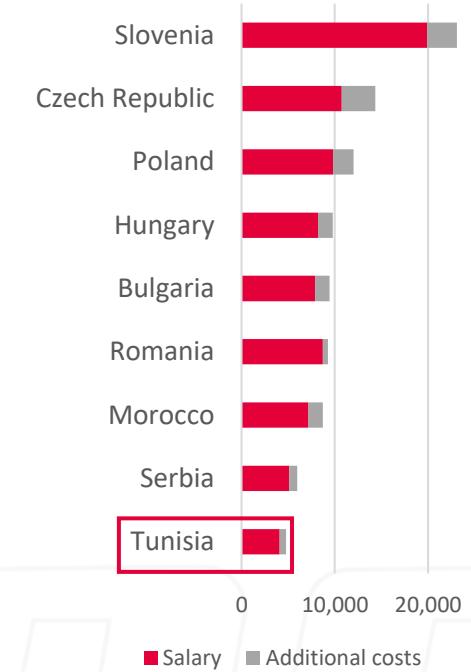
Labor Costs: Head of Manufacturing (Euro)



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.

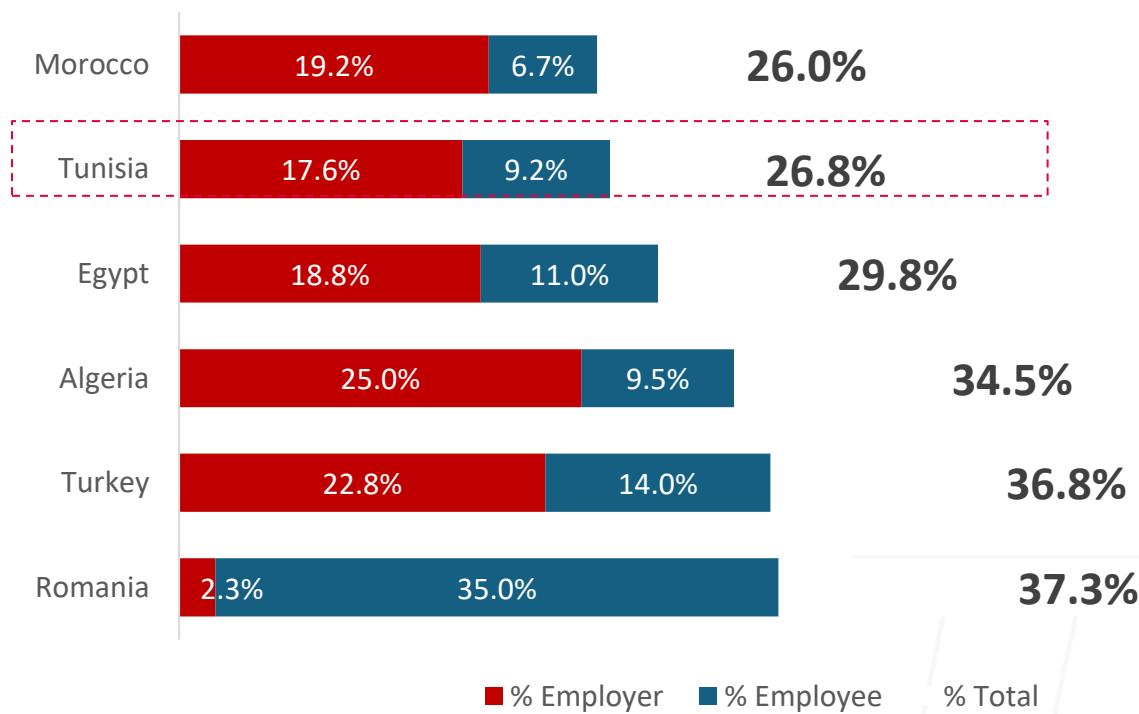
The annual labor cost for automotive workers varies from **€5,980** (skilled production operative) to **€12,223** (automotive engineer)



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

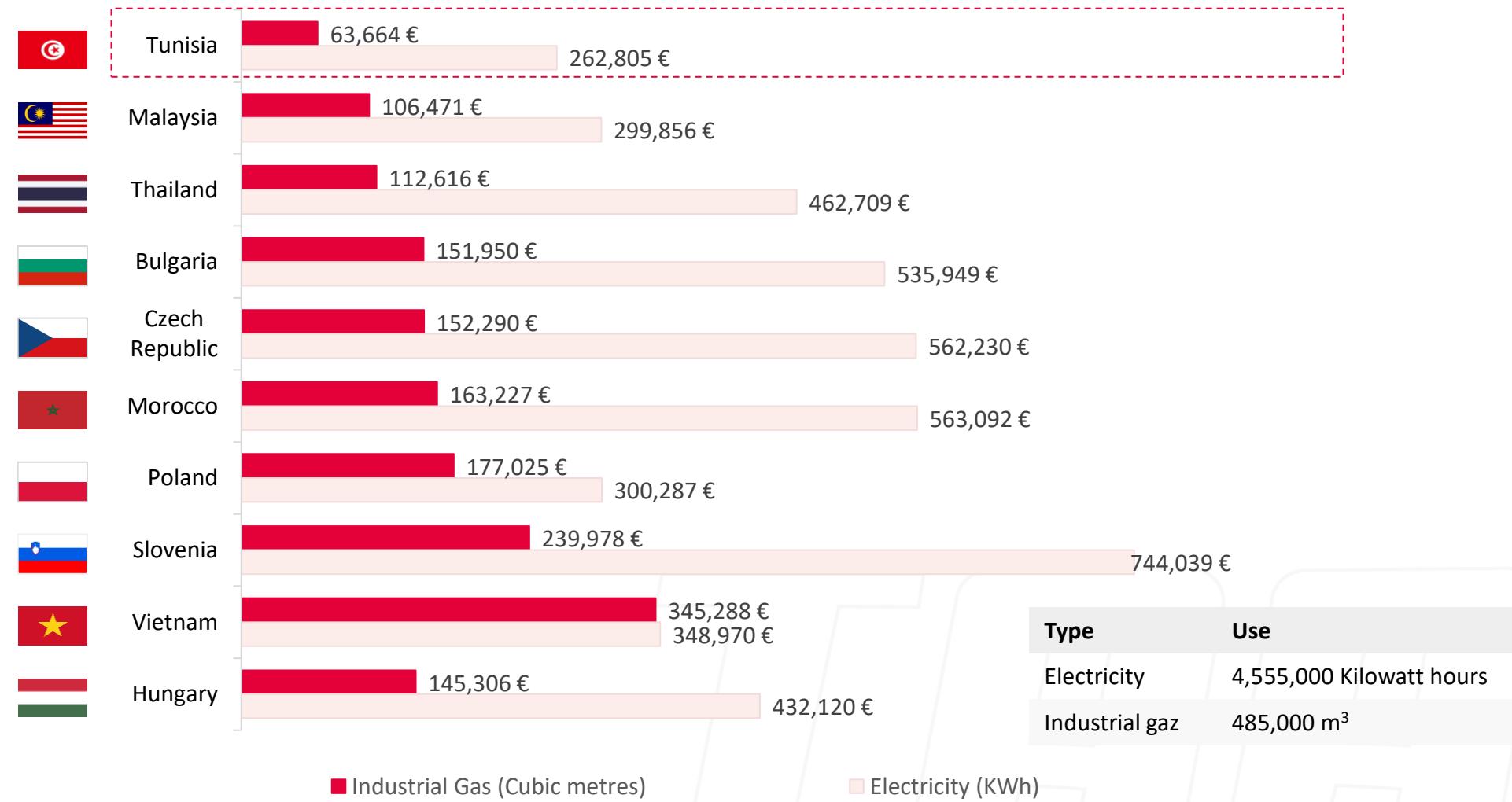


Source : Several country websites



AS WELL AS COMPETITIVE UTILITY COSTS

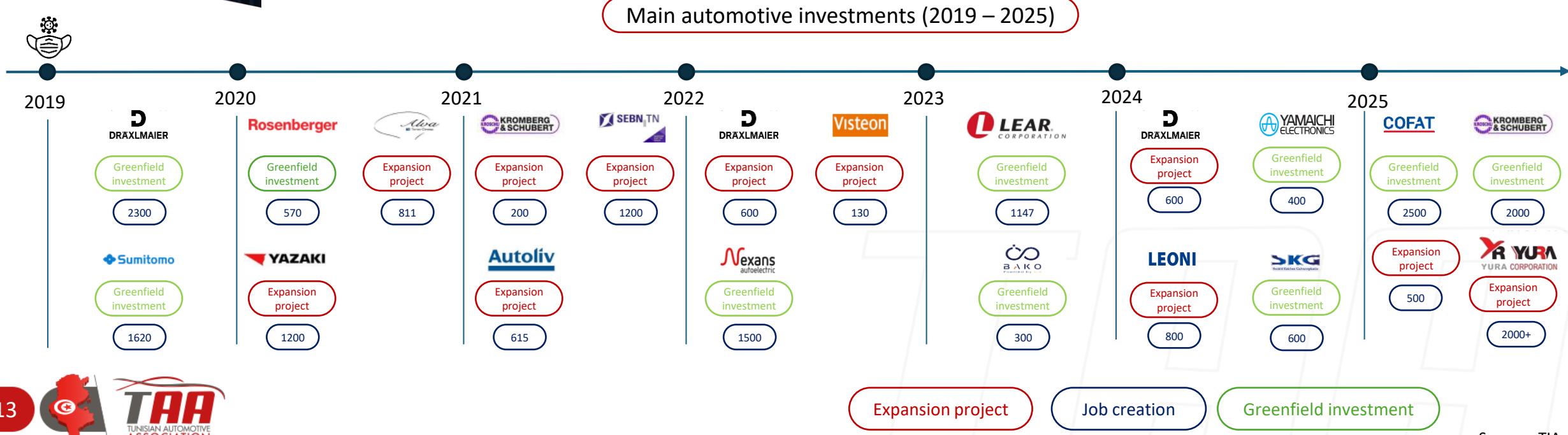
Utility costs overview in Euros (Electricity & Gas)





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.



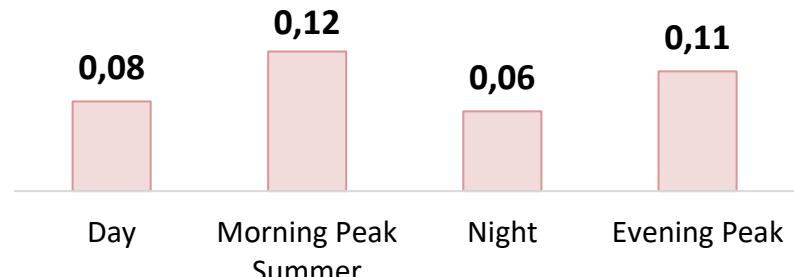


AS WELL AS COMPETITIVE UTILITY COSTS

Main industry related production costs



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

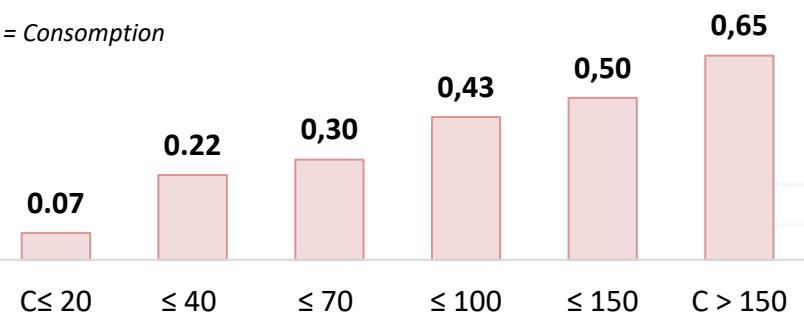


Source : STEG as of May 1st, 2022



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

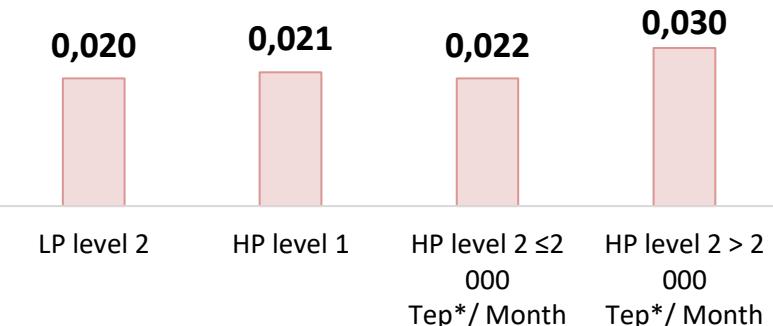
C = Consumption



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



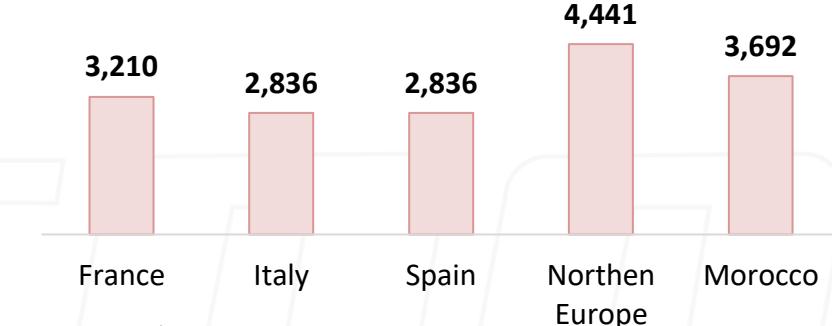
GAS FOR INDUSTRIAL USE – USD / Thep (**)



Source : STEG as of May 1st, 2022



MARITIME TRANSPORT – USD



Source : Ro/Ro tariffs, April 2022



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**.

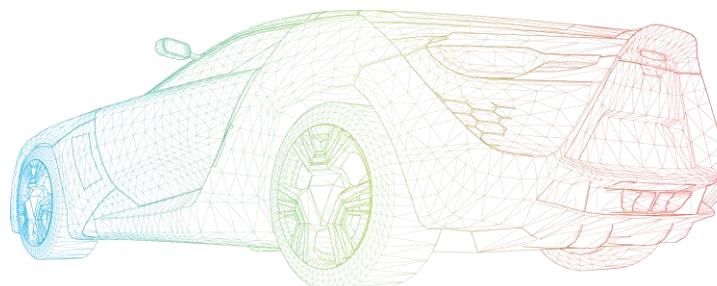


LEONI

ELCO
solutions

MICLA
engineering & design

wevioo



Capgemini

KPIT

ACTIA

FORVIA

SEGULA
TECHNOLOGIES

Sofiatech
A Onetech company

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

In-Vehicle Infotainment

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

Connectivity/ Telematics

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

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

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




Nabhen Bouchaala
Honorary President



THE TAA BOARD OF DIRECTORS FOR 2024-2027

12 dedicated members from prestigious Tunisian and international companies



LAMIA FOURATI
Vice-President



Imad 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 **Chekib DEBBABI**
Member

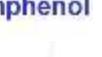


Safouane HAKIRI
Member





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





OUR NATIONAL AND INTERNATIONAL PARTNERS (examples)

National Partners



الهيئة التونسية للاستثمار
TUNISIA INVESTMENT AUTHORITY



INVEST IN TUNISIA



ASSOCIATION

TUNISIENNE

DES INDUSTRIELS

DE LA PLASTIQUE



CLUSTER
MECATRONIC
TUNISIA



G I T A S



NOVATION
CITY



Centre Technique des Industries
Mécaniques et Électriques

International Partners



German Association of the Automotive Industry
Quality Management Center



Verband der
Automobilindustrie



german
cooperation
with tunisia



Implemented by
giz



AAAM
African Association of
Automotive Manufacturers



CHAMBRE
DE COMMERCE

TUNISO-CHINOISE



EQUIPER LE FUTUR
DE L'AUTOMOTIVE



CCTC
Chambre de Commerce
Tunisie - Corseenne



RSCI
Responsible Supply
Chain Initiative



CHAMBRE DE COMMERCE ET INDUSTRIE
TUNISO-JAPONAISE



AHK



Industria Nacional
de Autopartes



TUNISIA-AFRICA
BUSINESS COUNCIL



European
Investment Bank





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 CERTIFYINGCATALOG

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.



TUNISIAN
AUTOMOTIVE
MANAGEMENT
ACADEMY

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



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 Enterprise
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

TAIA



**INVEST IN THE FUTURE OF MOBILITY
THANK YOU**

