

THE AUTOMOTIVE COMPONENTS SECTOR



KEY FIGURES

Around **4%**
of Tunisian GDP

Annual production
growth of more than
12%

About **52%**
of industrial exports

More than **280**
companies, of which 65% are
totally exporting

More than **100 000**
jobs

An integration rate of more than
40%

More than **2,5**
billion euros in export
revenue

SUCCESS STORIES

ACTIA, AMPERE SOFTWARE TECHNOLOGY, AMPHENOL, APTIV, AUTOLIV, CAVEO, COFICAB GROUP, COROPLAST, DRÄXLMAIER, DUAL BORGSTENA, FORVIA, KROMBERG & SCHUBERT, LEAR CORPORATION, LEONI, MARQUARDT, ONE TECH, SAGE AUTOMOTIVE INTERIORS, SIA, SUMITOMO, TELNET, TORAY GROUP, VALEO, VERNICOLOR, YAZAKI, YURA CORPORATION...

A HIGH-PERFORMANCE VALUE CHAIN

- The Tunisian automotive industry is characterised by its **flexibility**, allowing it to keep pace with the evolving trends in the sector. By **maintaining** and **enhancing** its strengths in R & D, in the manufacture of automotive components and in the development of an efficient customer service, the sector is capturing a larger share of **value** in the **global chain**.
- **Tunisia is the only country in Africa** to have local companies active in the sector of automotive components that have grown on a world scale, namely in Romania, Portugal, Mexico and China...

These companies cover the different stages of the value chain.

AUTO CABLES Electrical cables	CAVEO Suspension parts	COFAT Electrical distribution systems
COFICAB Electrical cables	FUBA PRINTED CIRCUITS TUNISIE Printed circuit boards	PLASTIC ELECTROMECHANIC COMPANY Injection moulds, technical plastics
SIA Shock absorbers for light and heavy-duty vehicles	TELNET On-board software, dashboards and on-board multimedia	TTE INTERNATIONAL Electromechanical components and sub-assemblies

- Tunisia is one of the **top 10** suppliers of cable harness components to the European Union and one of the top 3 exporters of automotive components in Africa, including electrical and electronic components, chassis and bodywork, engines and engine parts, textiles and leather, spare parts, rubber...

Tunisia is the **2nd largest exporter** of automotive components in Africa 

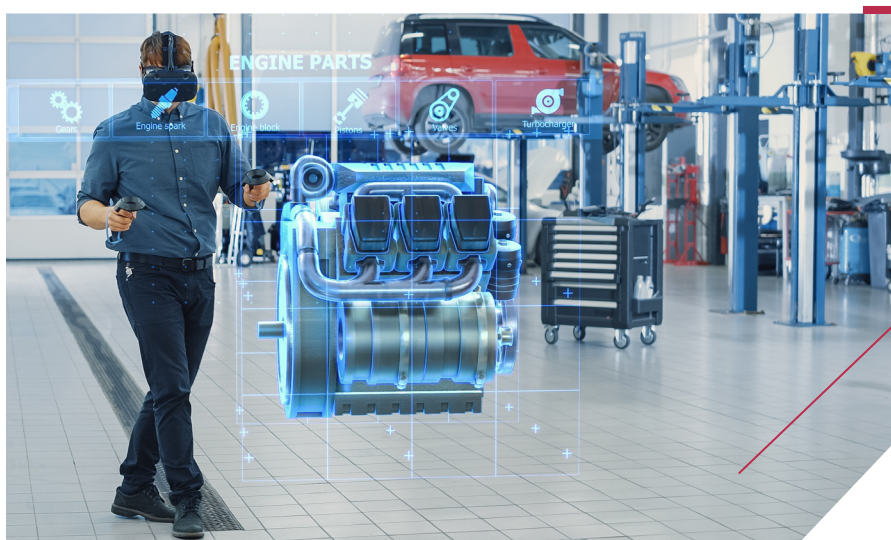


TUNISIA, A REGIONAL HUB

- Geostrategic position in the Mediterranean
- Tunisia is the first country in the southern Mediterranean to have signed an Association and Free Trade Agreement with the **European Union**, granting the country the status of Advanced Partner and reinforcing its trade liberalisation and economic integration (23 million companies and 500 million consumers)
- Tunisia is member of the **COMESA** trade agreement, a major market for internal and external trade bringing together the countries of Eastern and Southern Africa (a market of 482 million people)
- Tunisia has ratified the Convention on the African Continental Free Trade Area (**AfCFTA**) in order to strengthen its competitiveness and improve its trade potential in Africa (a market of 1.2 billion people).

QUALIFIED, PERFORMING AND COMPETITIVE HUMAN RESOURCES

- Tunisia offers high-performance human resources at all levels. Consistently in tune with business needs, they represent a rich pool of talent that is one of the country's major assets, thanks to their **qualifications, adaptability** and **creativity**
- Tunisia is regarded as a **talent pool** in the Mediterranean region, with:
 - **Nearly 62,000** new graduates per year
 - **More than 30%** of its graduates specialising in engineering, computer science, multimedia and technical fields.



Tunisia is **1st in North Africa** in terms of talent attractiveness

(Global Talent Competitiveness Index, INSEAD 2023)



Tunisia is **12th on a global scale** in terms of education spending (in % of GDP)

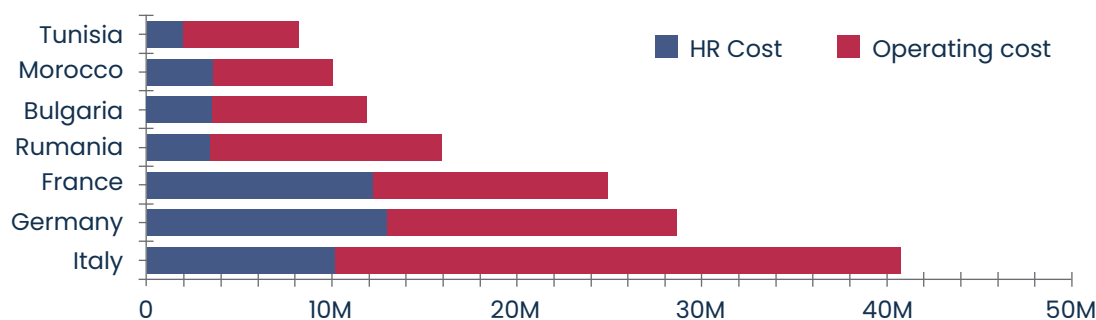
(Global Innovation Index, WIPO 2024)

Tunisia ranks **4th in the world** in terms of the share of graduates in science and engineering

(Global Innovation Index, WIPO 2024)

COMPETITIVE PRODUCTION COST

- Tunisia has the lowest operating costs among the 7 sites, at around 8.19 million euros per year. Tunisia offers costs that are **59% lower than the benchmark average** at around 20 million euros per year.



Source: fDi Benchmark of the Financial Times Ltd 2025
Cost in EUR – Euro

TECHNOLOGICAL INFRASTRUCTURE

- **More than a dozen** of sector-based technology parks spread over several regions
- **2** business parks in Bizerta and Zarzis
- **+150** developed industrial zones spread throughout the country
- **60** incubators/accelerators offering a variety of services
- **90** coworking spaces
- **19** cybers parcs
- **About 15** Fablabs providing access to digital production tools

INVESTMENT-FRIENDLY REGULATIONS

- **Protection** of investors' **assets** and **intellectual property** rights
- **Investment premium** of up to one third of the investment cost
- **State subsidy** of the employer's contribution to the statutory social security scheme (16.57% of gross salaries) for a period of up to **ten years**
- **Total exemption** from corporate tax for a period of up to **10 years**
- **Bonus** for the development of employability potential.
- **Total exemption** from VAT and customs duties on the inputs of the products to be re-exported
- **Preferential tax and customs regime.**



INVESTMENT OPPORTUNITIES

- ✓ Mobility and embedded systems
- ✓ Research and development
- ✓ Mechanics, electrics and electronics
- ✓ Design development and industrialisation
- ✓ Wiring harnesses
- ✓ Automotive upholstery
- ✓ Spare parts
- ✓ Plastics and rubber...



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