



# DTB

## Tunisia: value chain, actors & ambitions

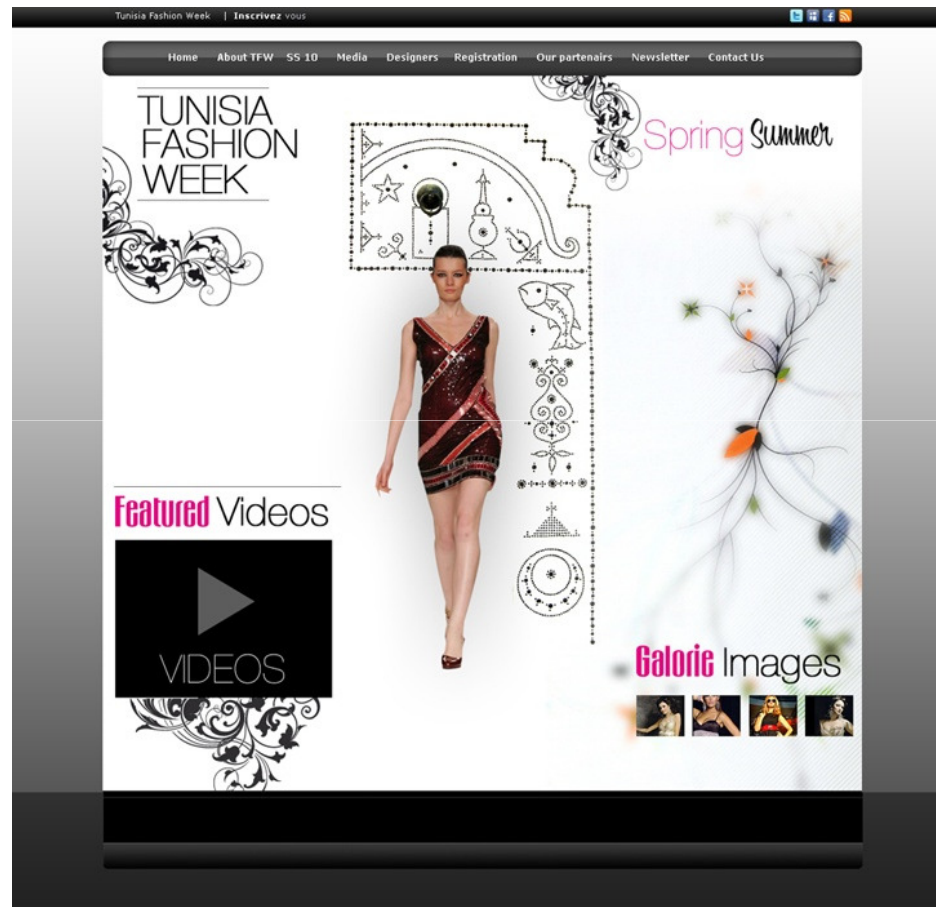
Outsourcing insights for EU brands and retailers



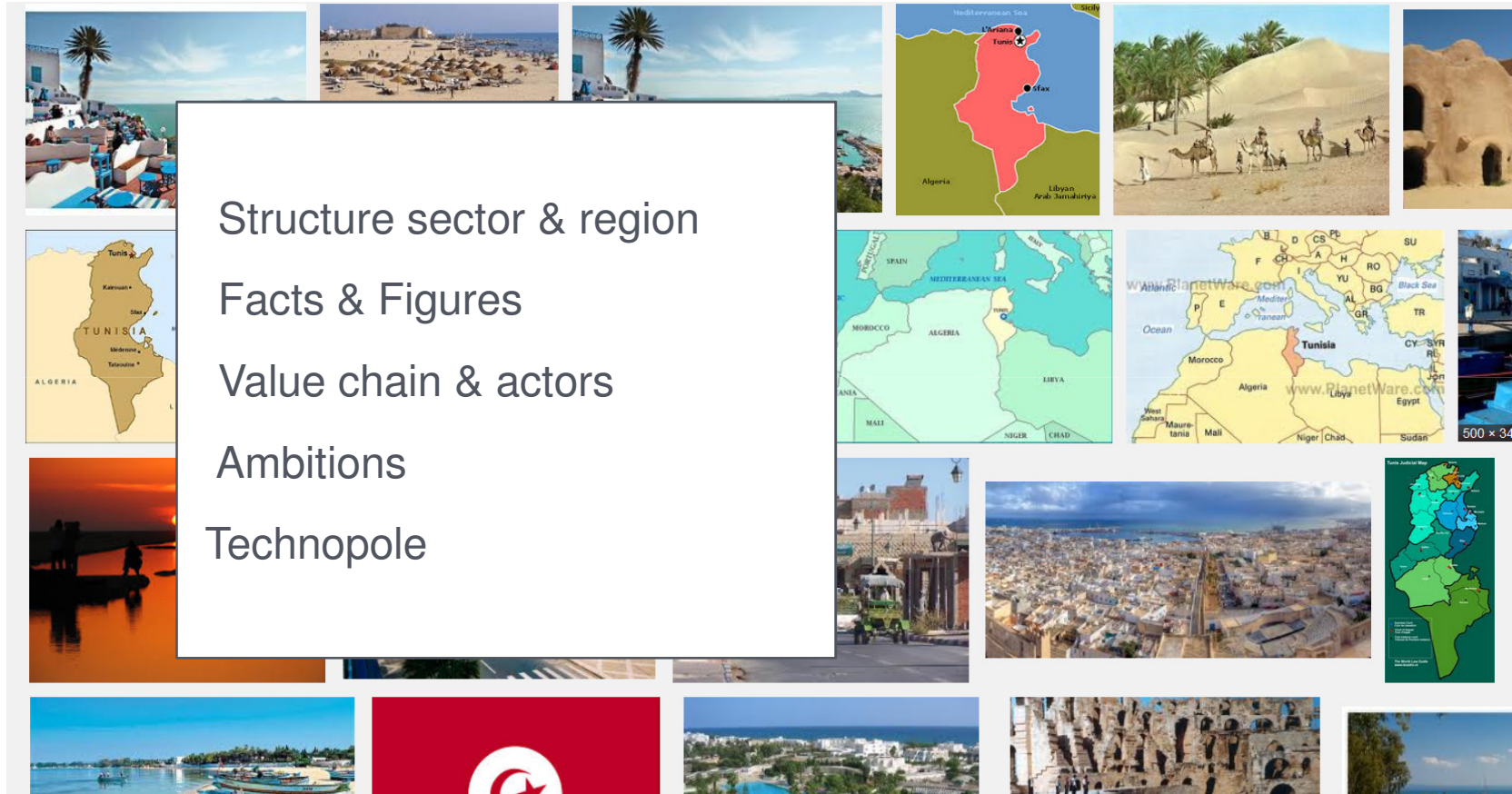
DTB, Düsseldorf, March 6, 2014

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# Tunisia



# Tunisia



# Tunisia: structure of sector & regions



**Table 1: Structure of Tunisian garment sector in nr companies and percentage (%)**

		<b>Nr of companies</b>	<b>%</b>	<b>Remarks</b>
1	Total number	2032	100%	Including domestic market
2	Totally exporting ( TE)	1777	86%	All goods for exports
3	Complete foreign ownership or joint venture	800-1000	59-62%	French- Italian-Belgian and German
4	Production structure CMT= "sous traitance"	700	70%	Sub contracting structure with little value addition
5	FOB nominated= "co traitance"= fabric buyer	225	20%	Transition possible to FOB full export product
6	FOB- ODM private label and own design	75	5-10%	This group covers for 55% of total export value
7	FOB +	50-75	10%	CMT- FOB transition in process

Source: DGTH and Nash International

**Table 2: regional division of activity**

<b>Region</b>	<b>Number of companies</b>	<b>%</b>
Bizerte	210	14
Monastir- Sousse= SAHEL	425	28
Tunis	300	23
Sfax	850	35

Source: Nash international

# Tunisia: fact & figures



- The exports turnover of the textile and clothing sector was 4.920 billion dinars (TD) in 2012.
- This equals to around €2.236 billion Euro's.
- The exports of the T&C sector decreased by 11 % in 2012 compared to the same period of 2011.
- This is partially explained by the EU monetary crisis that lingers on with decreasing retail margins as well as the result of declining orders due to political instability in Tunisia.
  
- The EU is the main importer from Tunisia, representing more than 94% of total Tunisian exports.
- Tunisia kept its place as the 5th supplier to the EU after China, Turkey, Bangladesh and India.

Main destinations of Tunisian fashion garments:

**Table 3: export destinations in the EU**

Country	Share (%)
France	34.4
Italy	29.2
Germany	10
Belgium	6.9
Netherlands	5.4
Spain	4.2
United Kingdom	3
Others	6.9

Source: DGTH

# Tunisia: export products



- 1 in 3 bras imported in the EU is made in Tunisia.
- 1 in 2 swimsuits imported in the EU is made in Tunisia.
- 1 in 3 jeans imported in the EU is made in Tunisia.
- 1 in 2 work wear products imported in the EU is made in Tunisia.

**Table 4: Product group division**

<b>Products</b>	<b>In %</b>
Trousers- jeans	17.59
Formal trousers	12.55
Lingerie	12.49
Work clothing	10.10
Other clothing	24.01
Pullovers	6.71
Shirts	5.40
T-shirts	11.13

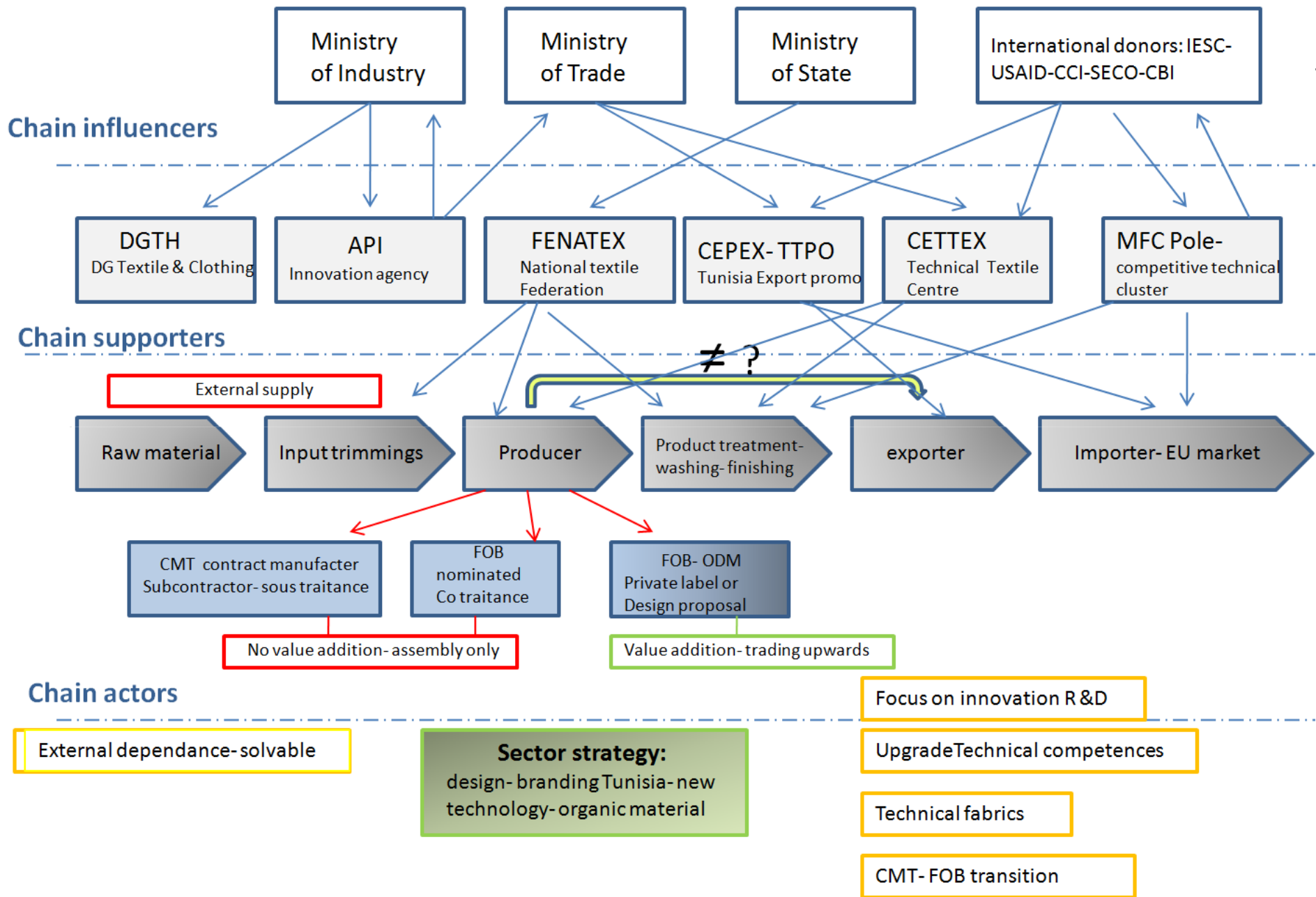
*Source CETTEX*

# Tunisia: in focus



- Tunisian garment sector is the largest employer of the nation
- Great number of influencers and actors within the supply chain for a relative small nation of 15 million inhabitants.
- Fast fashion is cited as the way ahead
- Focus is on adapting new design skills
- The country's sector aims to trade up to higher segments in the EU
- Become preferred supplier to higher ranked brands.
- This challenges will follow its course the coming years and is agreed upon by all chain parties.





# Tunisia: ambitions



- Grow FDI
- Focus on technical fibres
- Focus on technical fabrics
- Focus on further education
- Focus on design
- Become the pre production centre of Africa
- Focus on R &D
- Focus on innovative textiles
- Focus on modernization

<b>countries</b>	<b>investment in %</b>
France	25.2
Italy	18.3
Netherlands	13.9
Luxembourg	10.8
Germany	5.8
USA	3.9
Sweden	3.9
United kingdom	3.8
Switzerland	2.4
Belgium	2.1
Other countries	9.9

# Tunisia: Technopol Monastir



vue générale du projet

TECHNOPOLE TEXTILE MONASTIR - maître d'ouvrage : MFC Pôle | Architecte : ARCHITEX

# Tunisia: Technopole Monastir



# Tunisia: Technopole Elfejja



- **Spinning industry :**
- For the local and export market needs.
- **Weaving and finishing:**
- There is a huge needs of Fabric for the TE companies (more than 430 millions meter of fabrics every year )
- Modernization and upgrading of operating plants (joint-venture).
- Finishing of the high quality fabric for the ready to wear companies.
- **Top-of-range clothing :**
- Fashion garments
- High protection and customized work clothing
- Luxury clothing
- **Knitting :**
- Branded knit clothing,
- Women lingerie
- **Services :**
- Development of fashion & design platform

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