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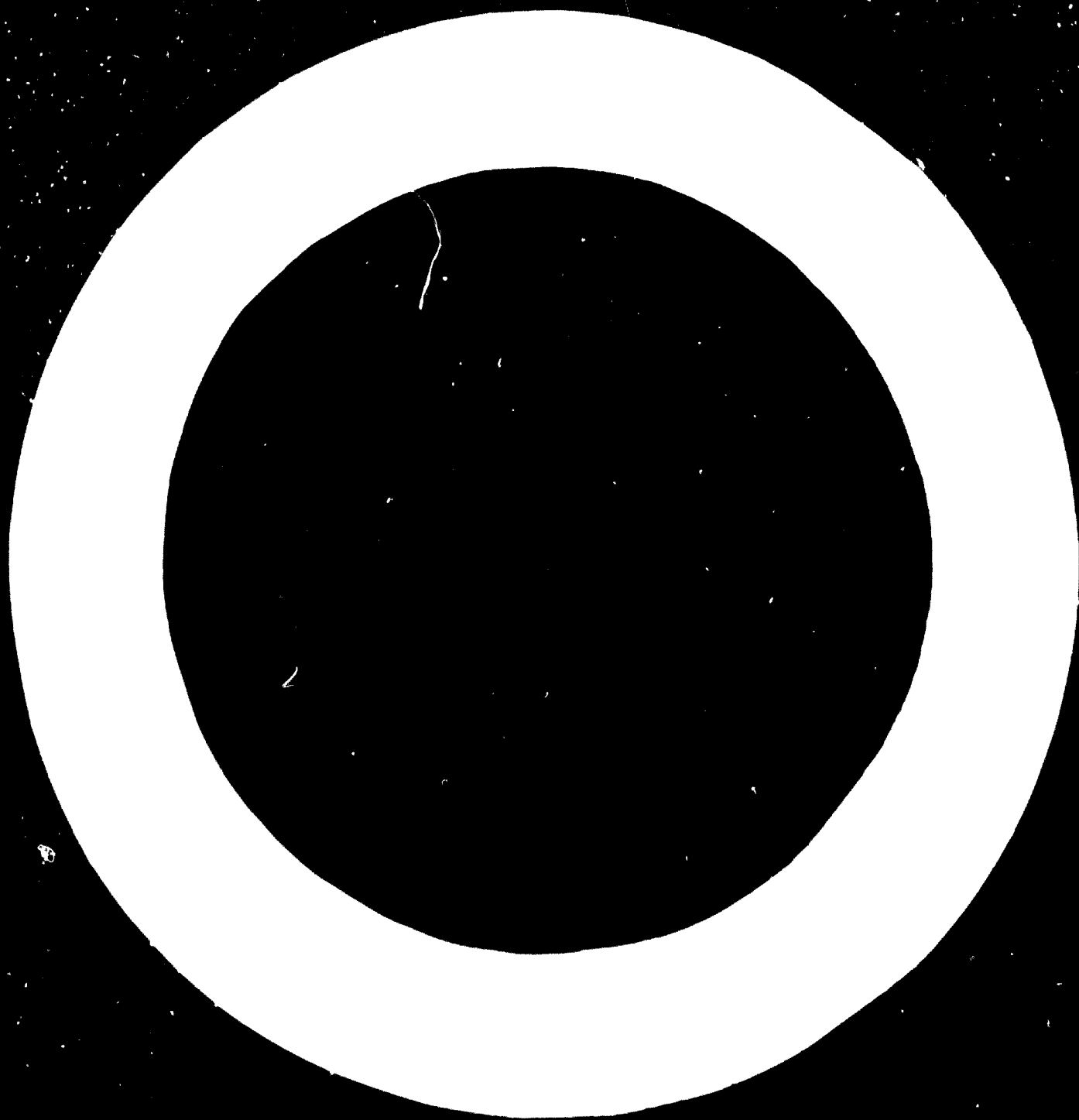
**THE CONSTRUCTION AND BUILDING MATERIALS INDUSTRY**  
**IN TUNISIA** <sup>1/</sup>

presented by

**the Government of Tunisia**

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NOTE

The information contained in this document gives not more than a brief outline of the present situation of the construction and building materials industry in Tunisia. It is based on limited information supplied by the Tunisian Government. The document by no means provides a complete description of Tunisia's industrial potential in this sector or of the sector's development.

The main purpose of this note is therefore merely to provide participants in the Promotion Week with an over-all picture of the industry, so that they may be able to identify the spheres in which co-operation with the Tunisian parties concerned might be of interest.

Naturally, any further information desired will be made available to those concerned by the Tunisian authorities and firms.

Further information on specific projects in this sector is provided in:

- ID/WG.35/21 "Tentative Data on Factory for the Manufacture of Expanded Clay Tiles"
- ID/WG.35/23 "Tentative Data on a Factory for the Manufacture of Ceramic Tiles"
- ID/WG.35/24 "Tentative Data on Project for the Enlargement of Factory for Earthenware Tiles at Tabarka"
- ID/WG.35/25 "Tentative Data on Expansion of the Brick Works at Mabeul"
- ID/WG.35/26 "Tentative Data on Refractory Brick Production at Tabarka"
- ID/WG.35/27 "Tentative Data on Factory for the Manufacture of Earthenware Pipes"

## I. INTRODUCTION

1. The purpose of the Investment Promotion Week for Industry is to achieve concrete results in each branch of Tunisian industry as a result of direct contact established between foreign firms and Tunisian firms or project promoters.
2. The main objective of the contacts to be established in the construction and building materials industry sector is to determine the possibilities for collaboration between existing Tunisian firms and foreign firms from whose experience, know-how and knowledge of international market requirements the former could benefit. This collaboration may take various forms, ranging from assistance in the identification of new industrial projects to the development of sub-contracting operations, or to the installation by the foreign firm of production units directed exclusively towards export markets.
3. The purpose of this note is first and foremost to supply the foreign participant with some background information on the industry as it exists to help him determine the direction and scope of his contacts with his potential Tunisian partners.

## II. GENERAL INFORMATION

4. To obtain an idea of the rate of growth of the construction and building materials sector, it can be noted that the demand for cement increased by 11% per annum between 1961 and 1967. An increase of 8% per annum is anticipated for the period 1968 to 1972.

5. Targets for production capacity in the various types of construction and building materials suggested by the Planning Committee responsible for examining this sector of industry were as follows:

<u>Building materials</u>	<u>1967</u>	<u>1972</u>
Marble	900 M <sup>3</sup>	6,000 M <sup>3</sup>
Cement	470,000 MT	930,000 MT
Concrete pipes	no data	no estimate
Lime	170,000 MT	224,000 MT
Plaster	20,000 MT	20,000 MT
Sanitary ware	1,800 MT	6,000 MT
Ceramic tiles	-	360,000 M <sup>2</sup>
Mosaic cement tiles	990,000 M <sup>2</sup>	1,500,000 M <sup>2</sup>
Decorated tiles	no data	100,000 M <sup>2</sup>
Expanded clay tiles	no data	270,000 M <sup>2</sup>
Earthenware tiles	250,000 M <sup>2</sup>	600,000 M <sup>2</sup>
Refractory bricks	no data	6,000 MT
Clay for tiles and bricks	220,000 MT	350,000 MT
<u>Related industries</u>		
Asphalt	-	20,000 MT
Bitumen	-	6,000 MT
Reinforcing bars	50,000 MT	no estimate
Paints	4,450 MT	no estimate
Sheet glass (security type)	-	36,000 M <sup>3</sup>
Sheet glass (mosaic type)	-	60,000 M <sup>3</sup>

### III. INFORMATION ON SPECIFIC PRODUCTS

#### (a) Marble

Local consumption of marble was estimated at 4,400 M<sup>3</sup> in 1968 and 60% was imported. Local production was 2,500 M<sup>3</sup> and 740 M<sup>3</sup> was exported. The plan is to increase output to 6,000 M<sup>3</sup> by 1972 of which 2,920 M<sup>3</sup> would be exported.

The two major producers recently combined to form a company called "Les Marbles de Tunisie". The planned increase in the capacity of their factory at Megrine will help to meet the higher production target set for 1972.

#### (b) Cement

Local demand for cement increased from 320,000 metric tons in 1964 to 520,000 metric tons in 1968. By 1972 demand is expected to be of the order of 680,000 metric tons. Although Tunisia exported as much as 140,000 metric tons of cement in 1964, exports have been at a much lower level in recent years because local demand has absorbed most of the production available.

There are two cement manufacturing plants in Tunisia at present - Ciments Artificiel Tunisiens (CAT), which produced 415,000 tons in 1968, and the Cements Portland de Bizertey (CPB) which produced 185,000 tons in 1968. The total capacity of about 600,000 metric tons is expected to increase to about 845,000 metric tons in 1969 and 930,000 metric tons in 1972, with the addition of a new kiln by CAT and a small expansion at CPB. No specific projects are proposed to foreign investors.

#### (c) Concrete pipes

No information was provided.

#### (d) Lime and Plaster

Local production is expected to be sufficient to meet demand.

#### (e) Sanitary ware

The plant of the company - Manufacture Tunisienne de Céramique (MTC) at Bizerte has a capacity of 1,800 MT per annum. The Tunisian market at present is estimated at 1,000 MT per annum, and full utilisation of the existing plant and future expansion will depend on exports to neighbouring and other countries.

At present the raw materials are imported.

(f) Ceramic tiles

A project to replace existing imports is described in ID/WG.35/23. The suggested capacity is 175,000 M<sup>2</sup> or 360,000 M<sup>2</sup>.

(g) Mosaic cement tiles

Existing plants were able to supply 90% of local demand in 1968. Production is expected to rise to the target figure suggested for 1972 as a result of the construction of three new plants in 1969.

(h) Decorated tiles

The Development Plan envisages a plant to produce 100,000 M<sup>2</sup> of decorated tiles (Carreaux de facence - décor).

(i) Expanded clay tiles

A plant to manufacture 270,000 M<sup>2</sup> (5,400 tons) per annum of expanded clay tiles is proposed. For further details see ID/WG.35/21.

(j) Earthenware tiles

Plans are to expand the capacity of the existing plant of Faïnceries Tunisiennes from 250,000 M<sup>2</sup> to 600,000 M<sup>2</sup> per annum. For further details see ID/WG.35/24.

(k) Refractory bricks

The 1969-72 Development Plan envisages the construction of the first Tunisian plant to manufacture refractory bricks at Tabarka with a capacity of 6,000 MT per annum. For further details of this project see ID/WG.35/26.

(l) Clay for tiles and bricks

Production of clay (terra cotta) in 1968 was 235,000 tons of which 50,000 tons were exported. The target output of 350,000 tons for 1972 includes exports of 65,000 tons principally to Libya. Some of the existing plants will be expanded to meet the growth in demand which will result from the new production facilities planned for refractory bricks and expanded clay tiles and increased output of other bricks and tiles.

(m) Asphalt

Present consumption is estimated at 5,000 MT per annum, all of it imported. By 1972 demand is expected to reach 20,000 MT.

(n) Bitumen

Present consumption of industrial and directly distilled bitumen is 1,300 MT per annum. By 1972 demand is expected to reach 5,000 MT.



(n) Reinforcing bars

Demand for reinforcing bars used in the building industry was estimated at 50,000 MT per annum in 1967. No forecast was made for 1972, but sufficient supplies should be available from the local steel plant.

(o) Paints

Demand in 1967 was estimated at 4,450 MT per annum. No forecast was made for 1972.

(p) Sheet glass

A plant for producing plain flat sheet glass has been under consideration some time. Latest plans are not known. ECA has estimated that the entire North African market for this product is about 9,300 MT.

The 1969-72 Development Plan estimated that demand for two special types of sheet glass will be as follows by 1972:

Security type	-	36,000 M <sup>3</sup>
Mosaic type	-	60,000 M <sup>3</sup>





**18. 1. 72**