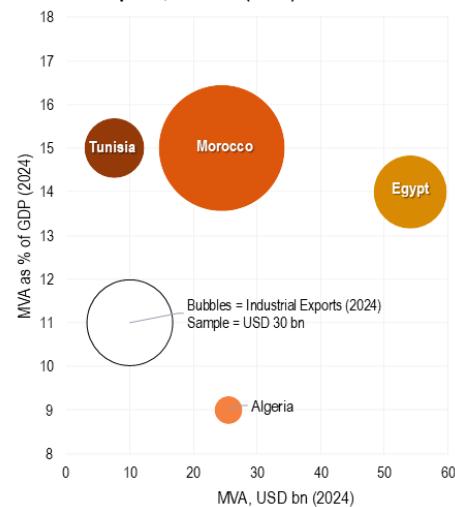


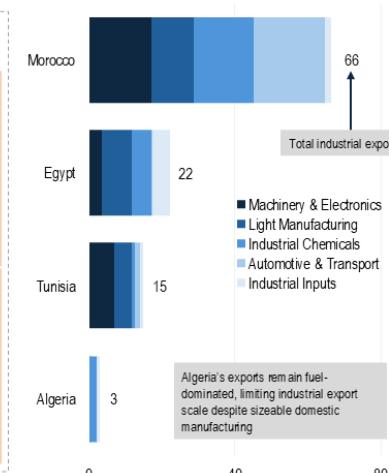
## North Africa's Manufacturing Landscape Offers Scale, Export Platforms and Specialisation

*Egypt anchors domestic manufacturing scale, Morocco leads industrial export integration, Tunisia is a high-intensity specialist and Algeria is constrained by a hydrocarbon-dominated export base.*

North African Economies: Manufacturing Value Added (MVA), USD bn and as % of GDP, and Industrial Exports, USD bn (2024)



North African Economies: Industrial Exports by Sector, USD bn (2024)



Note: Industrial exports include manufactured goods, automotive & transportation, chemicals and industrial inputs that power industry, infrastructure, consumers and technology.  
Source: World Bank, UN Comtrade, ANDAMAN PARTNERS Analysis

North Africa offers a compelling manufacturing proposition for global firms seeking nearshore capacity, cost-competitive production and proximity to European and Middle Eastern demand. The region's industrial opportunity is concentrated in four economies—Egypt, Morocco, Tunisia and Algeria—which collectively account for the overwhelming majority of North Africa's manufacturing value added (MVA) and export scale, and represent four distinct models for industrial growth.

Egypt is the region's clear domestic scale anchor, with USD 54.1 billion in manufacturing value added in 2024 and an MVA share of 14% of GDP. Industrial exports total USD 22.3 billion, reflecting a broad base across chemicals, light manufacturing, and food-linked industries, but export sophistication still lags behind the scale of domestic production.

Morocco is North Africa's standout export platform. While its MVA is smaller at USD 24.5 billion, its industrial export engine is the region's largest at USD 66.4 billion, underpinned by strong integration into European supply chains. Export strength is concentrated in automotive and transport, machinery and electronics and industrial chemicals, all of which are aligned with higher-value-added manufacturing.



Tunisia is a smaller but highly industrialised specialist, with MVA of USD 7.6 billion but a high MVA share of 15% of GDP. Its USD 15 billion in industrial exports highlights deep integration into export-oriented light manufacturing and electronics supply chains, though limited domestic scale constrains overall volume.

Algeria, by contrast, combines meaningful manufacturing value (USD 25.6 billion) with the lowest industrial export scale (USD 3.1 billion) and the lowest MVA intensity (9% of GDP), reflecting an export economy still dominated by hydrocarbons and limited diversification into tradable industrial sectors.

North Africa offers clear strategic options: scale in Egypt, export-led platforms in Morocco, specialised production in Tunisia and selective downstream potential in Algeria.

*Also by ANDAMAN PARTNERS:*

- [African Manufacturing Value Added in 2024: Real Gains and Mostly Currency-Related Losses](#)
- [A Small Set of Emerging Markets Is Driving Machinery & Electronics Export Scale to the World's Largest Markets](#)
- [High-Tech Manufacturing Export Growth Has Shifted to Asia, But China Remains the Industrial Core](#)

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