ITC by Country
Report
Madagascar
05/12/2014
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1. Country / Territory Brief

The Republic of Madagascar is a southern African island, situated in the Indian Ocean east of Mozambique. It is a country rich of diverse resources and natural deposits and is the world’s first exporter of the vanilla bean. Madagascar also counts coffee, shellfish, sugar and petroleum products as its main exports.

Despite its abundant resources, Madagascar still struggles to channel its trade revenues into a sound engine of development. In fact, the country has had recurrent political crises which have greatly disturbed its regional and interregional trade though not sufficiently developed. Madagascar mostly exports to France, China, the USA and Singapore, and is a member of the Southern African Development Community (SADC), the Common Market for Eastern and Southern Africa (COMESA) and the Indian Ocean Commission (IOC).

ITC has had a number of interventions in Madagascar with the International Trade Board of Madagascar in areas such as public-private partnership market access, National Tariff Measures. Another collaboration is currently underway as the country requested ITC expertise in the elaboration of a programme aimed at increasing Madagascar’s trade capacities. The country is also eligible for projects under the Enhanced Integrated Framework.
## 2. People and Economy

### 2.1 People

<table>
<thead>
<tr>
<th>Total population (growth rates per annum)</th>
<th>19,926,785 in 2012 with growth rates of 2.8% p.a during 2008-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population density (people per sq. km of land area)</td>
<td>34 in 2012</td>
</tr>
<tr>
<td>Female population</td>
<td>50.2% in 2012</td>
</tr>
<tr>
<td>Population below 15 years of age</td>
<td>42.7% in 2008; 44.0% in 2012</td>
</tr>
<tr>
<td>Urban population</td>
<td>30.7% in 2012</td>
</tr>
<tr>
<td>Population living below $1.25 a day at purchasing power parity (PPP)</td>
<td>N.A</td>
</tr>
<tr>
<td>Ranking in the Human Development Index (HDI)</td>
<td>151 out of 186 in 2012</td>
</tr>
</tbody>
</table>

### Evolution of the Human Development Index (HDI)

Source: United Nations Development Programme Human Development Indicators

Note: The Human Development Index measures the overall development of a nation and ranges from 0 (low level of development) to 1 (highest level of development). The United Nations Development Programme (http://hdr.undp.org) provides a detailed explanation. ITC Regional group refers to ITC definition.

### Health

- Life expectancy at birth (years) (64); Mortality rate, under-5 (per thousand live births) (58.2) in 2012

### Education

- Education index - expected and mean years of schooling (rank) (142 out of 191) in 2012

### Income level

- N.A.

### Inequality

- Inequality-adjusted HDI (rank) (103 out of 191) in 2012

### Poverty

- Multidimensional Poverty Index (rank) (16 out of 191) in 2012

### Gender

- N.A.

### Sustainability

- N.A.
2.2 Economy

### Added value per sector (current US$ and % of GDP)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>1,143</td>
<td>28.8</td>
<td>2,101</td>
<td>24.8</td>
</tr>
<tr>
<td>Industry</td>
<td>633</td>
<td>15.9</td>
<td>1,370</td>
<td>16.2</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>563</td>
<td>14.2</td>
<td>1,214</td>
<td>14.3</td>
</tr>
<tr>
<td>Services</td>
<td>2,192</td>
<td>55.3</td>
<td>4,998</td>
<td>59</td>
</tr>
</tbody>
</table>

Source: World Bank World Development Indicators (WDI)

Note: Added value is US$ terms are expressed in million, GDP US$, and "6,976 to be read 6'976"

### Evolution of GDP (constant 2005 US$)

Source: World Bank World Development Indicators (WDI)

Note: ITC calculations based on the World Bank WDI

### Evolution of GDP per capita (constant 2005 US$)

Source: World Bank World Development Indicators (WDI)

Note: ITC calculations based on the World Bank WDI
### Aid Dependency
(Official Development Assistance/Gross National Income)

Source: World Bank World Development Indicators (WDI)

Note: ITC calculations based on the World Bank WDI. Regional group refers to ITC definition

#### Remittances as a Share of GDP

<table>
<thead>
<tr>
<th>Year</th>
<th>Remittance ($ millions)</th>
<th>Remittance (% GDP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>12</td>
<td>26.4</td>
</tr>
</tbody>
</table>

Source: World Bank World Development Indicators (WDI)

Note: ITC calculations based on World Bank WDI, IMF BOP statistics, and "6,976 to be read 6'976"
3. Trade Performance

3.1 General Trade Performance

3.1.1 Evolution of Trade Ratio to GDP - Goods

3.1.2 Evolution of Trade Ratio to GDP - Services
3.1.3 Evolution of Total Trade

Evolution of the total import and export of goods of Madagascar

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Import</th>
<th>Total Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>3,343</td>
<td>1,923</td>
</tr>
<tr>
<td>2012</td>
<td>2,658</td>
<td>1,224</td>
</tr>
<tr>
<td>2011</td>
<td>2,956</td>
<td>1,471</td>
</tr>
<tr>
<td>2010</td>
<td>2,545</td>
<td>1,082</td>
</tr>
<tr>
<td>2009</td>
<td>3,159</td>
<td>1,036</td>
</tr>
</tbody>
</table>

3.1.4 Trade Map

List of importing markets for a product exported by Madagascar in 2013
Product: TOTAL - All products
3.1.5 Export and Import by Leading Destination - Export

Prospects for market diversification for a product exported by Madagascar in 2013
Product: TOTAL - All products

3.1.6 Export and Import by Leading Destination - Import

Prospects for market diversification for a product imported by Madagascar in 2013
Product: TOTAL - All products
3.1.7 Evolution of Exports and Imports by Destination - Export

3.1.8 Evolution of Exports and Imports by Destination - Import
3.1.9 Total Export Growth

Source: ITC, calculations based on ITC’s Trade Competitiveness Map data.
Note: Graph shows decomposition of the country’s export growth in value terms by diversification pattern over the indicated period.

3.1.10 Marginal Export Growth

Source: ITC, calculations based on ITC’s Trade Competitiveness Map data.
Note: Graph shows decomposition of the country’s export growth in value by structural driving effects over the indicated period. Values are in US$ thousands.
3.1.11 Composition of Trade in Services - Export

3.1.12 Composition of Trade in Services - Import
3.1.13 Evolution of FDI

Evolution of FDI inflow in Madagascar as % of GDP

Source: ITC based on World Bank HDI.
### 3.2 Sector Trade Performance

#### 3.2.1 Sectoral Diversification in Products - Export

**Sectoral diversification in products for Madagascar’s exports**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Average share of sector in country’s exports 2009</th>
<th>2013</th>
<th>Share of top 3 detailed products (HS6) in sector’s exports</th>
<th>Sector’s leading exported product HS6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing</td>
<td>26.5%</td>
<td>39.9%</td>
<td>36.7%</td>
<td>51081012: Jerseys, pullovers, cardigans, waistcoats and similar articles of knit or of textile fabrics</td>
</tr>
<tr>
<td>Fresh food</td>
<td>23.4%</td>
<td>72.9%</td>
<td>63.6%</td>
<td>090100: Cloves (whole fruit, cloves and stems)</td>
</tr>
<tr>
<td>Minerals</td>
<td>10.3%</td>
<td>80.4%</td>
<td>72.9%</td>
<td>271010: Other petroleum oils and preparations</td>
</tr>
<tr>
<td>Processed food</td>
<td>8.5%</td>
<td>59.1%</td>
<td>67.8%</td>
<td>166414: Tuna skis, pack &amp; fillets prepared or preserved, whale in pieces, etc.</td>
</tr>
<tr>
<td>Basic manufactures</td>
<td>8.0%</td>
<td>35.8%</td>
<td>59.5%</td>
<td>754910: Nickel unwrought, not alloyed</td>
</tr>
<tr>
<td>Textiles</td>
<td>3.4%</td>
<td>59.7%</td>
<td>31.6%</td>
<td>560710: Hair, cordage, ropes, and cables, of other synthetic fibers</td>
</tr>
<tr>
<td>Miscellaneous manufacturing</td>
<td>3.2%</td>
<td>33.4%</td>
<td>43.0%</td>
<td>911320: Watch straps, watch bands and watch bracelets, and place setting</td>
</tr>
<tr>
<td>Non-electronic machinery</td>
<td>3.1%</td>
<td>34.4%</td>
<td>39.4%</td>
<td>846910: Parts of taps, cocks, valves or similar appliances</td>
</tr>
<tr>
<td>Transport equipment</td>
<td>2.4%</td>
<td>43.9%</td>
<td>99.6%</td>
<td>866240: Aircraft of an unladen weight exceeding 15,000 kg</td>
</tr>
<tr>
<td>Wood products</td>
<td>1.5%</td>
<td>67.6%</td>
<td>85.1%</td>
<td>48110: Cartons, boxes and cases, of corrugated paper or paperboard</td>
</tr>
<tr>
<td>Unclassified products</td>
<td>1.4%</td>
<td>59.9%</td>
<td>100.0%</td>
<td>999999: Commodities not elsewhere specified</td>
</tr>
<tr>
<td>Leather products</td>
<td>1.2%</td>
<td>69.8%</td>
<td>85.3%</td>
<td>420600: Articles of leather or of composition leather, es</td>
</tr>
<tr>
<td>Chemicals</td>
<td>0.6%</td>
<td>45.6%</td>
<td>74.0%</td>
<td>310220: Ammonium sulphate, in packages weighing more than 1 kg</td>
</tr>
<tr>
<td>IT &amp; consumable electronics</td>
<td>0.2%</td>
<td>77.9%</td>
<td>61.0%</td>
<td>854140: Units of automatic data processing equipment nes</td>
</tr>
<tr>
<td>Electronic components</td>
<td>0.2%</td>
<td>42.3%</td>
<td>41.8%</td>
<td>854810: Wires &amp; scrap of copper</td>
</tr>
</tbody>
</table>

**Source:** ITC Trade Competitiveness Map

**Note:** HS codes refer to the revision 2007.

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### 3.2.2 Sectoral Diversification in Products - Import

**Sectoral diversification in products for Madagascar’s imports**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Average share of sector in country’s imports 2009</th>
<th>2013</th>
<th>Share of top 3 detailed products (HS6) in sector’s imports</th>
<th>Sector’s leading imported product HS6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minerals</td>
<td>19.8%</td>
<td>97.1%</td>
<td>81.3%</td>
<td>271010: Other petroleum oils and preparations</td>
</tr>
<tr>
<td>Basic manufactures</td>
<td>12.3%</td>
<td>47.3%</td>
<td>31.8%</td>
<td>253229: Perfumed cement nes</td>
</tr>
<tr>
<td>Non-electronic machinery</td>
<td>11.2%</td>
<td>22.1%</td>
<td>19.6%</td>
<td>846910: Taps, cocks, valves and similar appliances, nes</td>
</tr>
<tr>
<td>Processed food</td>
<td>10.4%</td>
<td>30.2%</td>
<td>38.7%</td>
<td>111910: Wheat or meslin flour</td>
</tr>
<tr>
<td>Textiles</td>
<td>10.1%</td>
<td>26.7%</td>
<td>28.7%</td>
<td>500720: Woven fabrics of silk/silk waste, or not silk,5% or more of linen</td>
</tr>
<tr>
<td>Chemicals</td>
<td>9.5%</td>
<td>23.6%</td>
<td>24.9%</td>
<td>390490: Medicaments nes, in dosage</td>
</tr>
<tr>
<td>Fresh food</td>
<td>5.7%</td>
<td>72.0%</td>
<td>76.2%</td>
<td>138630: Rice, semi-milled or wholly milled, whether or not polished</td>
</tr>
<tr>
<td>Transport equipment</td>
<td>5.6%</td>
<td>33.9%</td>
<td>42.7%</td>
<td>874421: Diesel powered trucks with a GVW not exceeding 12 t</td>
</tr>
<tr>
<td>Miscellaneous manufacturing</td>
<td>5.6%</td>
<td>51.1%</td>
<td>28.3%</td>
<td>445920: Used postage revenue stamps, cheques, forms, barcodes, bond, credit card, etc</td>
</tr>
<tr>
<td>Electronic components</td>
<td>3.2%</td>
<td>23.7%</td>
<td>24.4%</td>
<td>384140: Photographic semiconductor devices, photovoltaic cells &amp; modules</td>
</tr>
<tr>
<td>IT &amp; consumable electronics</td>
<td>2.5%</td>
<td>34.3%</td>
<td>33.0%</td>
<td>846710: Telephones for cellular networks, mobile telephones or for other uses</td>
</tr>
<tr>
<td>Wood products</td>
<td>1.6%</td>
<td>22.9%</td>
<td>30.0%</td>
<td>440100: Newsprint, in rolls or sheets</td>
</tr>
<tr>
<td>Unclassified products</td>
<td>1.0%</td>
<td>59.9%</td>
<td>99.9%</td>
<td>420600: Articles of leather or of composition leather, nes</td>
</tr>
<tr>
<td>Leather products</td>
<td>0.6%</td>
<td>63.7%</td>
<td>43.4%</td>
<td>426200: Articles of leather or of composition leather, nes</td>
</tr>
<tr>
<td>Clothing</td>
<td>0.4%</td>
<td>35.9%</td>
<td>56.5%</td>
<td>617130: Parts of garments or of clothing accessories of textile materials, textile</td>
</tr>
</tbody>
</table>

**Source:** ITC Trade Competitiveness Map

**Note:** HS codes refer to the revision 2007.
### 3.2.3 Sectoral Diversification in Destinations - Export

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector’s export growth in value (% p.a) 2009-2013</th>
<th>Share of top 3 importing countries in sector’s exports (%)</th>
<th>List of the top 3 importing countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic manufactures</td>
<td>182.9%</td>
<td>58.5%</td>
<td>Area Ns ; France ; Uganda</td>
</tr>
<tr>
<td>Chemicals</td>
<td>51.5%</td>
<td>51.5%</td>
<td>Area Ns ; France ; Mauritius</td>
</tr>
<tr>
<td>Transport equipment</td>
<td>49.2%</td>
<td>59.2%</td>
<td>United Kingdom ; Kenya ; France</td>
</tr>
<tr>
<td>Minerals</td>
<td>30.2%</td>
<td>58.6%</td>
<td>France ; China ; Area Ns</td>
</tr>
<tr>
<td>Processed food</td>
<td>16.6%</td>
<td>73.3%</td>
<td>France ; Bulgaria ; Italy</td>
</tr>
<tr>
<td>Fresh food</td>
<td>16.5%</td>
<td>62.4%</td>
<td>France ; Singapore ; United States of America</td>
</tr>
<tr>
<td>Electronic components</td>
<td>14.9%</td>
<td>57.2%</td>
<td>France ; Kenya ; United States of America</td>
</tr>
<tr>
<td>Leather products</td>
<td>11.1%</td>
<td>59.3%</td>
<td>France ; Area Ns ; Germany</td>
</tr>
<tr>
<td>Clothing</td>
<td>-0.9%</td>
<td>76.6%</td>
<td>United States of America ; France ; Germany</td>
</tr>
<tr>
<td>Miscellaneous manufacturing</td>
<td>-4.2%</td>
<td>83.6%</td>
<td>France ; Area Ns ; Italy</td>
</tr>
<tr>
<td>Textiles</td>
<td>-6.5%</td>
<td>91.1%</td>
<td>Area Ns ; France ; Mauritius</td>
</tr>
<tr>
<td>Unclassified products</td>
<td>-16.0%</td>
<td>76.4%</td>
<td>Area Ns ; France ; Mauritius</td>
</tr>
<tr>
<td>Non-electronic machinery</td>
<td>-16.5%</td>
<td>44.5%</td>
<td>Belgium ; United Arab Emirates ; France</td>
</tr>
<tr>
<td>Wood products</td>
<td>-26.3%</td>
<td>85.3%</td>
<td>China ; Area Ns ; Mauritius</td>
</tr>
<tr>
<td>IT &amp; consumable electronics</td>
<td>-30.0%</td>
<td>74.3%</td>
<td>Hong Kong (SARC) ; China ; France</td>
</tr>
</tbody>
</table>

*Source: ITC Trade Competitiveness Map*

### 3.2.4 Sectoral Diversification in Destinations - Import

<table>
<thead>
<tr>
<th>Sector</th>
<th>Sector’s import growth in value (% p.a) 2009-2013</th>
<th>Share of top 3 supplying countries in sector’s imports (%)</th>
<th>List of the top 3 supplying countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh food</td>
<td>36.8%</td>
<td>60.8%</td>
<td>Pakistan ; Seychelles ; India</td>
</tr>
<tr>
<td>Minerals</td>
<td>26.7%</td>
<td>66.0%</td>
<td>Mauritius ; China ; France</td>
</tr>
<tr>
<td>Clothing</td>
<td>20.2%</td>
<td>66.0%</td>
<td>China ; France ; Area Ns</td>
</tr>
<tr>
<td>Chemicals</td>
<td>16.1%</td>
<td>45.4%</td>
<td>France ; China ; South Africa</td>
</tr>
<tr>
<td>Unclassified products</td>
<td>13.7%</td>
<td>53.7%</td>
<td>France ; United Arab Emirates ; Belgium</td>
</tr>
<tr>
<td>Processed food</td>
<td>8.3%</td>
<td>36.4%</td>
<td>Malaysia ; Mauritius</td>
</tr>
<tr>
<td>Wood products</td>
<td>7.6%</td>
<td>45.8%</td>
<td>South Africa ; France ; China</td>
</tr>
<tr>
<td>Leather products</td>
<td>5.5%</td>
<td>92.5%</td>
<td>China ; France ; Hong Kong (SARC)</td>
</tr>
<tr>
<td>Transport equipment</td>
<td>5.5%</td>
<td>52.6%</td>
<td>Belgium ; France ; China</td>
</tr>
<tr>
<td>Textiles</td>
<td>2.6%</td>
<td>59.0%</td>
<td>China ; France ; Hong Kong (SARC)</td>
</tr>
</tbody>
</table>

*Source: ITC Trade Competitiveness Map*
3.2.5 Sectors by World Demand - Export

Growth of national supply and international demand for the products exported by Madagascar in 2013

Losers in growing sectors
- 27 - Mineral fuels, oils, distillation products, etc
- 32 - Other inorganic chemical products
- 71 - Mixed ferrous metals

Winners in growing sectors
- 05 - Ores, slag and ash
- 08 - Edible fruit, nuts, peel of citrus fruit, melons
- 17 - Sugars and sugar confectionery

Annual growth of world imports between 2009-2013, %

3.2.6 Sectors by World Demand - Import

Growth of national demand and international supply for the products imported by Madagascar in 2013

Losers in declining sectors
- 08 - Aircraft, spacecraft, and parts thereof
- 27 - Mineral fuels, oils, distillation products, etc

Winners in declining sectors
- 10 - Cereals
- 18 - Cocoa and cocoa preparations

Annual growth of world exports between 2009-2013, %

The country imports have increased less rapidly than world exports

The country imports have increased more rapidly than world exports
3.2.7 Trade Performance Index

Trade Performance Index of Madagascar

- Basic manufactures (USD 440 m):
  - Change in world market share index (2009-2013): 21
  - Current index (2013): 85

- Fresh food (USD 432 m):
  - Change in world market share index (2009-2013): 60
  - Current index (2013): 67

- Clothing (USD 415 m):
  - Change in world market share index (2009-2013): 76
  - Current index (2013): 73

- Minerals (USD 254 m):
  - Change in world market share index (2009-2013): 20
  - Current index (2013): 100

- Processed food (USD 166 m):
  - Change in world market share index (2009-2013): 52
  - Current index (2013): 87

- Textiles (USD 50 m):
  - Change in world market share index (2009-2013): 15
  - Current index (2013): 72

- Transport equipment (USD 45 m):
  - Change in world market share index (2009-2013): 43
  - Current index (2013): 91

- Miscellaneous manufacturing (USD 33 m):
  - Change in world market share index (2009-2013): 27
  - Current index (2013): 77

- Chemicals (USD 23 m):
  - Change in world market share index (2009-2013): 52
  - Current index (2013): 106

- Non-electronic machinery (USD 22 m):
  - Change in world market share index (2009-2013): 77
  - Current index (2013): 121

- Wood products (USD 16 m):
  - Change in world market share index (2009-2013): 45
  - Current index (2013): 111

- Leather products (USD 14 m):
  - Change in world market share index (2009-2013): 65
  - Current index (2013): 111

- Electronic components (USD 4 m):
  - Change in world market share index (2009-2013): 5
  - Current index (2013): 74

- IT & consumable electronics (USD 2 m):
  - Change in world market share index (2009-2013): 15
  - Current index (2013): 74

Source: ITC Trade Competitiveness Map

Note: The figures displayed on the bars correspond to the country’s global rankings among other countries that export the same category of products. The current index and change in market share index are the world countries ranking for the sector under review. Only sectors with more than USD 1 million export are considered.
## 4. Trade Strategy and Policy

### 4.1 Trade and Development Strategies

<table>
<thead>
<tr>
<th>Year</th>
<th>Strategy name</th>
<th>Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>COMESA Cotton-to-Clothing Value Chain Strategy</td>
<td>Cotton, Garment Industry, Textile Industry</td>
</tr>
<tr>
<td></td>
<td>The strategy is an update of the 2009 COMESA Regional Strategy for...</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>COMESA Leather Strategy</td>
<td>Leather Industry, Leather</td>
</tr>
<tr>
<td></td>
<td>The strategy envisages transforming the leather value-chain into a lead contributor to...</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>Southern Africa ADB Regional Integration Strategy Paper</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The document provides an overview of the current political, economic and social...</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>UNDAF Madagascar 2008-2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The UNDAF builds on the MAP, on the Vision Madagascar Naturellement and...</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>The Madagascar Action Plan (MAP)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The MAP envisages the transformation of Madagascar economy in order to become...</td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>Diagnostic Trade Integration Study - Madagascar</td>
<td>Vanilla, Cotton, Sugar Industry, Rice, Shrimp Farming, Mining Industry, Mining Industry, Tourism</td>
</tr>
<tr>
<td></td>
<td>The DTIS provides an overview of the main issue affecting the Malgasy...</td>
<td></td>
</tr>
</tbody>
</table>
4.2 Domestic and Foreign Market Access

Overview: Trade Policy and Business Environment

The Republic of Madagascar is classified as a low income country. The country was ranked 107th out of 132 countries in the World Economic Forum (WEF) Enabling Trade Index 2012, which measures institutions, policies and services to facilitate trade in countries. From 2009 and 2013 the country experienced a political coup and its most protracted period of political conflict in a state accustomed to political disorder. The World Bank has estimated that the political turmoil cost Madagascar around USD 8 billion in lost growth, and cost the country its membership in the African Union and the Southern African Development Community (SADC). Democratic rule was restored in January 2013 following elections, which is anticipated to improve trade and economic development.

WEF, 2012, Global Enabling Trade Report

<table>
<thead>
<tr>
<th>INDICATOR, UNITS</th>
<th>RANK/132</th>
<th>SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Market Access</td>
<td>The pillar assesses the level and complexity of a country’s tariff protection as a result of its trade policy. This component includes the effective trade-weighted average tariff applied by a country, the share of goods imported duty free and the complexity of the tariff regime, measured through tariff variance, the prevalence of tariff peaks and specific tariffs, and the number of distinct tariffs.</td>
<td>91</td>
</tr>
<tr>
<td>Foreign Market Access</td>
<td>The pillar assesses tariff barriers faced by a country’s exporters in destination markets. It includes the average tariffs faced by the country as well as the margin of preference in destination markets negotiated through bilateral or regional trade agreements or granted in the form of trade preferences.</td>
<td>8</td>
</tr>
<tr>
<td>Tariff rate (%)</td>
<td>This indicator is calculated as a trade-weighted average of all the applied tariff rates, including preferential rates that a country applies to the rest of the world. The weights are the trade patterns of the importing country’s reference group (2012 data). An applied tariff is a customs duty that is levied on imports of merchandise goods.</td>
<td>88</td>
</tr>
<tr>
<td>Complexity of tariffs, index 1-7 (best)</td>
<td>This indicator is calculated as the average of the following indicators: Tariff dispersion, Specific tariffs and Number of distinct tariffs. See description of each individual indicator for more details. Prior to averaging, values for each indicator were transformed to a 1–7 score, using the min-max method.</td>
<td>12</td>
</tr>
<tr>
<td>Tariffs dispersion (standard deviation)</td>
<td>This indicator reflects differences in tariffs across product categories in a country’s tariff structure. The variance is calculated across all the tariffs on imported merchandise goods, at the 6-digit level of the Harmonized Schedule.</td>
<td>32</td>
</tr>
<tr>
<td>Tariffs peaks (%)</td>
<td>This indicator is the ratio of the number of tariff lines exceeding three times the average domestic tariff (across all products) to the MFN (most-favoured nation) tariff schedule. The tariff schedule is equal to the total number of tariff lines for each country. These tariffs are revised on a yearly basis.</td>
<td>1</td>
</tr>
<tr>
<td>Specific tariffs (%)</td>
<td>This indicator is the ratio of the number of Harmonized System (HS) tariff lines, with at least one specific tariff, to the total number of HS tariff lines. A specific tariff is a tariff rate charged on fixed amount per quantity (as opposed to ad valorem)</td>
<td>1</td>
</tr>
<tr>
<td>Number of distinct tariffs</td>
<td>This indicator reflects the number of distinct tariff rates applied by a country to its imports across all sectors.</td>
<td>5</td>
</tr>
<tr>
<td>Share of duty-free imports (%)</td>
<td>Share of trade, excluding petroleum, that is imported free of tariff duties, taking into account MFN tariffs and preferential agreements. Tariff data is from 2013 or most recent year available and imports data is from 2012.</td>
<td>105</td>
</tr>
<tr>
<td>Tariffs faced (%)</td>
<td>This indicator is calculated as the trade-weighted average of the applied tariff rates, including preferential rates that the rest of the world applies to each country. The weights are the trade patterns of the importing country’s reference group (2012 data). A tariff is a customs duty that is levied by the destination country on imports of merchandise goods</td>
<td>16</td>
</tr>
<tr>
<td>Index of margin of preference in destination markets, 0-100 (best)</td>
<td>This indicator measures the percentage by which particular imports from one country are subject to lower tariffs than the MFN rate. It is calculated as the average of two components: 1) the trade-weighted average difference between the MFN tariff and the most advantageous preferential duty (advantage score), and 2) the ratio of the advantage score to the trade-weighted average MFN tariff level. This allows capturing both the absolute and the relative margin of preference.</td>
<td>10</td>
</tr>
</tbody>
</table>
Trade Policy and Market Access

Madagascar has been a WTO member since November 1995 and the simple average MFN tariff applied in 2012 was 11.8 per cent. Madagascar joined the Common Market for Eastern and Southern Africa's (COMESA) free trade framework in 2005 and the SADC in 2007; however Madagascar’s membership of SADC as well as the African Union has been suspended since 2009 due to the political crisis, but is expected to be reinstated following the return to democratic rule in January 2013. Intra-regional trade remains poorly developed with exports to the SADC and COMESA averaging only 5 per cent of total exports since 2010. Madagascan industrial fabric industry had enjoyed preferential access under the African Growth and Opportunity Act since 2000, with the aim to expand trade and investment between Sub-Saharan Africa and the United States; however this has also been suspended since 2009, which led to a reduction in textile sector output of 20 per cent (Bertelsmann Stiftung 2014). Madagascar signed an interim Economic Partnership Agreement with the European Union, which came into effect in January 2013. The agreement covers market access, fisheries and official development aid.

WTO, 2012, Tariff profile (Madagascar)

Bertelsmann Stiftung, 2012, Madagascar

Standard Compliance and Other Relevant Import/Export Restrictions

Madagascar submitted its first notification of its own Sanitary and Phytosanitary (SPS) regulations in 2008. In 2010, the country submitted 7 notifications relating to food. Madagascar has benefited from technical and finance assistance with an aim to enhance its SPS-related capacity in recent years. In 2004, Madagascar submitted a statement on the implementation and administration of the Agreement on Technical barriers to trade (TBT). However, Madagascar is not an active member for the TBT Committee. The country did not make any notification to the committee between 1995 and 2010.

United Nations Department of Economic and Social Affairs, 2013, Madagascar Summary Results
4.3 Trade Facilitation

According to the World Bank Logistics Performance Index (LPI) (2012) which measures countries’ trade logistics efficiency, Madagascar was ranked 84th out of 155 countries and all scores except international shipments are above the regional average scores of Sub-Saharan African and low income countries. In particular, Madagascar’s customs logistics perform better than the top performer in low income group (Benin), owing to a number of reforms since 2009, including: implementation of electronic data interchange, a single window (GASYNET), risk-based inspections, and improvement of port infrastructure that has led to a decrease in export and import times. In particular, its single-window system improved communication and coordination between customs and the terminal port operators, and reduced both the time and the cost to export and import. Moreover, Madagascar rolled out an online platform linking trade operators with government agencies involved in the trade process and customs clearance. The World Bank study estimates that exporters wait 22 days and spend USD 1, to export a standard container, whereas it takes 31 waiting days and costs USD 2,108 for other Sub-Saharan African countries to export the same container, on average. With regards to importing, it takes 21 days and costs USD 1,555 for Madagascar, while it takes 38 days and costs USD 2,793 for the low-income comparator countries (World Bank 2012; World Bank 2014).

Logistics Performance Index – Evolution

4.4 Business and Regulatory Environment

The four-year-long political crisis has led to deterioration in the business climate and greater loss of control in governance, and has worsened the living conditions of the population despite some progress in education. The World Bank Doing Business Report (2014) confirms the poor business environment with the country ranking 148th out of 189 economies. Among the 10 categories analysed by this survey, starting a business has a competitive edge (ranked inside the top 30 economies globally), owing to the government’s efforts to improve the entrepreneurial environment by lowering taxes, reducing the number of procedures and lowering minimum capital requirements to start a business over recent years. On the other hand, getting electricity and credit are ranked in the bottom 5 per cent of countries assessed. Madagascar has high cost and low quality electricity that covers only 15 per cent of the demand, which is due to the low generation capacities, operated by a single state owned company. The country is open to foreign investment and officially there is no mandatory screening of foreign investment, with no discrimination against foreign investors through special tax treatment, access to licenses or approvals. However, the weak legal and judicial environments, as well as the lack of transparency which are subject to political corruption, are barriers to investment. Also, capital markets remain underdeveloped and the interest rate is high, up to 45 per cent from 2007-2009.

(World Bank 2013; Chatham House 2013; Heritage Foundation 2013)

Source: Heritage Foundation, 2013, Index of Economic Freedom (Madagascar)  
World Bank, 2013, Doing Business 2014 (Madagascar)  

Multilateral Trade Instruments
Abstract

The Trade Treaties Map tool is a web-based system on multilateral trade treaties and instruments designed to assist trade support institutions (TSIs) and policymakers in optimizing their country’s legal framework on international trade.

Instrument ratified: 93 / 266 instruments
Ratification rate: 35%
Weighted score: 46.5/100

<table>
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<th>Ratification Rate Rank</th>
<th>Weighted Score Rank</th>
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<td>102 / 193</td>
</tr>
<tr>
<td>In Region: Sub-Saharan Africa 15/47</td>
<td>12/47</td>
</tr>
<tr>
<td>In Development level: Least developed country 7/48</td>
<td>6/48</td>
</tr>
</tbody>
</table>

Graph

Presents a visual illustration breaking down a country’s ratification level according to various categories and compares it to the world average.

Instruments ratified

Click here for a full list and more details about these multi-lateral trade instruments.
4.5 Infrastructure

The latest WEF Global Competitiveness Report ranked the quality of overall infrastructure of Madagascar 132nd out of 148 countries. Madagascar’s overall poor infrastructure is negatively affecting its economic growth and development opportunities. For example, the density of paved roads is estimated at 10 km in every 1,000 sq. km against 100 km in every 1,000 sq. km Mauritius, also an island nation in the Indian Ocean. Unfair business practices can be seen among transport companies that has led to increased transport costs. There are only two railroads in Madagascar and they are unconnected and in poor condition. Given that agricultural products contribute 70 per cent of total export share in Madagascar and the sector employs over 80 per cent of the country’s population. With regards to information and communications technology the sector has been growing, owing to greater liberalisation and further investment, which lead to more than 3 per cent growth per year over the past ten years (African Development Bank Group 2013). Mobile penetration in Madagascar increased from 4 per cent to 25 per cent between 2005 and 2010. Prior to the sector reform of 1994, domestic telecommunication services were poor and government controlled (WEF 2013; Bertelsmann Stiftung 2012; African Development Bank Group 2013)

Source: WEF, 2013, Global Competitiveness Report
African Development Bank Group, 2013, African Economic Outlook 2013 (Madagascar)

<table>
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<td>Quality of overall infrastructure How would you assess general infrastructure (e.g., transport, telephony, and energy) in your country? [1 = extremely underdeveloped—among the worst in the world; 7 = extensive and efficient—among the best in the world]</td>
<td>2.52</td>
<td>129</td>
</tr>
<tr>
<td>Quality of roads How would you assess roads in your country? (1 = extremely underdeveloped; 7 = extensive and efficient by international standards)</td>
<td>2.61</td>
<td>120</td>
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<tr>
<td>Quality of railroad infrastructure How would you assess the railroad system in your country? (1 = extremely underdeveloped; 7 = extensive and efficient by international standards)</td>
<td>2.01</td>
<td>86</td>
</tr>
<tr>
<td>Quality of port infrastructure How would you assess port facilities in your country? (1 = extremely underdeveloped; 7 = well-developed and efficient by international standards). For landlocked countries, this measures the ease of access to port facilities and inland waterways</td>
<td>3.53</td>
<td>96</td>
</tr>
<tr>
<td>Quality of air transport infrastructure How would you assess passenger air transport infrastructure in your country? (1 = extremely underdeveloped; 7 = extensive and efficient by international standards)</td>
<td>3.63</td>
<td>98</td>
</tr>
<tr>
<td>Individuals using Internet (%) Internet users are people with access to the worldwide network.</td>
<td>39.38</td>
<td>132</td>
</tr>
<tr>
<td>Mobile telephone subscriptions/100 pop According to the World Bank, mobile cellular telephone subscriptions are subscriptions to a public mobile telephone service using cellular technology, which provides access to switched telephone technology. Postpaid and prepaid subscriptions are included. This can also include analogue and digital cellular systems but should not include non-cellular systems. Subscribers to fixed wireless, public mobile data services, or radio paging services are not included.</td>
<td>2.06</td>
<td>133</td>
</tr>
<tr>
<td>Fixed broadband Internet subscriptions/100 pop: The International Telecommunication Union considers broadband to be any dedicated connection to the Internet of 256 kilobits per second or faster, in both directions. Broadband subscribers refers to the sum of DSL, cable modem and other broadband (for example, fiber optic, fixed wireless, apartment LANs, satellite connections) subscribers.</td>
<td>0.04</td>
<td>126</td>
</tr>
</tbody>
</table>

5. ITC and the Country/Territory

5.1 ITC Projects

5.1.1 Current projects

No Current Projects Found!

5.1.2 Recent projects

Comesa regional trade information networks
PACT 2 - COMESA Regional Private Sector Apex Bodies for Public-Private Dialogue
PACT 2 - COMESA Networks of National and Regional TSIs
PACT 2 - COMESA Sector Strategy
PACT 2 - COMESA Market Analysis and Sector Prioritization
Madagascar - Amélioration de l’encadrement juridique pour le commerce international
PACT 2 - COMESA Improved Technical Capacities and RBM Operations
Non-tariff measures - increasing transparency and understanding
Expansion du commerce intra et inter-regional pour les pays francophones du Mekong
5.2 Events

5.2.1 Upcoming events
No data

5.2.2 Recent events
Training for Business Managers on the EU-ESA-EPA Negotiations 28/11/2013-Antananarivo
5.3 ITC Contacts

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aissatou DIALLO</td>
<td>Senior Trade Promotion Officer</td>
<td>+41 22 730 0284</td>
<td><a href="mailto:diallo@intracen.org">diallo@intracen.org</a></td>
</tr>
<tr>
<td>Ruben PHOOLCHUND</td>
<td>Chief, Office for Africa</td>
<td>+41 22 730 0508</td>
<td><a href="mailto:phoolchund@intracen.org">phoolchund@intracen.org</a></td>
</tr>
</tbody>
</table>
6. Trade Information Sources and Contacts

6.1 Trade Information Sources

This section provides a list of country specific print and online publications on trade-related topics, including both ITC and external sources.

6.1.1 ITC publications

Rencontre acheteurs/vendeurs sur les produits alimentaires et agricoles, l'eau et l'assainissement, l'hébergement, les articles de protection personnelle et de ménage

Marchés mondiaux des fruits et légumes biologiques: Opportunités pour les pays en développement dans la production et l'exportation de produits horticoles biologiques

Etude conjointe FAO-CCI-CTA sur l'agriculture biologique visant à soutenir les pays en développement dans leurs efforts pour diversifier les exportations par le biais de méthodes de production écologiques. Constitue une...
Mercados mundiales de frutas y verduras orgánicas: Oportunidades para los países en desarrollo en cuanto a la producción y exportación de productos hortícolas orgánicos

Estudio conjunto de la FAO-CCI-CTA sobre los productos hortícolas orgánicos teniendo por objeto ayudar a los países en desarrollo en diversificar las exportaciones a través de métodos de producción agrícola...

Read more

The Packaging Supply Chains in Sub-Saharan Africa

Report summarising the results of a series of country studies and audits of the packaging sectors, industries and supply chains in Côte d'Ivoire, Ghana, Kenya, Madagascar, Mali, Nigeria, Senegal, and...

Read more

Situation actuelle et perspective du secteur de l'emballage agro-alimentaire : Madagascar

Considère l'importance des produits agro-alimentaires dans les exportations nationales du Madagascar; passe en revue le secteur d'emballage des produits agro-alimentaires pour l'exportation; examine la situation de l'offre et de la...

Read more
Madagascar - Supply Survey on Textiles and Clothing

Indicative COMESA Customs Tariff Rates and National Rates for Zimbabwe

Document lists Zimbabwe national tariffs and COMESA tariffs side by side for all commodities on the basis of the Harmonized Commodity Description and Coding System.

Madagascar: Analyse des flux commerciaux

Survey on the supply of food, water and sanitation, shelter and household items in Madagascar - examines the significance of these three product sectors to the economy of the country;...
World markets for organic fruit and vegetables

Opportunities for developing countries in the production and export of organic horticultural products

Joint FAO-ITC-CTA study on organic agriculture aimed at assisting developing countries in diversifying exports through environmentally sound agricultural production methods. Provides a source of information on latest market developments and...
Building Markets: Regional Integration, Responding to Necessity. - Kenya

Paper presented at ITC World Export Development Forum: 'Bringing Down the Barriers - Charting a Dynamic Export Development Agenda', Montreux, Switzerland, 8-11 October, 2007 - provides an overview of...

Read more

Bringing Down the Barriers: Defining the Priorities for Export Development. - Madagascar

Paper presented at ITC World Export Development Forum: 'Bringing down the Barriers - Charting a Dynamic Export Development Agenda', Montreux, Switzerland, 8-11 October, 2007 - presents the structure of...

Read more

Multilateral Trading System and the New Political Economy for Textiles and Clothing: An Introduction for Least Developed Countries

Study focuses on the WTO Agreement on Textiles and Clothing, ATC and its implications on Least Developed Countries. Discusses issues affecting trade in textiles and clothing, technical and marketing considerations...

Read more
Buyers/Sellers Meeting on Food, Water and Sanitation, Shelter and Household Items

Report referring to the fifth Buyers/Sellers Meeting (Midrand, South Africa, 14-14 October 2004) bringing together companies dealing with food, water and sanitation, shelter and household items from Madagascar, Mozambique, Namibia,...

Read more

Madagascar: Etude de l'offre sur les articles d'urgence, les équipements et produits chimiques pour l’eau et l’assainissement, les produits agricoles, les matériaux et matériels de construction et les services de transport

Etude sur l'offre des articles d'urgence et les services de transport à Madagascar - fournit une liste de produits concernés par cette étude; étudie la situation de l'offre de ces...

Read more
MAGADASCAR :
PERSPECTIVES DES ENTREPRISES

SÉRIE DE L’ITC SUR LES MESURES NON TARIFAIRES

6.1.2 Selected printed information sources

- 2007 Libéralisation des échanges de services et développement du tourisme
- 2006 - Kyambalesa H; Houngnikpo M C Economic Integration and Development in Africa
2005 Focus Report (Deliverable 3) : Madagascar Business and Market Expansion Project
2009 Regional Strategy for Cotton -to -Clothing Value Chain
2012 - Boateng N A Promoting Rural Enterprise Growth and Development : Lessons from Four Projects in Sub-Saharan Africa
1998 Répertoire sur les normes, les règlements techniques, les systèmes de certification, les laboratoires et l'expertise dans la région de la COI - 1998
2007 Global Trade and Poor Nations : The Poverty Impacts and Policy Implications of Liberalization
2013 Africa Competitiveness Report
2004 Madagascar ATRIP Program in Support of an Improved Investment and Trade Regime
2003 - De la Rocha M The Cotonou Agreement and its Implications for the Regional Trade Agenda in Eastern and Southern Africa
2006 Africa Foreign Investor Survey 2005
2010 - Kiratu S; Roy S Beyond Barriers : The Gender Implications of Trade Liberalization in Southern Africa
2013 e-COMESA Newsletter
2006 - Meyn, Mareike Regional Integration and EPA configurations in Southern and Eastern Africa : What are the feasible alternatives?
2011 ZDA Spotlight
2011 - Sandrey R Cape to Cairo : An Assessment of the Tripartite Free Trade Area
2006 - Ackerman, Frank Implications of REACH for the Developing Countries : Possible Ways and Means to Preserve their Interest
2000 Competition Policy, Trade and Development in the Common Market for Eastern and Southern Africa
2007 Asian Foreign Direct Investment in Africa : Towards a New Era of Cooperation Among Developing Countries
2008 Sub-Saharan Africa : Factors Affecting Trade Patterns of Selected Industries. - Second Annual Report
2010 - Meyer, N. Bilateral and Regional Trade Agreements and Technical Barriers to Trade : An African Perspective
2010 - Mackie J Joining up Africa : Support to Regional Integration
2010 - Ajumbo G Analysis of Regional Integration Cooperation in the COMESA and the EAC
2008 Perfil de la Industria Paraguaya de Software
2009 Characteristics of Malaysia's Animal Feed Market
2014 Perspectives on Global Development 2014: Boosting Productivity to Meet the Middle-Income Challenge
2010 Mobilizing Aid for Trade for SPS-Related Technical Cooperation in the Greater Mekong Sub-Region
2010 Leather Garments in the EU
2006 Overview of the Current State of Organic Agriculture in Kenya, Uganda and the Republic of Tanzania and the Opportunities for Regional Harmonization
2007 Export Diversification and Value Addition for Human Development : Addressing the Impact of the Agreement on Textiles and Clothing Expiration on Cambodia
2006 - Ruffing, Lorraine Deepening Development Through Business Linkages
2012 OECD Economic Surveys: Chile
2005 - Magder, D Egypt after the Multi-Fiber Arrangement: Global Apparel and Textile Supply Chains as a Route for Industrial Upgrading
2006 Bangladesh: Furniture Export Market Sector Brief
2006 - Boutou, Olivier Management de la sécurité des aliments : De l'HACCP à l'ISO 22000
2006 Trading up : Economic Perspectives on Development Issues in the Multilateral Trading System
2004 Perfiles de mercado para productos bolivianos en los mercados de Argentina, Brasil, Chile, Colombia, Ecuador, México, Paraguay, Perú, Uruguay y Venezuela
2010 Vietnam: Oilseeds and Products
2007 Organic Farming in the Czech Republic: 2007 Yearbook
2007 - Gibbon P; Bolwig S Economics of Certified of Organic Farming in Tropical Africa: A Preliminary Assessment
2006 The Relationship of Third-party Certification (TPC) to Sanitary / Phytosanitary (SPS) Measures and the International Agri-Food Trade; Case Study: Guatemala- with Emphasis on Food Safety
6.1.3 Selected online information sources

- Alliance for Commodity Trade in Eastern and Southern Africa (ACTESA)
- COMESA Food and Agriculture Market Information System (FAMIS)
- Southern African Enterprise Network (SAEN)
- Non-Tariff Barriers Reporting, Monitoring and Eliminating Mechanism
- Common Market For Eastern And Southern Africa (COMESA)
- TradeMark Southern Africa (TMSA)
- COMESA Statistical Database (COMSTAT)
- Cross Border Trade Desk (CBT DESK)
- Organisation InterAfricaine du Café (OIAC) = InterAfrican Coffee Organization (IACO)
- TradeAfrica.biz
- Leather Trade Information Portal (LMIP)
- COMESA afriBUSINESS
## 6.2 Trade Contacts

<table>
<thead>
<tr>
<th>Official Name</th>
<th>Address</th>
<th>City</th>
<th>Phone Number</th>
<th>Fax Number</th>
<th>Email</th>
<th>Website</th>
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<tbody>
<tr>
<td>Centre d’Informations Techniques et Economiques</td>
<td>Rue Samuel Rahamefy</td>
<td>Antananarivo</td>
<td>261 20 22 253 86</td>
<td>261 20 22 336 69</td>
<td><a href="mailto:cite@cite.mg">cite@cite.mg</a></td>
<td><a href="http://www.cite.mg/index.html/">http://www.cite.mg/index.html/</a></td>
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<tr>
<td>Association Crafters for Corporates</td>
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<td>+ 261 20 22 54864</td>
<td><a href="mailto:office.madagascar@ecocert.com">office.madagascar@ecocert.com</a></td>
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<tr>
<td>Groupement des Entreprises de Madagascar</td>
<td>Kianja MDRM sy Tia</td>
<td>Antananarivo</td>
<td>+261 202223841</td>
<td>+261 202221965</td>
<td><a href="mailto:gem@iris.mg">gem@iris.mg</a></td>
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<tr>
<td>Entreprendre au féminin Océan Indien EFOI Madagascar</td>
<td>Enceinte magasins généraux 5 rue Pasteur</td>
<td>Antananarivo</td>
<td>+261 33 37 00 245</td>
<td></td>
<td><a href="mailto:nr.contact@nrbp.o.com">nr.contact@nrbp.o.com</a></td>
<td><a href="http://www.w.efoi.biz">http://www.w.efoi.biz</a></td>
</tr>
<tr>
<td>Groupement des entreprises franches et partenaires (Madagascar export processing zone association)</td>
<td>BP 7564</td>
<td>Antananarivo</td>
<td>+261 20 22 380 50</td>
<td>+261 20 22 380 50</td>
<td><a href="mailto:gefp@bluelin.e.mg">gefp@bluelin.e.mg</a></td>
<td><a href="http://www.w.gefp.com">http://www.w.gefp.com</a></td>
</tr>
<tr>
<td>Centre de Recherches, d’Etudes et d’Appui à l’Analyse Economique à Madagascar</td>
<td>CREAM Lot II A 78 U A</td>
<td>Antananarivo</td>
<td>+261 34 09 395 08</td>
<td>+261 20 23 293 26</td>
<td><a href="mailto:tiaray@cream.mg">tiaray@cream.mg</a></td>
<td><a href="http://www.w.cream.mg">http://www.w.cream.mg</a></td>
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