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Gendered Impact of Dual Trade Shocks in the Garment and Textiles Sector in Madagascar

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Abstract

Madagascar's garment and textile sector employs 180 000 workers in Export Processing Zones, 57 per cent of whom are women concentrated in low-wage, precarious assembly roles within buyer-driven global value chains. This case study examines how US tariffs imposed in April 2025, alongside AGOA's expiry that October, expose asymmetric power dynamics in global trade, ranging from US buyer dominance over Malagasy firms to women's exclusion from trade negotiations, which together deepen gender injustice and compound existing inequalities. Firms' responses – layoffs, reduced hours, cost-cutting – have fallen disproportionately on women, who faced the risk of backsliding into poverty, greater exposure to gender-based violence, and loss of social protections. The study calls for gender-transformative reforms, including labour law enforcement, worker representation in trade policy, market diversification, and shock-responsive social protection.

1. Introduction

Madagascar's exposure to US tariffs and AGOA uncertainty has driven compounding shocks to an economy structurally dependent on preferential US market access. US-dependent garments and textiles (G&T) firms operating within Madagascar's Export Processing Zones (EPZ) face an uncertain future, and women are most impacted as they constitute the majority of workers in the sector.

The gendered impacts of the US tariffs illustrate how, in an export-oriented sector, high female employment masks deep structural inequality in labour markets. This case study examines these dynamics through a feminist political economy lens, analysing how tariff shocks, compounded by AGOA uncertainty, produce gendered outcomes at the macro (global trade regimes), meso (sectoral and institutional), and micro (household) levels.

A note on data

The analysis draws on secondary research and data-sets on trade and labour data from Madagascar's G&T sector. As the trade shocks are so recent, 2025–2026 data remains limited. Where gender-disaggregated data gaps exist, gender analysis draws on the structural vulnerabilities illustrated in this case study (e.g. women's overrepresentation in precarious, low-skilled roles) and historical experience, notably the COVID-19 pandemic and past financial and economic crises.

Primary data were collected through interviews with sectoral lobbying groups, garment and textile employers, trade unionists, the Ministry of Industrialisation, Trade and Consumer Affairs, and Malagasy and pan-African feminist economists. In keeping with a feminist political economy approach that recognises women's economic roles across both market and non-market spheres, this study focuses on women workers while acknowledging that women's economic lives extend beyond formal employment. The lack of direct worker interviews is a limitation the study partially addresses through trade union and feminist economist perspectives.

2. State of Play in Madagascar's Female-Dominated Garment and Textiles Sector

Madagascar launched its Zone et Entreprises Franches (ZEF) programme in 1989 to diversify from agricultural commodities into manufacturing (Bernard, 2011).¹ With ZEF's establishment, the G&T sector rapidly grew into the country's largest formal employer, driven by low wages and

preferential US market access under AGOA, conditional on low-value-added supply (Bernard, 2011; Marslev & Whitfield, 2023). These conditions locked Madagascar's sector into the cut-make-trim (CMT) assembly stage of the global value chain (Morris & Staritz, 2014; ILO, 2023), positioning supplier firms as low-cost assemblers in relationships defined by buyer dominance, with competition on labour costs alone (Gereffi & Frederick, 2010). Today, ZEF firms employ 180,000 workers, 57 per cent of whom are women, mostly based in the capital, Antananarivo (GEFP, 2024; Nicita, 2008).²

The sector's competitive advantage lies in a labour force dominated by young, relatively educated women concentrated in low-wage, semi-skilled assembly roles (Nicita, 2008).³ As such, women workers are central to Madagascar's ZEF sector, yet their position within it is defined by structural vulnerabilities across wages, contracts, and progression.

Insufficient Income Levels

Employment in ZEF firms has brought measurable improvements for women workers relative to their most likely alternative: the informal sector. ZEF hourly earnings are 77 per cent higher than informal wage work (Glick & Roubaud, 2006). At the same time, approximately 43 per cent of workers across the value chain remain below the poverty line, against a national backdrop in which 80 per cent of Madagascar's population lives in extreme poverty (ILO, 2023; Poverty Evidence, 2026). This suggests that employment gains remain real but insufficient to lift most workers out of poverty. Wages are rarely enough for workers who support more than one dependent alone and afford little protection against economic shocks – a vulnerability corroborated by one government official, who noted in an interview that any shock risks pushing workers back into

A Snapshot of Madagascar's Garment and Textile Sector

Box 2

2nd
largest sub-Saharan garment exporter to the US market

Garment and textile sector accounts for **20 %** of the country's GDP (2021)

Madagascar exported approximately **401.5 million** US dollars in G&T goods to the US (2025)

Garment and textile sector directly employs **180 000** workers, and 400 000 indirectly (2021)

Women workers represent **57 %** of the sector's workforce (2024)

¹ The Zone et Entreprises Franches (ZEF) scheme is Madagascar's EPZ Programme, focusing on industrial zones designed to attract investment in export-oriented businesses. Qualifying companies (i.e. *entreprises franches*) benefit from incentives including tax exemptions, customs advantages, and preferential market access.

² This figure is confirmed by 2012 stats reported by ODI (Calabrese et al., 2024). The figure was also cross-referenced with Groupement des Entreprises Franches et Partenaires (GEFP) (2024), which noted that the sector comprised 43 per cent men and 57 per cent women, with no data on the top management level. (The figures are unpublished and were shared with the author via email by a GEFP representative). These figures are also relatively consistent with a recent ILO study (2023), including a large-scale workers' survey in which respondents were 64 per cent women and 37 per cent men.

³ The average age of workers is between 20 and 45, with an official retirement age of 60 (ILO, 2023).

extreme poverty (Marslev & Whitfield, 2023; KII1).⁴ To compensate for insufficient incomes, most workers resort to paid overtime, with women accounting for 67 per cent of those who work extra hours (ILO, 2023).

Precarious Working Conditions

ZEF employment gains also mask structural precarity in women's working conditions, with limited job security due to their concentration in lower-skilled roles and insecure contracts. Women outnumber men in export-facing manufacturing and distribution, mainly in blue- and white-collar roles, while male workers are more evenly distributed across Madagascar's textile value chain, including agriculture, ginning, and weaving (ILO, 2023).⁵ Further, women are overrepresented in every form of insecure contract across Madagascar's CMT assembly process: they comprise 56 per cent of workers with no contract, 59 per cent of those on temporary contracts, and 68 per cent of those on daily contracts (ILO, 2023). High turnover is particularly pronounced in low-skill assembly roles – where women are most concentrated – driven by low wages and demanding workloads.

Limited Career Progression

Job progression for women remains constrained, further limiting formal employment gains. Men are statistically more likely to receive a promotion into supervisory roles than women with similar qualifications (Glick & Roubaud, 2006). A recent ILO survey (in which 64 per cent of respondents were women) found that 66 per cent of workers – mainly within manufacturing and distribution roles – reported no possibility of advancement in their current role (ILO, 2023), pointing to vertical occupational segregation that caps women's progression within the sector.

Limited Worker Bargaining Power

Trade unions operate within ZEFs but remain constrained by employer resistance and union fragmentation, limiting workers' collective bargaining power. Women are also underrepresented within unions, reportedly due to time constraints preventing attendance at union meetings and the perceived bargaining advantage of male workers (ILO, 2023). The structural barriers women face in formal employment are captured by one interviewee, »If you ask for too much, you will be fired and there are many people who want these jobs«.⁶

Overall, these structural vulnerabilities – insufficient incomes, precarious contracts, and limited progression – set the baseline conditions against which the impact of Madagascar's recent trade shocks must be understood.

3. Trade Shocks and Uncertainty: US Tariffs, AGOA Expiry, and Destabilising Livelihoods

In April 2025, the US imposed a 47 per cent tariff (10 per cent baseline plus a 37 per cent surcharge) on exports from Madagascar, later revised to 15 per cent. This tariff shock was compounded by the expiry of AGOA in October 2025, removing the duty-free US market access that many ZEF firms depended on to maintain their competitiveness (Grunow, 2025). This heightened trade instability threatened to put around 60 000 workers in the G&T sector at risk of losing their jobs or facing reduced workloads (Reuters, 2025).⁷

Trade Impacts

Figure 1 traces US imports from Madagascar between January 2024 and February 2026, revealing a pattern of volatility driven by US tariffs as well as by their interaction with AGOA expiry. Three inflection points capture the sequential impact of this dual trade shock. First, a spike in September 2025 reflects supplier firms front-loading orders to exploit the final window of AGOA preferential access before its October expiry (KII2_3).⁸ Second, a sharp 42 per cent drop in October 2025 (relative to October 2024) signals a deliberate pause by supplier firms, who held back new orders amid political uncertainty over AGOA renewal. Third, January 2026 exports fell below both 2024 and 2025 levels before a tentative recovery in February, suggesting early signs of restored buyer confidence as AGOA renewal discussions progressed.⁹ Taken together, the data suggest that while US tariffs appear negligible in isolation, their compounding effect with AGOA uncertainty produced significant and volatile disruption to Madagascar's export flows.

ZEF Firms' Response to Dual Trade Shock

US-dependent supplier firms reported being compelled to accept renegotiated terms heavily skewed toward US buyers, such as absorbing legal and logistics costs previously covered by buyers to avoid losing orders (KII3).¹⁰ This reflects a broader pattern in asymmetrical buyer-supplier relations,

4 Interview conducted with a representative of Ministry of Industrialisation, Trade and Consumer Affairs and former chair of WTO National Trade Facilitation Committee.

5 Madagascar's textile supply chain consists of three components: agriculture and ginning; spinning and weaving; manufacturing and distribution, with supplementary sub-contractors including stitching, screen printing, knitting, and embroidery (ILO, 2023).

6 Interview with Ministry of Industrialisation, Trade and Consumer Affairs (KII1), referring to women workers needing maternity leave, childcare facilities, transportation, and breastfeeding breaks.

7 The 60 000 jobs at risk reflect preliminary estimates by the GEFP when tariffs were first introduced. No sources explicitly describe how GEFP defined the risk of job loss or the nature of reduced workloads. However, the case study later reports the actual published job losses accrued up to the date of publication of this study.

8 This front-loading behaviour was confirmed through interviews with a GEFP representative (KII2) and a G&T firm (KII3). It should also be noted that the relatively high exports in June 2025 may partly reflect early front-loading following the April 2025 tariff announcement, though this modest increase compared to 2024 may equally reflect seasonal variation or growth in other export sectors beyond garments and textiles.

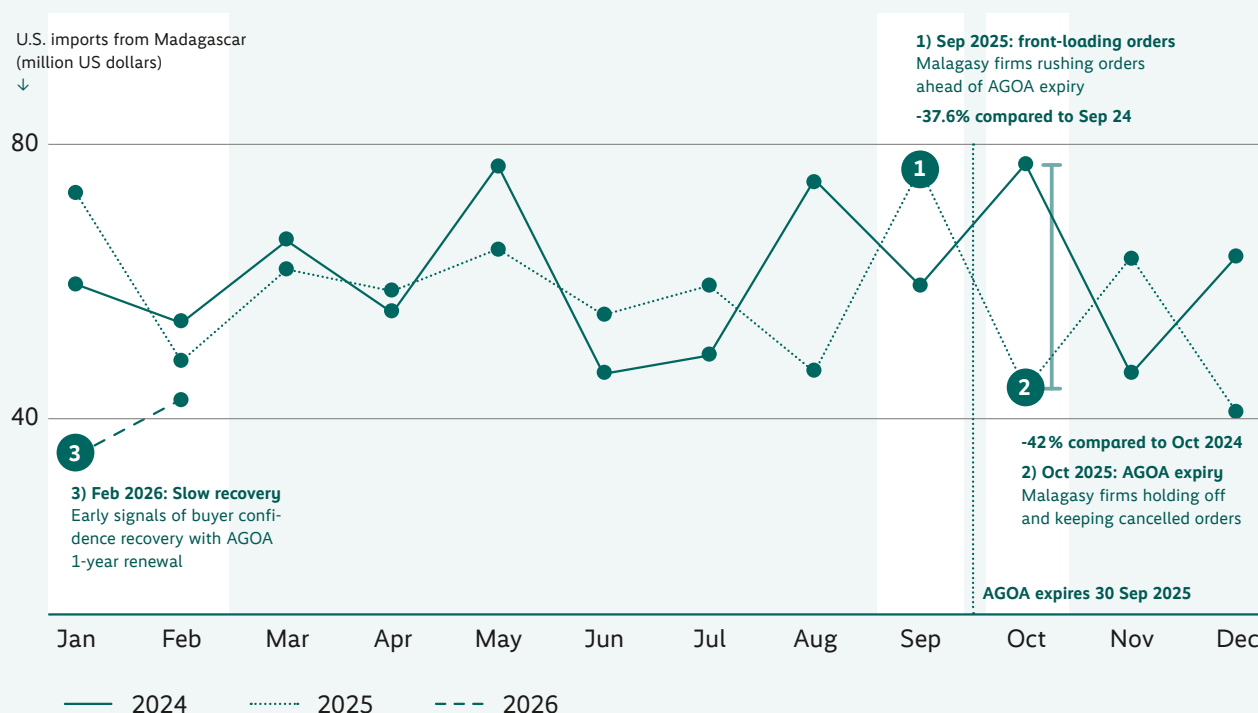
9 This apparent upturn should be interpreted cautiously, as February 2026 data is preliminary and the increase may reflect seasonal patterns rather than a sustained recovery.

10 Interview with a G&T firm impacted by US-imposed tariffs (KII3).

Fig. 1

U.S. Textile & Apparel Imports from Madagascar, million US dollars, 2024–2026

Monthly values (million US dollars). Three inflection points reflect the sequential impact of US-imposed tariffs and AGOA expiry on trade flows.



Source: U.S. Census Bureau, U.S. Trade in Goods with Madagascar; U.S. ITA OTEXA. Figures are nominal US dollars, not seasonally adjusted. 2026 data Jan-Feb only.

whereby suppliers routinely accept unfavourable terms during economic shocks (Venis, 2020).

Firms reduced operational costs and opted for layoffs to absorb the additional costs from renegotiated contracts and reduced orders from US buyers. By January 2026, ZEF representatives reported 7 000 direct job losses and reduced workloads across the sector (GEFP, 2026). One G&T firm interviewed reported that it follows a last-in, first-out procedure in line with Malagasy labour law. Interviewees unanimously characterised firms' responses to recent trade developments as 'gender-neutral', meaning layoff decisions were made without explicit reference to workers' gender. However, given women's disproportionate concentration in precarious roles with higher churn rates, evidence from Madagascar's past economic shocks suggests women were likely laid off in greater numbers.

Box 3

Past economic shocks have hit women hardest in Madagascar's ZEFs

In past economic shocks, firms in Madagascar also resorted to layoffs to maintain competitiveness, with women being laid off in greater numbers (Benería et al., 2016). During economic crises in 2002 and in 2009 that impacted Madagascar's ZEF firms, women workers faced job losses, shrinking wages, and reduced hours in greater numbers than men (Ravelosoa et al., 2015). In the 2002 financial crisis, women in ZEFs lost twice as many jobs as men (22 300 vs. 11 000). Similarly, the US' suspension of AGOA following Madagascar's political coup in 2009 led to the loss of 26 000 jobs, most of which were held by women (ibid, 2015). Pandemic-driven layoffs disproportionately affected operators and machinists with less than one year in post, accounting for 82.46 per cent of lost jobs (ILO, 2023), indicating layoffs hitting roles in which women are overrepresented.

Impacts on Women Workers and Society

The knock-on effects of trade shock-induced layoffs can have detrimental consequences on household's incomes, well-being, and security. A Malagasy trade official warned of workers' households backsliding into extreme poverty due to income losses (KII1).¹¹ For dual-income households where both partners were employed at the same factory,¹² dual redundancies compounded shocks to household income, leaving no income buffer. While limited data exist on households' coping mechanisms during the recent crisis, interviewees described the risk of food insecurity and families taking their children out of school as common coping measures (1_5_6).¹³

Gender-based violence (GBV) and sexual harassment are often unspoken but significant occupational risks that women workers already face at the workplace (KII4).¹⁴ This can intensify in households as job losses drive the stressors that can result in household and community exposure to GBV (Samy *et al.*, 2023). Other crises demonstrate similar patterns: during a recent drought in Madagascar women and girls were reportedly exposed to higher degrees of GBV by family members (World Bank, 2023). Interviewees also reported that women were taking on additional caregiving burdens or resorting to informal trading activities due to being back home.¹⁵

Beyond immediate displacement, the burden on women who retained employment is expected to intensify as firms downsize. In past shocks when wages and hours were reduced, Malagasy workers reported taking on additional hours or temporary jobs to compensate for reduced income (ILO, 2023). Past patterns of erosion in social protection during economic shocks can compound this precarity: Many ZEF enterprises stopped paying social security contributions during COVID-19, demonstrating that formal protections are among the casualties of firm-level cost-cutting (ibid, 2023).¹⁶ With already limited government social protection spending (averaging 0.2 per cent of GDP (IMF, 2023)), a trade unionist cautions that this precarity is structural and predates the trade shocks, viewing the shocks as amplifiers of existing structural conditions alongside diminishing social protection (KII4).¹⁷

4. Trade Policy Response: Negotiations and Missing Worker Perspectives

Madagascar's Diplomatic Efforts

The country's trade policy responses to both US tariffs and the expiry of AGOA centred on several diplomatic missions led by the Trade Ministry (Kugler & Washington, 2025). These efforts ran from April 2025, when tariffs were first imposed, through to early 2026, culminating in a tariff reduction to 15 per cent and a one-year AGOA extension. Madagascar's multi-layered crisis, combining economic, geopolitical, and environmental shocks, has left the country in a heightened state of economic and diplomatic vulnerability, depleting its bargaining power in ongoing trade negotiations with the US (KII1).¹⁸ In such fragile times, a Malagasy trade official reinforced the importance of African countries such as Lesotho and South Africa pursuing aligned – though independently conducted – negotiating positions with the US.

Despite these concerted efforts, the imposition of tariffs on AGOA-eligible goods exposed the fragility of US unilateral preferential agreements (Muhammed, 2025). Interviewees warned that the narrow renewal window is already distorting commercial behaviour: US buyers are offering smaller, shorter-term contracts on less favourable terms, leaving Malagasy firms with little leverage or predictability.¹⁹ In turn, Malagasy firms are unable to renew many of their workers' contracts.

A broader US strategic interest may be implicitly concurrent with tariff and AGOA renegotiations: securing increased access to African rare-earth reserves, including Madagascar's substantial deposits. Proposals to embed a critical minerals agreement within AGOA signal an attempt to lock African states into unfavourable terms heavily tilted towards US buyers (Baskaran, 2024). This architecture of access to manufactured goods traded for raw mineral extraction is consistent with a broader US strategy in which asymmetric trade dependency creates conditions for resource concessions with limited room for bargaining (Davies, 2025).

¹¹ Interview with Ministry of Industrialisation, Trade and Consumer Affairs (KII1).

¹² This is a common phenomenon.

¹³ Interviews with Ministry of Industrialisation, Trade and Consumer Affairs (KII1); Malagasy feminist economist (KII5); and Pan-African feminist economist (KII6).

¹⁴ Interview with a female trade union representative. Even though recent studies, such as Marslev & Whitfield (2023), indicate minor instances of sexual harassment mainly by supervisors to female factory workers, the interviewee emphasised the taboo nature of sexual harassment that is not captured by formal literature channels (KII4).

¹⁵ Interview with a Malagasy feminist economist (KII5).

¹⁶ Even though social security is considered a prerequisite for AGOA access, along with registration with the CNAPS and with an occupational health service under the Malagasy Labour Code, nearly half of the workers surveyed did not have access to these social protections during the pandemic (ILO, 2023).

¹⁷ Interview with a female trade union representative (KII4).

¹⁸ Interview with Ministry of Industrialisation, Trade and Consumer Affairs (KII1).

¹⁹ This was an outcome of a recent survey conducted by GEFP in January 2026 and received responses from 12 GEFP member textile and garment companies. Raw data of the survey was provided by the interviewee.

Collective Organising and Women Workers' Absence from Trade Negotiations

Behind trade negotiations lie divergent collective organising strategies shaped by these trade shocks, reflecting a broader pattern of weakened worker representation. G&T firms have adopted a proactive, lobbying-focused role, working closely with the government to address the economic disruption they have faced. In 2022, the Groupement des Entreprises Franches et Partenaires (GEFP), the body representing companies located in the ZEFs, joined the African Coalition of Trade to align with the US administration ahead of AGOA renegotiations, with the ultimate aim of securing a bilateral trade agreement and a long-term AGOA renewal. GEFP and select employers were also present during ministry-led US trade negotiations.

Unions and worker associations have taken to the streets and the courts in protest against layoff waves, organising demonstrations, filing lawsuits, and appearing before Ministry of Labour panel hearings. Yet despite this activity, workers' perspectives – and any gender lens – were absent from trade negotiations entirely. Trade Ministry representatives emphasised the importance of centring workers' rights in negotiations, yet confirmed that neither workers nor unions were present at the table during the government's discussions with the US on tariffs and AGOA renewal (KII4).²⁰

5. Gender-transformative Solutions to Trade

It is evident that the Malagasy government and firms have adopted a gender-blind approach, overlooking workers' – particularly women's – perspectives in trade negotiations. With tariffs reduced to only 15 per cent and AGOA renewed for just one year, trade uncertainty persists, making stronger labour protections and targeted support for women workers not only necessary but urgent. Women must be recognised not as passive recipients of policy, but as economic actors whose stability underpins Madagascar's broader economic performance. This calls for:

- 1. Strengthening existing social protection policies and programmes.** This involves enhancing enforcement of labour laws and social protections (e.g. National Social Insurance Fund (CNAPS), Malagasy Professional Training Fund (FMFP)) led by tripartite actors (i.e. government, employers' and workers' organisations); improving the safety nets provided to workers by introducing shock-responsive social protection measures that shield workers from bearing the personal cost of macroeconomic volatility and backsliding into extreme poverty; leveraging tax-incentive conditionalities stipulated for Export Processing Zone (EPZ) firms to generate revenue for social protection and care infrastructure (KII6).²¹
- 2. Trade architecture and negotiation.** This involves strengthening Madagascar's negotiating position by building bloc-level bargaining through the Southern African Development Community (SADC) and the African Continental Free Trade Area (AfCFTA); creating space for feminist, worker-centred perspectives in trade negotiation channels, while ensuring employer proactivity in securing trade deals for the country. This also requires rethinking trade success measures beyond export volume alone, instead considering the well-being of the workers who generate it.
- 3. Market diversification and upskilling.** This entails departing from US dependence in Madagascar's export industries by diversifying products and markets over time. Diversification toward the EU and intra-African trade offers a path toward greater resilience, but only if the transition is strategically planned with gender justice and long-term economic resilience in mind. Beyond diversifying its export markets, Madagascar's offer should be improved by upgrading its position in value chains to reduce price-taker status and increase bargaining power with buyers. Upskilling women into higher-value roles is one way to reduce their vulnerability and strengthen their individual and collective bargaining position, requiring the redesign of national training schemes such as FMFP to reflect this decisive gendered direction.
- 4. Collective bargaining and voice.** That involves strengthening worker voices in trade and labour policy channels, and workers' rights for freedom of association and collective bargaining. Strengthening organised action, addressing union fragmentation, and creating formal channels for worker representation in trade negotiations are all necessary steps.

²⁰ Interview with Ministry of Industrialisation, Trade and Consumer Affairs (KII1).

²¹ Interview with a pan-African feminist economist (KII6).

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Access to full study



Gendered Impacts – Blind Responses

The 2025 Tariff Crisis and the Case for
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