

# EXPORT insights

DECEMBER 2023



MARKET TRENDS  
AND EMERGING  
OPPORTUNITIES  
IN SUSTAINABLE  
TRADE

# EXECUTIVE SUMMARY

The trade landscape is changing rapidly with increased linkages between trade and environment policy and the gradual implementation of new rules that mitigate the impact of trade on climate change. With the rise in environmental threats, a new trade landscape is being shaped with the emergence of new 'green' trade rules, new consumer segments and new buyer requirements.

For the last two decades, the focus for many countries, including Mauritius, has been primarily on the negotiation of preferential trade agreements for the removal of tariffs and non-tariff barriers for enhanced preferential market access on goods. Today, the new generation of trade agreements goes beyond trade liberalisation and has a much wider scope, and includes in-built provisions on trade and sustainable development, environmental standards and climate change among others. In addition, countries are also adopting new measures aimed at ensuring sustainable manufacturing practices with the use of clean energy, reduction of pollution and waste, recycle and reuse materials, and moderate emissions in their processes. Initiatives such as the EU Green Deal and the Carbon Border Adjustment Mechanism (CBAM) aim to boost the efficient use of resources by moving to a clean and circular economy, revert biodiversity loss and reduce pollution. These new trade rules are gradually becoming the new guiding principles for the manufacturing sector.

At the same time, the global consumer is also evolving and becoming more conscious of the difference they can make through their purchase behaviour and help address the environmental concerns relating to climate change. Today, 'green consumerism' is on the rise with a new generation of consumers choosing products that are less harmful to the environment and promote the use of eco-friendly (or green) products. While the 'green consumer' segment is still a niche market, it is a segment that is poised to a strong growth in the coming years.

Over the last few decades, the structure of our export sector has evolved moving from a monocrop agricultural-based economy into more diversified sectors including textiles and clothing, fish and fish products, jewellery and, more recently, medical devices.

An analysis of the export figures over the last ten years provides some interesting insights:

- The European Union, the United States and United Kingdom still remain key markets for Mauritian exporters with over 70% of our exports destined to these three markets in 2022.
- South Africa, Madagascar, Reunion Island, Kenya, and Seychelles were now in our top 10 export markets in 2022 indicating the growing importance of regional markets and regional value chains for Mauritius.
- Exports to EU remained highly concentrated, with 75% of exports destined to France, Spain, Netherlands, Italy, and, interestingly, Reunion Island. Opportunities to expand exports and explore new markets within the EU region is still untapped.
- The export product categories have remained the same over the review period with fish and fish preparations, cane sugar, and textile and apparel leading the export market. These three product categories represented 71% of total exports.
- In 2022, exports to preferential markets represented 86% of total exports to the world and the top 20 countries accounted for over 80% of our total exports.
- In 2022, 95% of exports to Africa were destined to five countries namely South Africa, Madagascar, Kenya, Seychelles and Tanzania, which are SADC and COMESA countries. The top products exported were garments, sugar, fabrics, plastic products, and animal feed.
- With the advent of the African Continental FTA, the whole African continent will gradually become a duty-free market and represent huge export opportunities for Mauritius. An analysis of the main trade and economic indicators help identify countries as potential markets on which exporters could focus as a way forward in targeting African countries, including in Western and Northern Africa.

- Sectoral analysis indicates the evolution of exports for products manufactured locally, both by export-oriented and local manufacturers. It also provides guidance on potential products which could be targeted in our export promotion efforts.

While Mauritius already has access to wide range of preferential markets, our actions need to be two-fold. First, there is a need to identify new products with export growth opportunities to maximise access under the various FTAs' and second, ensure that our existing exports have an edge over competing products in our main exports with the rapidly changing trade environment.

Since Mauritius is actively exploring avenues to expand its market reach through its preferential trade agreements, it needs to develop a comprehensive strategy to improve its export capacity and to rapidly adapt to changing market and consumer requirements. Mauritius could consider the following pathways:

## **EXPANDING THE EXPORT BASE**

One of the current challenges remain the limited number of 'exportable' products. While in the short to medium term, targeted efforts are been undertaken to attract foreign investment to manufacture in Mauritius and take advantage of our extensive preferential market access. A quick win would be to accompany our local manufacturing industry (non-EOEs) towards a transition into an export-oriented model. Already a wide range of products ranging from animal feed, pasta, packaging materials (plastic and paper), aluminium structures, are being produced and exported mostly to regional markets. Targeted support to assist the local manufacturing industries in achieving export objectives would lead to widening of the export manufacturing base.

## **TRANSITIONING TOWARDS GREEN MANUFACTURING**

The changing trade landscape warrants rapid action as the international regulatory requirements, buyer specifications and consumer preferences are also changing. Rapid transition in adopting green manufacturing would give a definite advantage to Mauritian exporters in capturing the growing 'green market' segment. Moreover, the adoption of 'green labels' by manufacturing industries would ensure a strong competitive edge as buying behaviours across the globe are now clearly changing in favour of environmentally friendly products.

## **TARGETING THE 'GREEN CONSUMER'**

Green consumerism is a rapidly growing segment of consumers in several countries and is seemingly significantly influencing consumer behaviour, especially millennials and younger consumers. As a result, numerous brands have embraced sustainability and have marketed products as being eco-friendly.

The use of 'green labels', such as ecolabels, energy labels, recycle labels, organic and fair trade, are becoming increasingly important both for importers and consumers, especially in more developed markets. While green products and services are only a niche market today, they are poised for strong growth with consumers more and more willing to pay a premium for green products and contribute to climate change.

## **EXPANDING TRADE HORIZONS**

Maximising market access opportunities in our preferential trade agreements remains crucial. Trade figures indicate high concentration of exports on a few markets both in Europe and Africa highlighting the need for sustained efforts targeted towards other preferential markets in these various FTAs. Moreover, the newly signed trade agreements with China, India and the upcoming AfCFTA remain to be exploited to their full potential. Potential export markets and products have been identified based on actual exports.

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# INTRODUCTION

**Mauritius has successfully transitioned from the agricultural, textile and tourism-based economy of the 1980s and 1990s to become more open and services-oriented. Bold economic reforms, openness to international trade and investment and a strategic utilization of trade preferences in major markets which include the European Union, Africa and North America have been instrumental in the Mauritian economic miracle since independence.**

The European Union and the United States have historically been major export partners for Mauritius. Over the last decades, the Sub-Saharan African region has risen as an important market for Mauritian manufacturers. More recently, the signature of three trade agreements namely the Mauritius-China Free Trade Agreement, the Mauritius-India Comprehensive Economic Cooperation and Partnership Agreement (CECPA), and the African Continental Free Trade Agreement (AfCFTA), have provided enhanced preferential market access to India, China and Africa. Our preferential markets represent over 80% of the world's population and provides huge export opportunities for Mauritius to leverage on.

Mauritius, being an export driven economy, is constantly under the pressure of fierce global competition. With the world changing at a very fast pace, there are new challenges for the industry as well as opportunities. Major developments such as increased use of AI in design and manufacturing, trends for adopting more sustainable production methods and the rise of the eco-friendly consumer constitute new opportunities for our local manufacturing and export sector.

This edition of the 'Export Insights' aims to provide an overview of the evolution of the export structure of the Mauritian market for goods over the period 2012 to 2022. Section 1 provides an overview of the evolution in export trends from 2012 to 2022, with a comparative analysis of main markets and product categories.

Section 2 provides an analysis of the export trends with major preferential markets, namely the European Union (EU), United Kingdom (UK), United States (US), India, China, and Africa. A deeper analysis has been carried out for trade with Africa, encompassing trade analysis with SADC/COMESA as well as a study for identifying new market and product opportunities within the region.

Section 3 provides a detailed analysis of Mauritius' main export products, namely fish and fish products, cane sugar, textiles and apparel, articles of jewellery, medical instruments, and leather products. This section also provides an analysis of potential emerging export products, namely, beverages, pasta, animal feed, soap and detergents, paint and varnishes, and packaging products (plastics and paper).

Section 4 delves into the potential pathways that could be undertaken to consolidate and revamp our export structure. This strategic approach involves not only broadening the range of products and services available for export but also reinforcing the country's position in existing markets while exploring new ones.

This entails the transformation of our local enterprises into export-oriented enterprises (EOE), ultimately facilitating the export of a broad spectrum of non-traditional products like animal feed, soap & detergents, paper, and plastic packaging. Simultaneously, recognizing the growing significance of the circular economy, there is a pressing need to align local enterprises with the export of eco-friendly and green products, embracing a green manufacturing approach. The achievement of these goals can be facilitated by capitalizing on various free trade agreements in place. This strategic leveraging of trade agreements can play a crucial role in propelling Mauritius towards a more dynamic and sustainable position in the global export market.



# GENERAL OVERVIEW

Exports remain a vital component of economic strategy for Mauritius, contributing to economic growth, job creation, and overall development of the island. The contribution of exports to the economic growth of Mauritius is substantial, and the country has historically relied on a strong export sector to drive development, and Mauritius has left no stone unturned on maintaining its export-oriented objectives to drive its economic growth. Over 2012-2022, exports of goods represented an average of 19% of the country's Gross Domestic Product (GDP) at current market prices.

Traditionally, key exports have included sugar, garments and preserved fish. Over the years, Mauritius has successfully diversified its export base to reduce its dependence on only a few key sectors. Today, the export-oriented

industries also include medical devices, fabrics, worked diamonds, sunglasses and jewellery. Concerted efforts have also been made to enhance value addition in other sectors, such as agro-processing, leather products as well as soap and detergents. It is to be highlighted that the extensive network of preferential trade agreements has been a key enabler for local manufacturers and export-oriented industries.

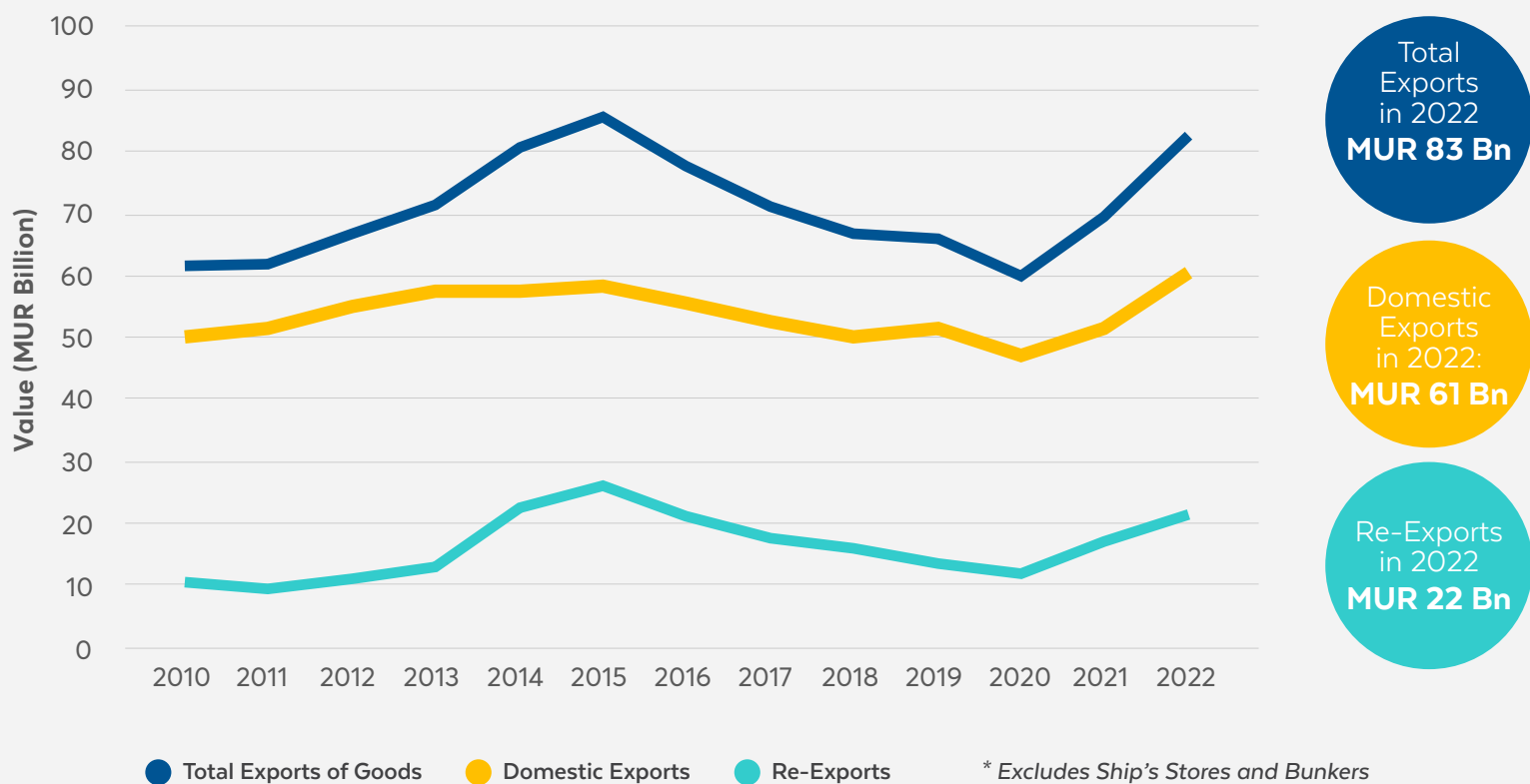
The following section examines the export performance of Mauritius over the period 2012 to 2022, with focus on evolution of export markets and products.

## Evolution of Exports (2012-2022)

During the period 2012 to 2022, the overall nominal value of total exports (domestic and re-exports) has increased from MUR 67 billion in 2012 to MUR 83 billion in 2022. Pre-covid (2012-2019), total exports averaged MUR 74 billion before falling to MUR 66 billion in 2020. With the subsequent opening of borders and the gradual normalisation of activities, total exports improved substantially to MUR 70 billion in 2021, and further to MUR 83 billion in 2022.

A breakdown of total exports into domestic exports and re-exports over the period 2012 to 2022 is shown in Figure 1.

Figure 1: Evolution of Exports (2012-2022)



From 2012 to 2022, domestic exports have increased from MUR 56 billion to MUR 61 billion. During the 2012-2021 period, the nominal value of domestic exports has remained stable, averaging MUR 54 billion per annum. In 2022, domestic exports for the first time reached MUR 61 billion representing 73% of total exports.

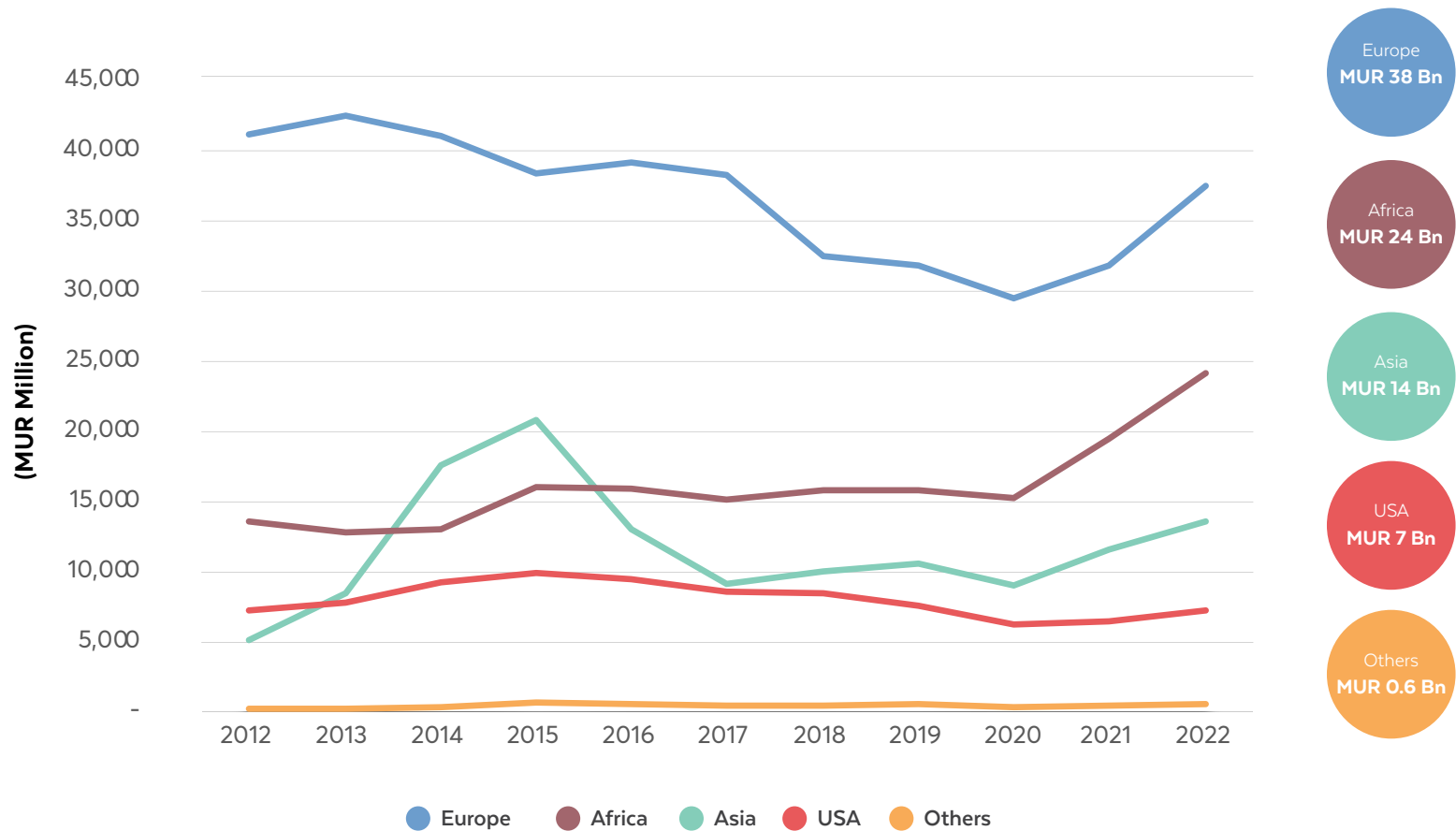
Domestic exports constituted mainly garments (chap 61 & 62), prepared or preserved fish (HS 1604), and cane sugar (HS 1701) representing 75% and 61% of total domestic exports in 2012 and 2022 respectively. The domestic export figures in 2022 also highlights the significant increase in the export of new products such as medical instruments and fabrics.

Re-exports represented 27% of total exports in 2022 and comprised mainly jewellery (MUR 4.2 billion), frozen fish (MUR 2.6 billion), and machinery/mechanical appliances (MUR 1.7 billion). The re-export of Jewellery items rose significantly from MUR 492 million in 2012 to MUR 4.2 billion in 2022. This is mainly due to a significant rise in re-exports of polished diamonds from MUR 40 million in 2012 to MUR 3.7 billion in 2022, destined to Viet Nam.

## Total Exports by Geographical Region

A breakdown of exports by geographical region indicate that Europe remains our main export market with 45%, followed by Africa.

Figure 2: Evolution of Exports by Geographical Region (2012-2022)



Source: External Trade, Statistics Mauritius

An analysis of Mauritius' by export region reveals that Europe maintains its position as the primary destination for Mauritian products. More specifically, the European Union (EU) remains a key preferential market for Mauritius where exports have been carried out under various preferential trade agreements including the ESA-EU Interim Economic Partnership Agreement and the UK-ESA Economic Partnership Agreement which grant duty free and quota free market access for Mauritian products, as well as the Generalised System of Preferences (GSP) schemes with specific countries such as Switzerland.

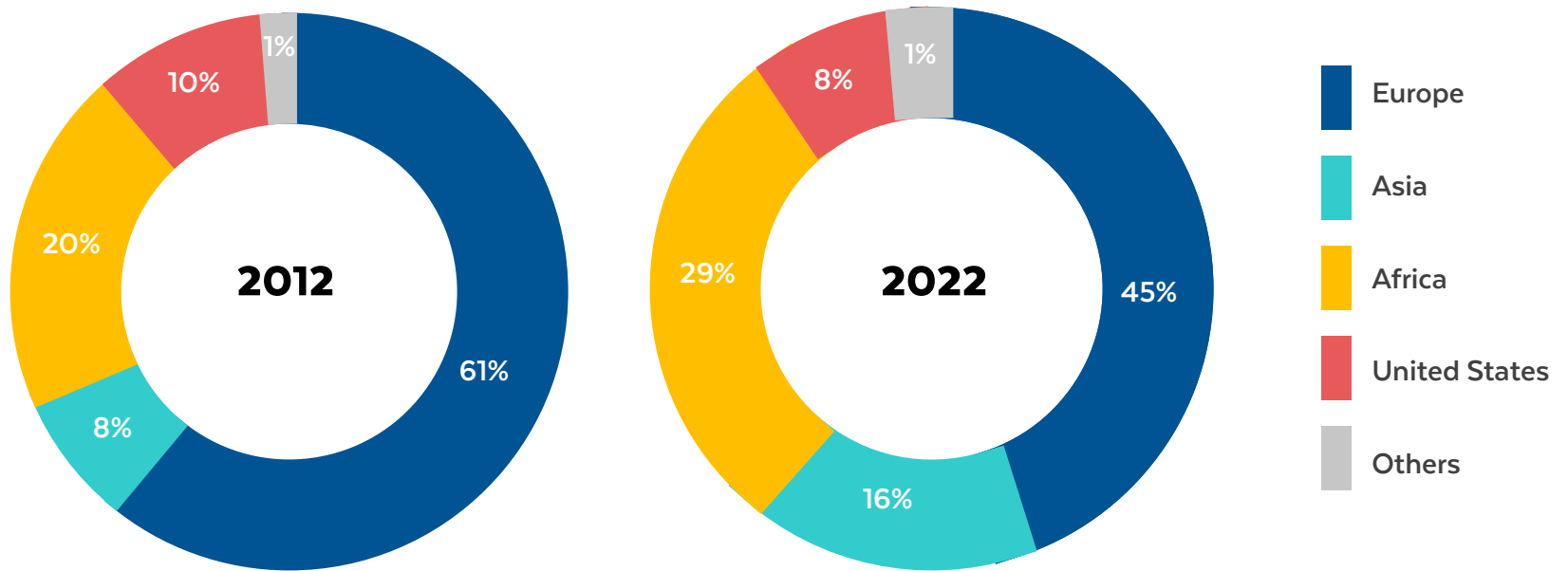
Over the same period, exports to the American continent have been primarily destined to the USA with a value of MUR 7.3 billion in 2022 representing 92% of total exports to this region.

It is interesting to note that improved market access and the easing of trade barriers over the years has propelled Africa to become a major export destination for Mauritius. From 2012 to 2022, the nominal value of exports to Africa have increased by over 77% from MUR 14 billion to reach MUR 24 billion.

Europe\*: All European Countries (including United Kingdom, Norway, Switzerland, Iceland and Liechtenstein)



Figure 3: Market Share by Geographical Region (2012 - 2022)



Source: External Trade, Statistics Mauritius



## Main Export Markets

Over the last ten years, significant changes can be noted with regard to our top 20 export markets. While European countries and the US remain key export markets for Mauritius, it is important to note the changing trade dynamics and the emergence of the regional market. A significant increase in exports to countries in the region namely South Africa, Madagascar, Reunion Island, Kenya and Seychelles can be noted with the total exports to these five countries representing 30% of our total exports in 2022.

Table 1: Evolution of Top 20 Export Markets

	2012			2022		
	Countries	Value Exported (MUR Million)	Share to total exports	Countries	Value Exported (MUR Million)	Share to total exports
1	UK	12,497	19%	South Africa	11,090	13%
2	France	8,720	13%	Madagascar	7,451	9%
3	US	6,714	10%	France	7,205	13%
4	South Africa	6,693	10%	UK	7,123	9%
5	Italy	4,892	7%	US	6,686	9%
6	Spain	4,862	7%	Spain	5,501	9%
7	Madagascar	4,641	7%	Viet Nam	3,733	8%
8	Reunion	2,092	3%	Netherlands	3,218	7%
9	Belgium	1,916	3%	Reunion	3,025	4%
10	Germany	1,246	2%	Italy	2,817	4%
11	Netherlands	1,244	2%	India	2,584	4%
12	Japan	1,033	2%	Kenya	2,537	3%
13	Switzerland	927	1%	Belgium	1,897	3%
14	Seychelles	883	1%	Taiwan, China	1,489	3%
15	Viet Nam	573	1%	Germany	1,345	2%
16	India	552	1%	Switzerland	1,250	2%
17	Singapore	548	1%	Seychelles	1,216	2%
18	Taiwan	486	1%	UAE	1,114	2%
19	UAE	443	1%	Thailand	734	1%
20	Greece	433	1%	Portugal	693	1%

Source: External Trade, Statistics Mauritius

In 2012, Mauritius' main export partners were the United Kingdom (UK), followed by France and the United States (US). A major shift can be noted in 2022 with South Africa, Madagascar and France leading as the top export markets.

These varied dynamics highlight the changing export landscape for Mauritius and the varying trajectories of its trade relations with different countries. Among other European countries is Portugal which joined the league of the top 20, with exports rising from MUR 255 million to MUR 693 million over the past decade driven by an increase in exports of preserved fish, cane sugar, and fish oils.

Exports to Africa have significantly risen over the past decade, thus, propelling South Africa and Madagascar as the two leading export destinations for Mauritius in 2022.

Exports to both countries saw impressive increases by 66% and 61%, respectively in 2022. Additionally, Mauritius has witnessed remarkable growth in exports to Kenya, which escalated from MUR 333 million in 2012 to MUR 2.5 billion in 2022. This noteworthy performance has propelled Kenya from the 22nd position in 2012 to the 12th position in 2022, underlining the expanding trade ties between Mauritius and African nations.

Exports to Viet Nam have been on the rise over the past decade, levelling up from MUR 573 million in 2012 to MUR 3.7 billion in 2022. The main products exported to Viet Nam were polished diamonds, flours, meals, and pellets. In 2022, Thailand became one of the top 20 export destinations for Mauritius. A decade earlier, in 2012, Thailand held the 31st position with an export value of MUR 193 million. Over the course of these ten years, exports to Thailand experienced a nearly fourfold increase, reaching MUR 734 million in 2022. This remarkable growth was fuelled by a notable increase in the export of frozen fish and worked precious stones from Mauritius to Thailand.



## MAURITIUS' TOP 20 EXPORT MARKETS ACCOUNTED FOR

**91%** of Total  
Exports  
in 2012

AND FOR

**87%** in  
2022



## Main Export Products

A breakdown of Mauritius' total exports of goods clearly indicates that fish and fish products (frozen and preserved), garments, cane sugar, and jewellery articles (mainly polished diamonds) have been dominating the export market over the past decade. In 2012, these four dominant categories collectively represented 73% of Mauritius' total exports, indicating their substantial contribution to the export market. However, by 2022, this combined market share decreased to 58%, highlighting a shift in the composition of exports and the emergence of other products.

**Table 2: Top 20 Export Product Categories**

Chap	Description	2012		2022	
		Rank	Value (MUR Mn)	Rank	Value (MUR Mn)
16	Preparations of meat, of fish or of crustaceans	2	10,444	1	11,334
61	Articles of apparel and clothing accessories, knitted or crocheted	1	14,089	2	9,549
62	Articles of apparel and clothing accessories, not knitted or crocheted	3	9,476	3	8,962
17	Sugars and sugar confectionery	4	8,530	4	8,828
71	Natural or cultured pearls, precious or semi-precious stones, imitation jewellery	5	4,270	5	5,959
3	Fish and crustaceans, molluscs and other aquatic invertebrates	6	2,294	6	3,586
60	Knitted or crocheted fabrics	14	800	7	3,185
90	Optical, photographic, medical or surgical instruments and apparatus	7	1,303	8	2,418
1	Live animals	16	681	9	2,183
30	Pharmaceutical products	10	900	10	2,068
39	Plastics and articles thereof	15	761	11	2,035
84	Boilers, machinery and mechanical appliances; parts thereof	11	878	12	1,774
23	Residues and waste from the food industries; prepared animal feed	13	832	13	1,529
91	Clocks and watches and parts thereof	12	864	14	1,479
22	Beverages, spirits and vinegar	18	534	15	1,325
76	Aluminium and articles thereof	30	251	16	1,276
72	Iron and steel products	23	342	17	1,228
52	Cotton	9	1,160	18	1,186
95	Toys, games and sports requisites	31	248	19	1,110
85	Electrical machinery and equipment	8	1,194	20	1,008

Source: External Trade, Statistics Mauritius

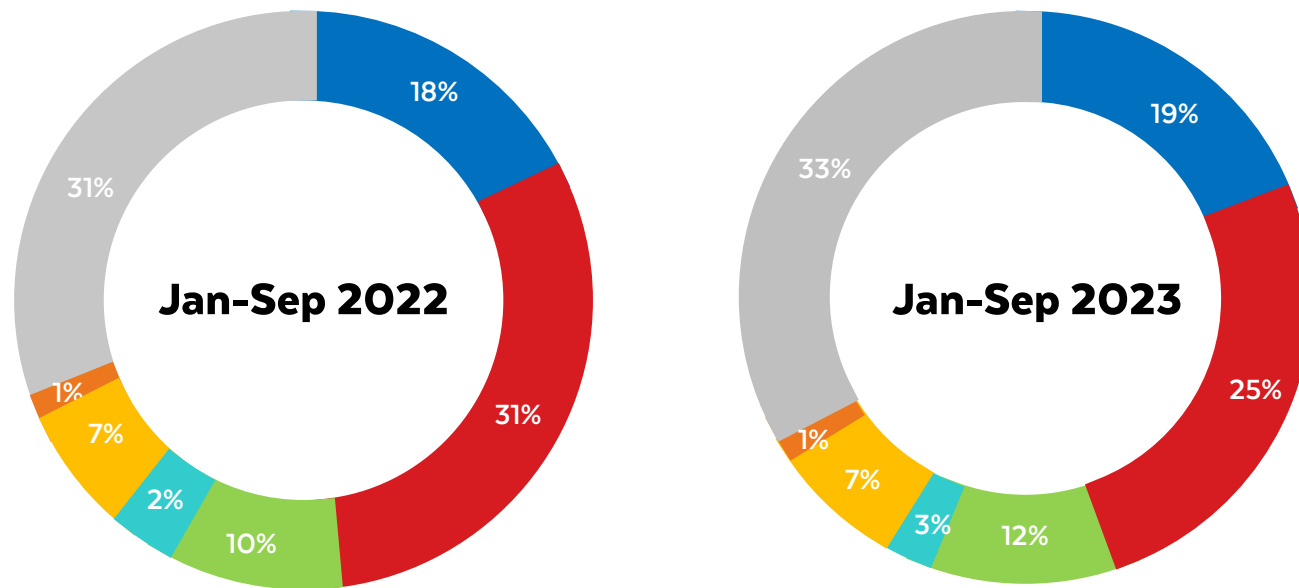
It is worth highlighting the substantial increase in the export of knitted and crocheted fabrics over the last ten years from MUR 800 million to MUR 3.2 billion in 2022. In 2022, fabric was the 7th largest exported product and representing 4% of total exports to the world.

It is to be noted that jewellery articles (Chap 71), frozen fish and crustaceans (Chap 03) and pharmaceutical products (Chap 30) consisted mainly of re-exports in 2022.

## Trade Snapshot: Jan-Sep 2023

Trade in goods continues to be a significant economic foundation for Mauritius. As per latest figures provided by Statistics Mauritius, total exports of goods during the first three quarters of 2023 amounted to MUR 64 billion compared to MUR 60 billion in 2022.

Figure 4: Main Export Product Categories (Jan-Sep 2023)



MUR Mn	Fish and Fish Products (Chap 03 & HS 1604)	Textiles & Apparel (Chap 50-63)	Cane Sugar (HS 1701)	Medical Devices (HS 9018)	Articles of Jewellery (Chap 71)	Leather Products (Chap 42)	Other Products
Jan- Sep 2022	10,745	18,576	5,859	1,434	4,386	625	18,722
Jan-Sep 2023	12,397	15,962	7,600	1,640	4,716	714	20,978

Source: External Trade, Statistics Mauritius

It is worth noting the rise in exports of pasta (HS 1902) by 77% (from MUR 190 million to MUR 336 million), and wood products (Chap 44) by 64% (from MUR 173 million to MUR 285 million).

**Table 3: Top 15 Product Categories (MUR Million)**

HS Code	Description	Q1-Q3 2022	Q1-Q3 2023	% Change
<b>1604</b>	Prepared or Preserved Fish	8,060	9,280	15%
<b>1701</b>	Cane or beet sugar	5,859	7,600	30%
<b>6203</b>	Men's or boys' suits	3,825	3,418	-11%
<b>0106</b>	Other live animals	1,579	3,128	98%
<b>7102</b>	Polished diamonds	3,172	2,936	-7%
<b>0303</b>	Frozen fish	1,958	2,489	27%
<b>6109</b>	T-shirts, singlets and other vests, knitted or crocheted	2,839	2,413	-15%
<b>6006</b>	Other knitted or crocheted fabrics	1,846	1,816	-2%
<b>9018</b>	Medical Instruments and Appliances	1,434	1,640	14%
<b>6205</b>	Men's or boys' shirts	1,098	1,094	0%
<b>3004</b>	Medicaments	1,088	1,086	0%
<b>6110</b>	Jerseys, pullovers, cardigans, articles, knitted or crocheted	1,132	1,009	-11%
<b>6204</b>	Women's or girls' suits, ensembles	1,330	994	-25%
<b>3923</b>	Articles for the conveyance or packing of goods, of plastics	791	953	21%
<b>6104</b>	Women's or girls' suits, ensembles, knitted or crocheted	1,230	940	-24%

Source: External Trade, Statistics Mauritius

South Africa remains the leading export destination with exports amounting to MUR 6.7 billion although a decline of 21% in value exported can be noted when compared to Q1-Q3 2022. The United States ranked in second position with exports amounting to MUR 6.2 billion (+21%).

**Table 4: Top 10 Export Markets**

Q1-Q3 2022 Top Export Markets (MUR Mn/Share)			Q1-Q3 2023 Top Export Markets (MUR Mn/Share)		
South Africa	8,478	14%	South Africa	6,701	10%
Madagascar	5,500	9%	United States	6,155	10%
France	5,346	9%	France	5,984	9%
United Kingdom	5,337	9%	United Kingdom	5,926	9%
United States	5,081	8%	Madagascar	4,498	7%
Spain	3,430	6%	Spain	4,341	7%
Viet Nam	2,734	5%	Italy	3,190	5%
Reunion	2,244	4%	Viet Nam	2,614	4%
Netherlands	2,213	4%	Netherlands	2,403	4%
India	1,973	3%	India	1,973	3%

Source: External Trade, Statistics Mauritius

# TRADE WITH PREFERENTIAL MARKETS

## Overview

Trade Agreements play a crucial role in advancing international trade by enhancing market access and competitiveness for exporters. Mauritius, as a diverse and open economy, has signed numerous trade agreements and is continuously working to broaden its network of trade agreements.

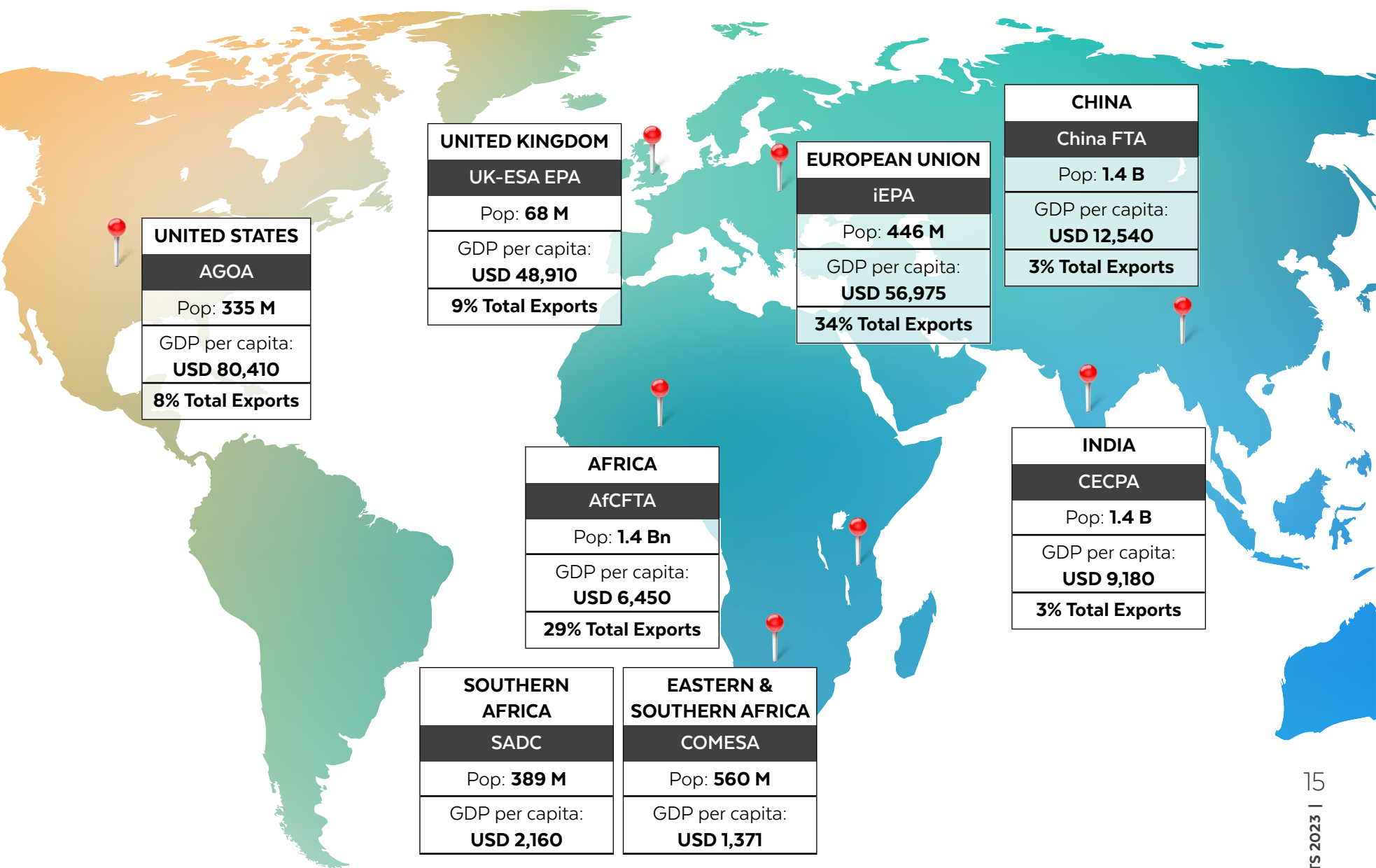
Currently, Mauritius receives preferential trade treatment from various regional agreements. In the African region, the country is a member of the Southern African Development Community (SADC), Common Market for Eastern and Southern Africa (COMESA), the Indian Ocean Commission (IOC), and the recently ratified African Continental Free Trade Agreement (AfCFTA). The trade agreements predominantly provide preferential market access on the African Continent.

Mauritius has also signed several regional and bilateral trade agreements, including the Interim Economic Partnership Agreement with the European Union, Economic Partnership Agreement with the UK, Comprehensive Economic Cooperation and Partnership Agreement with India, Free Trade Agreement with China, Preferential Trade Agreement with Pakistan, and Free Trade Agreement with Turkey. Notably, the country benefits from Generalized System of Preferences schemes with Japan, Norway, and Switzerland, and it has access to the US market through the African Growth and Opportunity Act.

Presently, Mauritius is negotiating a Preferential Trade Agreement with Indonesia and has recently concluded its technical negotiations for a Comprehensive Economic Partnership Agreement (CEPA) with the United Arab Emirates. The CEPA with the UAE is expected to provide Mauritius improved market access for goods and services and will likely also cover other related areas of trade and investment.

**IN 2022, 86% OF  
MAURITIUS' TOTAL  
EXPORTS WERE  
DESTINED TO  
PREFERENTIAL  
MARKETS AS  
COMPARED TO 90%  
IN 2012.**









## European Union (EU)

The EU is one of the largest markets, with a consumer base of 446 million people and a GDP of over Euro 15 trillion. The EU has remained a key market for Mauritian exporters with sustainable and long-term relations built over the years. Since the 1970s, Mauritius has been exporting to Europe under the successive Lomé Conventions preferences, the Cotonou Agreement, and under the Interim Economic Partnership Agreement (iEPA) which was signed in 2009.

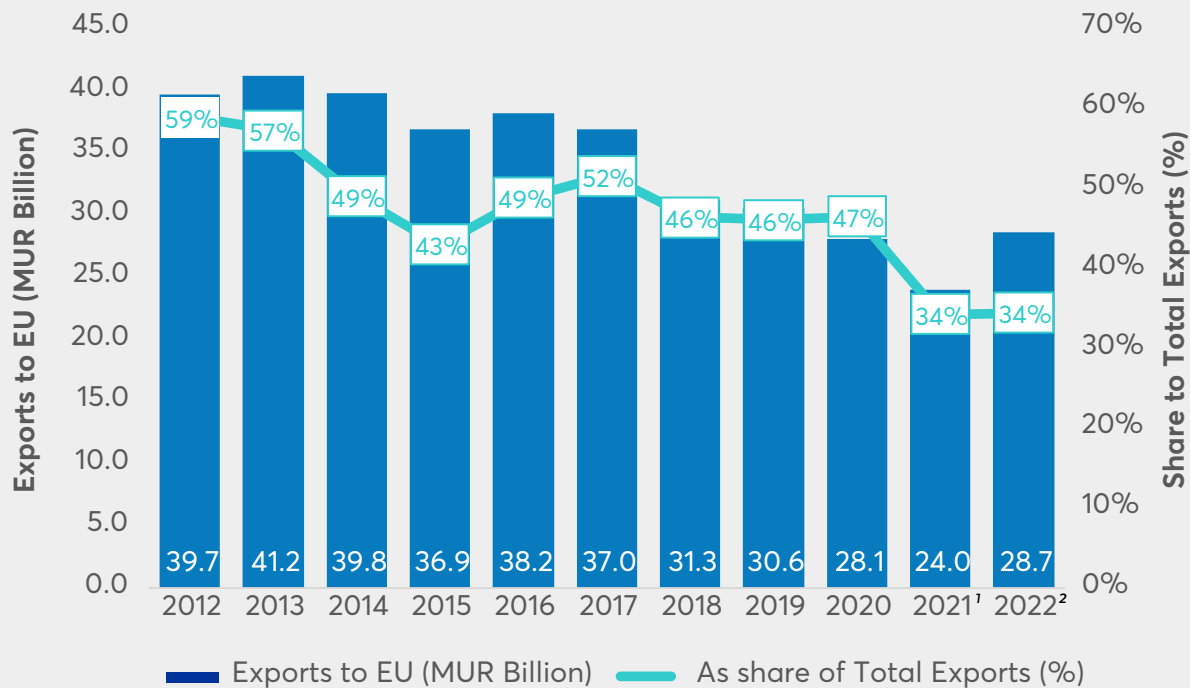
The iEPA provides duty-free, quota-free market access for all exports to the EU originating from Mauritius and other participating Eastern and Southern (ESA5) states. The present agreement covers goods, fisheries and economic development. The iEPA rules of origin are product-specific rules. Notably, the agreement provides duty-free access to ESA countries, including Mauritius, and an automatic derogation of 8000 metric tons of preserved tuna and 2000 metric tons of tuna loins annually which allows ESA countries to process non-originating tuna for export to the EU.

Since 2019, the EU and ESA(5) have resumed negotiations to deepen the existing agreement to cover other areas of trade, such as services, intellectual property, and investment facilitation among others. In addition, the parties are working to improve the rules of origin for certain goods as well.

Over the 2012-2022 period, the EU was the main export market for Mauritius' locally manufactured products, with total exports averaging MUR 34.1 billion during the corresponding period.



Figure 5: Evolution of Exports to EU



<sup>1</sup>EU includes Reunion and Mayotte

<sup>2</sup>From 2012 to 2020, export figures include UK

<sup>3</sup>From 2021 to 2022 (post-Brexit), export figures do not include UK.

Source: External Trade, Statistics Mauritius

Before the onset of COVID-19, Mauritius' exports to the EU were annually above MUR 30 billion. However, during the pandemic crisis, a decline was observed, with exports dropping to MUR 28.1 billion. The exit of the United Kingdom (Brexit) from the EU in 2021 led to a subsequent decrease in exports to the EU to MUR 24.0 billion. However, there was a notable improvement in 2022 with exports rebounding to MUR 28.7 billion. It is also to be noted that the market share of EU exports as compared to our total exports has progressively diminished over the past decade. In 2012, EU exports accounted for 59% of the total, whereas by 2022, this market share had declined to 34%.

Mauritius' exports remain highly concentrated in a few EU countries, namely France, Spain, Netherlands, Italy, Belgium, and Germany which lead Mauritius' top EU export destinations in both 2012 and 2022.

**Table 5: Main Export Markets in European Union**

Rank	2012			2022		
	Countries	Value Exported (MUR Million)	Share to total exports to EU	Countries	Value Exported (MUR Million)	Share to total exports to EU
1	United Kingdom	12,497	31%	France	7,205	25%
2	France	8,720	22%	Spain	5,501	19%
3	Italy	4,892	12%	Netherlands	3,218	11%
4	Spain	4,862	12%	Reunion	3,025	11%
5	Reunion	2,092	5%	Italy	2,817	10%
6	Belgium	1,916	5%	Belgium	1,897	7%
7	Germany	1,246	3%	Germany	1,345	5%
8	Netherlands	1,244	3%	Portugal	693	2%
9	Greece	433	1%	Mayotte	477	2%
10	Austria	408	1%	Denmark	395	1%

Source: External Trade, Statistics Mauritius

In 2012, UK was the leading export destination in the EU market, with a market share of 31% and exports totalling MUR 12.5 billion, followed by France (MUR 8.7 billion), and Italy (MUR 4.9 billion).

With UK exiting the EU in 2021, France became the leading export destination in the EU market in 2022, with a market share of 25% and exports amounting to MUR 7.2 billion. A deeper analysis indicates that while the combined market share of most EU countries has risen from 2012 to 2022, individual export figures to these countries have exhibited distinct trends.

Notably, there has been a reduction in exports to specific nations, including France (-17%), Italy (-42%), Belgium (-1%), Greece (-58%), and Austria (-71%). In contrast, Spain (+13%), Germany (+8%), Reunion (+45%) and the Netherlands (+159%) have experienced an upswing in export volumes during this period. These nuances underscore the dynamic and varied nature of Mauritius' trade relations with different EU partners over the past decade.

The European Union has consistently been the primary export destination for Mauritius in key product categories such as garments, preserved fish, and sugar over recent years. Preserved fish (HS 1604) and cane sugar (HS 1701) held the top positions in both 2012 and 2022. Preserved fish were mainly exported to Spain, Netherlands and Italy, while cane sugar was mostly exported to Spain, Italy, and France.

**Table 6: Main Export Products to EU**

HS Code	Description	2012		2022	
		Rank	Value (MUR Mn)	Rank	Value (MUR Mn)
<b>1604</b>	Prepared or Preserved Fish	<b>1</b>	10,137	<b>1</b>	7,789
<b>1701</b>	Cane or beet sugar	<b>2</b>	7,339	<b>2</b>	4,092
<b>6203</b>	Men's or boys' suits	<b>6</b>	1,253	<b>3</b>	1,130
<b>9018</b>	Medical Instruments and Appliances	<b>14</b>	365	<b>4</b>	956
<b>6109</b>	T-shirts, singlets, and other vests, knitted or crocheted	<b>3</b>	5,075	<b>5</b>	850
<b>0303</b>	Frozen fish	<b>8</b>	768	<b>6</b>	603
<b>3004</b>	Medicaments	<b>11</b>	531	<b>7</b>	569
<b>0106</b>	Other live animals	<b>18</b>	291	<b>8</b>	569
<b>7102</b>	Polished diamonds	<b>10</b>	606	<b>9</b>	559
<b>6110</b>	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	<b>4</b>	1,833	<b>10</b>	544
<b>9114</b>	Other clock or watch parts	<b>105</b>	15	<b>11</b>	460
<b>6204</b>	Women's or girls' suits, ensembles	<b>13</b>	389	<b>12</b>	449
<b>9113</b>	Watch straps, watch bands and watch bracelets	<b>24</b>	200	<b>13</b>	436
<b>6104</b>	Women's or girls' suits, ensembles, knitted or crocheted	<b>7</b>	1,246	<b>14</b>	418
<b>4202</b>	Leather bags /cases	<b>15</b>	345	<b>15</b>	412

Source: External Trade, Statistics Mauritius

Garments represent a major export product to the EU. In 2012, export of garments to the EU stood at MUR 12 billion, out of which, MUR 6.4 billion were destined for UK. In 2022, post-Brexit, exports of garments to EU stood at 4.5 billion. Main garments exported include trousers, t-shirts, shirts, jerseys, and pullovers.

New emerging products include medical devices which have surged by 162% from MUR 365 million in 2012 to MUR 956 million in 2022. These were mainly destined for France, Germany, and Italy.

Export of live animals have also risen over the past decade, by 96%, destined mainly to Spain, France, and Netherlands. A rise from MUR 200 million to MUR 436 million in the export of watch straps, watch bands and watch bracelets has been noted from 2012 to 2022.

### Export Potential Methodology

Based on the ITC export potential methodology, the Export Potential Map evaluates export performance, target market demand, market access conditions, and bilateral linkages between the exporting and importing countries to provide a ranking of unrealized opportunities.

## Export Potential to EU

According to the International Trade Centre (ITC), the products with greatest export potential from Mauritius to the EU include preserved fish and garments which shows the largest unrealised potential of USD 222 million and USD 185 million, respectively. It is worth noting that the top ten EU countries represent 83% of Mauritius' total exports to the EU. Given the high concentration of exports on only some countries, there is potential to diversify to other remaining EU countries.

**Table 7: Products with Export Potential to EU**

	USD Million			Potential Products
	Actual Exports	Export Potential	Unrealised Potential	
France	199	252	140	Fabrics, polished diamonds, alcoholic beverages, spectacle frames
Italy	85	145	79	Rum, spectacle frames, cotton fabrics, polished diamonds, carded yarn, pineapples
Spain	91	138	76	Cane sugar, alcoholic beverages, medical devices, artist/cosmetics brushes
Netherlands	69	109	49	Medical devices, cane sugar, live animals, Undenatured ethyl alcohol
Germany	40	57	32	Medical devices, cane sugar, alcoholic beverages, artists/cosmetics brushes
Belgium	29	35	18	Medical devices, fish oils, cane sugar, pineapples
Greece	9.7	19	16	Flours of fish or crustaceans, fish oils, frozen fish, cotton fabrics, medical devices, aluminium waste/scrap, pineapples
Finland	10	16	6.3	Cane sugar, medical devices, watch straps, bands, artists/cosmetics brushes, bottles & articles for plastic packaging, alcoholic beverages, animal feed preparations
Poland	8.7	14	10	Frozen fish, artists/cosmetics brushes, cane sugar, medical devices, profiles of aluminium alloys, yarn, bottles & articles for plastic packaging
Portugal	11	14	6.8	Cane sugar, cotton yarn, frozen fish, carded yarn, pineapples, medical devices
Sweden	8	14	8	Undenatured ethyl alcohol, artists/cosmetics brushes, cane sugar, frozen fish, alcoholic beverages, medical devices, line fishing tackles

Source: Export Potential Map, ITC

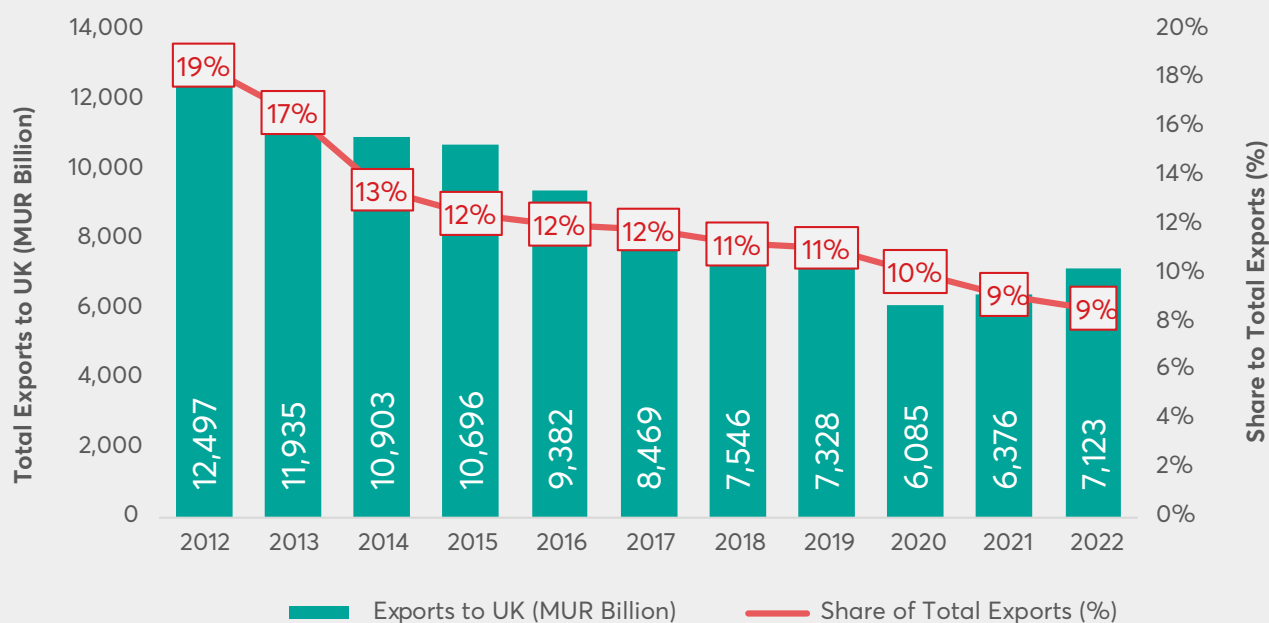
The EU remains one of the most attractive markets for Mauritius. Being party to the ESA-EU iEPA, Mauritius has a competitive edge with its duty-free market access and trade facilitative measures provided by the agreement. Our analysis shows that there is a sizable amount of untapped potential for exports of our traditional products to Greece, Sweden, Poland, Czech Republic, Denmark, Portugal and Finland. The products concerned include fish and related products, medical instruments and appliances, and undenatured ethyl alcohol, beverages, among others.

## United Kingdom (UK)

The United Kingdom is one of the leading export markets in Europe. Mauritius currently trades on preferential terms with UK under the ESA-UK Economic Partnership Agreement (EPA). The ESA-UK which came into force on 01 January 2021 is based on the EPA with the European Union and offers duty-free and quota-free market access to the UK Market. The agreement is comprised of three main components namely the Trade in Goods, Fisheries, and Development Cooperation and similar rules of origin as the iEPA. The Agreement also provides an automatic derogation allowing the use of non-originating tuna that can be used in the production of processed tuna.



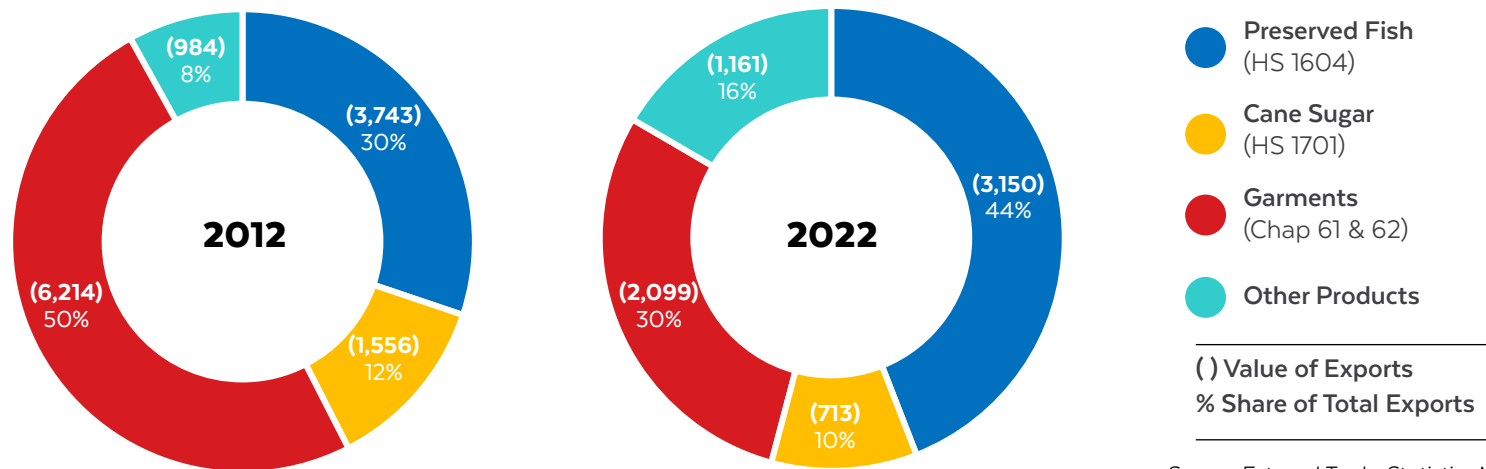
**Figure 6: Total Exports to United Kingdom (2012-2022)**



Total exports to the UK have been on a declining trend over the past decade, from MUR 12.5 billion in 2012 to MUR 7.1 billion in 2022. Subsequently, the UK lost its leading position in 2012 to become the fourth largest export market in 2022.

A breakdown of the main product categories exported to the UK indicates that the main product categories destined for UK remain garments, preserved fish, and sugar.

Figure 7: Top Product Categories Exported to UK



A decline in the nominal value of the main products exported to UK have been registered from 2012 to 2022: preserved fish (-16%), cane sugar (-54%), and garments (-66%).

In 2012, 36% of Mauritian' preserved fish was exported to UK, and the market share has reduced to 28% in 2022. Similarly, the market share for export of cane sugar to the UK has declined from 19% to 8%.

Yarn, live animals, and fresh fruits were among the other products exported to UK and accounted for 16% of total exports to UK.

Table 8: Other Products Exported to UK

HS Code	Product Description	2012	2022	% Change (2012/2022)
		Value Exported (MUR Million)		
5106	Yarn of carded wool	187.4	273.3	+46%
0106	Other live animals	103.8	208.2	+101%
0810	Fresh Fruits (including lychee,...)	4.5	11.1	+146%
4202	Leather bags	1.7	10.8	+519%
0904	Pink pepper	0.01	6.0	-

Source: External Trade, Statistics Mauritius

There are significant opportunities for Mauritius to further expand exports to the UK market as illustrated below:

Table 9: Products with Export Potential to UK

Product	Actual Exports	USD Million	
		Export Potential	Untapped Potential
Processed fish products	64	79	17
Garments	52	66	23
Live animals (HS 0106)	3.1	5.3	2.2
Artists/cosmetics brushes (HS 960330)	0.04	1.9	1.8
Frozen fish fillets (HS 0304)	0.6	1.7	1.2
Rum (HS 220840)	0.1	1.1	1.0
Spectacle frames (HS 900311)	0	0.9	0.9

Source: Export Potential Map, ITC

## United States of America (USA)



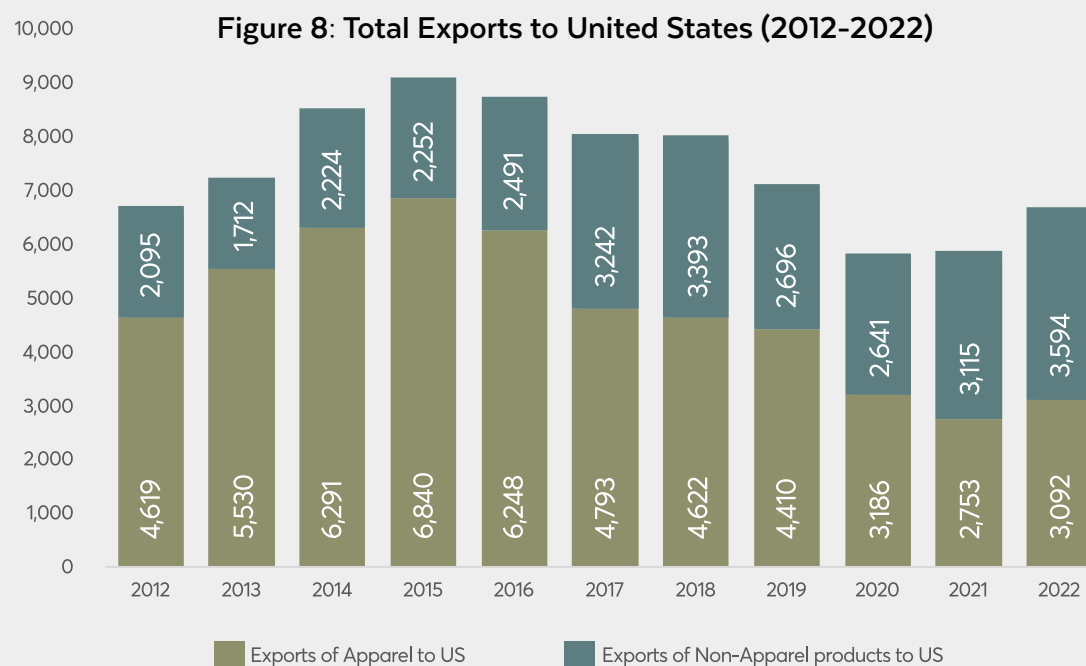
The United States is a major trading partner for Mauritius. In 2022, the United States was Mauritius' 5th largest export destination with exports amounting to MUR 6.7 billion, representing 8% of Mauritius' total exports.

The Africa Growth and Opportunity Act (AGOA) which was enacted by the US Congress in May 2000 is at the heart of US – Mauritius trade relations. The AGOA has played a key role in shaping our manufacturing industries, in particular the textile and clothing industry.

The AGOA builds on the existing USA trade programs by expanding the (duty-free) benefits previously available only under the Generalised System of Preferences (GSP) program to eligible sub-Saharan countries. Duty-free access to the U.S. market under the combined AGOA/GSP program stands at approximately 6,800 tariff lines, including the tariff lines that were added by the AGOA legislation. Notably, these newly added “AGOA products” include items such as apparel and footwear, a wide range agro-processed and horticultural products, chemicals, steel, and many others. The rules of origin for non-textile products exported under AGOA include either wholly produced goods or a local value addition of at least 35%. It should be noted that, in view of promoting regional value chains, non-originating products are those that are sourced from non-AGOA eligible countries which gives exporters the flexibility of sourcing raw or intermediate materials from other AGOA eligible countries. On the other hand, for wearing apparel products, Mauritius is able to export duty-free and quota free for products made of U.S fabric, yarn and thread whereas those made from materials produced outside of the U.S are subject to a yearly quota representing 3.5% of U.S. imports of garment.

After completing its initial 15 year-period of validity, the AGOA legislation was extended on 29 June 2015 by a further 10 years, to 2025. Mauritius and other AGOA eligible countries are lobbying for a long-term extension of the AGOA in view of preserving access to this crucial market.

Figure 8 below shows the evolution of Mauritius' exports to the United States over the past decade.



Source: External Trade, Statistics Mauritius

In 2012, total exports to the United States amounted to MUR 6.7 billion, out of which, 69% consisted of apparel. In 2012, 83% of woven men’s or boys’ shirts exported were destined to the United States (valued at MUR 3.6 billion) and amounted to 1.1 Billion in 2022.

In 2015, there was a peak in our total exports to the USA, which rose to MUR 9.1 billion and gradually declined to reach MUR 6.7 billion in 2022. In 2022, only 46% of total exports to the USA comprised products of apparel, which indicate a slight diversification of our export basket towards other products, such as live animals, sugar and preserved fish among others.

Exports of garments to the USA amounting to MUR 4.6 billion represented 73% of total exports to the US in 2012 and gradually fell to MUR 3.1 billion in 2022.

**Table 10: Main Products Exported to USA**

HS Code	Product Description	Value Exported (MUR Million)	
		2012	2022
0106	Other live animals	299	1,317
6205	Men’s or boys’ shirts	3,623	1,082
1701	Cane sugar	322	678
6109	T-shirts, singlets and other vests, knitted or crocheted	119	488
6203	Men’s or boys’ suits, ensembles	249	278
6204	Women’s or girls’ suits	244	276
6114	Other garments, knitted or crocheted	0	256
7102	Polished diamonds	859	245
0905	Vanilla	0	180
1604	Preserved fish	166	141

Source: External Trade, Statistics Mauritius

It can also be noted that in 2012, there were no exports of vanilla (HS 0905) compared to MUR 180 million being exported to USA in 2022.

Polished diamonds were the second largest product category exported to the United States in 2012, amounting to MUR 859 million and representing 14% of total exports to the USA. It is to be noted that there has been an increase in certain categories of garments such as knitted or crocheted t-shirts, men’s or boys’ suits. Importantly, exports of live primates have grown significantly, representing the highest export value to the USA in 2022 and raw cane sugar has also increased by 110%. It should be noted that, exports of sugar to the USA are made under a USDA administered quota system.



## Export Potential to USA

Table 11: Export Potential to United States

Product	Actual Exports	USD Million	
		Export Potential	Untapped Potential
Garments (Chap 61 & 62)	87	103	45
Live animals (HS 0106)	25	48	23
Processed fish (HS 1604)	22	41	19
Articles of semi-precious stones (HS 711620)	0.03	2.4	2.4
Frozen fish fillets (HS 0304)	0.2	2.3	2.3
Semi-precious stones, synthetic, worked (HS 7104)	0.1	2.2	2.1
Artists/cosmetics brushes (HS 960330)	0.6	2.1	1.5
Medical devices (HS 9018)	1.4	3.9	2.4
Jewellery of precious metal, n.e.s	0.5	1.8	1.4
Bottles & articles for packaging of goods, of plastics (HS 3923)	0	1.3	1.3

Source: Export Potential Map, ITC

In light of AGOA preferences, Mauritius has the potential to significantly increase its exports to the USA for products such as garments, fish and fish products, medical devices, sugar and articles of jewellery. In addition, Mauritius may also consider diversifying its export base to the USA.

The fact that the market is relatively stable and predictable allows businesses to build lasting partnerships with U.S. importers. Exporters participate in numerous trade fairs which facilitates access to the US market. Since the AGOA is the cornerstone of Mauritius-US trade relations, the on-going discussions for a long-term renewal of AGOA remain crucial for our export industries, especially those in the apparel sector, which would otherwise face tariffs up to 32% for their products.



## Africa

Over the years, Africa has grown into an important export market for Mauritius. Driven by its largely duty-free access to the Southern and Eastern African region under the SADC and COMESA trade protocols, Mauritius has successfully positioned itself in rising markets in the eastern and southern African region including South Africa, Madagascar and Kenya.

The entry into force of the AfCFTA in 2019 is likely going to consolidate the presence of Mauritius on the continent and expand the reach of Mauritian exporters in what is referred to as the world's largest free trade area. The AfCFTA spans over 54 African countries (47 ratifications as at November 2023) representing a market of 1.3 billion people and a combined GDP of USD 3.4 trillion.

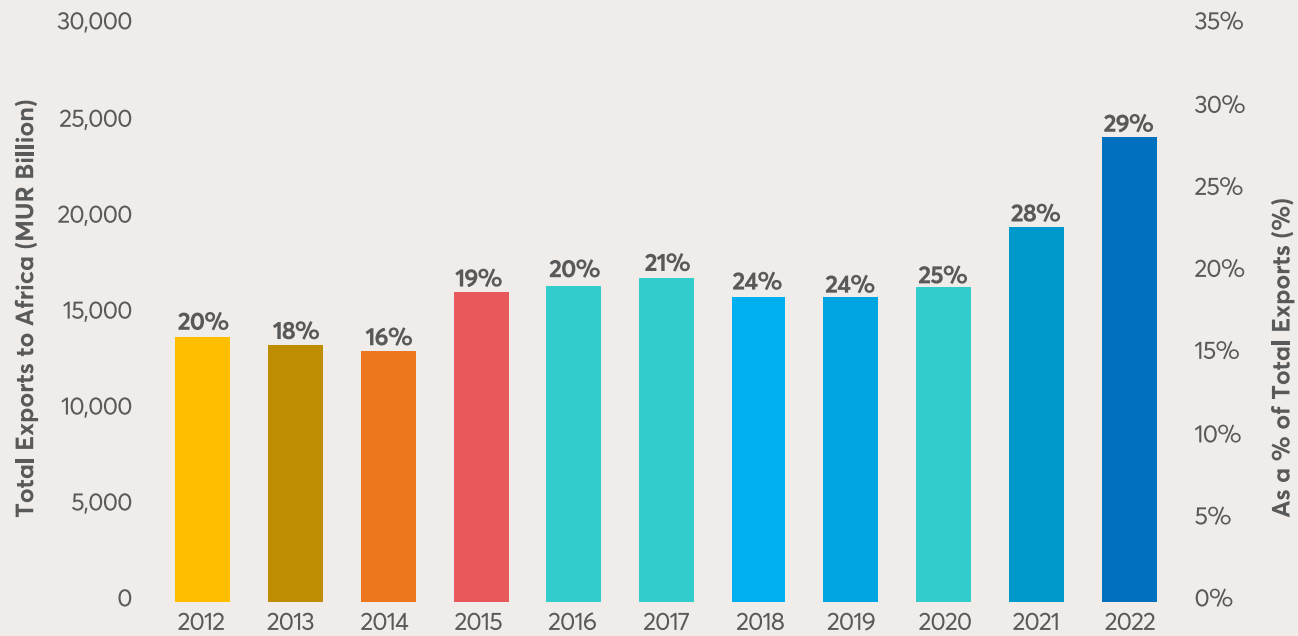
In addition to lowering tariffs, the AfCFTA is expected to significantly lower trade barriers, and implement an array of trade facilitation initiatives to boost trade across the continent, such as the guided trade initiative, the pan-African payment and settlement system, and the NTB online reporting mechanism.

The AfCFTA covers trade in goods and services, investment, competition policy and intellectual property rights. Presently, the protocol for trade in goods and services are in force while the remaining protocols are yet to be ratified by AfCFTA parties. In terms of rules of origin, the agreement contains a hybrid, or general and product specific rules.

Currently, exports from Mauritius to Africa take place under the COMESA and SADC regimes which have been implemented in 1994 and 2000 respectively. Mauritian exporters are therefore relatively familiar with these well-established free trade markets. Rules of origin under SADC are product specific whereas the COMESA additionally provides an across-the-board rule of 35% value addition for all goods.



Figure 9: Evolution of Exports to Africa (2012-2022)



Source: External Trade, Statistics Mauritius

Similarly, the market share of total exports to Africa has risen from 20% to 29%.

A deeper analysis of the export trend for the African market indicates that out of 54 countries in Africa, Mauritius' exports have been highly concentrated to preferential markets in SADC and COMESA countries namely South Africa, Madagascar, Kenya, Seychelles, and Tanzania. On average, exports to these five countries represented around 95% of total exports to Africa over the past decade. This clearly indicates untapped opportunities for expanding exports to other African countries.

Figure 10: Main Export Markets in Africa (MUR Million)

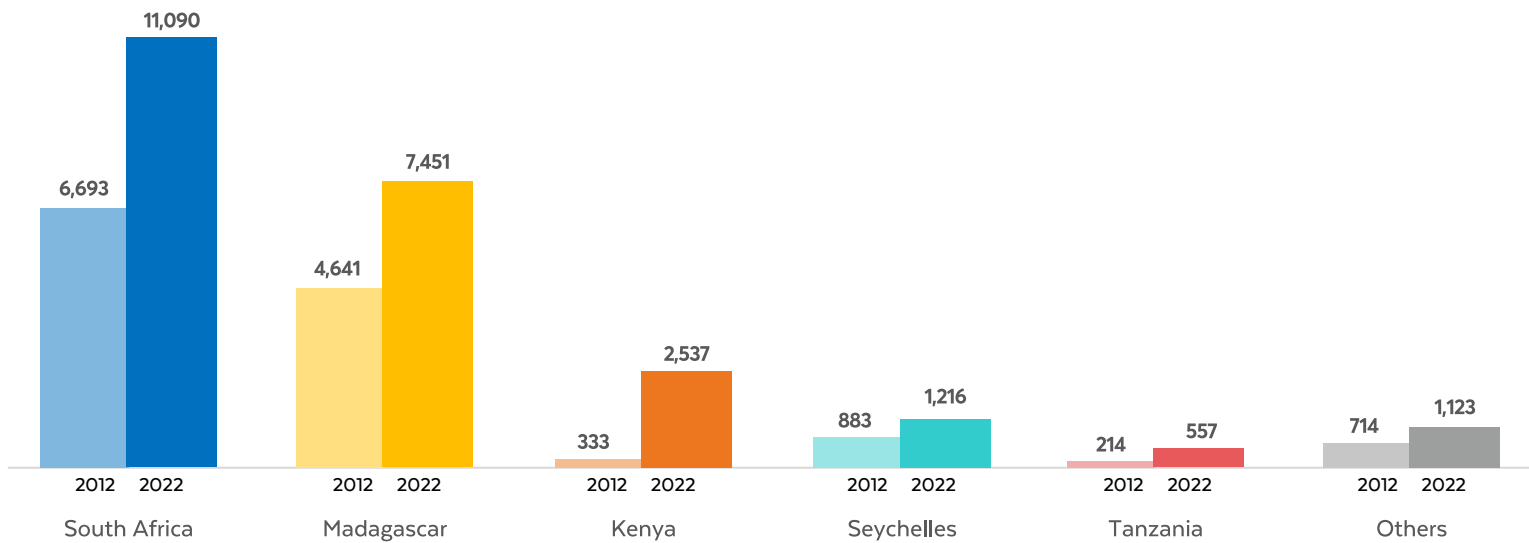
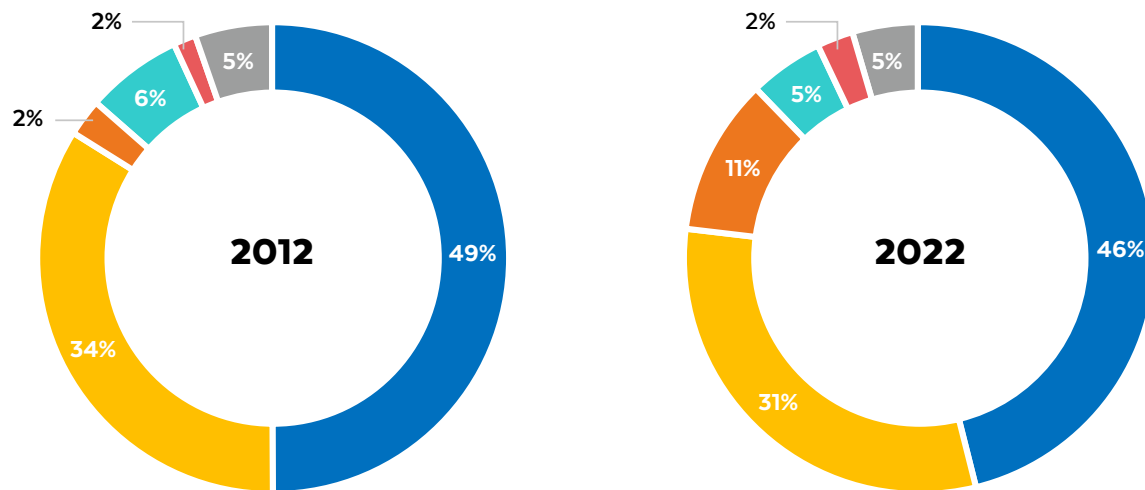


Figure 11: Market Share of Main Export Markets in Africa



Source: External Trade, Statistics Mauritius

South Africa was the leading export destination for Mauritius in 2022 and represented 46% of total exports to Africa and 13% to the world. Main products of export to South Africa include garments (MUR 7.5 billion), fabrics (MUR 752 million), and cotton (MUR 673 million).

Madagascar was the second largest export destination in Africa, rising by 61% from MUR 4.6 billion in 2012 to MUR 7.5 billion in 2022. Main products of export include fabrics (MUR 2.3 billion), machinery and mechanical appliances (MUR 709 million, 94% re-exported), and plastic articles (MUR 701 million).

Exports to Kenya increased by over seven times during the corresponding period, driven mainly by a rise in exports of sugar. Seychelles and Tanzania also represent important markets for Mauritius exports amounting to MUR 1.2 billion and MUR 557 million, respectively in 2022.

Other emerging markets include Comoros (MUR 250 million), Mozambique (MUR 237 million), and Namibia (MUR 103 million).

## SADC/COMESA Region

As an active member of the Common Market for Eastern and Southern Africa (COMESA) and the Southern Africa Development Community (SADC) since the 1990s, Mauritius benefits from duty-free market access for goods exported to the markets in the region.

Total exports to the SADC/COMESA region amounted to MUR 23.9 billion which represents 29% of total exports to the world and 99% of total exports to Africa.

**EXPORTS TO THE SADC/COMESA AMOUNTED TO MUR 23.9 BILLION IN 2022 AND REPRESENTED 99% OF TOTAL EXPORTS TO AFRICA. WITH THE AFCFTA, THERE IS HUGE POTENTIAL FOR MAURITIUS TO FURTHER EXPAND ITS POTENTIAL MARKETS TO OTHER AFRICAN COUNTRIES.**

Figure 12: Mauritius Trade Factsheet with SADC/COMESA (2022)



### Countries in SADC

South Africa  
Tanzania  
Mozambique  
Namibia  
Botswana  
Angola  
Lesotho

### Countries in both SADC/COMESA

Madagascar  
Seychelles  
Eswatini  
Zimbabwe  
Zambia  
Malawi

### Countries in COMESA

Kenya  
Comoros  
Uganda  
Djibouti  
Rwanda  
Egypt  
Burundi  
Ethiopia  
D. R. of Congo  
Eritrea  
Sudan  
Libya  
Tunisia  
Somalia



### Exports to SADC /COMESA

**MUR 24.0 Billion**

**29%**  
of Total Exports to the World

**99%**  
of Total Exports to Africa

As highlighted, the main export destinations over the past decade in Africa include South Africa where all exports to are duty-free under the SADC Trade Protocol.

From 2012 to 2022, garments (Chap 61 & 62) have remained the main product of export to SADC/COMESA. In 2012, 25% of total exports of garments were destined to SADC/COMESA (MUR 5.8 billion) and represented 43% of total exports to SADC/COMESA.



**Table 12: Evolution of Top Product Categories Exported to SADC/COMESA**

HS Code	Product Description	Value Exported (MUR Million)	
		2012	2022
6203	Men's or boys' suits	1,752	3,194
1701	Cane or beet sugar	96	2,802
6006	Other knitted or crocheted fabrics	263	2,408
6109	T-shirts, singlets and other vests, knitted or crocheted	2,126	1,671
3923	Articles for the conveyance or packing of goods, of plastics	369	975
2309	Preparations of a kind used in animal feeding	429	900
5205	Cotton yarn	191	821
6204	Women's or girls' suits, ensembles	346	732
6001	Pile fabrics	277	663
6105	Men's or boys' shirts, knitted or crocheted	382	599

Source: External Trade, Statistics Mauritius

In 2022, exports of garments to SADC/COMESA rose to MUR 7.65 billion and represented 32% of total exports to SADC/COMESA, indicating that the country is now exporting a more diversified set of goods to these regions. Of note, 41% of total exports of garments were destined to the SADC/COMESA market in 2022. Main textile products exported included trousers, t-shirts, and shirts.

Other exports with growing value include cane sugar, animal feed, soap, and aluminium bars/rods. The export of cane sugar has increased significantly over the last decade from a mere MUR 96 million in 2012 to MUR 2.8 billion in 2022 – destined mostly to the Kenyan market.

Sugar also represents an important product of export to the SADC/COMESA, surging significantly from only MUR 96 million (3.5 tonnes) in 2012 to over MUR 2.8 billion in 2022 (116 tonnes). In 2022, 73% of cane sugar exported to the SADC/COMESA region were destined for Kenya, followed by Madagascar (18%).

**IN THE SADC/COMESA REGION, SOUTH AFRICA WAS THE LEADING EXPORT DESTINATION FOR GARMENTS (CHAP 61 & 62). OUT OF MUR 7.6 BILLION EXPORTED TO THE REGION, 98% WERE DESTINED TO SOUTH AFRICA.**

**MAURITIUS WAS THE FIRST EXPORTER OF T-SHIRTS AND SECOND LARGEST EXPORTER OF 'MEN'S AND BOYS' SUITS' TO SOUTH AFRICA.**

# EXPANDING TRADE WITH AFRICA

Our exports to Africa have been growing steadily over the past decade. However, it can be noted that 95 % of exports to Africa were targeted to five countries namely South Africa, Kenya, Madagascar, Seychelles and Tanzania.

In order to maximize the export opportunities available on the African continent, it is crucial that a bold export strategy is worked out to identify potential markets and products that could be exported to the African continent.

As member of the African Continental Free Trade Area (AfCFTA), signed in 2021, Mauritius aims to further strengthen its trade relations with Africa.

## Identifying Potential Export Markets in Africa

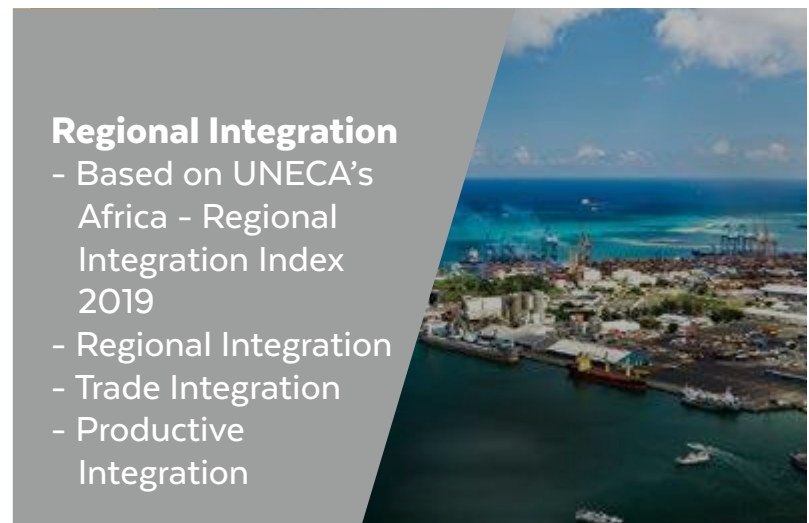
The following sets of trade and economic indicators have been used for identifying potential African markets, as illustrated below:

### Trade and Economic Indicators



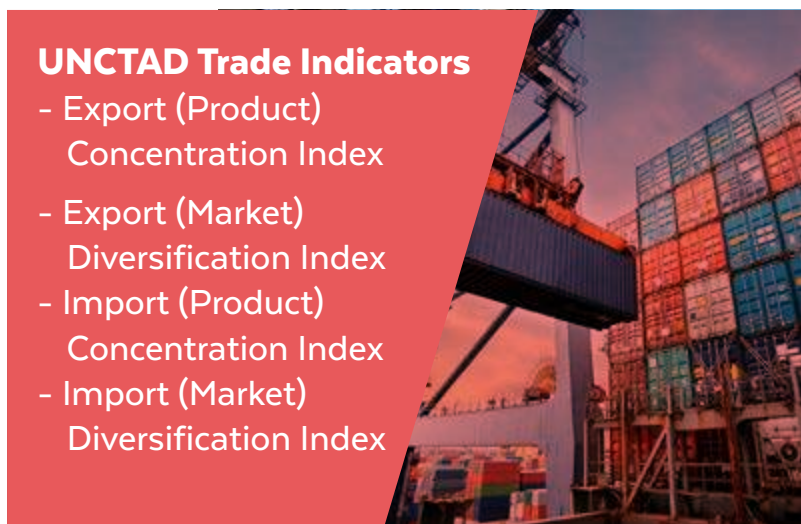
**Economic Factors**

- GDP per capita
- GDP Growth Rate (%)
- Inflation Rate



**Regional Integration**

- Based on UNECA's Africa - Regional Integration Index 2019
- Regional Integration
- Trade Integration
- Productive Integration



**UNCTAD Trade Indicators**

- Export (Product) Concentration Index
- Export (Market) Diversification Index
- Import (Product) Concentration Index
- Import (Market) Diversification Index



**Competitiveness Indicators**

- Trade Openness index
- UNCTAD Technological Development Index
- Mo Inrahim Index
- WEF Global Competitiveness Index



These various indicators are compiled and provide a basis for the identification of potential export markets on the African continent:

**Table 13: Economic and Trade Indicators for Identifying Potential African Markets**

			GDP GROWTH RATE (%)		INFLATION RATE (%)		AFRICA REGIONAL INTEGRATION INDEX 2019 (54 COUNTRIES) RANK					
	Pop (Mn) f2023	GDP per capita (USD) f2023	f2023	f2025	f2023	f2025	Regional Int.	Trade Int.	Productive Int.	Macroeco	Infrastructural Int.	Free movement of people
South Africa	61.5	6,191	0.93	1.61	5.842	4.5	1	4	1	25	1	44
Egypt	105.7	3,770	4.157	5.041	23.516	19.878	6	21	10	3	2	46
Morocco	37	3,980	2.385	3.181	6.302	2.892	4	39	8	1	4	47
Tunisia	12.2	4,191	1.312	2.329	9.409	8.691	24	51	4	16	5	38
Kenya	51.5	2,188	4.966	5.344	7.696	5.406	2	18	7	38	8	10
Senegal	18.2	1,715	4.102	10.166	6.083	2.044	7	9	15	9	20	14
Ghana	32.9	2,329	1.16	4.594	42.186	11.5	8	10	16	40	18	8
Côte d'Ivoire	29.1	2,728	6.2	6.4	4.311	1.95	17	6	6	17	11	39
Botswana	2.7	7,758	3.841	4.349	5.9	4.5	34	7	13	37	19	42
Rwanda	13.5	1032	6.17	7.007	14.5	5	3	13	33	4	23	6
Madagascar	29.8	530	4	4.7	10.5	8.1	37	38	46	34	39	11
Zimbabwe	16.2	2,006	2.5	4.139	314.501	128.078	12	5	17	33	13	17
Zambia	20.6	1,436	3.554	4.477	10.624	7.47	41	16	5	52	14	37
Mauritius	1.3	11,752	5.092	3.431	7.815	7.406	5	33	32	2	6	29

UNCTAD TRADE INDICATORS (2022)						COMPETITIVENESS INDICES RANKING			
Number of products exported at the 3-digit SITC, Rev.3 level	Export Concentration Index	Export Diversification Index	Number of products imported at the 3-digit SITC, Rev.3 level	Import Concentration Index	Import Diversification Index	TRADE OPENNESS INDEX	Technological Development Index	Mo Ibrahim Index (2021) - 54 countries	WEF Global Competitiveness Index
253	0.18	0.60	255	0.12	0.27	0.29	56	6	60
232	0.18	0.56	245	0.08	0.37	0.16	83	27	93
229	0.21	0.70	247	0.11	0.43	0.36	70	10	75
226	0.14	0.51	248	0.09	0.41	0.52	66	3	87
235	0.19	0.66	246	0.16	0.45	0.11	117	13	95
209	0.25	0.76	237	0.13	0.37	0.28	128	9	114
216	0.46	0.80	240	0.06	0.44	0.22	109	7	111
215	0.36	0.75	236	0.13	0.45	0.22	136	20	118
161	0.79	0.91	225	0.28	0.56	0.45	108	5	91
168	0.34	0.73	220	0.12	0.43	0.2	139	12	100
141	0.34	0.84	229	0.19	0.52	0.29	146	34	132
155	0.43	0.86	235	0.10	0.48	0.19	148	29	127
208	0.67	0.85	244	0.08	0.41	0.36	147	24	120
152	0.19	0.68	227	0.12	0.4	0.33	73	1	52

The table below provides potential export products for selected African countries. It is to be noted that these countries have been selected based on the best performing African countries for the above indicators.

**Table 14: Export Potential in Africa: Expanding Markets and Products**

	ITC Export Potential (USD'000)			Potential Products
	Actual Exports	Export Potential	Unrealized Potential	
South Africa*	200,000	411,000	241,000	Fabrics, animal feed, uncooked pasta, fish products, medical devices
Madagascar*	103,000	117,000	43,000	Fabrics, carded yarn, wheat flour, alcoholic beverages, uncooked pasta, paper packaging, soap and detergents
Zimbabwe	23,000	51,000	41,000	Uncooked pasta, plastic bottles for packaging, animal feed, wheat flour, doors/windows of aluminium, paper packaging, medical devices
Zambia*	16,000	38,000	32,000	Animal feed, plastic bottles for packaging, undenatured ethyl alcohol, doors/windows of aluminium, uncooked pasta
Morocco	232	317	282	Fabrics, yarn, medical devices, spectacle frames, pineapples, animal feed
Tunisia	1,300	1,700	1,500	Fabrics, yarns, animal feed, medical devices, plastic bottles for packaging, animal feed
Egypt*	113	201	179	Yarn, frozen fish, cotton fabrics, animal feed, medical instruments, beverages
Senegal	43	78	64	Aluminium profiles, cotton fabrics, doors/windows of aluminium, plastic bottles for packaging, jewellery
Kenya*	51,000	118,000	71,000	Cane sugar, alcohol, animal feed, plastic bottles for packaging
Botswana*	516	1,800	1,700	Polished diamonds, medical devices, animal feeding, doors/windows of aluminium, plastic bottles for packaging
Rwanda	772	1,900	1,800	Undenatured ethyl alcohol, Fabrics, plastic bottles for packaging, doors/windows of aluminium, medical instruments, rum, uncooked pasta
Côte d'Ivoire*	222	435	391	Animal feeding, undenatured ethyl alcohol, fertilisers, hollow profiles of aluminium alloys, plastic bottles for packaging, doors/windows of aluminium
Ghana*	536	890	818	Undenatured ethyl alcohol, hollow profiles of aluminium alloys, animal feed, uncooked pasta, alcoholic beverages, fertilisers

Source: Export Potential Map, ITC

**Note:** These countries have been selected based on the best performing African countries for the selected indicators. Madagascar, Zambia and Zimbabwe have also been included given their wide consumer base, proximity and better performance on trade integration.

## Potential Export Products

Mauritius stands at the threshold of significant opportunities to expand its exports to its traditional African export markets, both by expanding its offerings of existing products and venturing into new product segments.

The following product categories currently being manufactured in Mauritius with export potential to Africa are:

**Table 15: Potential Products for Export to Africa**

Products	Mauritius' Main Exports to Africa	Africa's Imports from the World	Top Importing Countries in Africa
Garments (Chap 61 & 62)	USD 150 Mn	USD 7.4 Bn	South Africa, Algeria, Morocco, Tunisia, Sudan, Ghana
Processed Fish (HS 1604)	USD 96 K	USD 1.1 Bn	Egypt, South Africa, Ghana, Morocco, Somalia, Angola
Knitted Fabrics (HS 6006)	USD 45 Mn	USD 1.3 Bn	Morocco, Egypt, Madagascar, Kenya, South Africa, Tunisia, Algeria
Animal Feed (HS 2309)	USD 12 Mn	USD 1.3 Mn	South Africa, Egypt, Uganda, Morocco, Nigeria, Namibia
Uncooked Pasta (HS 1902)	USD 2.2 Mn	USD 709 Mn	Somalia, South Africa, Ghana, Zimbabwe
Plastic Packaging Products (HS 3923)	USD 11 Mn	USD 2.1 Bn	Morocco, South Africa, Ghana, Sudan, Algeria, Tunisia
Carded Wool Yarn (HS 5106)	USD 8.5 Mn	USD 28 Mn	Madagascar, Tunisia, South Africa, Morocco, Egypt
Rum (HS 220840)	USD 346 K	USD 28 Bn	Madagascar, Tunisia, South Africa, Morocco, Egypt
Cane Sugar (HS 1701)	USD 54 Mn	USD 7.9 Bn	Sudan, Nigeria, Morocco, Ethiopia
Medical Devices (HS 9018)	USD 67 Mn	USD 2.9 Bn	South Africa, Egypt, Morocco, Algeria
Aluminium Products (Chap 76)	USD 7.9 Mn	USD 5.5 Bn	Morocco, South Africa, Egypt, Algeria, Tunisia
Sunglasses (HS 900410)	USD 63 K	USD 88 Mn	South Africa, Morocco, Tunisia, Egypt
Leather Products (Chap 42)	USD 52 K	USD 5.1 Bn	South Africa, Ghana, Morocco, Algeria, Cameroon
Soap & Detergents (HS 3401 & 3402)	USD 3.8 Mn	USD 2.7 Bn	South Africa, Morocco, Ghana, Egypt

Source: Export Potential Map, ITC

# India



The Comprehensive Economic Cooperation and Partnership Agreement (CECPA) between Mauritius and India, which became effective on 1 April 2021, marks a significant development for Mauritius as it engages in trade with one of the world's fastest-growing economies, India. With India boasting a population of over 1.4 billion people, the agreement opens substantial opportunities for Mauritian businesses. Notably, this accord holds historical significance as it is India's first trade agreement with a country in Africa.

The CECPA covers a range of aspects aimed at fostering trade and economic relations between both countries through trade in goods and services.

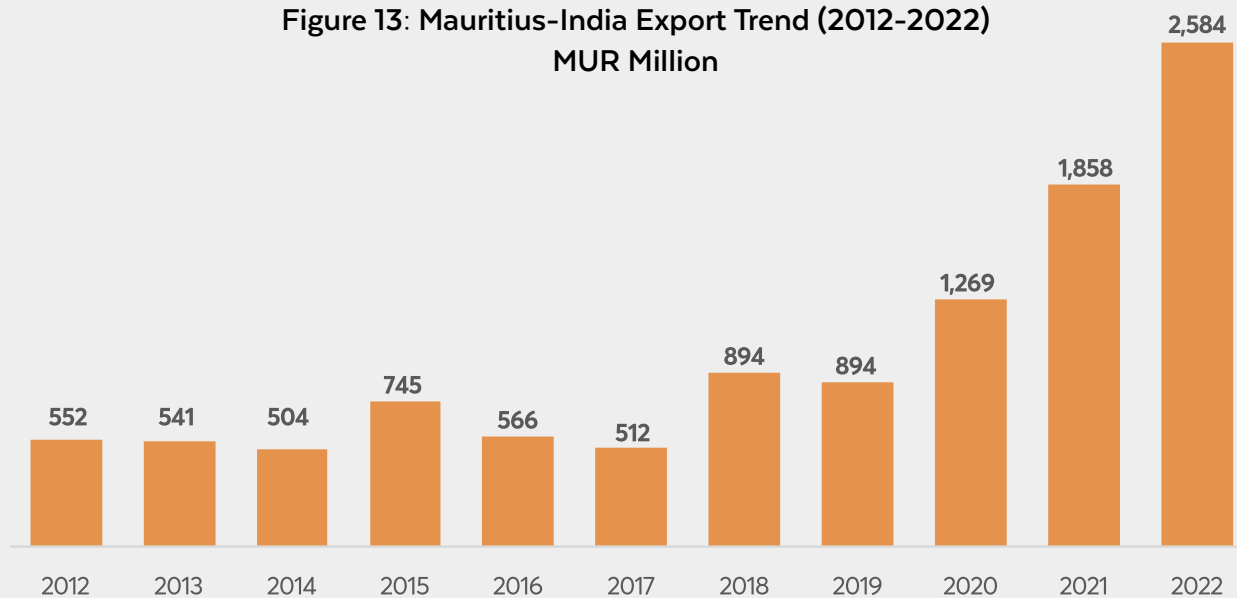
A pivotal aspect of the agreement is the preferential market access it grants to Mauritian exporters for a specified list of 615 products with gradual tariff liberalisation over a period of 10 years. It also includes significant allowances such as 40,000 tons of special sugar at 10% duty, 2 million liters of beer at 25% duty, 1.5 million liters of rum at 50% duty, 5000 liters of fruit wine at 50% duty, 7.5 million pieces of garments at zero duty, and 7000 tons of canned tuna at zero duty.

The rules of origin of the CECPA include wholly obtained/produced goods, or product specific rules, including change in tariff classification, value addition, or specific manufacturing process.

In the last ten years, Mauritius has witnessed a remarkable surge in exports to India, soaring from MUR 552 million in 2012 to a substantial MUR 2.6 billion in 2022.



**Figure 13: Mauritius-India Export Trend (2012-2022)**  
MUR Million



Source: External Trade, Statistics Mauritius

Analysis by product indicates that the top three categories of products exported to India remained the same over the past decade. These comprise ferrous waste and scrap, medical devices, and aluminium waste and scrap. However, a more in-depth examination indicates a noteworthy shift in other product categories being exported in 2022 compared to ten years ago.

In 2022, electrical and electronic scrap and wood were two other large products exported to India, valued at MUR 69 million and MUR 47 million, respectively. However, none of these were exported in 2012. Table 16 below indicates the top 15 product categories exported to India in 2012 and 2022.

**Table 16: Evolution of Top Products Exported to India**

2012			2022		
HS Code	Product Description	MUR Million	HS Code	Product Description	MUR Million
7204	Ferrous waste and scrap	190.7	7204	Ferrous waste and scrap	1,136.2
9018	Medical devices	168.1	9018	Medical devices	734.2
7602	Aluminium waste and scrap	33.5	7602	Aluminium waste and scrap	249.1
7404	Copper waste and scrap	32.5	8549	Electrical and electronic waste and scrap	68.7
8517	Telephone sets	16.1	4707	Recovered (waste and scrap) paper or paperboard	61.6
4707	Recovered (waste and scrap) paper or paperboard	14.4	4403	Wood in the rough	46.6
6205	Men's or boys' shirts	7.2	2301	Flours, meals and pellets	42.9
7102	Polished diamonds	3.7	7213	Bars and rods	30.1
7213	Bars and rods	2.6	8901	Cruise ships, excursion boats, ferry-boats, cargo ships	27.9
7103	Precious stones	2.5	7419	Other articles of copper	20.0
8443	Printing machinery	2.3	7404	Copper waste and scrap	12.5
3004	Medicaments	2.2	7113	Articles or jewellery and parts thereof	11.5
6109	T-shirts, singlets and other vests, knitted or crocheted	1.6	8425	Pulley tackle and hoists other than skip hoists; winches and capstans;	11.0
6203	Men's or boys' suits	1.4	6310	Used or new rags, scrap twine	10.4
6302	Bed linen, table linen, toilet linen and kitchen linen	1.4	9015	Surveying instruments and appliances	10.0

Source: External Trade, Statistics Mauritius

## Export Potential to India

The CECPA is a significant step forward in the Mauritius – India trade relations as it addresses several key areas of trade and provides improved market access for goods exported by Mauritius. India maintains relatively high tariffs for a number of products, and the margin of preference given to Mauritius is significant, bearing in mind our production capacity. Furthermore, the parties have agreed to pursue discussions on the implementation of CECPA in view of further improving our market access for sugar, food preparations, rum, beer, fruit wine, textiles, garments, medical devices, pasta, jewellery and soap and detergents which are major carriers of Mauritian exports. Moreover, the regular negotiations with India also aim to eliminate regulatory or administrative bottlenecks that may impair the ability of Mauritian exporters that wish to penetrate the Indian market.

**Table 17: Products with Export Potential to India**

HS	Product	MFN Rate 2019	Preferential Tariffs	Actual Exports (USD'000)	Export Potential (USD'000)	Unrealised Potential (USD'000)
1701	Cane sugar	100%	TRQ of 40,000 Tons @ 10%	0	3,200	3,200
2309	Animal feed			0	2,300	2,300
Chap 61 & 62	Garments			7.7	2,400	1,700
9018	Medical Devices	7.5%	3 years TE	0.351	1,300	1,300
9114	Clock / watch dials	10%	3 yrs / 10 yrs TE	0	726	726
3923	Plastic Bottles for packaging	15%	Gradual TE	9.7	568	559
4911	Printed Matter	10%	3 yrs TE	0	321	321
1604	Canned tunas	30%	7000 tons @ 0%	0	40	40
2208	Undenatured ethyl alcohol	150%	1.5 million litres @ 50%	4.9	62	62

Source: Export Potential Map, ITC





## FTA with China



The Free Trade Agreement (FTA) between the Government of the Republic of Mauritius and the Government of the People's Republic of China, signed in October 2019 in Beijing, officially came into effect on 01 January 2021. The FTA holds particular significance as China's first FTA with an African nation.

This FTA encompasses four key components: trade in goods, trade in services, investment, and economic cooperation. Notably, the text of the agreement is comprehensive, featuring chapters on sanitary and phytosanitary measures (SPS), technical barriers to trade (TBT), trade remedies, competition, intellectual property, and electronic commerce.

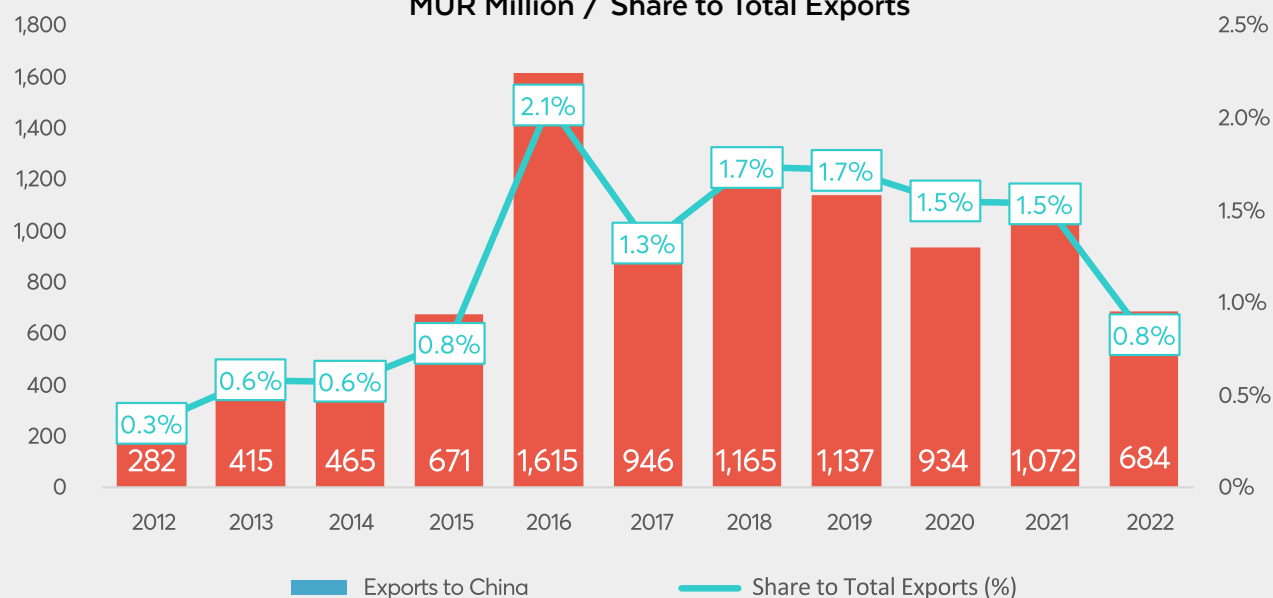
Mauritius obtained duty-free access to the Chinese market on 7,504 tariff lines. Additionally, tariffs on an additional 723 tariff lines are set to be phased out over a 5 to 7-year period from 01 January 2021. The agreement also implements a tariff rate quota, granting the access for 50,000 tonnes of Mauritian sugar to China at an in-quota rate of 15%. This quota is progressively implemented over an 8-year span, commencing with an initial quantity of 15,000 tonnes in 2021.

The rules of origin for Mauritian exports are either wholly obtained/produced, and value addition of no less than 40%, except for a list of product specific rules which include change in tariff classification or regional value content requirements.

The Mauritius-China FTA not only solidifies economic ties but also establishes a robust institutional framework, fostering a platform for mutual benefit and cooperation in various facets of trade and economic relations.



**Figure 14: Total Exports to China (2012-2022)**  
MUR Million / Share to Total Exports



Source: External Trade, Statistics Mauritius

Over the past decade, exports to China have averaged MUR 849 million, rising from MUR 232 million in 2012 to reach MUR 684 million in 2022. It is to be noted that there was a surge in exports in 2015 (MUR 1.6 billion) in 2015, mainly on account of a rise in exports of telephone sets (consisting mainly of re-exports).

In 2012, frozen fish was the main product of export to China, amounting to MUR 42.1 million. Table 18 clearly indicates a change in the breakdown of products exported to China. Notably, in 2022, refined copper products emerged as the predominant export, reaching a substantial value of MUR 235.8 million. According to trade statistics, the entirety of refined copper products, equivalent to 100%, was exclusively directed to China in the same year. Exports of garments to China have also increased from MUR 64 million to MUR 95 million over the past decade.

**Table 18: Evolution of Top Products Exported to China**

2012			2022		
HS Code	Product Description	MUR Million	HS Code	Product Description	MUR Million
0303	Frozen fish	42.1	7403	Refined copper and copper alloys, unwrought	235.8
6203	Men's or boys' suits	32.3	0303	Frozen fish	92.3
3915	Waste, parings and scrap, of plastics	18.2	1701	Cane sugar	74.5
2301	Flours, meals and pellets	16.2	4202	Leather cases and bags	37.4
1701	Cane sugar	14.0	1504	Fish fats and oils	34.2
6310	Used or new rags, scrap twine, cordage, rope and cables and worn out articles of twine	11.6	6205	Men's or boys' shirts	33.3
6204	Women's or girls' suits, ensembles, jackets	10.4	6203	Men's or boys' suits	23.1
5208	Woven fabrics of cotton	9.4	2301	Flours, meals and pellets	21.4
8443	Printing machinery	6.1	6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	20.9
8517	Telephone sets	5.7	6109	T-shirts, singlets and other vests, knitted or crocheted	15.4
0106	Other live animals	5.2	0511	Animal products not elsewhere specified or included	7.8
6205	Men's or boys' shirts	4.9	8517	Telephone sets	6.0
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	4.4	9605	Travel sets for personal toilet, sewing or shoe or clothes cleaning.	2.9
6105	Men's or boys' shirts, knitted or crocheted	3.6	1905	Bread, pastry, cakes, biscuits and other bakers' wares	2.3
6109	T-shirts, singlets and other vests, knitted or crocheted	2.7	8471	Automatic data processing machines and units thereof;	2.3

Source: External Trade, Statistics Mauritius

## Export Potential to China

The products with greatest export potential from Mauritius to China are fishmeal, raw cane sugar, and frozen fish. The export potential for fishmeal is the highest with difference between potential and actual exports in value terms, leaving room to realize additional exports worth USD 5.6 million.

**Table 19: Products with Export Potential to China**

Product	MFN Rate 2019	Preferential Tariffs	Actual Exports (USD'000)	Export Potential (USD'000)	Unrealised Potential (USD'000)
Flours of fish or crustaceans (HS 2301)	2-5%	0%	1,100	6,700	5,600
Garments/Apparel			5,400	6,700	2,000
Cane sugar (HS 1701)	50%	CSTQ	840	4,900	4,100
Frozen fish (HS 0303)	10-12%	0%	1,600	3,200	1,600
Polished diamonds (HS 7102)	3-8%	0%	0	2,200	2,200
Medical devices (HS 9018)	3-8%	0%	10	2,900	2,890
Leather handbags (HS 420221)	10%	0%	116	1,100	989
Carded yarn (HS 510610)	5%	0%	0	602	602
Jewellery of precious metal (HS 7113)	20-35%	MOP over 5 yrs	0	578	578
Preparations used in animal feeding (HS 2309)	5-15%	0%	0	529	529

Source: Export Potential Map, ITC





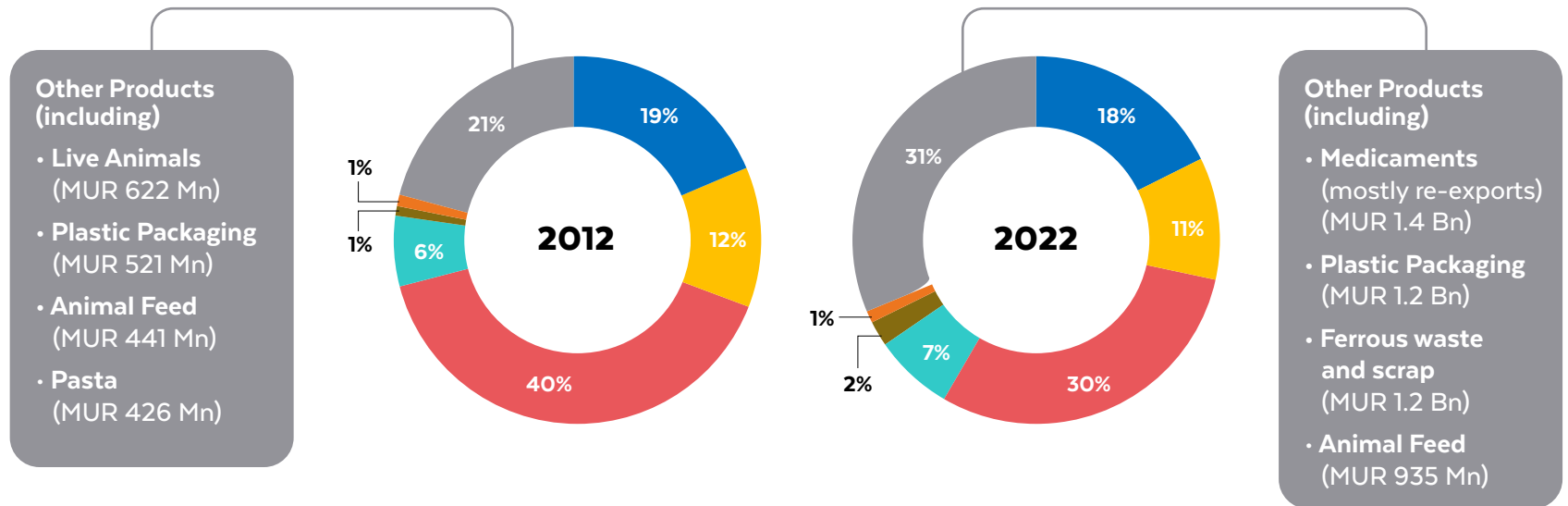
# SECTORAL ANALYSIS

Mauritius, supported by an array of strategically signed free trade agreements, as explored in the previous section, has firmly positioned itself as a dynamic and influential participant in the regional trade landscape.

Over the past decade, the country has experienced significant transformations in its export landscape, showcasing resilience and adaptability. The product categories exported by Mauritius span a spectrum of industries, reflecting both traditional strengths and emerging opportunities. From the early export dominance of textiles, fish products and cane sugar, to the more recent prominence of emerging products such as rum, animal feed, leather products, and medical devices, Mauritius has navigated shifts in global demand and market dynamics.

This section sets the stage to delve into the multifaceted nature of Mauritius' exports, highlighting key trends into the evolution of exports of the main products, namely fish and fish products, textiles and apparel, sugar, jewellery and medical devices over the past decade. Additionally, a section has been added, where potential product niches, namely, beverages, animal feed, soap and detergents, among others, have been identified.

Figure 15: Evolution of Market Share for Main Export Products  
Market Share and Value Exported



MUR Mn	Fish & Fish Products Chap 03 & HS 1604	Cane Sugar HS 1701	Textiles & Apparel Chap 50-63	Articles of Jewellery Chap 71	Medical Devices (HS 9018)	Leather Products	Other Products
<b>2012</b>	12,735	8,135	26,671	4,270	607	641	14,312
<b>2022</b>	14,920	8,801	24,547	5,959	1,870	854	26,160

Source: External Trade, Statistics Mauritius

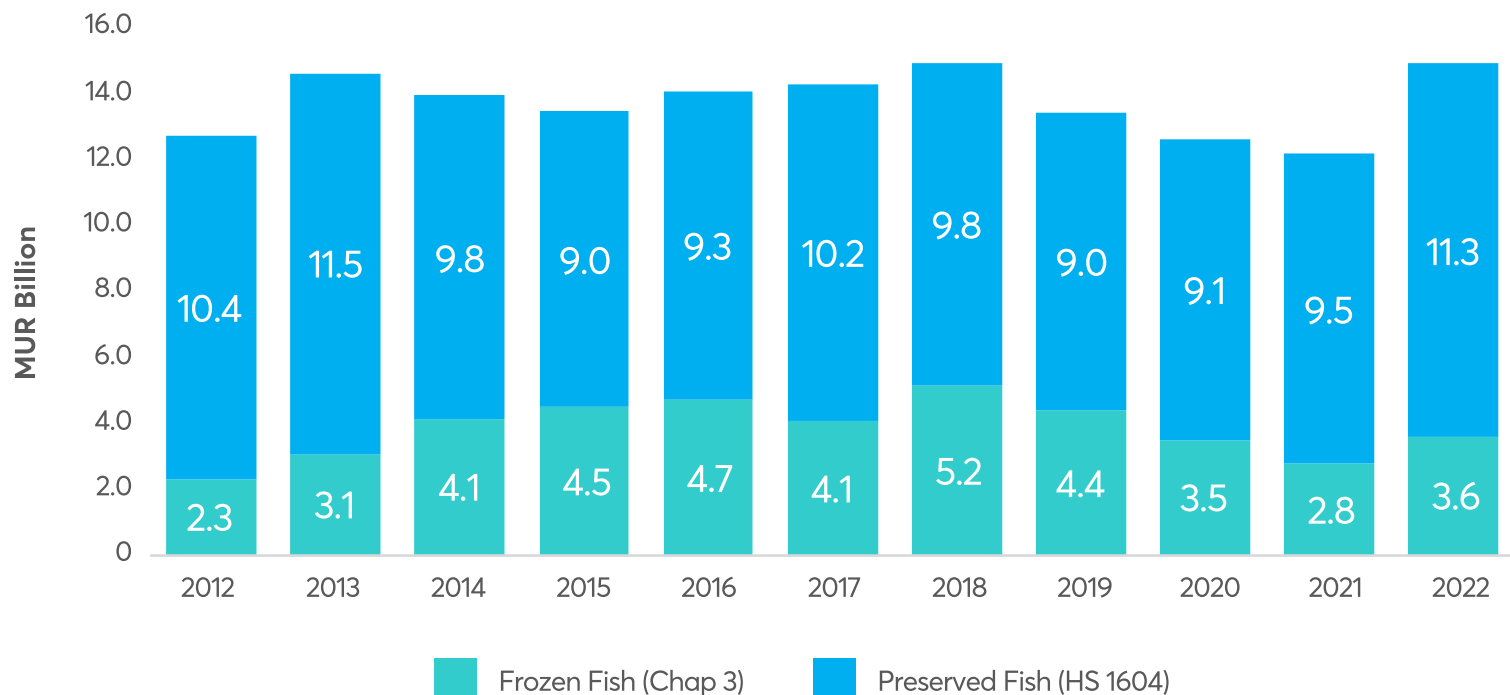
It was noted that, other than textile and apparel, all traditional products exported by Mauritius have grown, albeit by varying amounts. In terms of value, medical devices have increased threefold whereas most other exports have seen relatively little growth. The other product categories which includes plastic packaging, ferrous waste and scrap, and animal, among others, have also rapidly increased, indicating the potential to increase exports of non-traditional products. However, textile and apparel, despite having been a driver of industrialisation and development for Mauritius, has been on a declining trend since.

## Fish and Fish Products

Over the period 2012 to 2022, export figures for preserved fish, classified under HS code 1604, and chilled or frozen fish classified under Chapter 03, have averaged MUR 13.7 million.

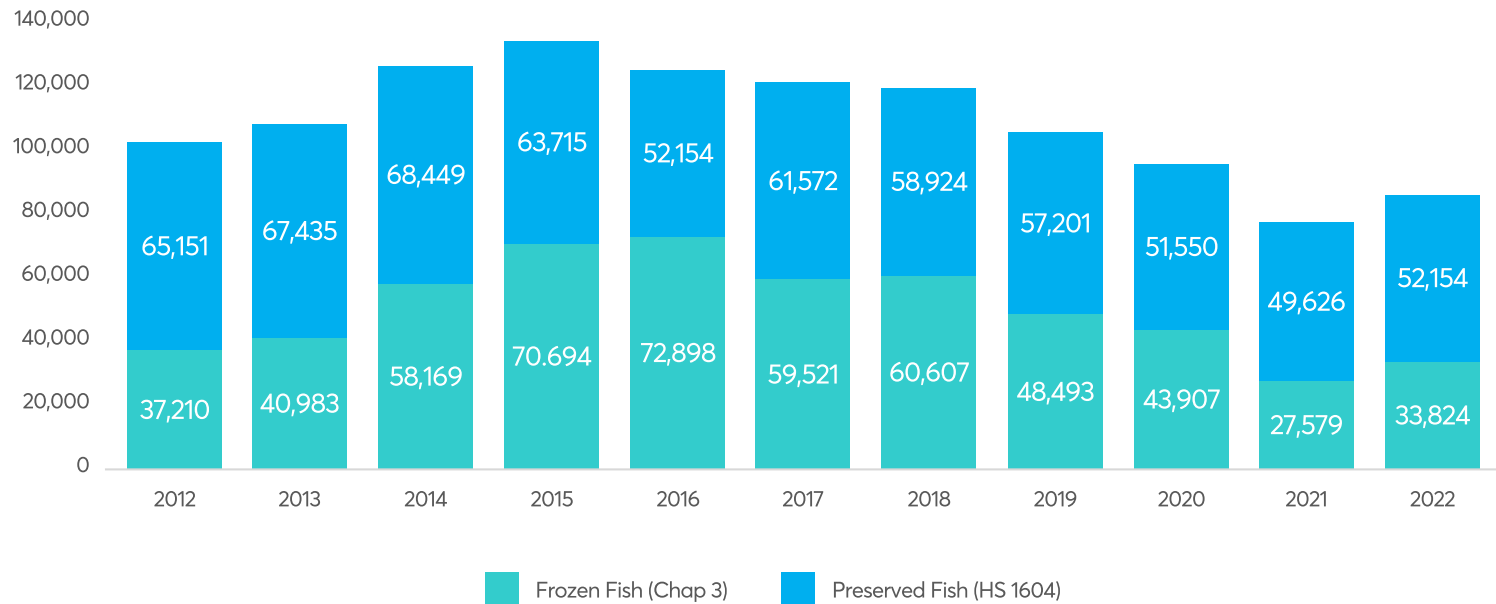
“ FISH AND FISH PRODUCTS REMAINS THE MAIN PRODUCT OF EXPORT, VALUED AT MUR 14.9 BILLION IN 2022 AND REPRESENTING 18% OF TOTAL EXPORTS TO THE WORLD. ”

Figure 16: Total Exports of Fish and Fish Products 2012-2022



Source: External Trade, Statistics Mauritius

**Figure 17: Evolution of Exports of Fish and Fish Products – Volume (tonnes)**



Source: External Trade, Statistics Mauritius

A thorough examination of the export trends of fish and fish products, considering both their monetary value and volume, reveals somewhat divergent patterns. An analysis in terms of monetary value indicates that overall exports of frozen fish and preserved/prepared fish remained relatively constant at around MUR 13-14 billion throughout the last decade. Conversely, the volume analysis indicates a rising trend in exports from 2012 to 2015, followed by a decline from 2016 to 2022.

Furthermore, when comparing the two categories, exports of prepared/preserved fish (HS 1604) surpassed frozen fish (Chap 03) in terms of value, maintaining an average ratio of 72:28. However, in volume terms, it was noted that frozen fish declined by 53% since its peak in 2016 whereas preserved fish declined by 23% since its 2014 peak.

It is worth noting that preserved fish is a significant contributor for the local industry, with 98% being locally made (domestic exports). On the other hand, frozen or chilled fish are mainly re-exported – only 27% being domestic exports.

Exports of fish and fish products comprise mainly of preserved fish, valued at MUR 11.3 billion in 2022. These were primarily destined for United Kingdom, Spain and Netherlands. Frozen fish, on the other hand, were mainly exported to Thailand, Spain, Japan, and China.

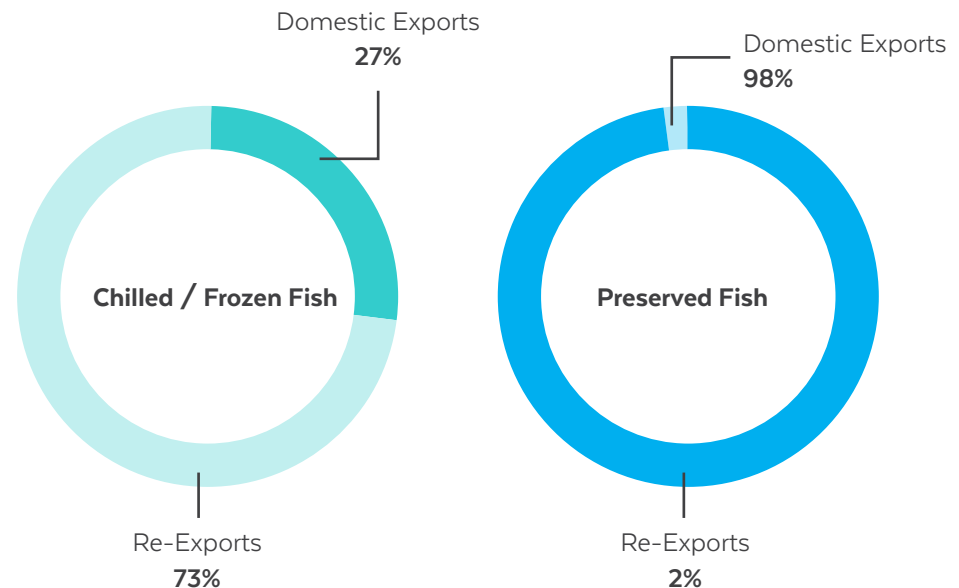
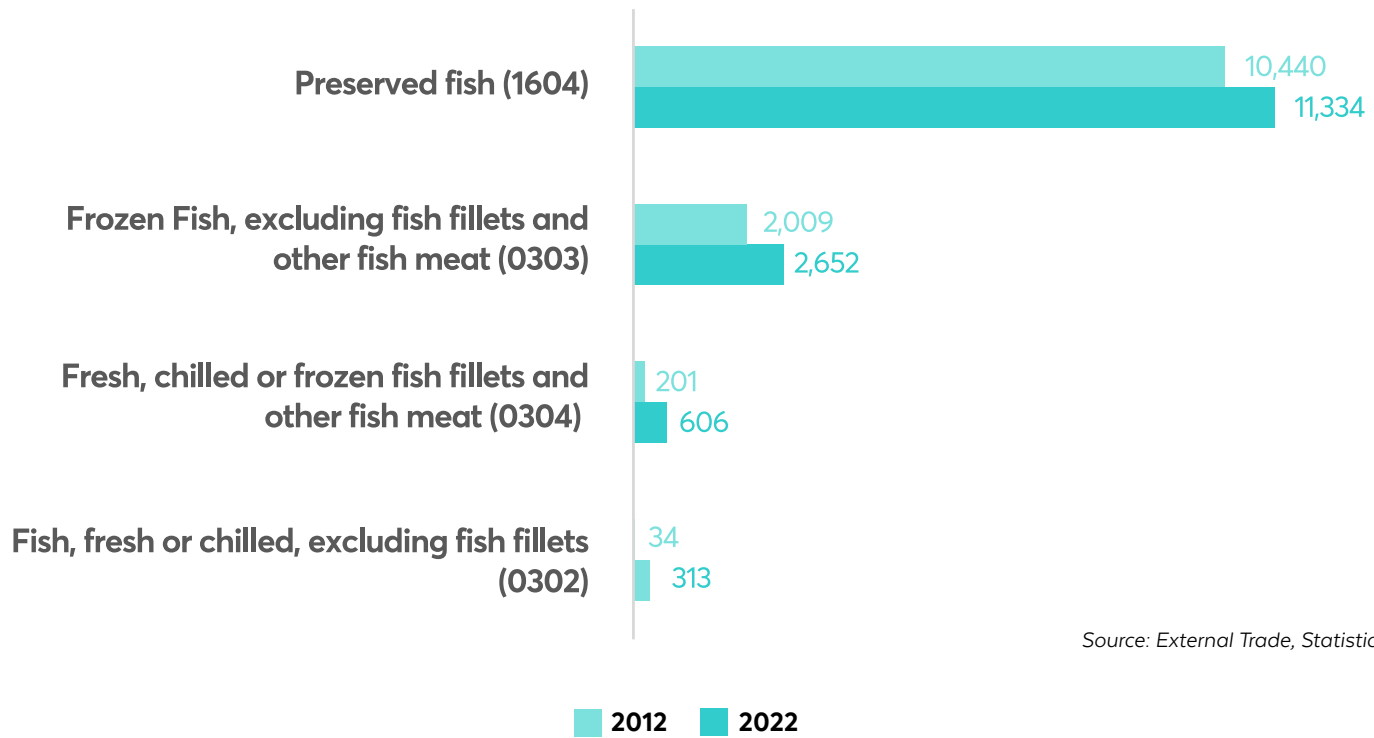


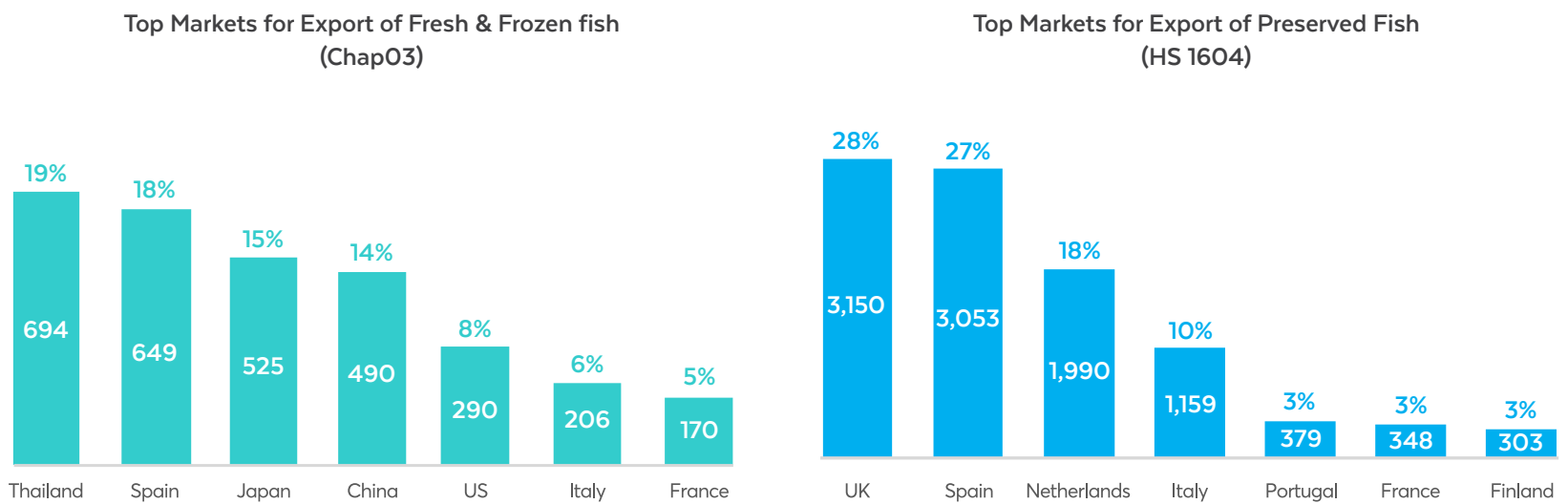


Figure 18: Evolution of Main Products of Fish and Fish Products (MUR Million)



Source: External Trade, Statistics Mauritius

Figure 19: Main Export Markets for Fish & Fish Products in 2022



Source: External Trade, Statistics Mauritius

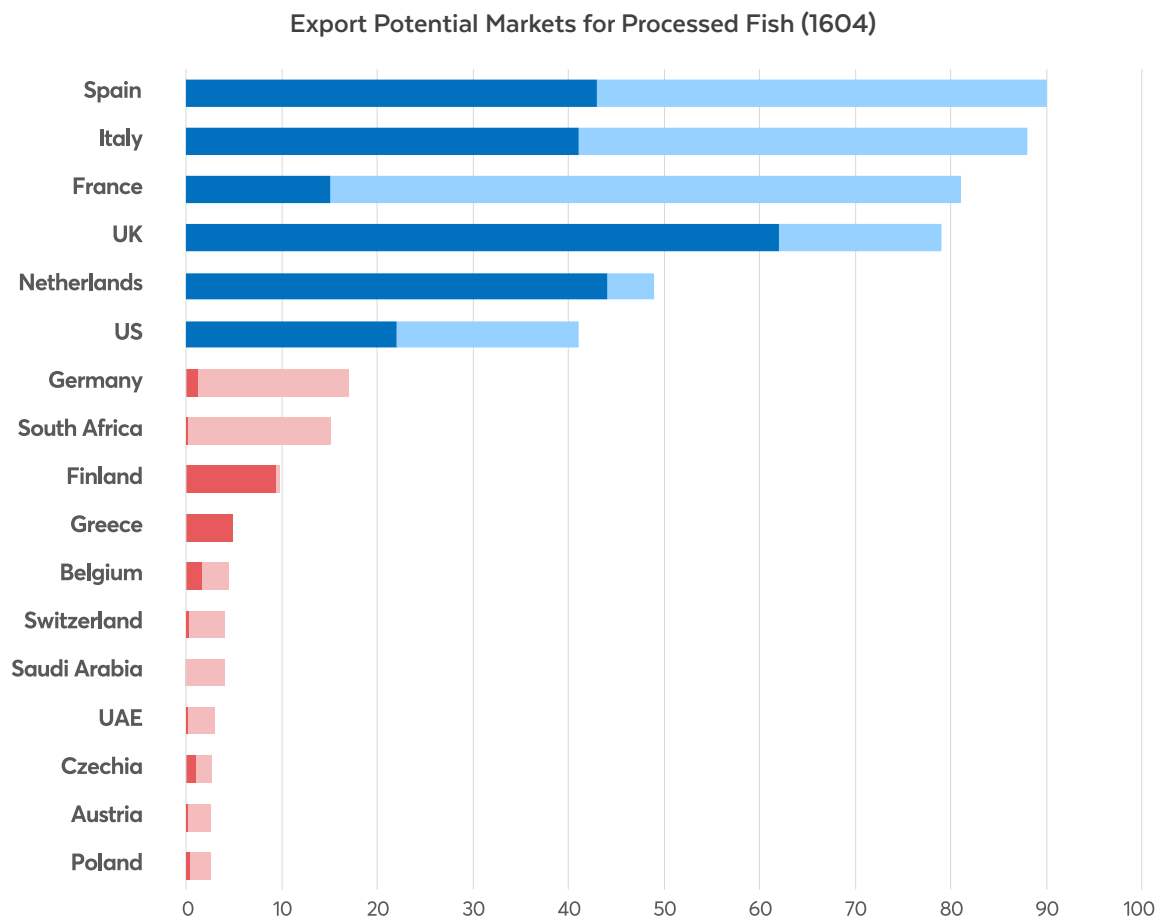
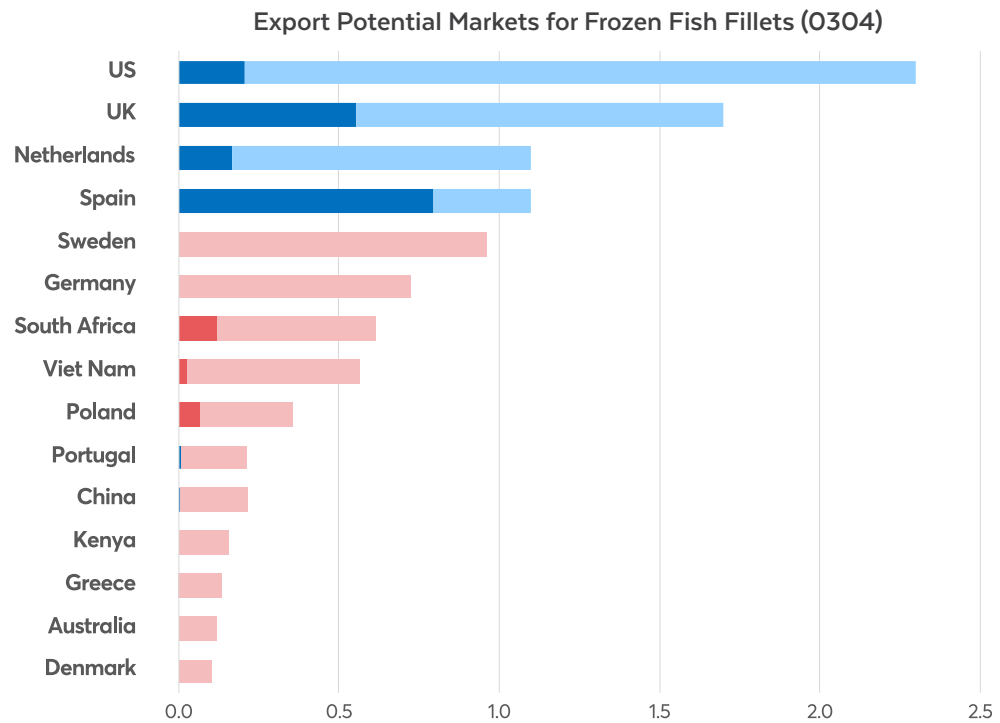
## Potential Export Markets

Fish and fish products are significant for Mauritius' exports and represent a substantial portion of export earnings, while generating revenue, sustaining employment opportunities, and fostering economic diversification. The top five export destinations represent a market share of 74% for fresh/frozen fish and 86% for prepared and preserved fish. This indicates opportunities for Mauritius to explore other new market avenues.

Existing Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)
Emerging Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)

Source: Export Potential Map, ITC

Figure 20: Potential Markets for Export of Fish and Fish Products

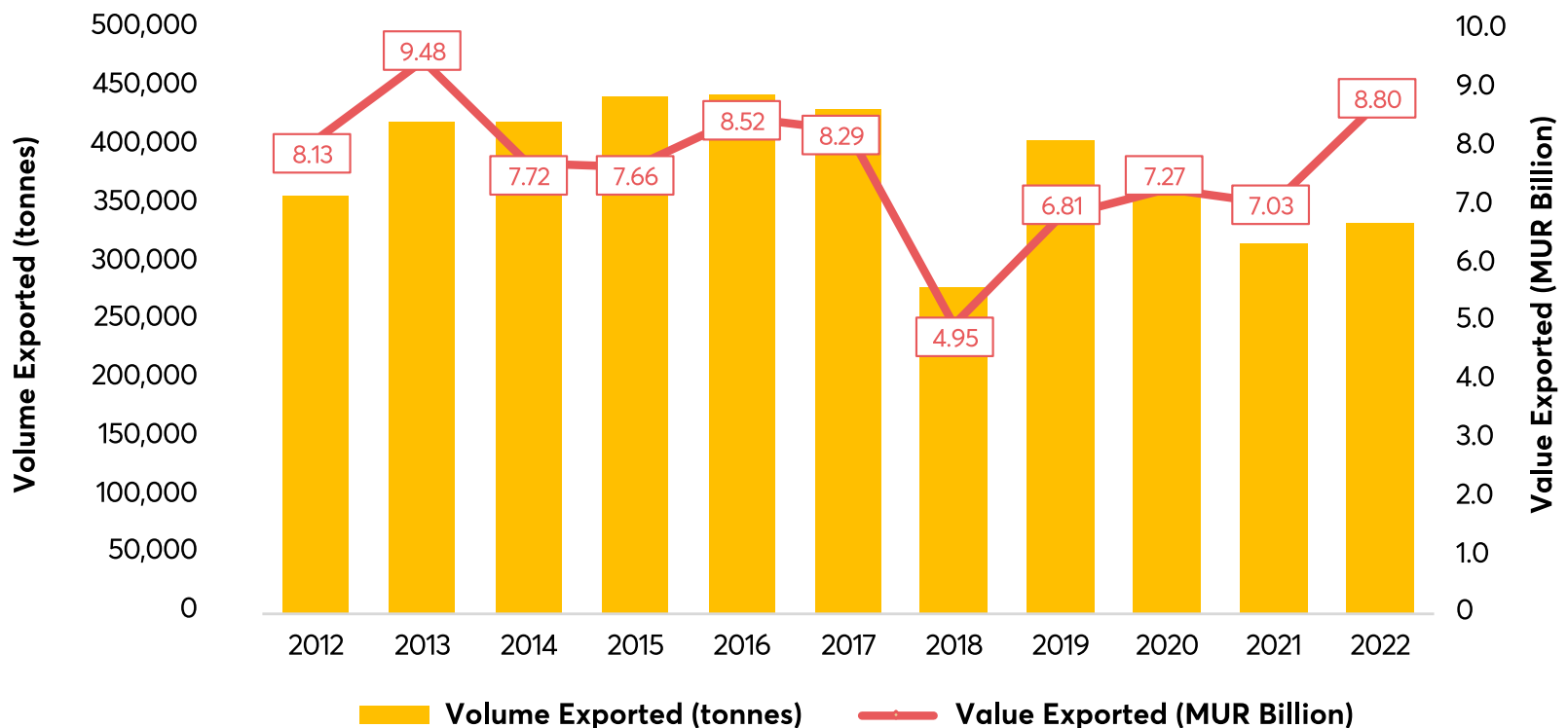


## Cane Sugar

Cane sugar has traditionally been the most important agricultural sector in the Mauritian economy. In 2012, total exports of cane sugar to the world amounted to MUR 8.1 billion and was estimated at MUR 8.8 billion in 2022.

In terms of volume, during the 2012 - 2022 period, an average of 584,000 tonnes were exported to the world.

Figure 21: Evolution of Total Exports of Cane Sugar (HS 1701)



Source: External Trade, Statistics Mauritius

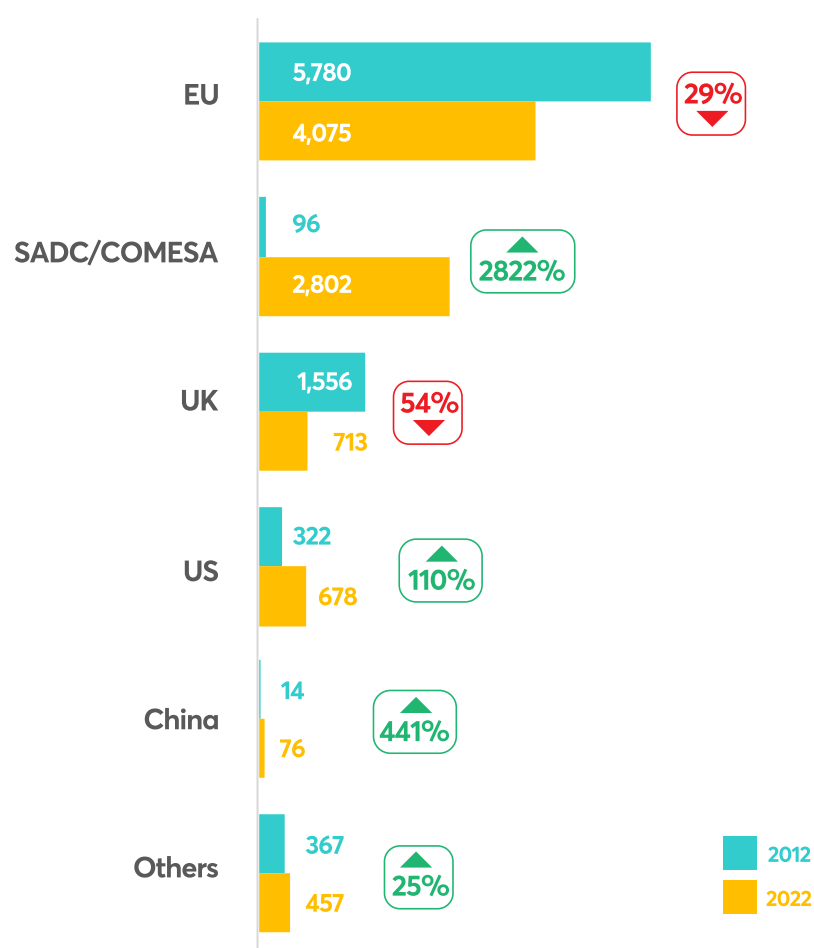
The European Union (EU) has been the main export market for a very long time owing to preferences obtained under the Sugar Protocol. In 2012, 71% of Mauritius' cane sugar was destined to the EU.

With the end of the 'Sugar Protocol' in 2017, exports of cane sugar fell significantly to MUR 5.0 billion in 2018, much below the average of MUR 8.0 billion. Subsequently, Mauritius has intensified its efforts to diversify and identify new markets for its exports of sugar.

Today, exports of cane sugar amount to MUR 8.80 billion and the EU represented only 46% of the market share. This clearly indicates that cane sugar has achieved a successful market diversification strategy over the last decade. Indeed, Africa has become an important market for Mauritian cane sugar representing 32% of total exports in 2022 compared to a market share of only 1% in 2012.

Regional exports of sugar was mainly destined for Kenya, accounting for 23% of the market share. Of note, cane sugar is exported to Kenya duty-free under the COMESA Treaty but is currently subject to quantitative restrictions.

Figure 22: Evolution of Main Export Markets for Cane Sugar (HS 1701)



Source: External Trade, Statistics Mauritius

Table 20: Main Export Markets for Cane Sugar in 2022

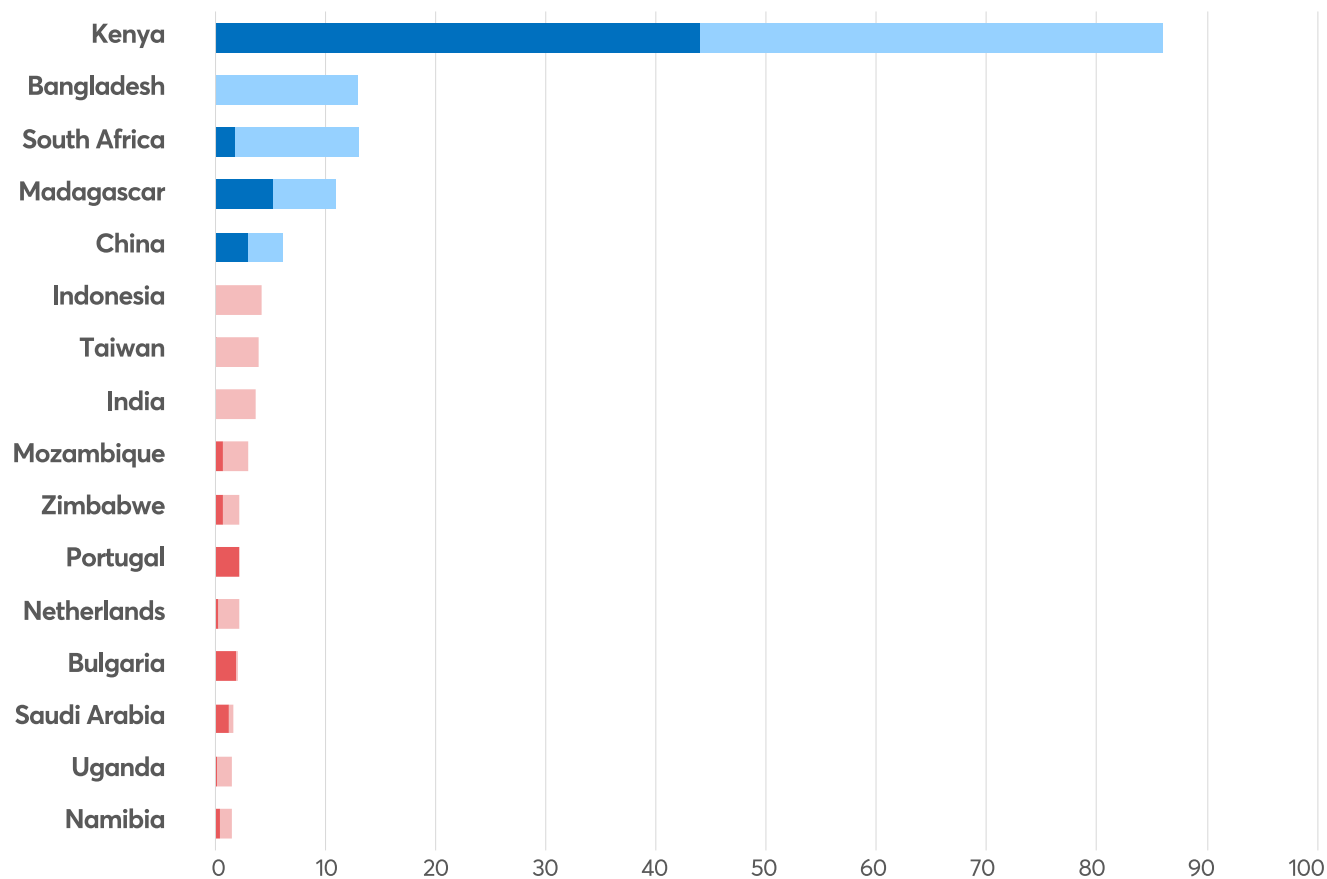
Main Countries of Export in 2022	Value Exported (MUR Million)	Share of Total Export of Cane Sugar
Kenya	2,045	23%
Spain	1,020	12%
Italy	780	9%
UK	713	8%
US	678	8%
Madagascar	510	6%
France	460	5%
Belgium	362	4%
Poland	326	4%
Germany	312	4%

Source: External Trade, Statistics Mauritius

## Potential Export Markets for Cane Sugar and Special Sugars

Cane sugar has been a traditional and major export product for Mauritius, contributing substantially to the economy. Over the years, the industry has evolved and a wide range of special sugars are now also being exported. Figure 23 below identifies potential markets for expanding exports of cane sugar and special sugars.

Figure 23: Potential Markets for Export of Cane Sugar and Special Sugars



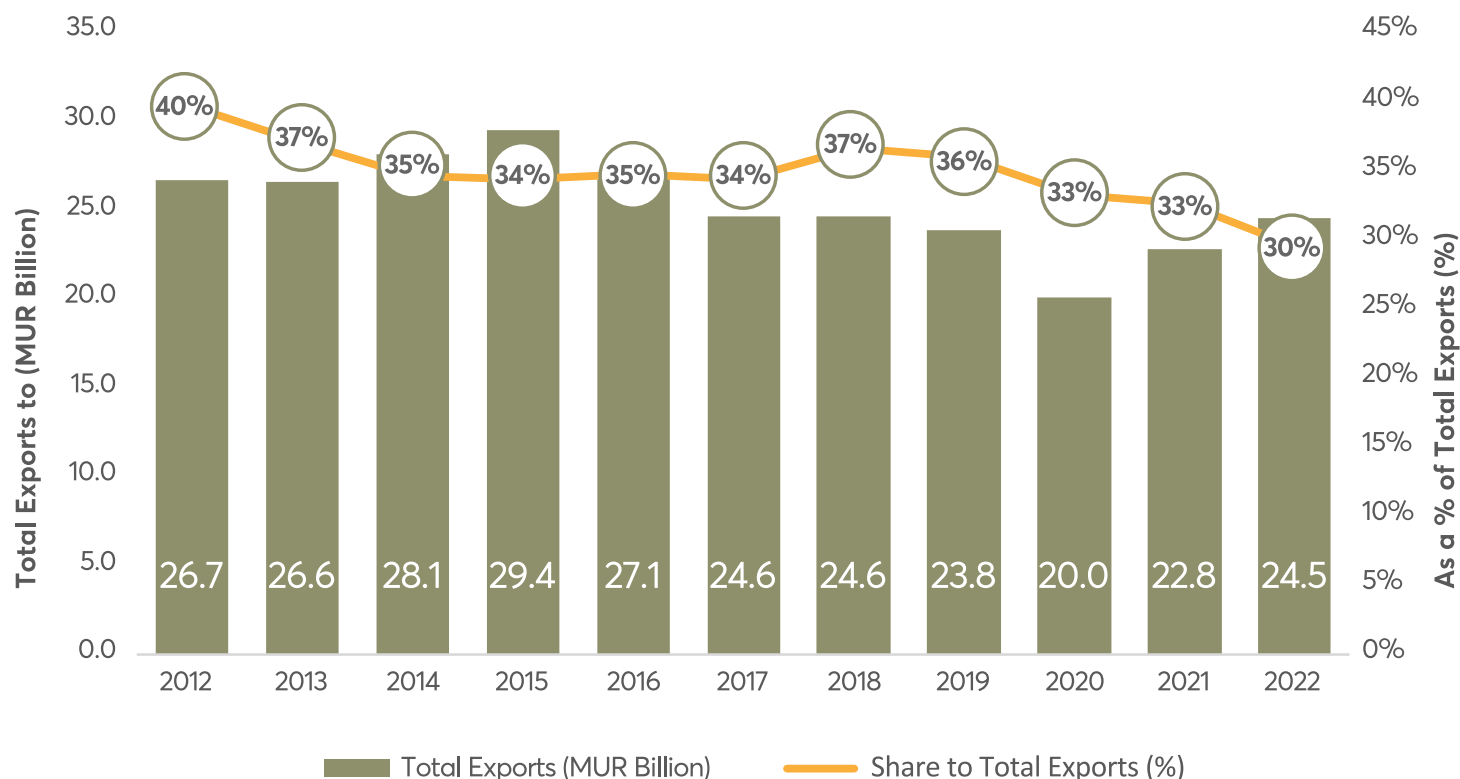
Source: Export Potential Map, ITC

Existing Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)
Emerging Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)

## Textiles and Apparel

The textile industry has been considered as a major economic pillar of the Mauritian economy, attracting foreign direct investment, creating new employment opportunities, and strengthening the manufacturing base of the economy. In 2012, exports of textile and apparel amounted to MUR 27 billion - representing 40% of total exports to the world. Over the years, with the diversification of export industries, the contribution of the sector to total exports gradually fell to 30%.

Figure 24: Evolution of Total Exports of Textiles and Apparel (Chap 50-63)



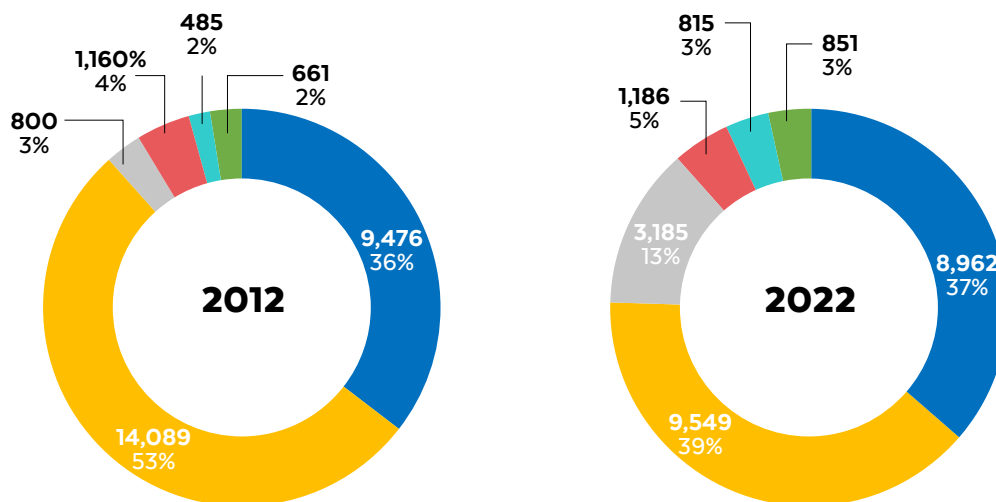
Source: External Trade, Statistics Mauritius

Except for 2020, where exports stood at MUR 20 billion, due to the pandemic, exports of textile and apparel products averaged MUR 25-29 billion during the past decade.

A breakdown of the sectoral exports indicate that the main categories of textile products exported were garments, classified under Chapter 61 and 62, which represented 76% of total textile and apparel products exported.

From 2012 to 2022, a significant increase in exports of fabrics has also been realised, from MUR 800 million to MUR 3.2 billion. These fabrics have been mainly exported to Madagascar (MUR 2.3 billion) and South Africa (MUR 752 million).

Figure 25: Evolution of Exports of Main Product Categories of Textile and Apparel



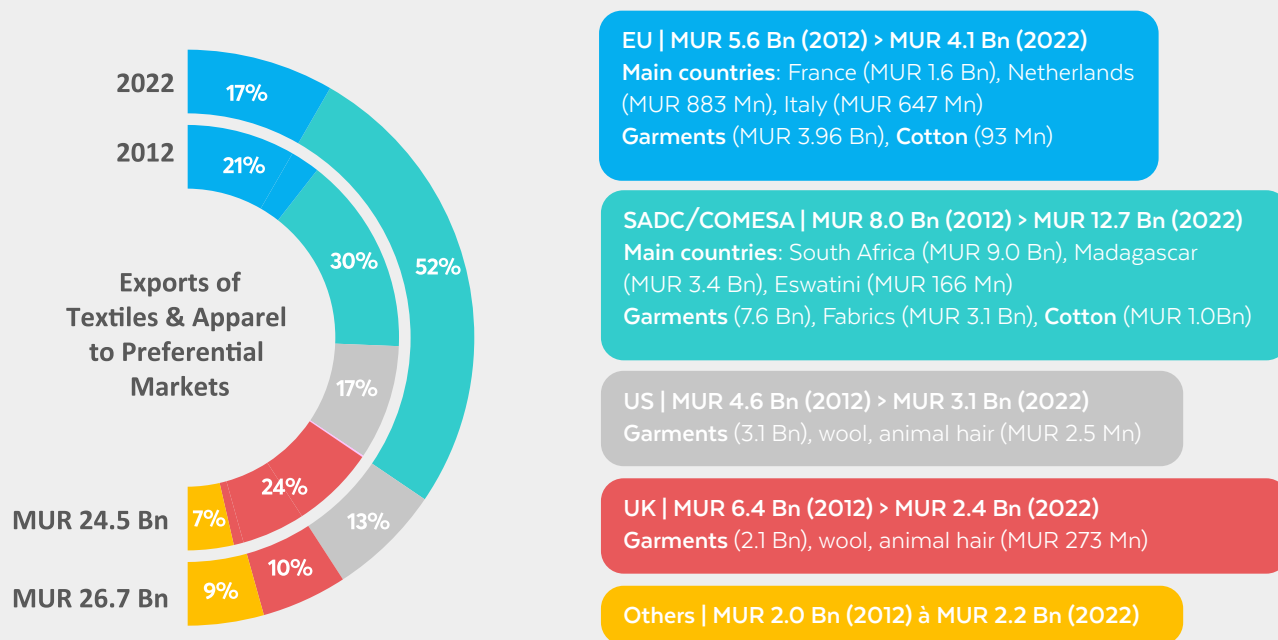
Source: External Trade, Statistics Mauritius

Table 21: Top 10 Products of Garments (Chap 61 & 62) Exported in 2022

Product Description	Quantity Exported (Unit)	Value Exported (MUR Million)
6203 - Men's or boys' suits, ensembles, jackets, blazers, trousers	7,874,896	5,125
6109 - T-shirts, singlets and other vests, knitted or crocheted	19,823,405	3,726
6204 - Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, trousers	3,324,192	1,781
6110 - Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	3,034,728	1,575
6104 - Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, trousers, knitted or crocheted	5,499,888	1,559
6205 - Men's or boys' shirts	1,639,404	1,541
6105 - Men's or boys' shirts, knitted or crocheted	3,101,115	992
6114 - Other garments, knitted or crocheted	2,038,890	555
6103 - Men's or boys' suits, ensembles, jackets, blazers, trousers, knitted or crocheted	558,366	312
6106 - Women' or girls' blouses, shirts and shirt-blouses, knitted or crocheted	1,041,343	244

Source: External Trade, Statistics Mauritius

Figure 26: Exports of Textile and Apparel to Main Markets



Source: External Trade, Statistics Mauritius

In 2012, UK was the leading export destination for textile and apparel, with total exports amounting to MUR 6.4 billion. In 2022, exports dropped by 63% to MUR 2.4 billion, resulting mainly from a significant decline in exports of garments to the UK, by 66%. Nonetheless, exports of yarn of carded wool to the UK have increased by 46% during the corresponding period.

The SADC/COMESA region has emerged as a leading export destination for textile and apparel over the years, with a market share of 52% in 2022 compared to only 30% in 2012. Garments, valued at MUR 7.6 billion, f.o.b. were destined to the SADC/COMESA region in 2022. These included trousers, t-shirts, and shirts. Main recipients' countries were South Africa, followed by Madagascar. Similarly, South Africa and Madagascar were the leading export destinations for fabrics and cotton.

Textile products were also exported to United Arab Emirates (MUR 246 million), Canada (MUR 149 million), and Bangladesh (MUR 125 million) in 2022.

Table 22: Evolution of Main Export Markets of Textiles and Apparel

	2012	2022
<b>Garments (Chap 61 &amp; 62)</b>	<ol style="list-style-type: none"> <li>1. UK   MUR 6.2 Bn</li> <li>2. South Africa   MUR 5.7 Bn</li> <li>3. US   MUR 4.6 Bn</li> <li>4. France   MUR 3.7 Bn</li> <li>5. Belgium   MUR 593 Mn</li> </ol>	<ol style="list-style-type: none"> <li>1. South Africa   MUR 7.5 Bn</li> <li>2. US   MUR 3.1 Bn</li> <li>3. UK   MUR 2.1 Bn</li> <li>4. France   MUR 1.6 Bn</li> <li>5. Netherlands   MUR 883 Mn</li> </ol>
<b>Fabrics (Chap 60)</b>	<ol style="list-style-type: none"> <li>1. South Africa   MUR 398 Mn</li> <li>2. Madagascar   MUR 317 Mn</li> <li>3. Bangladesh   MUR 76 Mn</li> <li>4. Italy   MUR 3.4 Mn</li> <li>5. Ethiopia   MUR 2.2 Mn</li> </ol>	<ol style="list-style-type: none"> <li>1. Madagascar   MUR 2.3 Bn</li> <li>2. South Africa   MUR 752 Mn</li> <li>3. Bangladesh   MUR 53 Mn</li> <li>4. Kenya   MUR 18 Mn</li> <li>5. Eswatini   MUR 17 Mn</li> </ol>
<b>Cotton (Chap 52)</b>	<ol style="list-style-type: none"> <li>1. Madagascar   MUR 597 Mn</li> <li>2. South Africa   MUR 188 Mn</li> <li>3. Turkey   MUR 99 Mn</li> <li>4. Bangladesh   MUR 73 Mn</li> <li>5. Italy   MUR 58 Mn</li> </ol>	<ol style="list-style-type: none"> <li>1. South Africa   MUR 673 Mn</li> <li>2. Madagascar   MUR 246 Mn</li> <li>3. Eswatini   MUR 98 Mn</li> <li>4. Italy   MUR 67 Mn</li> <li>5. Reunion   MUR 30 Mn</li> </ol>

Source: External Trade, Statistics Mauritius



# Potential Export Markets

Textile and Apparel constitute an essential sector in Mauritius' export landscape and plays a significant role in the country's economic growth. Mauritius aims to consolidate its textile industry by adopting a dual strategy of market diversification and product expansion. To diversify markets, the focus is on identifying and entering new geographical regions with untapped potential. The table illustrates potential export markets for textiles and apparel.

Figure 27: Potential Export Markets for Garments (Chap 61 & 62)

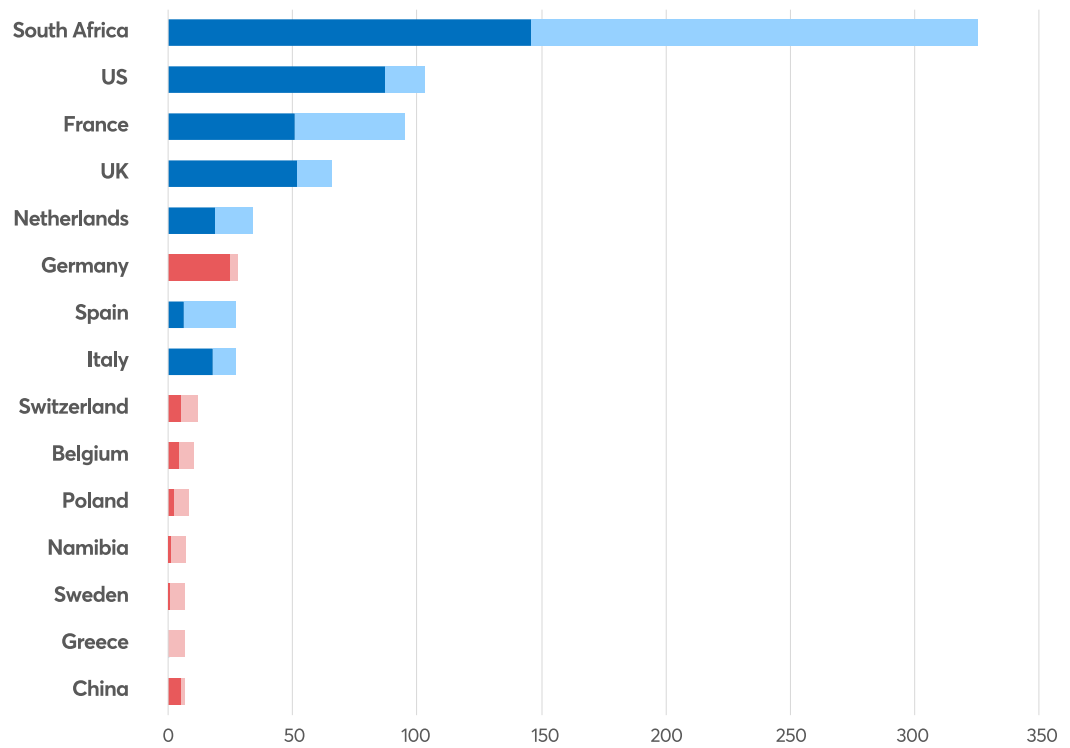
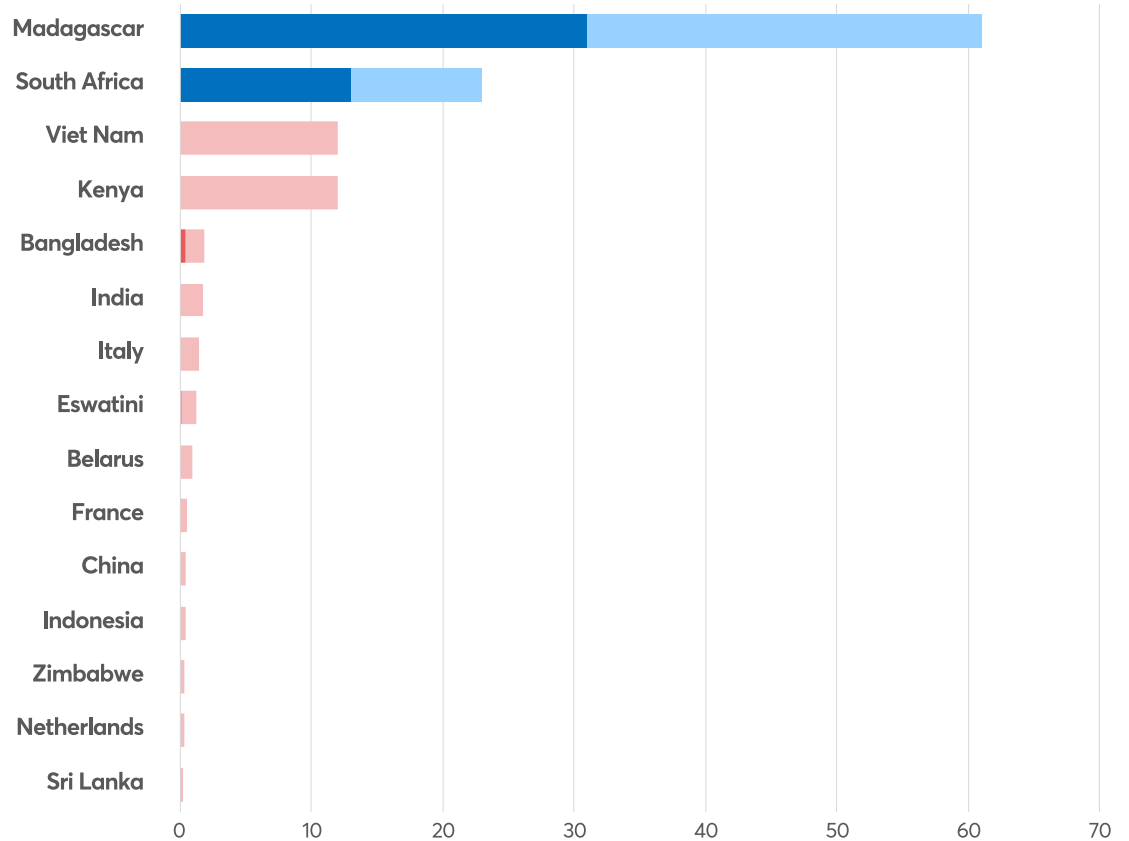


Figure 28: Potential Export Markets for Fabrics (Chap 60)



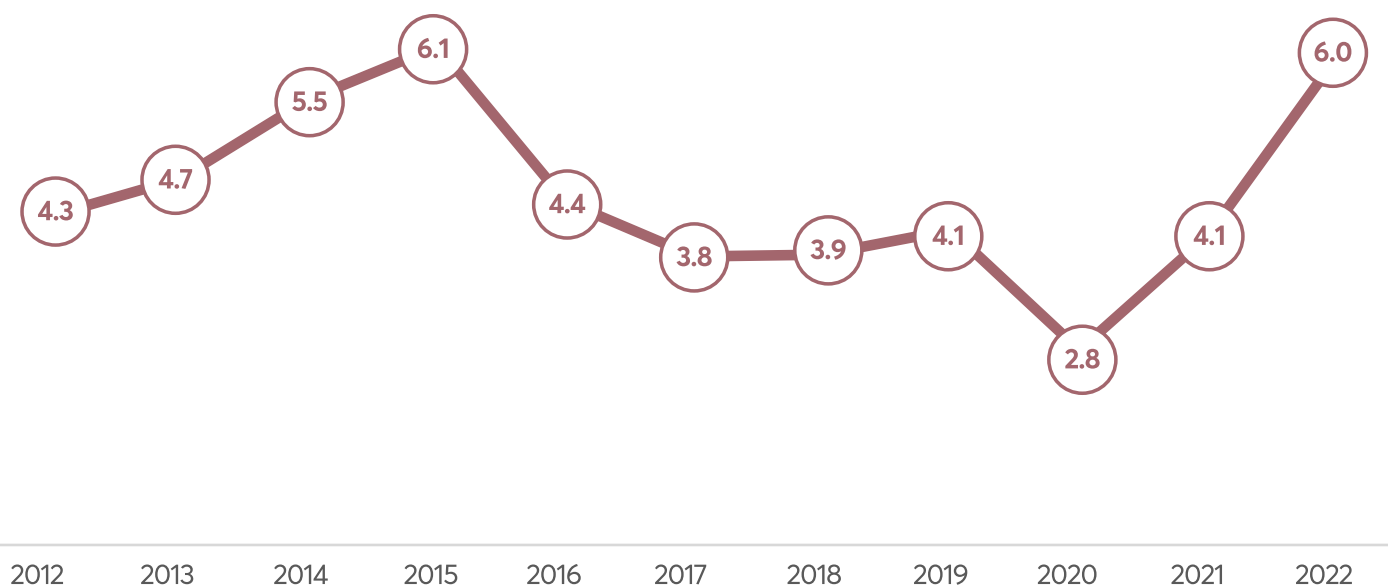
Source: Export Potential Map, ITC

Existing Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)
Emerging Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)

## Articles of Jewellery

Over the past decade, total exports of jewellery products (classified under Chapter 71) averaged MUR 4.5 billion. Following the COVID-19 pandemic, total exports fell to MUR 2.8 billion in 2020 before improving to MUR 6.0 billion in 2022, its highest point since 2015.

Figure 29: Total Exports of Articles of Jewellery 2012-2022 (Chapter 71)  
MUR Billion



Source: External Trade, Statistics Mauritius

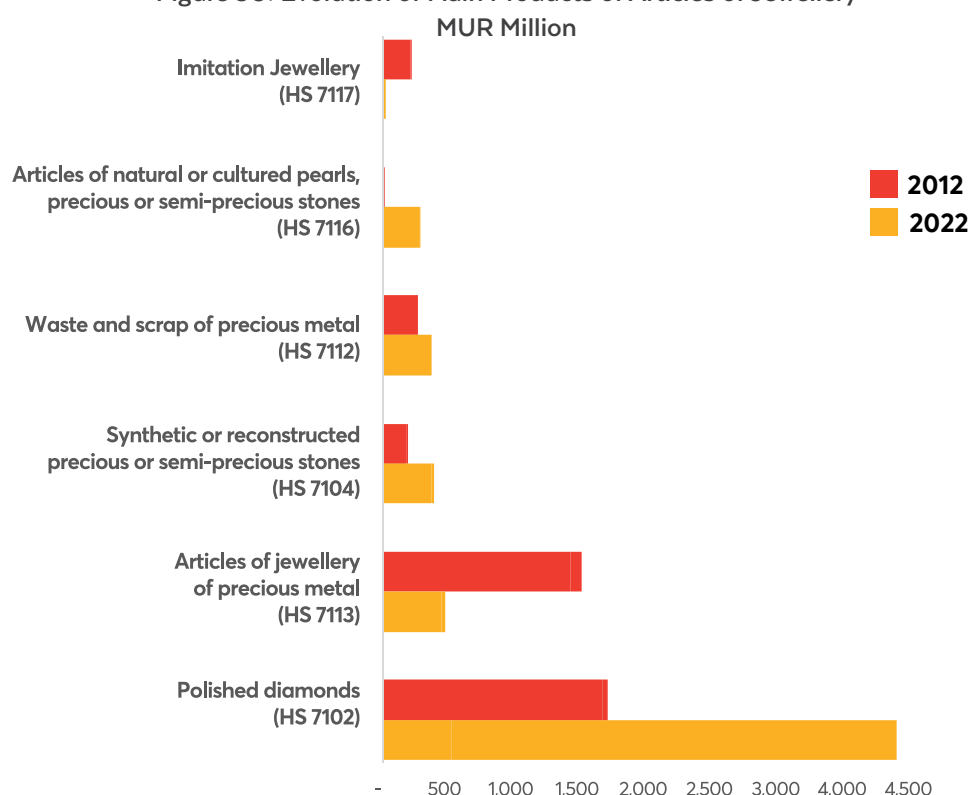
### Year 2022

Total Exports of Jewellery	MUR 6.0 Billion
Share of Total Exports	7.2%

The main products of export classified under jewellery articles (Chapter 71) are polished diamonds (MUR 4.2 billion), articles of jewellery of precious metal (MUR 508 million), synthetic or reconstructed precious or semi-precious stones (MUR 419 million), and waste and scrap of precious metal (MUR 403 million).

Exports of polished diamonds (HS 7102) was most significant among jewellery articles, with total exports of the product amounting to MUR 4.2 billion in 2022 compared to MUR 1.8 billion in 2012. These were mainly destined to Viet Nam.

Figure 30: Evolution of Main Products of Articles of Jewellery



As for articles of jewellery of precious metal (HS 7113), total exports declined by 69% from 2012 to 2022. Exports to the leading market, France, fell by 81% during the corresponding period to reach MUR 1.4 billion in 2022. Italy and UK also registered a decline in their imports from Mauritius by 95% and 30%, respectively.

Exports of synthetic or reconstructed precious or semi-precious stones (HS 7104) are mainly destined for Switzerland, with total exports increasing from MUR 102 million in 2012 to MUR 212 million in 2022.

Source: External Trade, Statistics Mauritius

Table 24: Main Export Markets for Articles of Jewellery in 2022

Polished diamonds (HS 7102)	Articles of jewellery of precious metal (HS 7113)	Synthetic or reconstructed precious or semi-precious stones (HS 7104)
Viet Nam (81%) Belgium (13%) US (6%)	France (53%) US (20%) Germany (13%) Madagascar (4%) UK (3%)	Switzerland (51%) France (41%) Indonesia (8%)

Source: External Trade, Statistics Mauritius



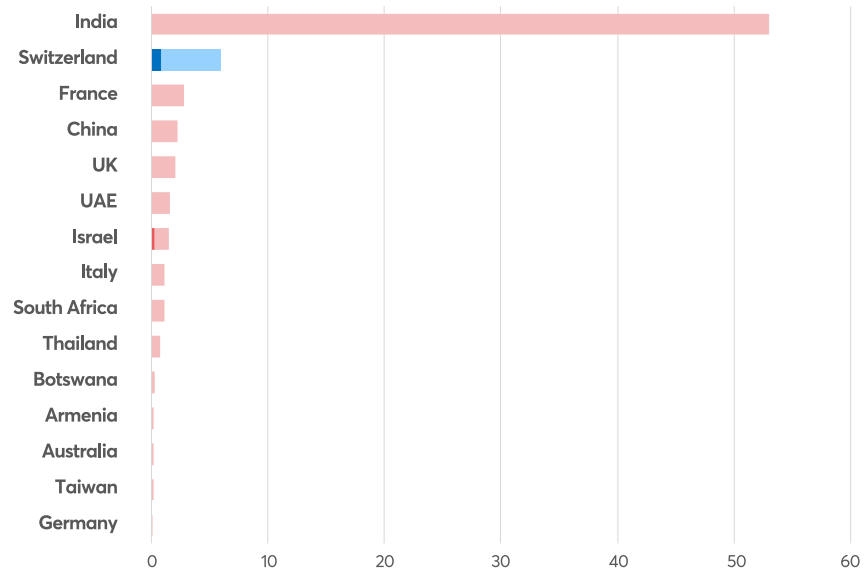
**IN 2012, ARTICLES OF JEWELLERY WERE MAINLY EXPORTED TO EUROPE (66%), AND THE UNITED STATES (22%). IN 2022, ASIA HAS BECOME THE LEADING EXPORT DESTINATION (59%), OWING TO RISING EXPORTS OF POLISHED DIAMONDS TO VIET NAM.**



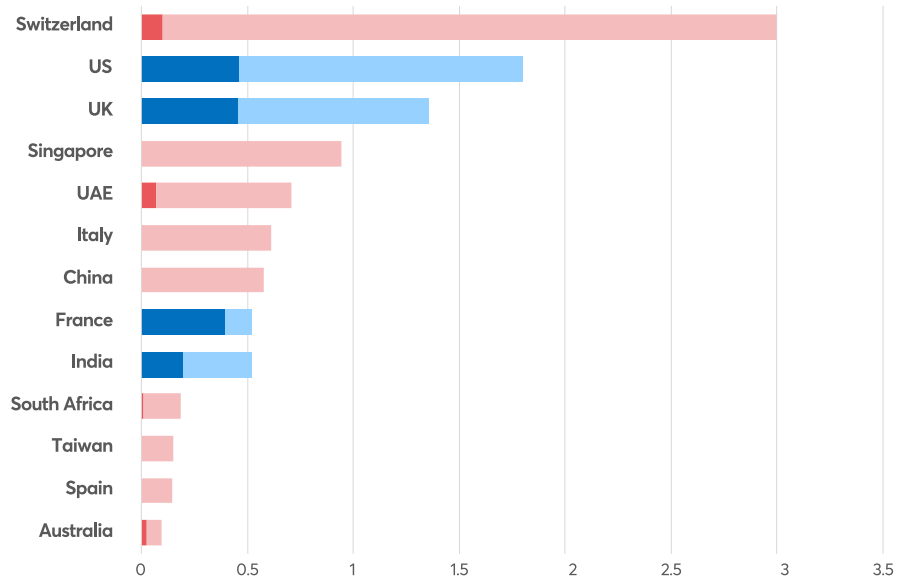
## Export Potential for Jewellery Sector

The jewellery sector has been an important contributor to Mauritius' export economy. The main products exported under this Chapter include polished diamonds and jewellery made from precious metals. This sector has been identified as a potential for further expansion. Figure 31 depicts potential export markets for jewellery products.

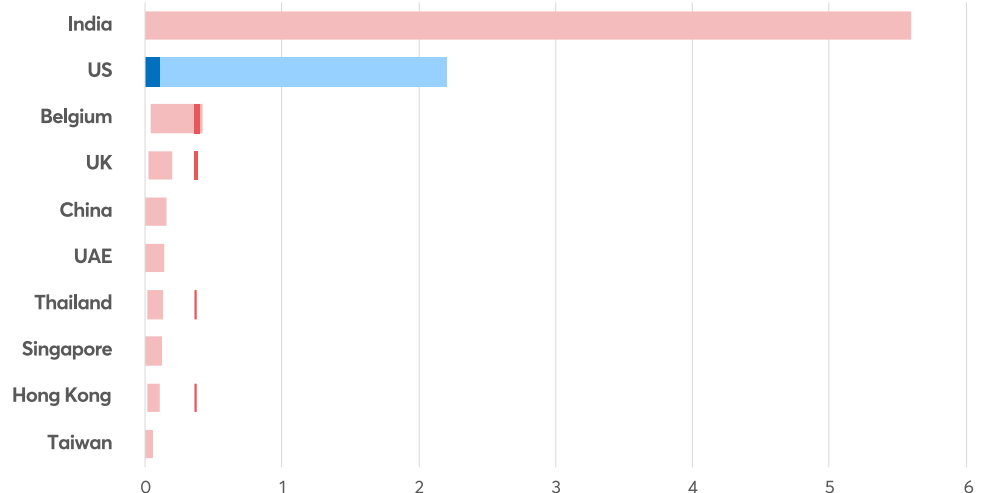
Figure 31: Potential Export Markets for Worked Diamonds (HS 7112)



Potential Export Markets for Articles of jewellery of precious metal (HS 7113)



Potential Export Markets for Synthetic or reconstructed precious or semi-precious stones (HS 7104)



Existing Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)
Emerging Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)

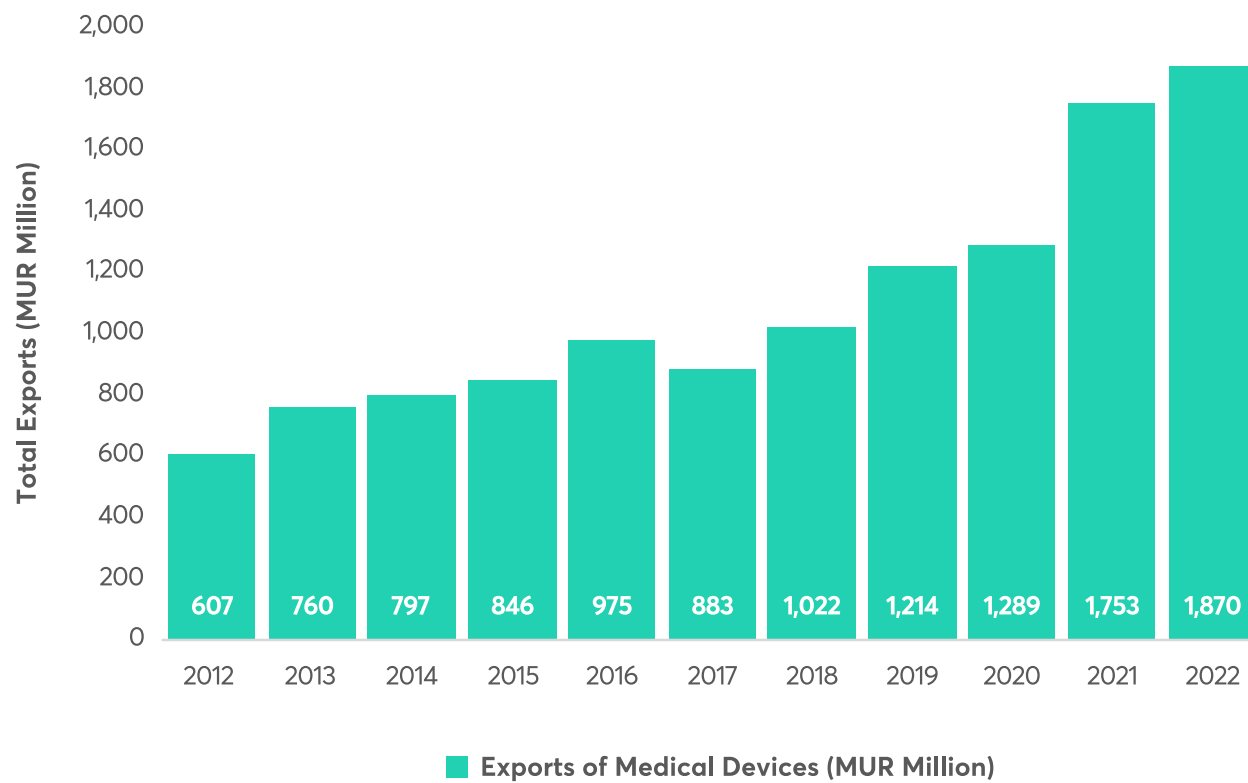
Source: Export Potential Map, ITC2

## Medical Devices

Over the past decade, ‘medical instruments’ classified under HS 9018 has emerged as a promising and buoyant sector. Figure 29 clearly depicts the increasing trend in export of medical instruments from MUR 607 million in 2012 to MUR 1.8 billion in 2022.

In 2022, exports of medical instruments represented 2% of total exports. 92% of total exports are domestic exports.

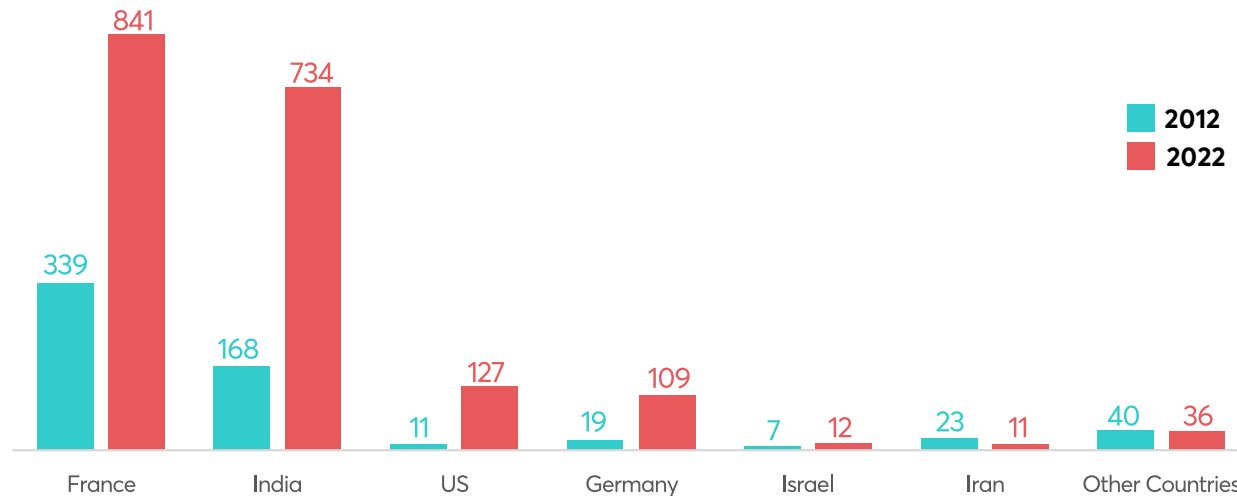
Figure 32: Evolution of Total Exports of Medical Instruments (HS 9018)



Source: External Trade, Statistics Mauritius

Europe remains the leading export destination for medical devices exported by Mauritius between 2012-2022. The market share, however, has declined from 62% to 52%. On the other hand, exports to the Asian region has increased during the corresponding period from MUR 204 million to MUR 746 million, driven by rising exports to India from MUR 168 million in 2012 to MUR 734 million in 2022. Exports to the United States have also increased over the past decade from MUR 11 million to MUR 127 million.

Figure 33: Evolution of Main Export Countries of Medical Devices (MUR Million)

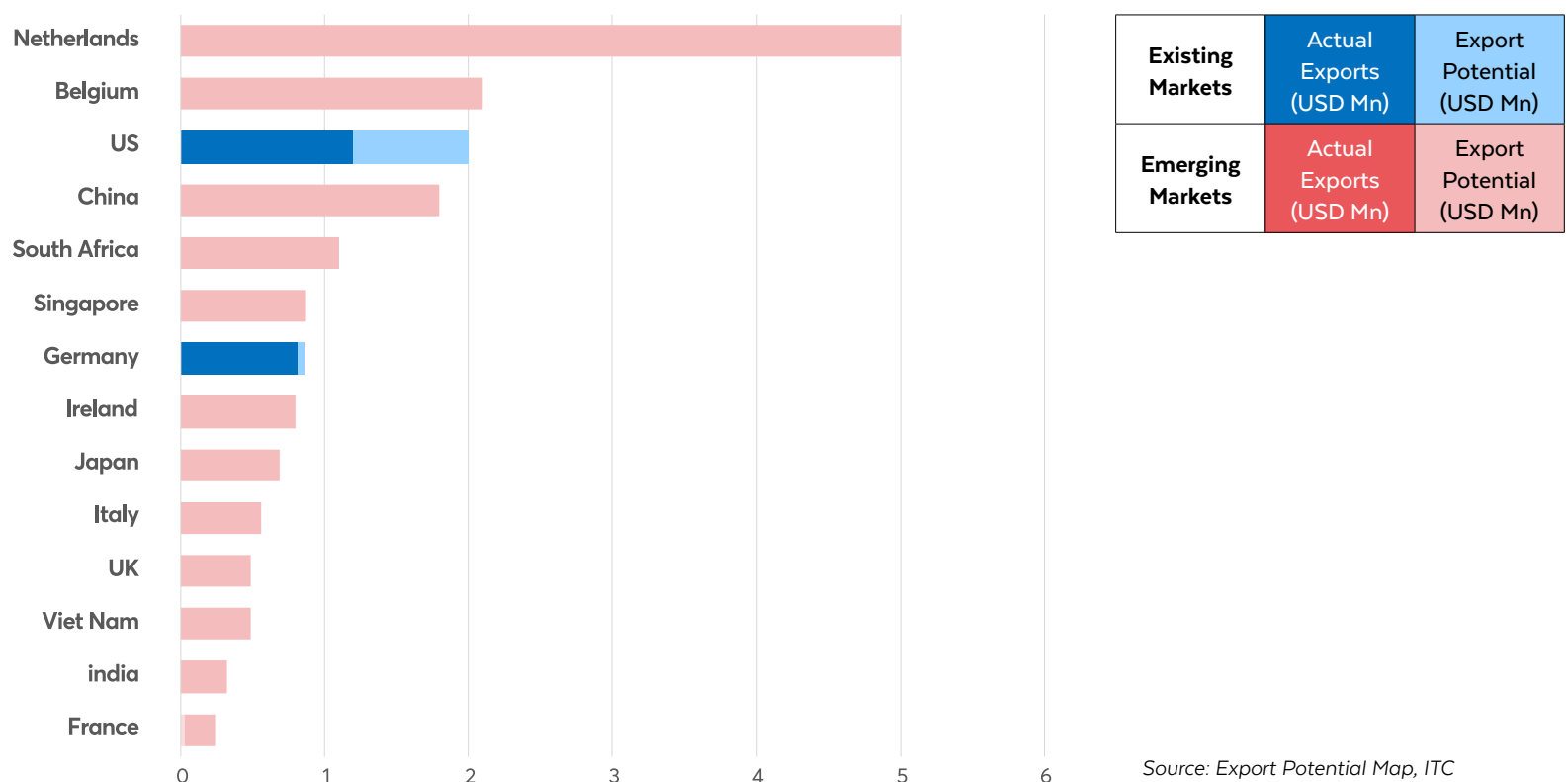


Source: External Trade, Statistics Mauritius

## Export Potential for Medical Devices

The export of medical devices has become a pivotal and growing sector for Mauritius, with a promising avenue for economic development. Mauritius is well-positioned with its increased production capabilities of medical devices to significantly expand exports to the identified potential markets.

Figure 34: Markets with Export Potential for Medical Devices



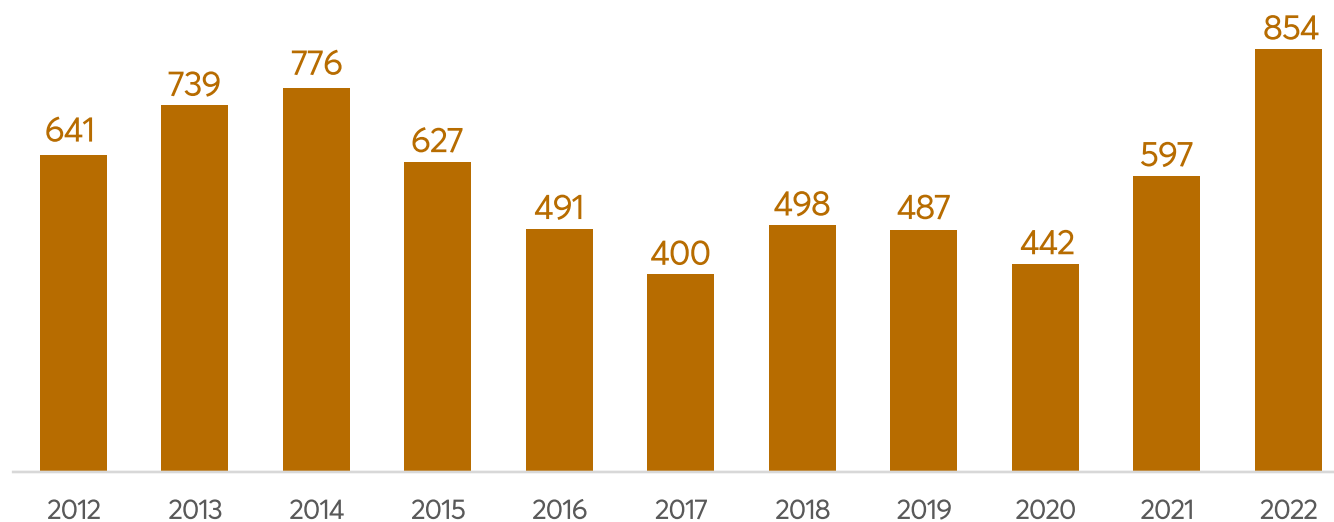
Source: Export Potential Map, ITC



**Leather Products**

Over the past decade, the export market for leather products has emerged as a promising sector. In 2022, total exports of leather products amounted to MUR 854 million rising from MUR 641 million in 2012. Figure 35 below illustrates the evolution of total exports of leather products over the past decade.

**Figure 35: Evolution of Total Exports of Leather Products (Chap 42)**  
MUR Million



Source: External Trade, Statistics Mauritius

Export of leather products consist mainly of suitcases, and handbags, classified under HS 4202. These amounted to MUR 703 million in 2022, almost doubling from MUR 376 million in 2012.

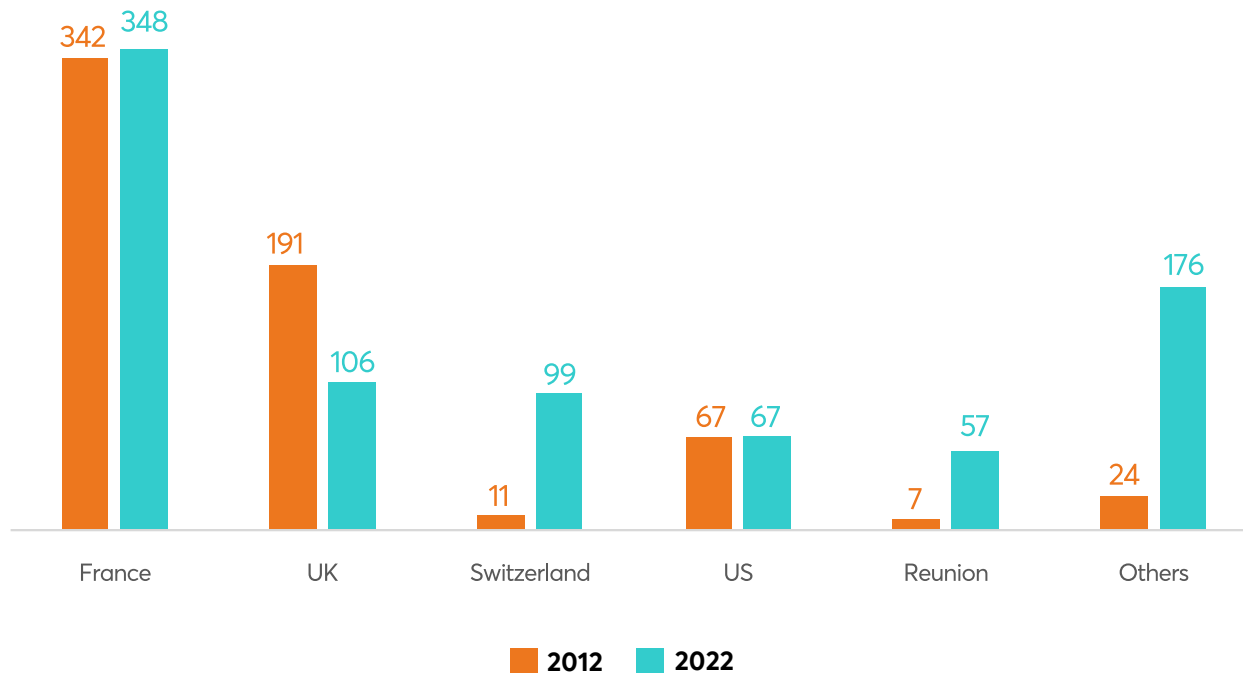
Figure 36: Evolution of Export of Main Leather Products



Source: External Trade, Statistics Mauritius

Exports of leather products were mostly destined to France, amounting to MUR 348 million in 2022 and representing a market share of 40% for leather products. Other main export markets include UK (12%), Switzerland (8%), US (8%), and Reunion (7%).

Figure 37: Evolution of Main Export Markets for Leather products



Source: External Trade, Statistics Mauritius



## Export Potential for Leather Products

The sector is still at its nascent and there exists huge opportunities for both export diversification and expansion. These figures identify potential market opportunities for Mauritius to expand its exports of leather products.

Figure 38: Potential Export Markets for Leather Products

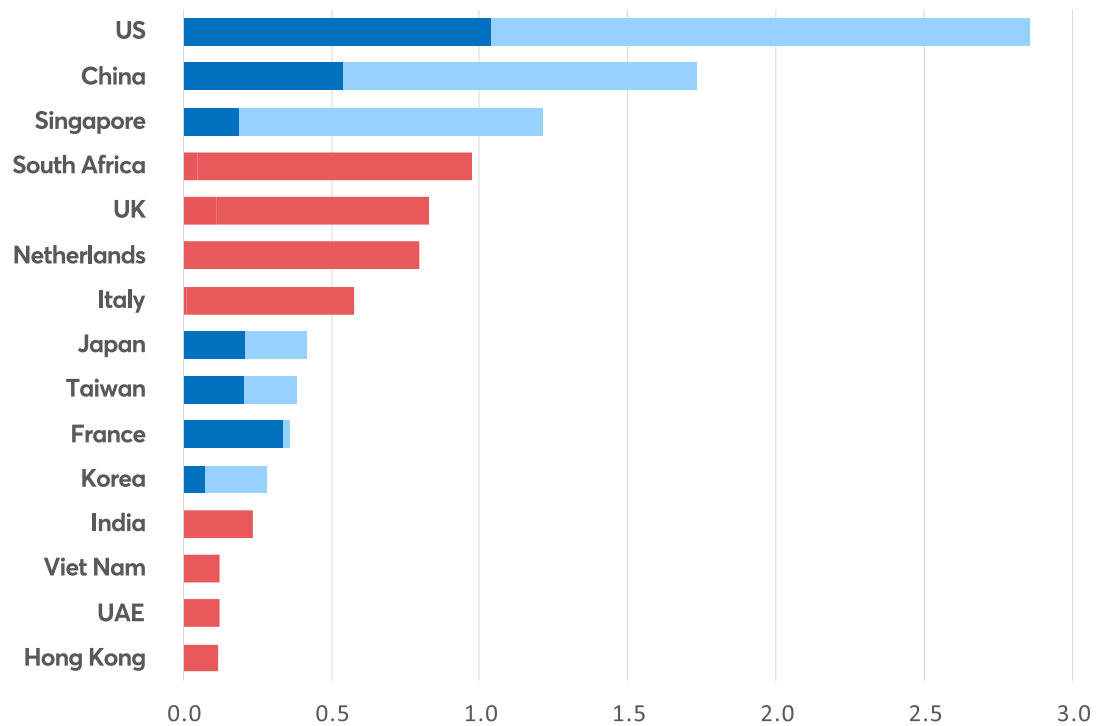
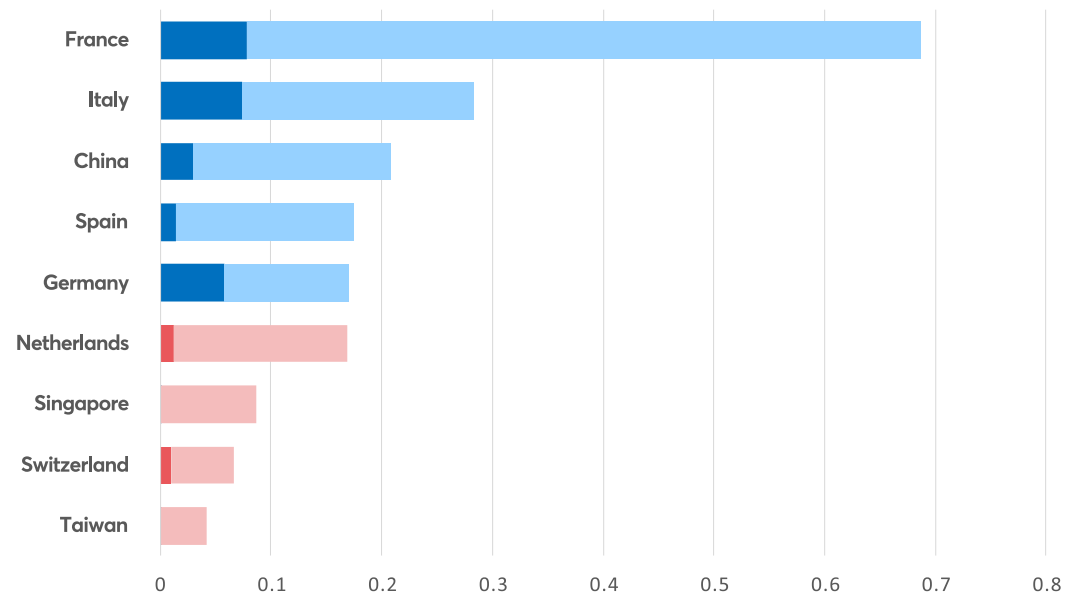


Figure 39: Potential Export Markets for Apparel of Leather (HS 4203)



Source: Export Potential Map, ITC

Existing Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)
Emerging Markets	Actual Exports (USD Mn)	Export Potential (USD Mn)



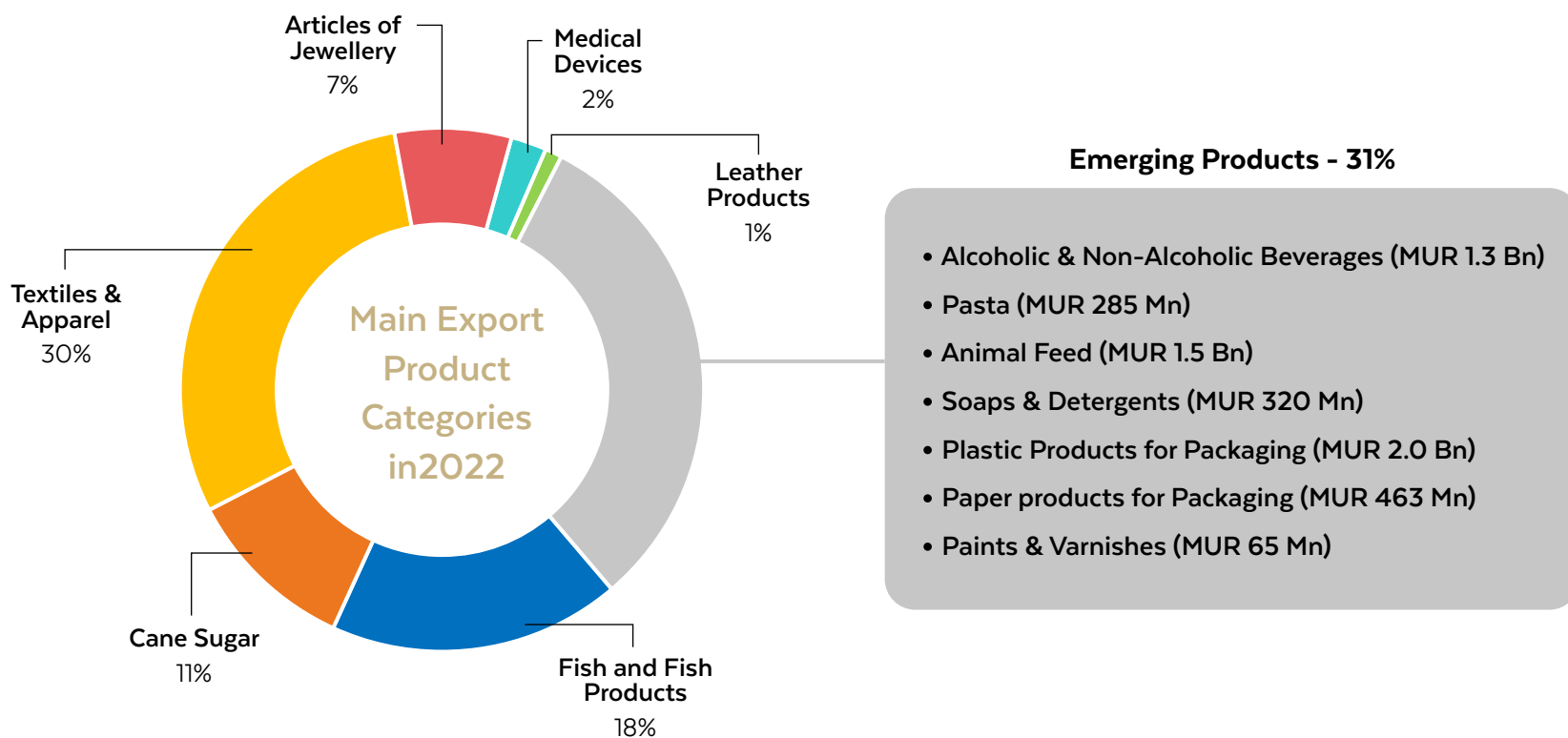
# EMERGING / POTENTIAL EXPORT PRODUCTS



Over the years, Mauritius has been successful in diversifying its export base beyond traditional sectors such as cane sugar and textiles and apparel. Analysis of Mauritius' export base over the past decade indicates that cane sugar, textiles and apparel, fish and fish preparations, articles of jewellery, and medical devices were the main products of export – representing 67% of total exports. Leather products have also gradually become a major export product, with total exports amounting to MUR 854 million in 2022.

Beyond these traditional products, exports of other major products have become prominent, providing huge opportunities for the local industry to leverage for increased production and export. These mainly include alcoholic and non-alcoholic beverages, pasta, animal feed, paint and varnishes, paint and detergents, plastic products, and paper products.

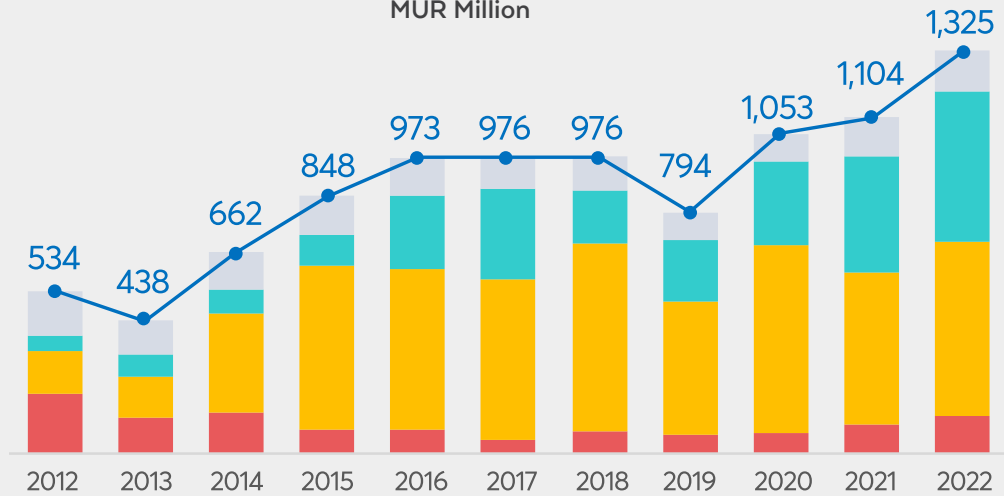
Figure 40: Emerging and Potential Export Products



This section delves into the evolution of exports of these emerging products and identify potential markets for exports.

# ALCOHOLIC & NON-ALCOHOLIC BEVERAGES

Total Exports of Beverages (Chap 22)  
MUR Million



HS 2202  
Waters &  
non-alcoholic  
beverages

HS 2207  
Undenatured  
ethyl alcohol  
used as input

HS 2208  
Undenatured ethyl alcohol: spirits,  
liqueurs, rum, and other spirituous  
beverages

Other  
beverages

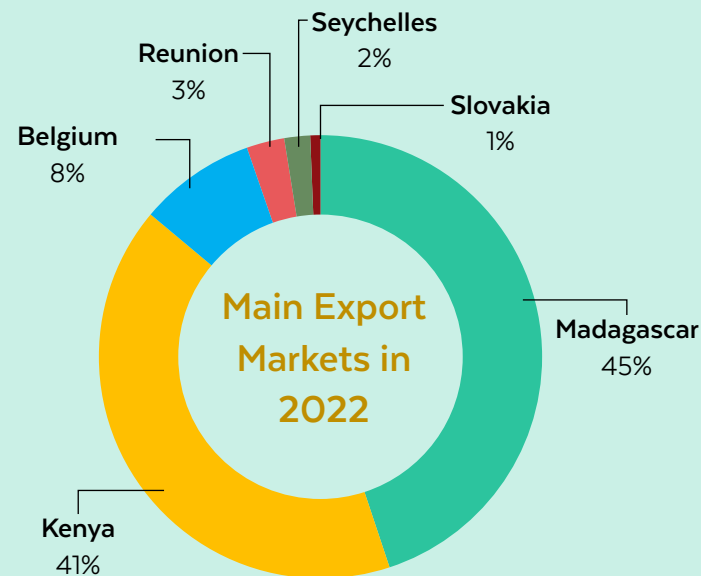
Total

Total Exports in 2022

**MUR 1.3 BILLION**

Main Products include Undenatured ethyl alcohol used as input (HS 220710), rum (HS 220840), and aerated waters (220210)

## Undenatured Ethyl Alcohol (HS 220710)

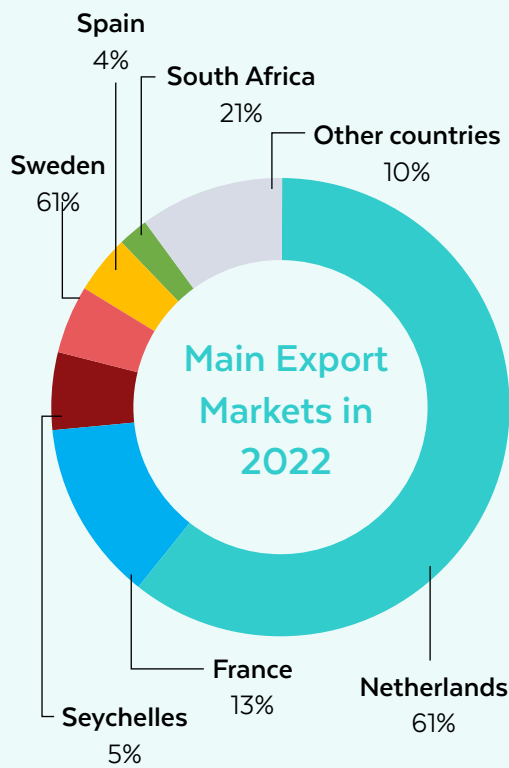


### Export Potential (USD'000)

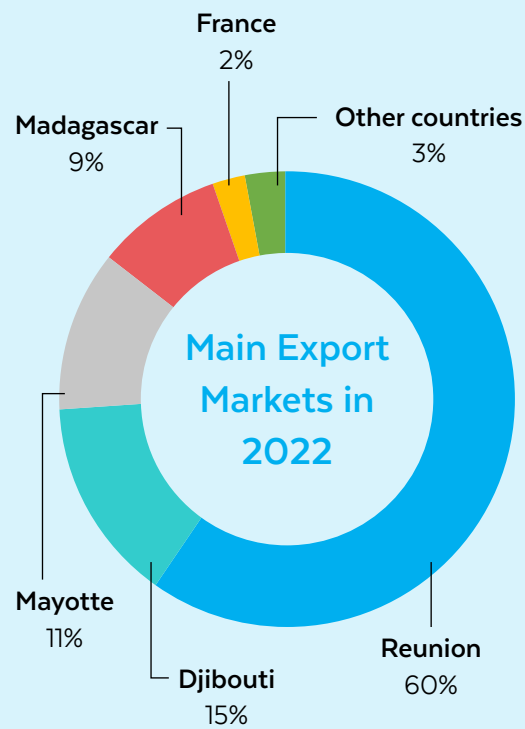
#### Undenatured Ethyl Alcohol (HS 220710)

Madagascar	4900
Netherlands	3000
Kenya	1400
South Africa	1000
UK	1000
France	872
US	763
Zambia	751
Philippines	532
Sweden	321
Italy	307
Zimbabwe	289
Singapore	253
Japan	249
Seychelles	228

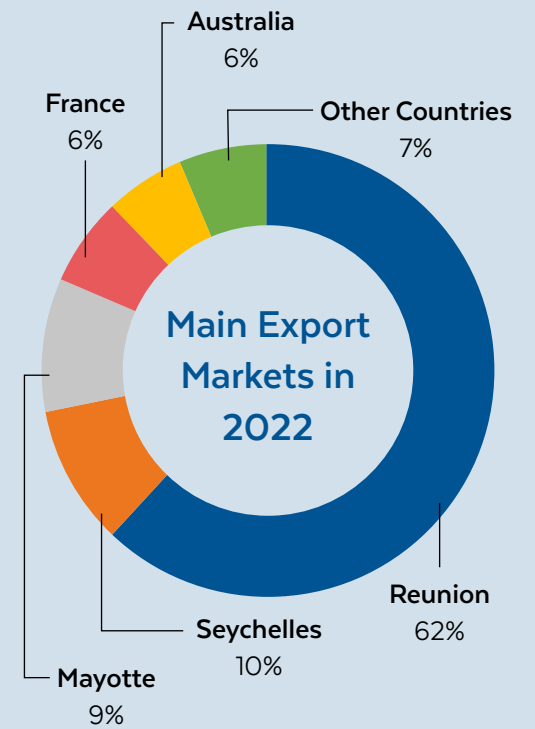
## Rum (HS 220840)



## Waters (HS 220210)



## Beer (HS 2203)



Export Potential (USD'000)	
Rum (HS 220840)	
Italy	3000
France	1000
UK	1100
Spain	909
Seychelles	498
Netherlands	454
Germany	443
South Africa	436
Czechia	247
Kenya	241
Zimbabwe	204
US	169
Belgium	160
Zambia	147
Switzerland	114

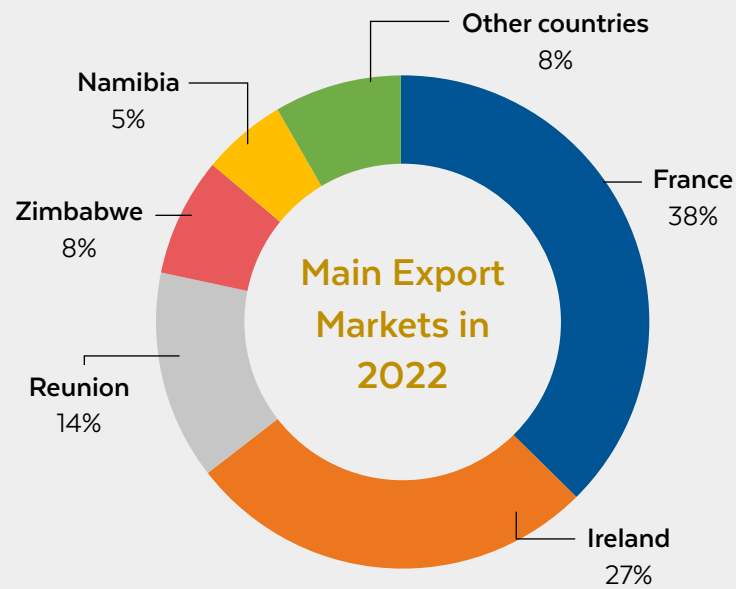
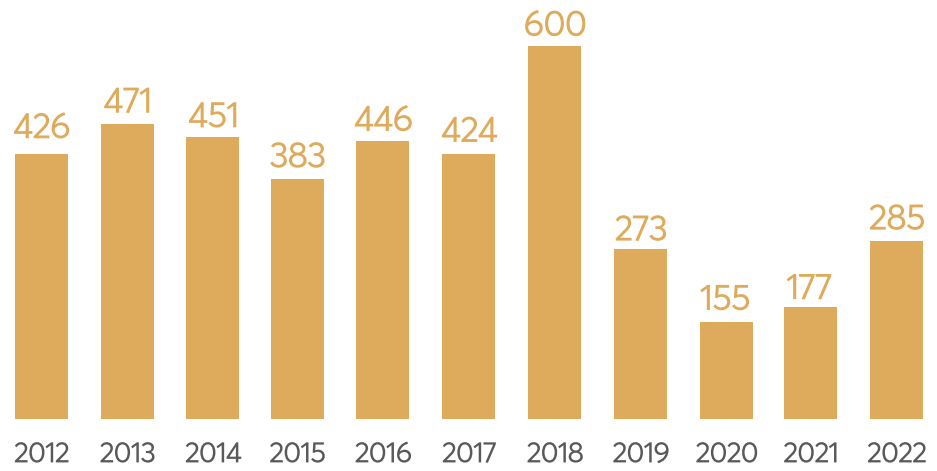
Export Potential (USD'000)	
Waters (HS 220210)	
Zimbabwe	285
US	284
Comoros	265
South Africa	257
France	76
Kenya	72
Mozambique	70
Seychelles	56
UK	53
Viet Nam	47
Australia	39
Eswatini	35
Zambia	33
India	30
Namibia	29

Potential Export Markets (USD Million)	
Beer (HS 2203)	
US	7,050
France	1011
China	650
Italy	643
UK	581
Netherlands	504
Germany	448
Canada	415
Spain	379
Ireland	237
Russia	231
Taiwan	229
Australia	225
Chile	209
Korea	195



# PASTA

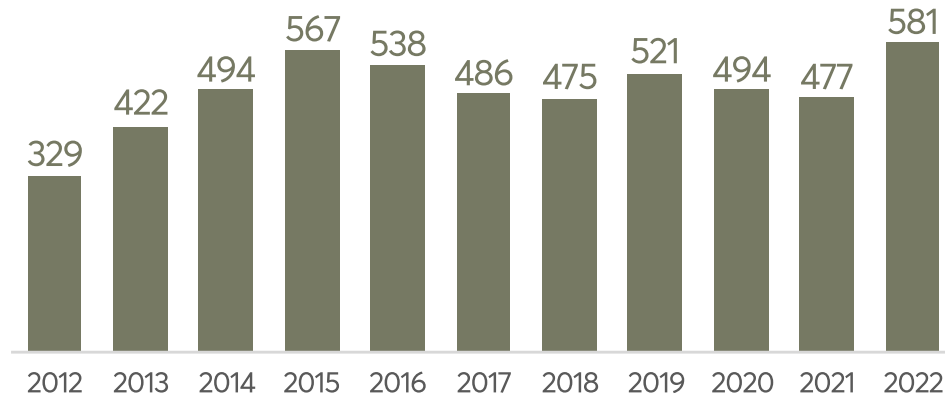
Total Exports of Pasta (HS 1902)  
(MUR Million)



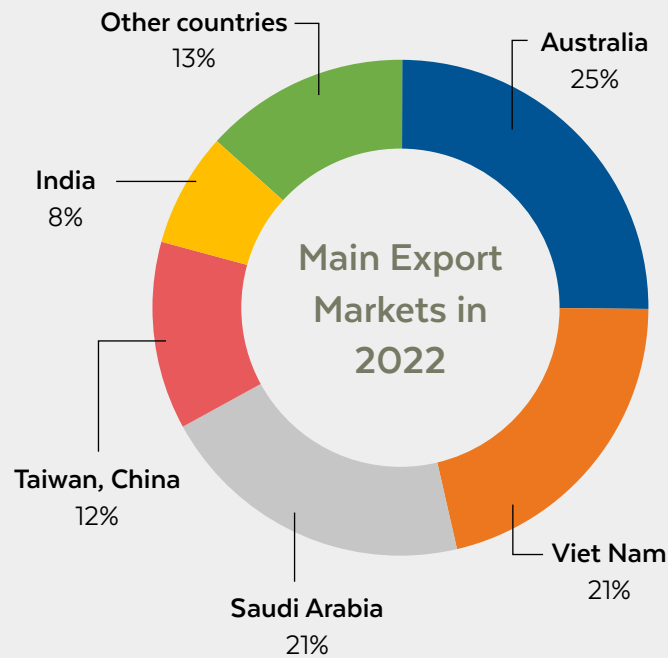
Export Potential (USD'000)	
Uncooked Pasta (HS 1902)	
Zimbabwe	8300
South Africa	3300
Zambia	625
Madagascar	492
Kenya	457
US	447
UK	186
France	156
Japan	91
Singapore	78
Netherlands	69
Seychelles	59
Comoros	59
Canada	54
China	52

# ANIMAL FEED – FLOURS, MEALS AND PELLETS

Total Exports of Flours, meals and pellets (HS 2301)  
MUR Million



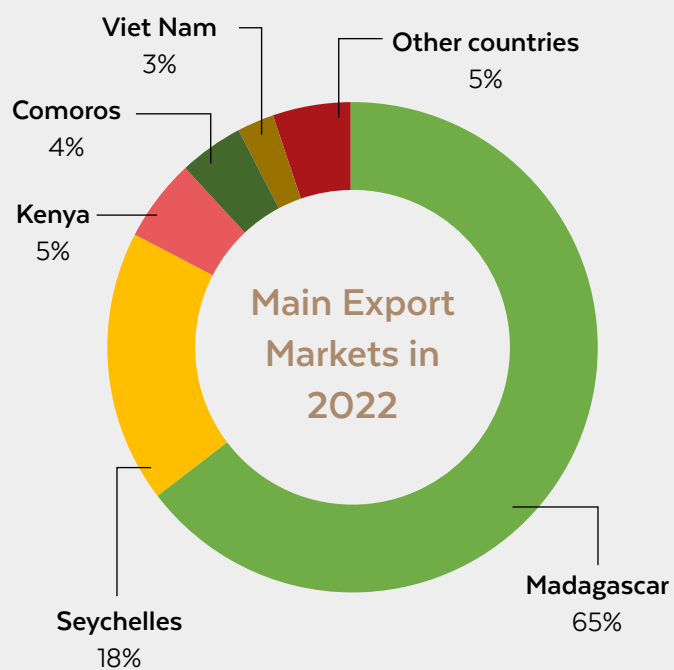
Export Potential (USD'000)	
Fish flours (HS 2301)	
China	6700
Viet Nam	6000
Taiwan	1200
Greece	1100
Zambia	583
UK	460
India	437
Japan	405
Germany	368
Italy	357
South Africa	269
France	255
Spain	219
Denmark	210
Zimbabwe	198





# ANIMAL FEED PREPARATIONS

Total Exports of Animal Feed Preparations (HS 2309)  
(MUR Million)

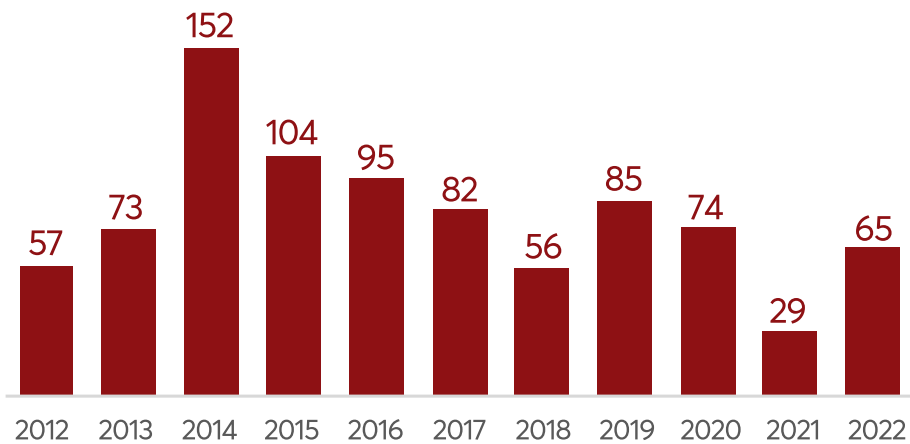


Export Potential (USD'000)

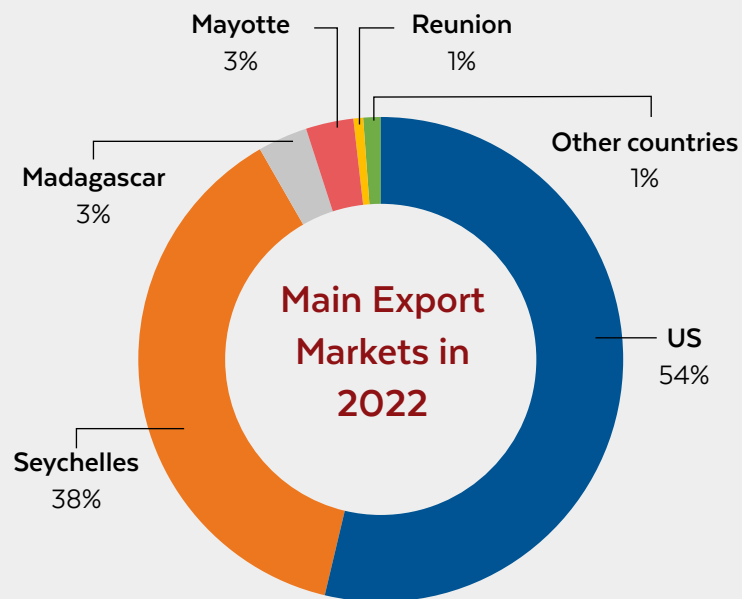
Animal Feed (HS 2309)	
Zimbabwe	3400
Viet Nam	3300
South Africa	3200
India	2300
Seychelles	1900
Zambia	1800
Madagascar	1400
Kenya	1300
US	600
China	529
Comoros	506
Thailand	475
Bangladesh	365
France	359
Uganda	336

# PAINT & VARNISHES

Total Exports of Paints & Varnishes  
(MUR Million)



Export Potential (USD'000)	
Paint & Varnishes (HS 3209/10)	
China	1505
US	1284
Germany	1253
France	945
Poland	938
Belgium	876
Italy	768
Netherlands	767
UK	703
Spain	702
Turkey	609
Viet Nam	527
Austria	421
Thailand	390
India	368

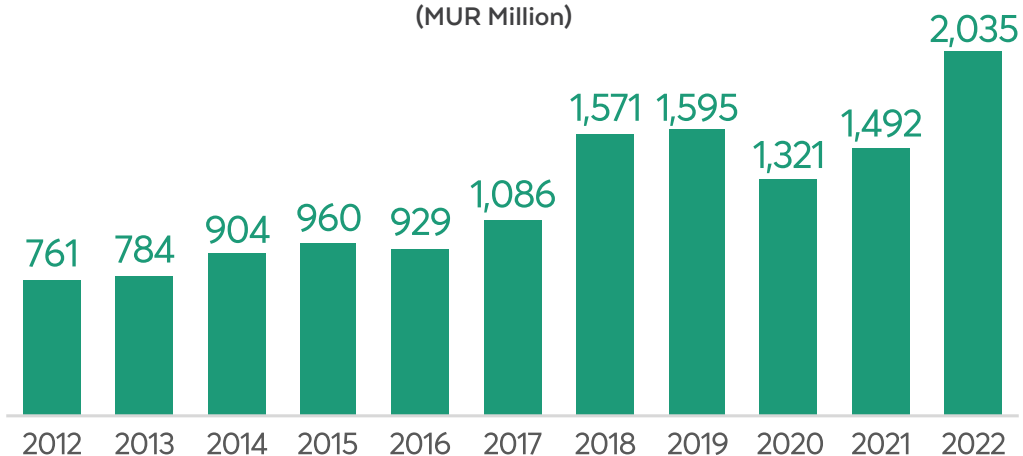


Potential Markets: China, Canada, US, Germany



# PLASTIC PACKAGING

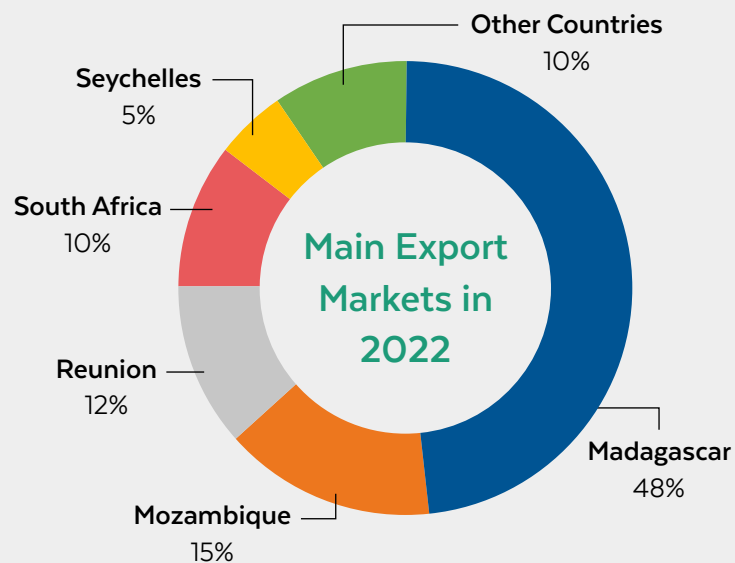
Exports of Plastics Products  
(MUR Million)



**Main Product Categories:**

- Articles for the conveyance or packing of goods, of plastics (HS 3923) - MUR 1.2 Bn
- Other plates, sheets, film, foil and strip, of plastics (HS 3921) - MUR 416 Mn

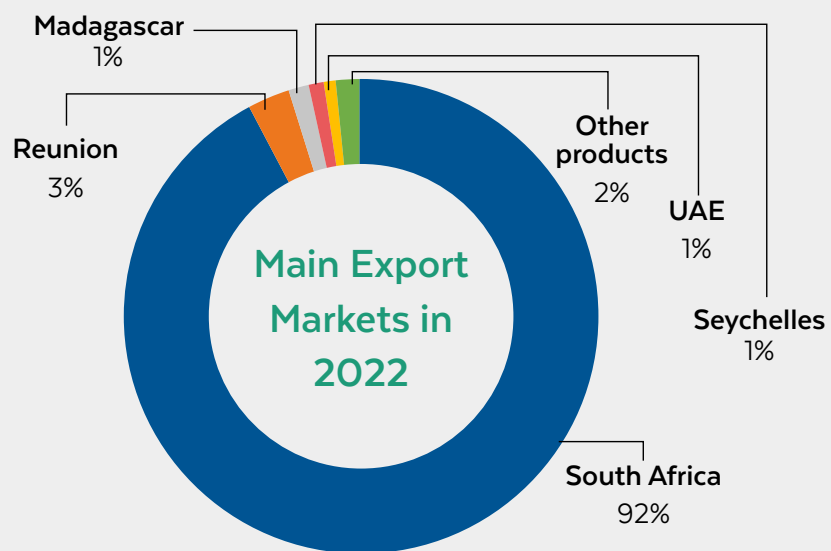
Articles for the conveyance or packing of goods, of plastics (HS 392330 & HS 392390)



Export Potential (USD'000)	
Plastic Packaging (HS 392390)	
Zimbabwe	1200
Madagascar	710
Zambia	559
US	418
France	320
India	300
Seychelles	288
Mozambique	278
UK	204
South Africa	189
Kenya	143
Singapore	127
Viet Nam	116
Netherlands	106
China	91

Export Potential (USD'000)	
Other Plastic Materials (HS 3921)	
Zimbabwe	1300
India	624
South Africa	619
Viet Nam	437
US	385
Zambia	365
Kenya	311
France	271
China	228
UK	222
Taiwan	122
Italy	109
Singapore	101
Netherlands	91
Spain	72

Other plates, sheets, film, foil and strip, of plastics (HS 3921)



# PAPER AND PAPER PRODUCTS

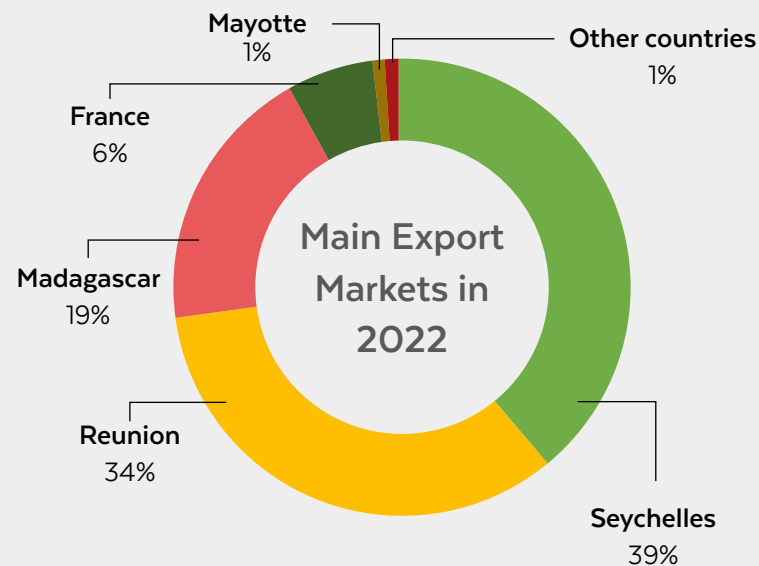
Exports of Paper and Paper Products  
(MUR Million)



## Main Product Categories:

- Cartons, boxes, cases, bags and other packing containers, of paper, paperboard (HS 4819) – MUR 261 million
- Paper or paperboard labels of all kinds, whether or not printed (HS 4821) – MUR 109 million

Cartons, boxes, cases, bags and other packing containers,  
of paper, paperboard (HS 4819)



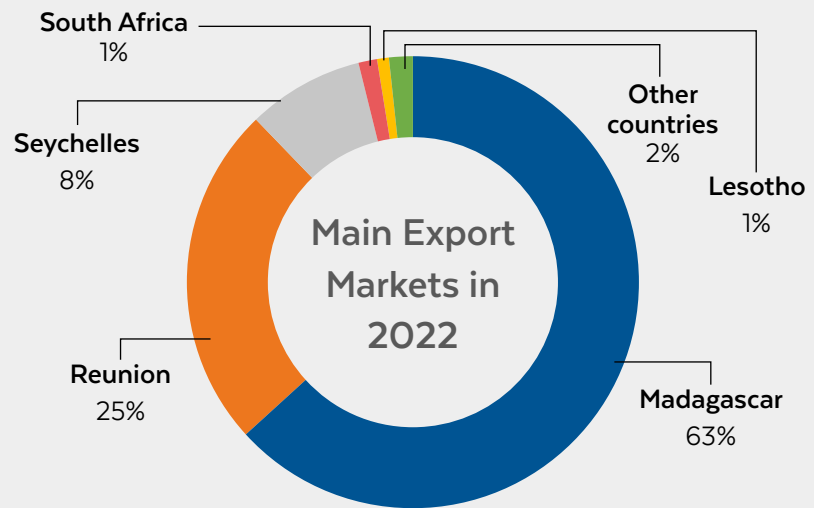
Export Potential (USD'000)

Carton, boxes and cases of  
paper (HS 4819)

Zimbabwe	1400
Zambia	369
Seychelles	317
France	277
South Africa	240
Kenya	226
US	179
UK	157
Madagascar	116
Viet Nam	92
India	72
Singapore	72
Italy	54
Namibia	48
Spain	37

Export Potential (USD'000)	
Paper or paperboard labels of all kinds, whether or not printed (HS 4821)	
Zambia	398
Kenya	263
Madagascar	220
Zimbabwe	214
India	263
Viet Nam	234
Seychelles	112
US	121
France	125
UK	90
Mozambique	145
South Africa	87
Singapore	53
Eswatini	39
Italy	40

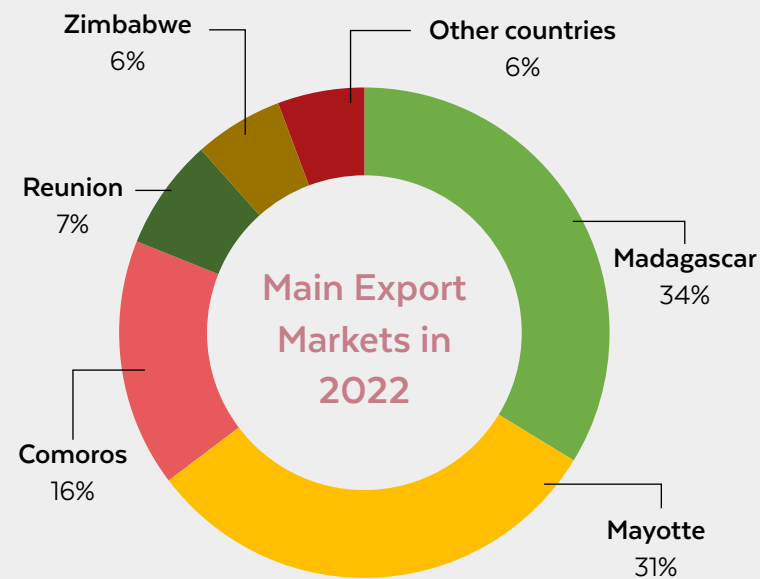
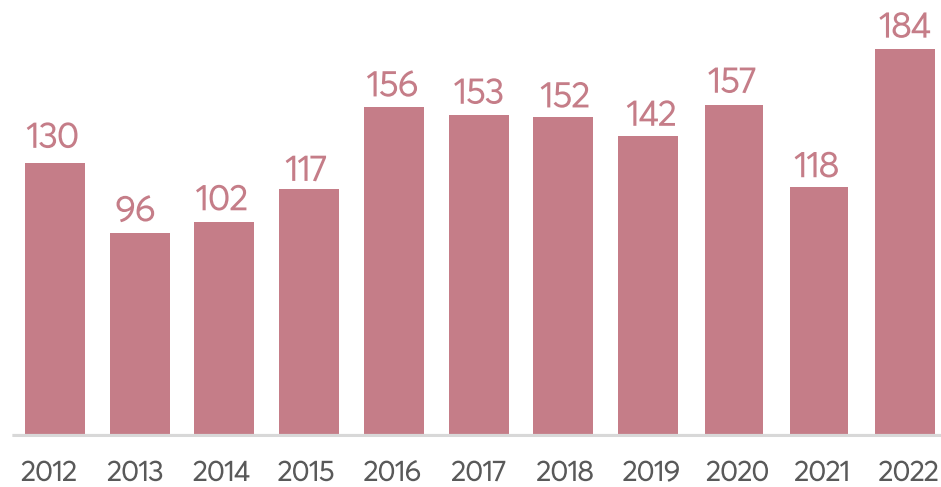
Paper or paperboard labels of all kinds, whether or not printed (HS 4821)



# SOAP & DETERGENTS

## Soap

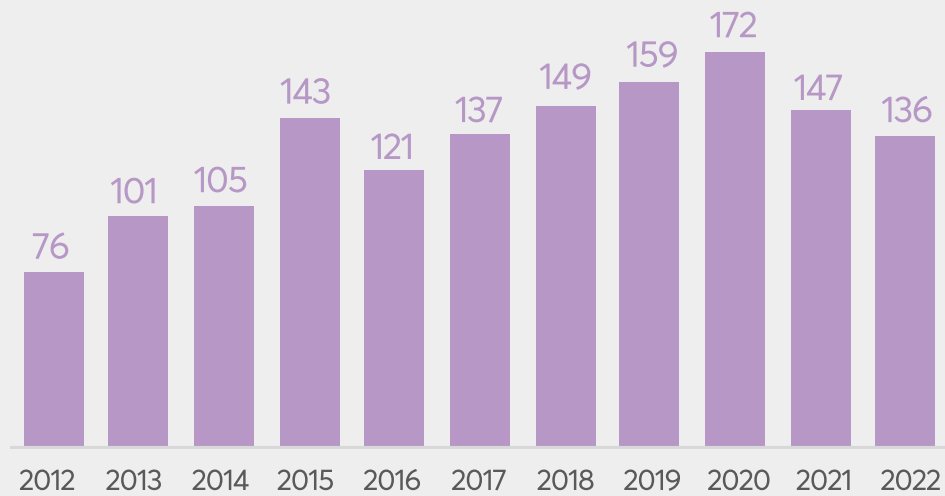
Total Exports of Soap (HS 3401)  
(MUR Million)



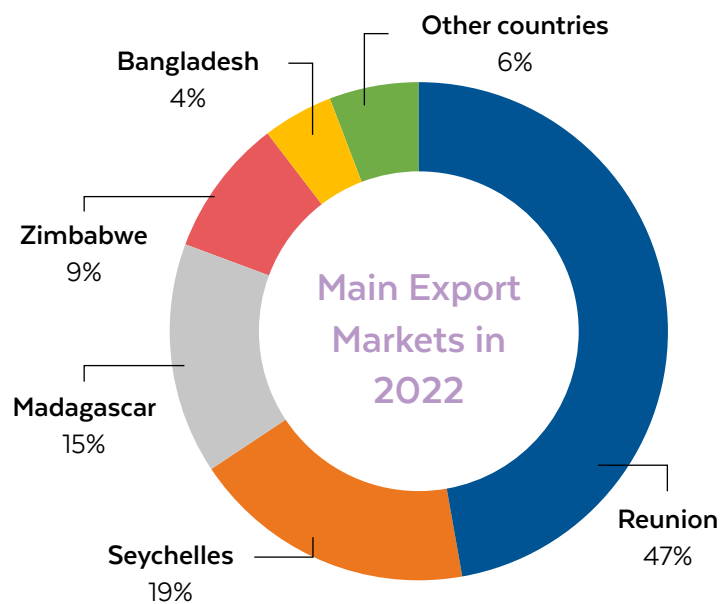
Export Potential (USD'000)	
Soap (HS 3401)	
Zimbabwe	768
Zambia	140
US	333
UK	291
South Africa	351
Singapore	47
Netherlands	66
Mozambique	180
Madagascar	391
Kenya	208
India	467
France	247
Comoros	244
China	52
Australia	60

## Detergents

Total Exports of Detergents (HS 3402)  
MUR Million



Export Potential (USD'000)	
Detergents (HS 3402)	
Zimbabwe	729
Zambia	304
Viet Nam	115
US	103
UK	108
Taiwan	72
South Africa	192
Singapore	77
Seychelles	103
Mozambique	364
Madagascar	78
Kenya	560
India	181
France	137
China	141





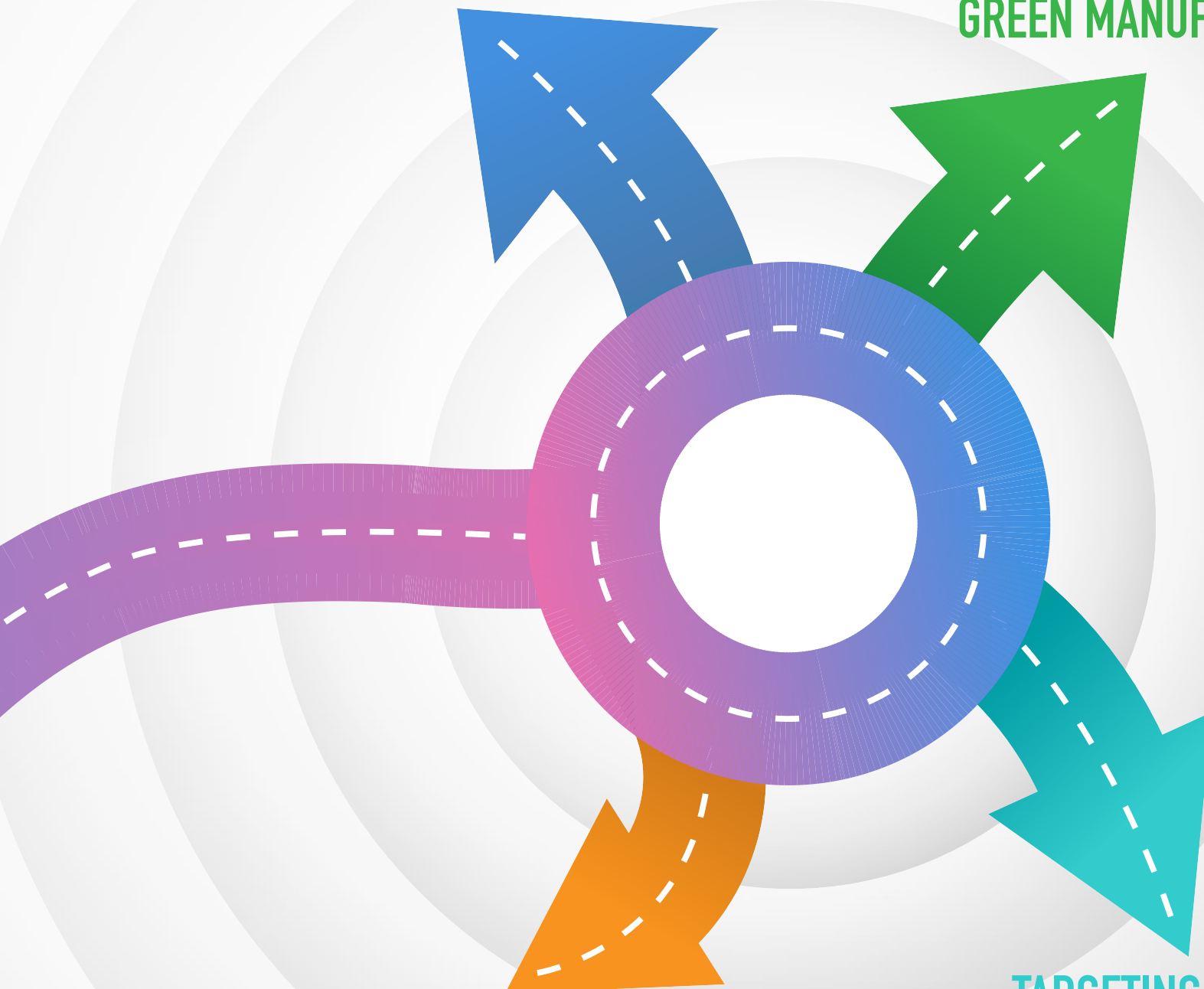
# POTENTIAL PATHWAYS

Acknowledging the major role that exports play in generating foreign earnings, there exists an urgent requirement not only to broaden the spectrum of goods exported but also to strengthen and consolidate market positions. Analysis of exports over the past decade clearly indicates that Mauritius' export structure, both in terms of products and markets have been limited. This strategic goal encompasses the exploration of potential pathways, encompassing both the expansion into untapped markets and the enhancement of existing ones. By steering towards a more diversified and robust export base, Mauritius can bolster its economic resilience and at the same time unearth new avenues for sustainable or green manufacturing, while at the same time commit to green exports.

The commitment to expanding exports reflects a forward-thinking strategy, considering various pathways that align with global trends and evolving market demands.

**EXPANDING THE  
EXPORT BASE**

**TRANSITIONING TOWARDS  
GREEN MANUFACTURING**



**EXPANDING MARKET HORIZONS  
LEVERAGING ON FTAS**

**TARGETING THE GREEN  
CONSUMER**

## EXPANDING THE EXPORT BASE



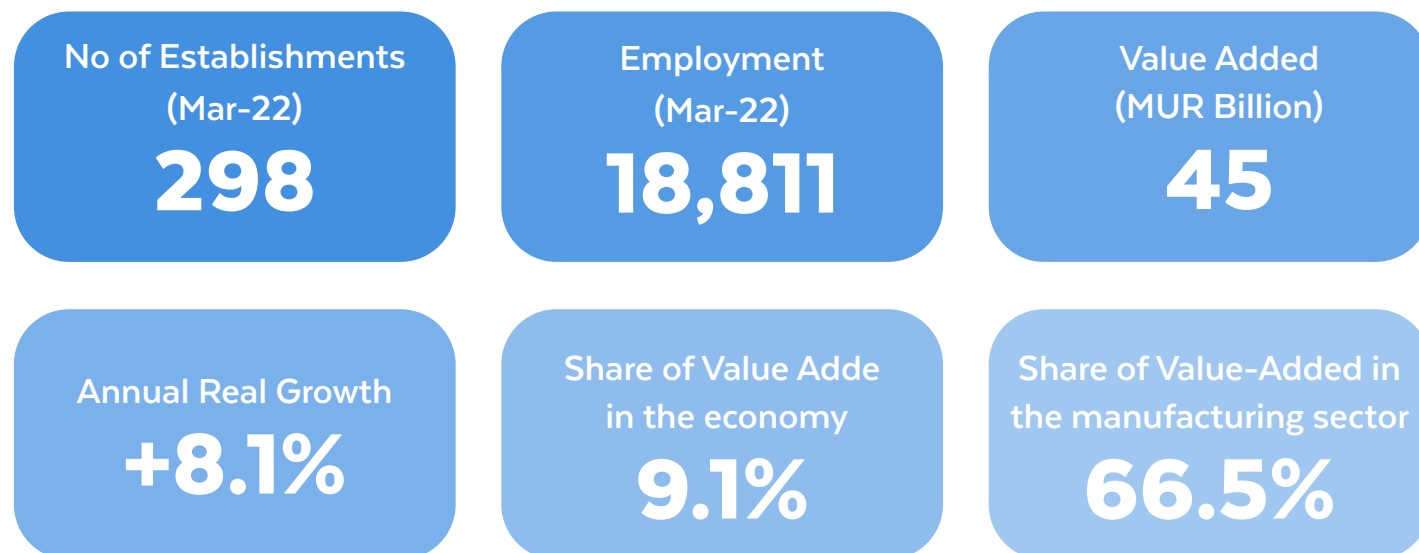
Over the past decade, our main export product categories, except for medical devices exported have remained unchanged. Although there have been some shifts in export destinations, the range of products exported has remained largely unchanged. The export sector in Mauritius has been mostly dominated by manufacture of a limited range of products namely textile and apparel, sugar, seafood processing, medical devices, and jewellery.

The diversification of the export base remains a key challenge for Mauritius.

While Mauritius is being promoted as a prime investment destination for the manufacture and export of goods under preferential access under the various signed trade agreements, the outcome and success of all promotion initiatives will be only be visible in the medium to long-term. In the short-term, there is a need to explore ways and means to increase the export base, both in terms of products and industries.

A potential route would be to enable the growth of our local manufacturing industry (non-EOEs) and promote their transition to an export-oriented model. Over the years, the local manufacturing industries have emerged as major players with the potential to expand their production capacity and product range, if given the necessary support structures.

### Local Manufacturing Industries (non-EOEs) Factsheet 2022



Source: Manufacturing, Statistics Mauritius

Many DOEs are well established on the local scene and comprises of SMEs, mid-market and large enterprises producing primarily for the local market. Statistics indicate that we have a vibrant local manufacturing industry contributing significantly to the economy. At the same time, many DOEs are also successfully exporting their products to other markets in the region.

Export figures indicate a wide range of products are being exported to the African continent and other preferential markets.

#### Main Export Products Manufactured by Local Industry (2022)

HS Code	Product Description	Total Exports (MUR Mn)
2309	Animal feed	935
7604	Aluminium bars, rods and profiles	613
2301	Flours, meals and pellets	581
2208	Rum	492
1101	Wheat or meslin flour	262
4819	Cartons, boxes, cases, bags and other packing containers, of paper	261
1902	Pasta	285
7403	Refined copper and copper alloys, unwrought	236
1504	Fish Oil	312
7610	Aluminium structures	352
2207	Undenatured ethyl alcohol	574
3923	Plastic Packaging materials	1,221
9003	Frames and mountings for spectacles	201
3401	Soap	184
4403	Wood in the rough	148
4911	Other printed matter	109
3402	Detergents	136

Source: External Trade, Statistics Mauritius

A creative and targeted approach to provide technical, financial support and other accompanying measures could help identified DOEs engage in exports. An increase and diversification of the export base remains an important element for increasing exports.

# TRANSITIONING TOWARDS GREEN MANUFACTURING



The convergence of trade and climate agendas has become increasingly evident, showcasing the indispensable role of the global trading system in facilitating the decarbonization of the world. With the incredible environmental challenges such as increasing global temperatures and deforestation, there seems to be a convergence in adopting corrective policy actions to mitigate the impact on the environment.

A rapid transition and a coherent national strategy towards green manufacturing with the adequate financial and technical support to industry transformation would significantly improve the export competitiveness as well as align with global market trends. It would, at the same time, provide a distinct competitive edge to companies exporting to markets such as EU where a whole array of new environmental-friendly regulations are being implemented with direct repercussions on the technical compliance requirements for exporters.

Significant regulatory shifts such as the EU Green Deal or the OECD Guidelines on green procurement, or the new Carbon Border Adjustment Mechanism (CBAM) in the European Union bears testimony that the regulatory trading environment is changing. These measures are compelling leaders in both the public and private sectors to reassess their strategies concerning sustainability and trade. Moreover, the United Nations Climate Change Conference (COP28) held in Dubai in November 2023 is expected to bring thematic discussions to the forefront with focus on the pivotal role of trade in addressing climate change and fostering climate-smart growth. Indeed, the adoption of green production by firms has accelerated due to regulatory pressure, customer pressure, and green creativity. Studies show that the influence of customer pressure surpasses that of regulatory pressure and other factors. As such, the role played by customers is more critical for firms when choosing to embrace green production.

## EU Green Policies

### EU Green Deal

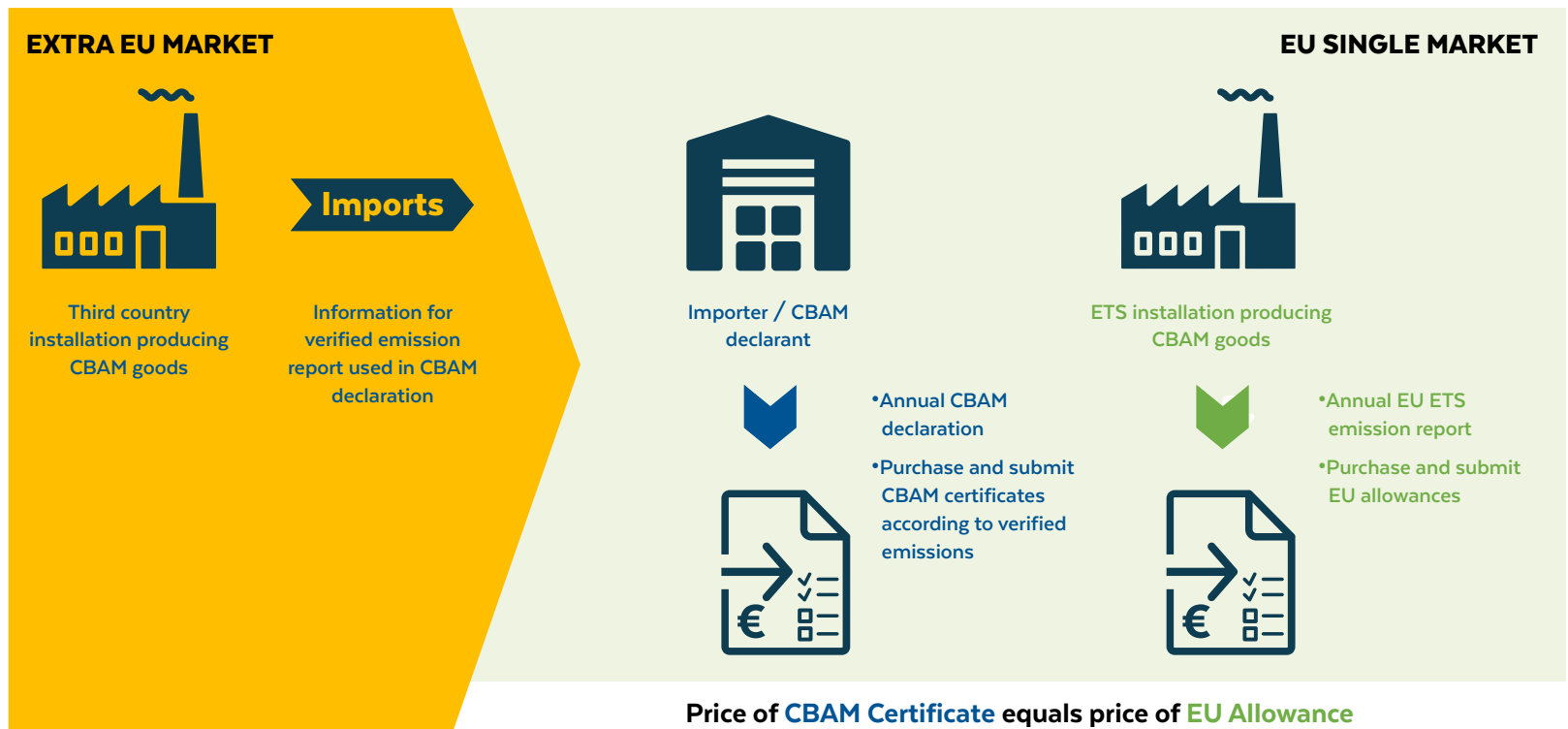
The European Green Deal (EGD) represents the European Union's new sustainable growth strategy, aiming to transform the EU into a fair and prosperous society with a competitive economy. The EGD seeks to achieve a net carbon-neutral European Union by 2050 and achieve economic growth from resource use through a comprehensive policy strategy that outlines ambitions in various sectors. The EGD focuses on eight key areas, including increasing climate ambition, supplying clean energy, mobilizing industry for a circular economy, promoting energy-efficient construction, zero pollution, preserving ecosystems and biodiversity, fostering a sustainable food system, and accelerating sustainable and smart mobility.

## EU Carbon Border Adjustment Mechanism (CBAM)

The EU is advancing its climate-neutrality target and green transformation of the economy through the Carbon Border Adjustment Mechanism (CBAM). This mechanism makes importers pay if their products have a higher carbon footprint than their European counterparts, aiming to prevent “carbon leakage” caused by lax climate policies outside the EU.

The CBAM’s objective is to encourage cleaner industrial production globally by putting a price on carbon emitted during the production of certain goods entering the EU. The transitional period for CBAM, starting in October 2023 and extending through 2025, requires quarterly emissions reporting. Affected goods include iron and steel, aluminium, cement, nitrate fertilizers, hydrogen, and electricity. Mauritius does not export a significant amount of the concerned products directly to the EU. However, since Reunion and Mayotte are both part of the French territory, exports to these countries will also expose exporters to CBAM obligations. In 2022, Mauritius exported a significant amount of chemicals, fertilisers, aluminium, and iron and steel to Reunion Island.

The CBAM reporting obligation will directly apply to EU importers and will include information about the CBAM goods being imported, emissions, production methods, and report issuing authority, among others.



Source: Europa website

## EU Deforestation Regulation

The EU deforestation regulation is set to become effective on December 30, 2024. This regulation mandates companies engaged in the trade of cattle, cocoa, coffee, oil palm, rubber, soya, wood, and related products to conduct thorough due diligence throughout the value chain. The purpose is to ensure that these goods are not a result of recent deforestation, forest degradation, or violations of local environmental and social laws occurring post-December 31, 2020.

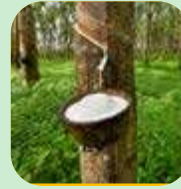
### Commodities within the scope



Wood



Soy



Rubber



Cattle



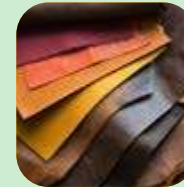
Coffee



Palm Oil



Cocoa



Derived Products  
such as leather,  
chocolate or  
furniture

New products included under **Wood** in comparison with the EU Timber Regulation, are charcoal and printed paper products.

The Regulation requires that operators trace every relevant commodity back to its plot of land before exporting it. Consequently, the submission of the due diligence statement which includes geolocation information is a requirement for the shipment to enter the EU market and for the consignment for transactions within the Union market. Commodities placed on the EU market need to be segregated from commodities of unknown origin or from non-deforestation-free commodities at every step of the supply chain.

## Obligations



Industry

### Operators

1 Prohibited to place on the EU market or export **non-complying PRODUCTS**

*that are not deforestation-free and produced in accordance with the relevant legislation of the country of production*

2 Exercise due diligence



The due diligence system should include, among other things, obtaining information on **geo-localisation coordinates** of all plots of land where the relevant commodities were produced, and date or time range of production.

### Traders

1 Be able to identify buyers and suppliers

2 Keep information for at least 5 years

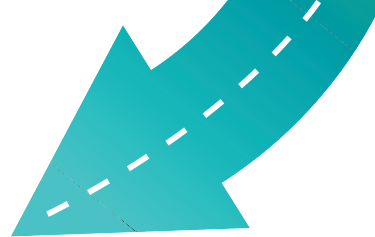
3 Provide information to competent authorities

*"Traders" who are not SMEs will be required to meet due diligence obligations for operators*





## TARGETING THE 'GREEN CONSUMER'



Sustainable development and trade have become increasingly interlinked and consumers across the globe seek products that are produced in line with international environmental protection best practices. Green products are designed to have a minimal impact on the environment and can include products that are made from recycled materials, products that are designed to be reused or recycled, and products that are made from renewable resources.

Green consumers are becoming increasingly conscious of the environmental impact of their choices, and businesses that align themselves with sustainable practices can gain a competitive edge while making a positive contribution to the planet. Green marketing would aim at promoting products or services that are environmentally friendly and socially responsible. Businesses that adopt sustainable marketing practices aim to meet the needs of the present generation without compromising the ability of future generations to meet their own needs. Sustainable brands are increasingly important in the eyes of consumers, especially for millennials and many companies are marketing their circular economy strategies to attract this new category of consumer.

The use of 'green labels', such as ecolabels, energy labels, recycle labels, organic and fair trade, is becoming increasingly important both for importers and consumers, especially in more developed markets. While green products and services are only a niche market today, they are poised for strong growth with consumers more and more willing to pay a premium for green products and contribute to the protection of the environment.

The support to our local manufacturing industries with regard to the compliance and certification process to these various 'green labels' could be a major asset for our local products and help in the creation of premium products and brands.

## Major Eco Labels and Standards



The EU Ecolabel is a globally recognized voluntary initiative that promotes environmentally excellent goods and services based on standardized processes. Governed by the European Union, it is a pan-European ISO 14024 Type 1 ecolabel, that addresses environmental impacts across product lifecycles, from raw materials to disposal. The Ecolabel has become a prominent scheme in many EU countries and consumers seek the 'EU flower' symbol, indicating sustainability. The label ensures products use sustainable ingredients and avoid hazardous, toxic or otherwise harmful substances.



Fairtrade International's label signifies a global initiative promoting ethical and sustainable trade practices. It aims to empower farmers and workers in developing countries by ensuring fair wages, safe working conditions, and environmental sustainability. Fairtrade emphasises ecologically and agriculturally sound practices, including responsible water and waste management, preserving biodiversity and soil fertility, and minimal use of pesticides and agrochemicals. Fairtrade prohibits the use of several hazardous materials and all genetically modified organisms (GMOs).



The Global Organic Textile Standard (GOTS) is a comprehensive and internationally recognized certification for organic textiles. It sets stringent criteria for the entire textile supply chain, ensuring organic integrity, environmental sustainability, and social responsibility. GOTS covers the production, processing, manufacturing, packaging, labeling, exportation, and distribution of all textiles made from at least 70% certified organic natural fibers.



Textile Exchange is a global non-profit organization that works to drive sustainability in the textile industry. The organization provides various certification standards aimed at promoting responsible and sustainable practices in the textile supply chain. Some of the key Textile Exchange certification standards include:

1. **Global Recycled Standard (GRS):** Focuses on verifying the content of recycled materials in products and ensuring responsible social, environmental, and chemical practices in their production.
2. **Organic Content Standard (OCS):** Certifies the organic content of products, addressing the presence and amount of organic material in textiles and finished products by tracing organic production from farms up to the final product.
3. **Content Claim Standard (CCS):** Allows companies to verify and communicate the percentage of certified organic, recycled, or responsibly produced content in their products.



Friend of the Sea (FOS) certification is a globally recognized standard for products and services which respect and protect the marine environment. It signifies that the certified products adhere to strict criteria ensuring responsible fisheries practices, minimal environmental impact, and the protection of marine ecosystems. FOS certification encompasses a wide range of seafood products. By displaying the Friend of the Sea logo, producers and retailers signal their commitment to environmental stewardship and responsible fishing practices, providing consumers with a reliable indicator for making sustainable choices in the seafood market.



GLOBALG.A.P. represents a suite of intelligent farm assurance solutions founded on standards promoting safe and conscientious production processes in agriculture, aquaculture, and floriculture. The certification's comprehensive nature results from extensive collaboration with industry experts. The legitimacy of GLOBALG.A.P. activities is maintained through a robust integrity program and the engagement of over 430 organizations in the GLOBALG.A.P.

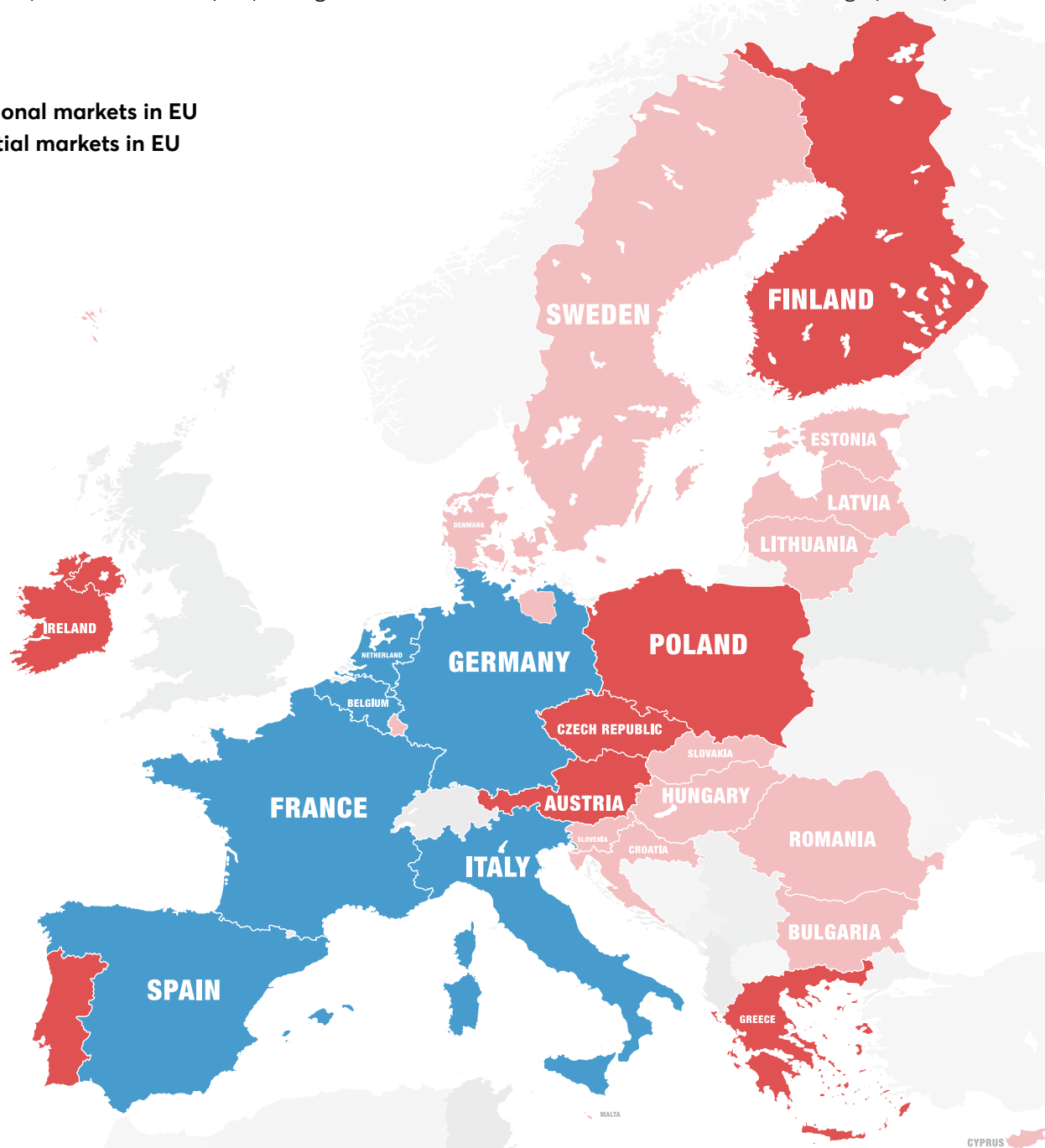
## EXPANDING TRADE HORIZONS LEVERAGING ON FTAS

Maximising market access opportunities in our preferential trade agreements remains crucial. Trade figures indicate high concentration of exports on a few markets both in Europe and Africa highlighting the need for sustained efforts targeted towards other preferential markets in these various FTAs. Moreover, the newly signed trade agreements with China, India and the AfCFTA remain to be exploited to their full potential. Potential export markets and products have been identified based on actual exports.

### European Union

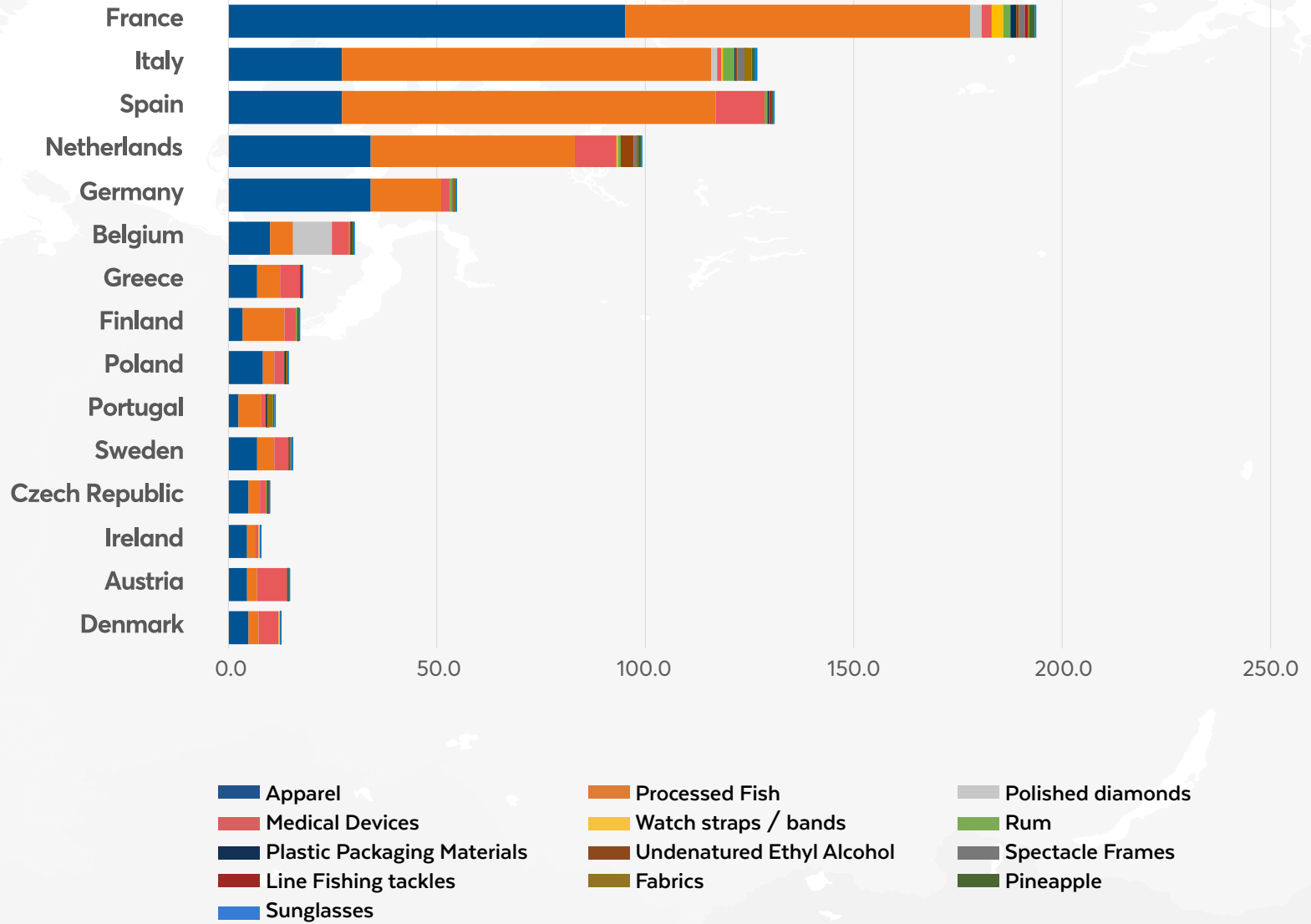
The EU is characterised by a large, relatively homogenous market with affluent consumers. The map below illustrates the areas that Mauritian exporters are already exporting to, as well as some of the markets that remain largely unexplored.

- Traditional markets in EU
- Potential markets in EU



Processed fish and apparel are the leading products that Mauritius has the potential to export to EU. The actual top importing markets for Mauritian products have the potential to import significantly more whereas new markets such as Belgium, Greece, Denmark and Finland are also promising. The region is also a growing market for medical devices exported by Mauritius.

Export Potential by Country (USD Million)



## Africa

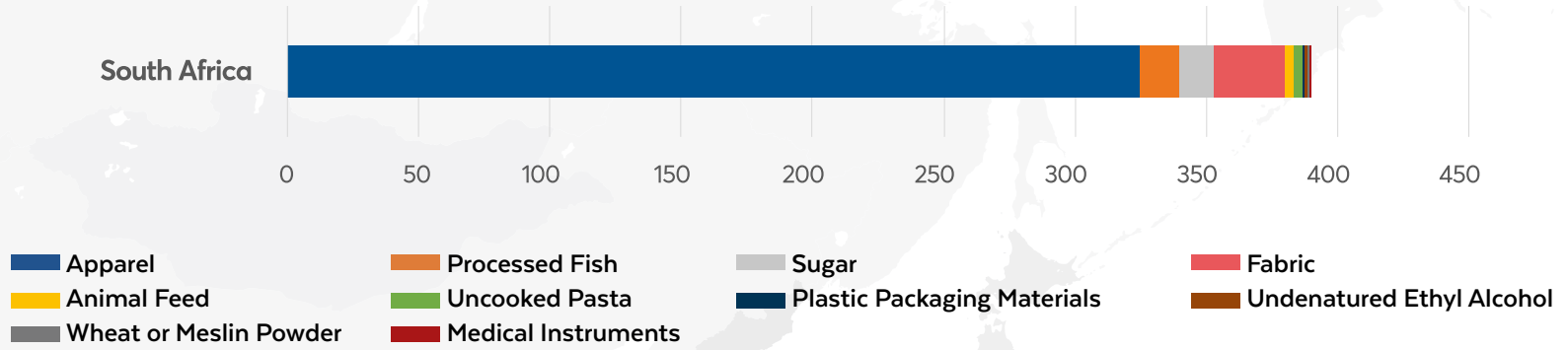
Africa has been the fastest growing export market for Mauritius over the last 10 years. However, exports to Africa were highly concentrated in the South African, Kenyan, and Madagascar market, which cumulatively represented 88% of total exports to Africa.

With the coming into force of the AfCFTA, Mauritius now has preferential market access to the entire continent. Exporters can take advantage of initiatives such as the guided trade initiative to find new markets in the region.

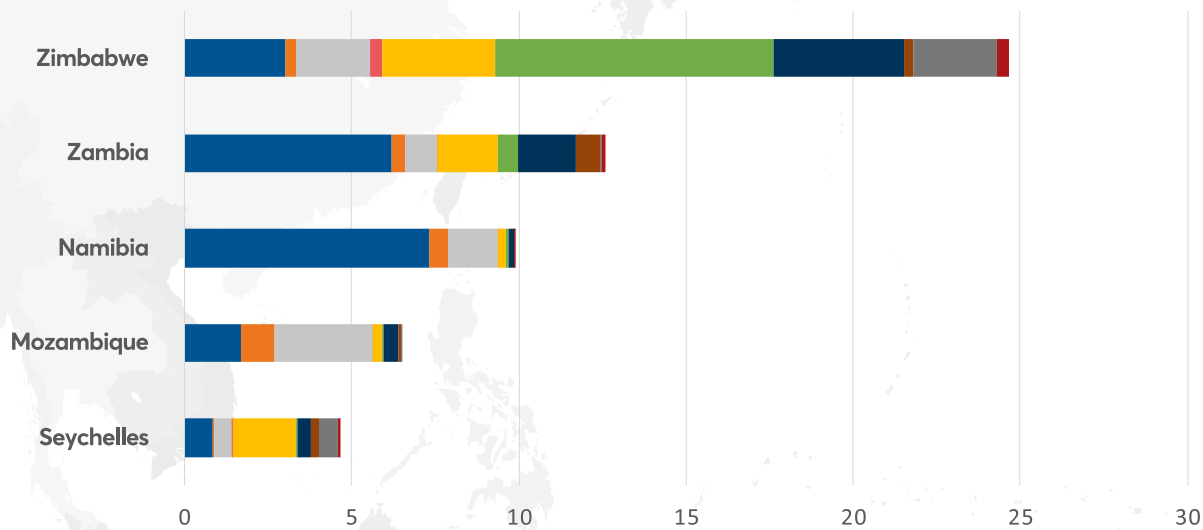
South Africa is the most promising market for Mauritian exports, in particular for textile and apparel. There is also a high demand for processed fish and sugar.



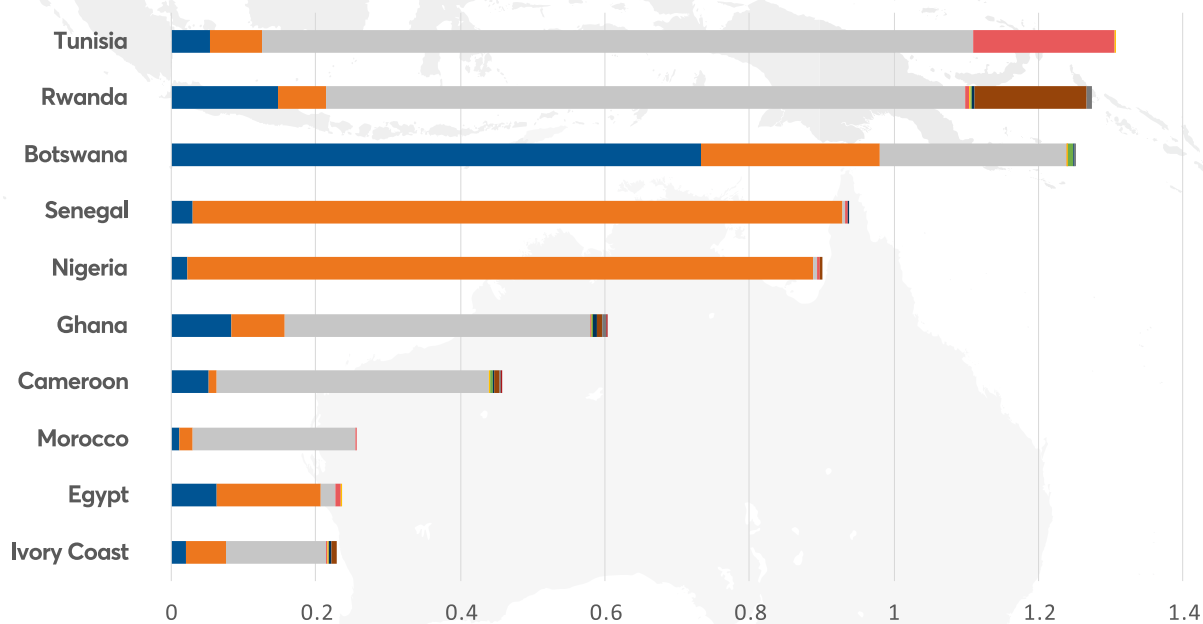
### Export Potential by Country (USD Million)



Interestingly, Zimbabwe, Zambia, and Namibia are the following top 3 markets with highest export potential. While there is a demand for apparel in these regions as well, there is a notable potential for Mauritius to export animal feed, sugar and pasta.



As depicted below, there is potential for Mauritius to export processed fish to Senegal and Nigeria. A lot of the remaining markets with potential for Mauritius have not been explored by Mauritius and will therefore require more effort by exporters.



Source: ITC Export Potential Map

# United States

The US is one of the more attractive markets for exporters worldwide given the extensive trade preferences available under the AGOA.

As shown in the charts below there's untapped potential for exports of apparel, live animals, fish products, medical devices, and sugar among others.

Mauritius's products with potential to United States



Source: ITC Export Potential Map

Export Potential  
Realized potential

The table below indicates the opportunities for Mauritian exporters given the high value of US' imports of the same products from third countries.

HS Code	Product Description	Mauritius Exports to US (USD'000)	US Imports from the World (USD'000)	Annual growth in US Value Imported between 2018-2022, %, p.a.	Mauritius Exports to the World (USD'000)
106	Live animals	29,807	472,636	27	48,814
6205	Mens or boys shirts	24,542	3,386,997	-5	34,794
1701	Cane or beet sugar and chemically pure sucrose, in solid form	14,786	2,276,218	8	196,644
6109	T-shirts, singlets and other vests, knitted or crocheted	11,053	9,303,249	10	80,539
6203	Men's or boys' suits, ensembles, jackets, blazers	6,287	10,241,470	3	114,359
6204	Women's or girls' suits, ensembles, jackets, blazers	6,189	12,189,220	2	38,138
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	5,787	1,881,553	7	12,172
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	3,334	18,009,894	3	31,762
6104	Women's or girls suits, ensembles, jackets,	2,580	7,489,311	6	31,515
9018	Medical Devices	2,386	35,504,557	8	38,891
6105	Men's or boys' shirts, knitted or crocheted	2,203	2,594,010	2	22,037
4202	Leather bags/cases/trunks	786	14,676,723	4	12,397
3923	Articles for the conveyance or packaging of goods, of plastics	1	10,880,779	8	4,779
1604	Prepared or preserved fish	0	2,378,593	5	250,288

Source: ITC Export Potential Map

Notably, Mauritius has the potential to significantly increase its exports of men's or boys' suits, ensembles, jackets, blazers given the high value of US' imports. While there is a demand for sugar in the US, it is to be noted that exports of sugar to the US is subject to quotas.



# United Kingdom

In view of ensuring its smooth transition out of the EU and to maintain its legal commitments to trade partners of the EU, the UK introduced a similar Economic Partnership Agreement granting duty free, quota free market access to the group of ESA countries.

Mauritius's products with potential to United Kingdom



Source: ITC Export Potential Map

Export Potential  
Realized potential

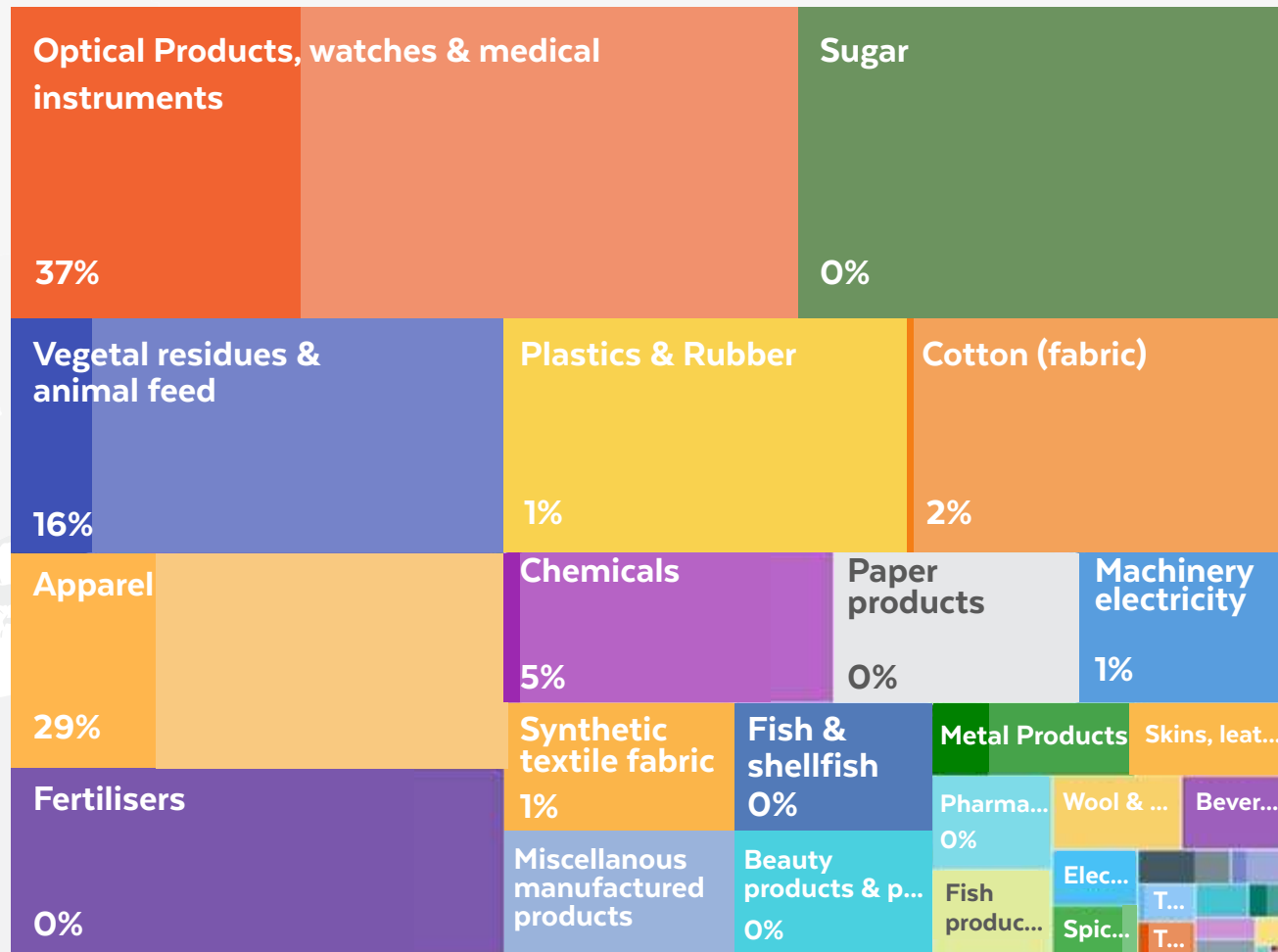
As shown in the table below, Mauritius has the potential to export a significantly higher amount of fish products, sugar and apparel to the UK. Other products that Mauritius may consider exporting to the UK include, among others, medical devices, undenatured ethyl alcohol and rum.

HS Code	Product Description	Mauritius' Exports to UK (USD'000)	UK's Imports from the World (USD'000)	Annual growth in UK's Value Imported between 2018-2022, %, p.a.	Mauritius' Exports to the World (USD'000)
1604	Prepared or preserved fish	71,288	932,675	-3	250,288
'1701	Cane or beet sugar and chemically pure sucrose, in solid form	16,190	383,075	-4	196,644
'6203	Men's or boys' suits, ensembles,	6,666	1,954,377	-5	114,359
'6109	T-shirts, singlets and other vests, knitted or crocheted	12,632	2,606,543	-2	80,539
'6204	Women's or girls' suits, ensembles, jackets	2,623	3,269,697	-7	38,138
'6205	Men's or boys' shirts	65	581,468	-12	34,794
'0106	Live animals	4,711	51,723	4	48,814
'6110	Jerseys, pullovers, cardigans	6,347	3,284,530	-1	31,762
'6104	Women's or girls' suits, ensembles	10,725	2,114,062	3	31,515
'6105	Men's or boys' shirts, knitted or crocheted	1,305	600,598	-1	22,037
'6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	3,965	393,309	0	12,172
'4202	Leather trunks and bags	240	3,042,612	-4	12,397
'3923	Articles for the conveyance or packaging of goods, of plastics	4	2,816,270	1	4,779
'2207	Undenatured ethyl alcohol	0	1,107,702	21	4,806
'2208	Rum	0	1,211,199	3	7,605
'9018	Medical Devices	0	5,765,490	8	38,891

# India

Mauritius signed the CECPA with India in 2021 and can take advantage of the market access preferences with tariffs being gradually liberalised on specific goods. There is potential for Mauritius to export a variety of products to India, including medical devices, chemicals, textile and apparel.

Mauritius's products with potential to India



Source: ITC Export Potential Map

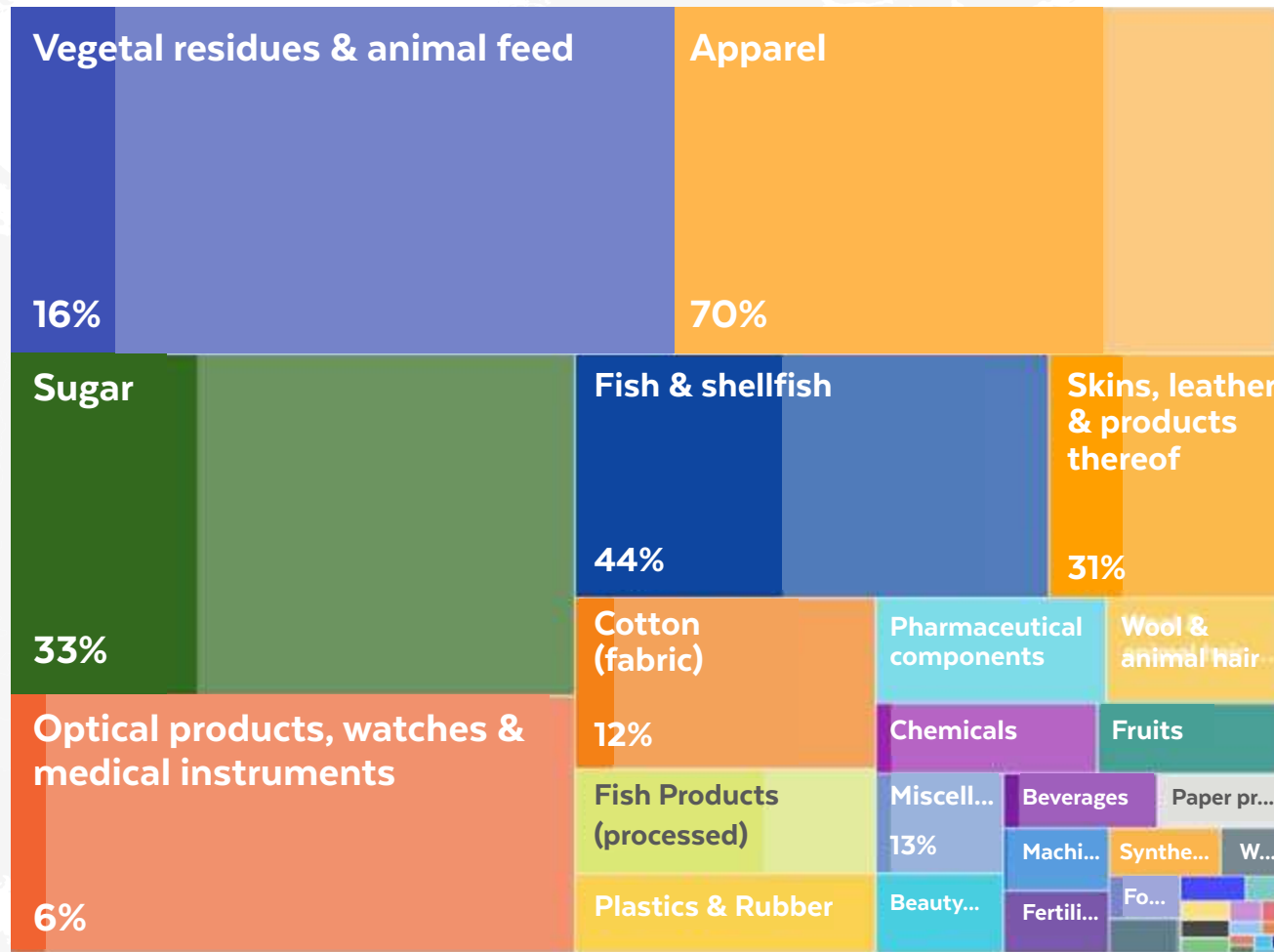
Export Potential  
Realized potential

HS Code	Product Description	Mauritius Exports to India	India Imports from the World (USD'000)	Annual growth in India's Value Imported between 2018-2022, %, p.a.	Mauritius' Exports to World (USD'000)
<b>TOTAL</b>	<b>All products</b>	<b>71,288</b>	<b>932,675</b>	<b>-3</b>	<b>250,288</b>
1701	Cane or beet sugar	16,190	383,075	-4	196,644
6203	Men's or boys' suits	6,666	1,954,377	-5	114,359
6109	T-shirts, singlets and other vests, knitted or crocheted	12,632	2,606,543	-2	80,539
9018	Medical devices	2,623	3,269,697	-7	38,138
6204	Women's or girls' suits	65	581,468	-12	34,794
6205	Men's or boys' shirts (excl. knitted or crocheted)	4,711	51,723	4	48,814
6110	Jerseys, pullovers, cardigans,	6,347	3,284,530	-1	31,762
6104	Women's or girls' suits, ensembles,	10,725	2,114,062	3	31,515
2301	Flours, meals and pellets	1,305	600,598	-1	22,037
4202	Leather trunks and cases	3,965	393,309	0	12,172
3923	Articles for the conveyance or packaging of goods, of plastics	240	3,042,612	-4	12,397

# China

With the recently signed Mauritius-China FTA, there is huge potential to expand our product range, especially for animal feed, apparel, sugar, fish and medical devices.

Mauritius's products with potential to China



Source: ITC Export Potential Map

Export Potential  
Realized potential

HS Code	Product Description	Mauritius Exports to China (USD'000)	China Imports from the World (USD'000)	Annual growth in Chinas Value Imported between 2018-2022, %, p.a.	Mauritius Exports to the World (USD'000)
1701	Cane or beet sugar	1686	2,564,284	29	196,644
6203	Mens or boys suits, ensembles, jackets	515	759,428	-1	114,359
6109	T-shirts, singlets and other vests, knitted or crocheted	344	966,866	5	80,539
4202	Leather bags, cases	454	5,470,125	20	12,397
6204	Womens or girls suits, ensembles, jackets,	35	1,299,954	8	38,138
6205	Mens or boys shirts (excl. knitted or crocheted,)	752	256,913	2	34,794
6110	Jerseys, pullovers, cardigans	446	1,549,201	13	31,762
6104	Womens or girls suits, ensembles, jackets	1	513,487	7	31,515
6105	Mens or boys shirts, knitted or crocheted	0	236,172	12	22,037
1604	Prepared or preserved fish	0	114,737	0	250,288
2309	Preparations of a kind used in animal feeding	0	1,153,970	28	21,096
3923	Articles for the conveyance or packaging of goods, of plastics	0	1,257,726	1	4,779
6006	Fabrics, knitted or crocheted	0	394,992	-16	55,412
9018	Medical devices	0	14,852,869	14	38,891

# CONCLUSION

Mauritius' exports have grown from MUR 67 billion to MUR 83 billion between 2012 and 2022. Despite the setback caused by the pandemic, exporters have rapidly recovered and have exceeded pre-pandemic export figures in 2022. While the EU remains the most important export partner for Mauritius, Africa has emerged as one of the most important markets for the country. Exports to the continent grew by a noteworthy 77% since 2012 and were concentrated on the SADC and COMESA regions. The coming into force of the AfCFTA will likely create interesting opportunities for exporters, especially in the western and northern areas of Africa.

The traditional exports of Mauritius, including sugar, textile and apparel, and jewellery have remained relatively stable, although some shifts in destination markets were observed. Notably, Kenya has emerged as an alternative for exports of sugar, worked diamonds are now mostly exported to Viet Nam, and South Africa panned out to be a key importer of textile and apparel.

In addition, some degree of diversification of the export basket was noted, indicating the development of new sectors and sub-sectors in the country. The manufacturing of medical devices stood out as a highly promising industry that can take advantage of the trade agreements to which Mauritius is party. Other industries with potential for growth include, special sugars, alcoholic beverages, leather products, plastic packaging, pasta and animal feed among others.

Since Mauritius is actively exploring avenues to expand its market reach through its preferential trade agreements, it needs to develop a comprehensive strategy to improve its export capacity and to rapidly adapt to changing market and consumer requirements. In light of the foregoing, the following pathways could be considered for incorporation in future export strategies:

- Expanding the export base by supporting local manufacturing industries in their transition to an export-oriented model.
- Transitioning towards green manufacturing practices in line with global policies and new regulations to mitigate the impact of climate change and provide a competitive edge to our export industries.
- Targeting the 'green consumer' by encouraging local manufacturers to adopt internationally recognised eco and sustainable standards and labels.
- Expanding trade horizons by leveraging on the extensive network of trade agreements to consolidate existing markets and to explore new potential markets and products.



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