

CLOVE

INTELLIGENCE REPORT 2026

plantation mapping, production intelligence, market timing
and risk analysis for the global clove trade.



Prepared by Robust Research Team
Basic Intelligence Edition

madagascar



MADAGASCAR CLOVE BASIC INTELLIGENCE

2026 H2 | Complimentary Edition

PLANTATION • MARKET • SEASONALITY • DESTINATION • RISK



PREPARED BY ROBUST RESEARCH TEAM

MAIN POINT A concise, evidence-grounded introduction to Madagascar's clove supply base and market structure - designed to orient the reader before deeper commercial planning.

ABOUT THIS INTELLIGENCE

**WHAT THIS EDITION IS – AND
WHAT IT IS NOT**

Basic Intelligence gives the reader the market frame: the physical scale of Madagascar’s mapped clove system, the timing of supply, global context, destination visibility and the principal commercial risks.

Evidence layer	What it means
Mapped result	Satellite-derived plantation estimate validated against field evidence.
Modelled production	Mapped maturity area translated into a production benchmark using regional/class yield logic.
Public trade data	Customs-reported HS 0907 flows used for market structure and destination analysis.
Field evidence	Ground observations used to validate crop condition, plantation characteristics and commercial interpretation.
Expert interpretation	A commercial conclusion drawn from multiple evidence layers - not a deterministic forecast.

SOURCE: ROBUST RESEARCH TEAM ANALYSIS; ROBUST-COMMISSIONED SATELLITE SURVEY; PUBLIC TRADE SOURCES AS CITED.

MAIN POINT Basic Intelligence establishes the scale, concentration and timing of the market. Detailed regional modelling, proprietary price/cost intelligence and named counterparty records are reserved for the paid editions.

HOW TO USE THIS INTELLIGENCE

WHO SHOULD USE BASIC INTELLIGENCE – AND FOR WHAT?

The same crop number means different things to different decision makers. Use this edition as an orientation tool before moving into detailed commercial planning.

User	Primary decision	Use this edition to...
Trader	Origin positioning	Compare Madagascar with competing origins and monitor supply concentration, destination demand and execution risk.
Importer	Coverage timing	Understand crop windows, destination breadth and quality/logistics risk before committing coverage.
Food manufacturer	Supply continuity	Translate crop, drying and logistics risks into procurement and specification planning.
Processor / exporter	Origin execution	Assess crop geography, season timing, access constraints and the scale of the national supply base.
Financial / insurance user	Exposure screening	Identify concentration, weather, currency, policy and logistics variables that can affect execution.

MAIN POINT The value of a headline crop estimate improves when it is read alongside seasonality, destination demand and execution risk.

AT A GLANCE

MADAGASCAR CLOVE INTELLIGENCE DASHBOARD

Six metrics establish the physical scale, confidence and concentration of the mapped clove system.

126,600 ha

MAPPED CLOVE
AREA

Four primary east-coast
regions

28,878 t

MODELLED
PRODUCTION

Maturity- and region-
specific yield logic

228 kg/ha

AVERAGE
MODELLED YIELD

Not a uniform farm-level
yield

89-91%

MAPPED-CLASS
ACCURACY

Protocol-based assessment

78%

AREA IN
ANALANJIROFO

National supply
concentration

2+ years

RESEARCH
PROGRAMME

Satellite + field validation

SOURCE: ROBUST-COMMISSIONED SATELLITE SURVEY; ROBUST RESEARCH TEAM ANALYSIS.

The mapped core covers four primary east-coast regions. Analanjirofo alone accounts for approximately 78% of mapped area, making national availability highly sensitive to conditions in one region.

MAIN POINT Madagascar's supply story is large in absolute terms but geographically concentrated - a combination that creates both procurement scale and concentration risk.

EXECUTIVE FINDINGS

FIVE FINDINGS THAT CHANGE THE COMMERCIAL VIEW

These are the five conclusions most useful for understanding the market before moving into detailed paid analysis.

#	Finding	Commercial meaning
1	Supply is concentrated	Analanjirifo dominates both mapped area and modelled output; national supply cannot be read as geographically diversified.
2	Maturity matters more than hectares alone	The productive value of plantation area depends on maturity class and region-specific performance.
3	28,878 tonnes is a production benchmark - not export availability	Stocks, moisture/process loss, farmer behaviour, licensing and market timing separate biological output from customs exports.
4	Indonesia remains the largest external swing variable	A weak Indonesian crop can increase Madagascar demand rapidly, but inventory, policy and kretek demand also matter.
5	Execution risk can matter before statistics show it	Harvest-stage rain, FX, roads, documentation and port performance can change the trade outcome after the crop is already counted.

MAIN POINT The strongest commercial signal is rarely a single number; it is the interaction between crop concentration, destination demand and execution constraints.

WHAT MATTERS COMMERCIALY

EXECUTIVE MARKET VIEW

Madagascar is highly export-oriented, but crop size, export availability and market realization are three different questions.

CROP	MARKET	EXECUTION
The survey mapped 126,600 ha and modelled 28,878 tonnes of dry-clove output.	Madagascar competes within a concentrated global clove system shaped by Indonesia, India and a long tail of destination markets.	Drying quality, FX, licensing, logistics and political continuity determine how much biological output becomes financeable export supply.

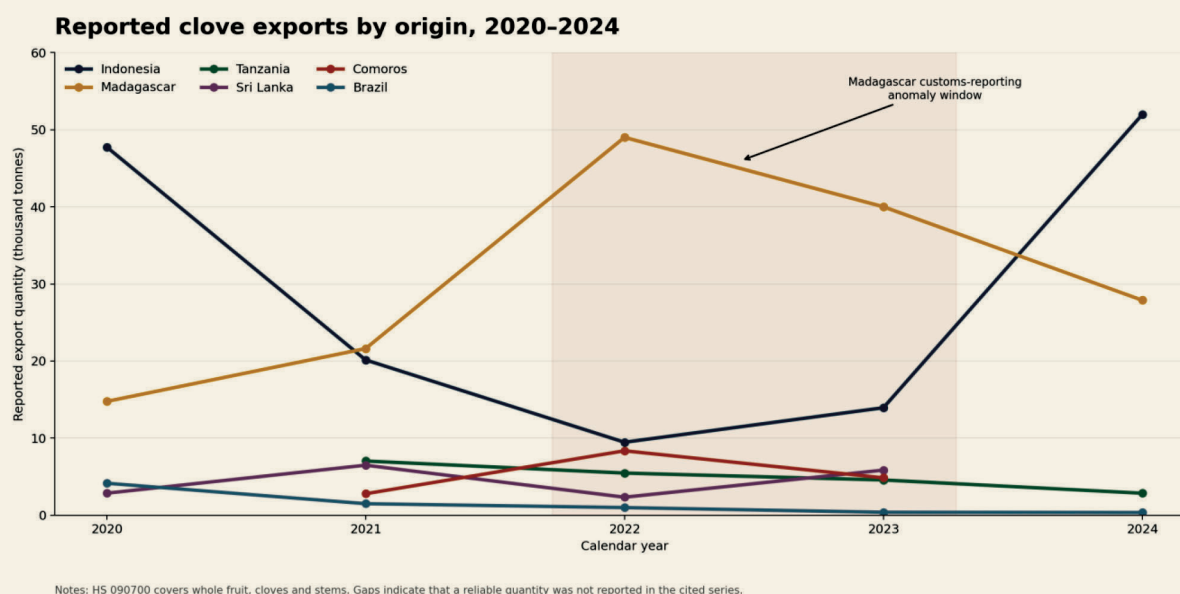
Commercially, the most important distinction is between a plantation-derived production benchmark and the quantity that is actually offered, processed, financed and shipped. Harvest timing, farmer liquidity, leaf harvesting for essential oil, weather and post-harvest losses all influence the gap.

- For buyers: plan coverage before origin procurement accelerates and before external demand becomes visible at origin.
- For sellers: nominal origin availability is not the same as realized margin; execution costs and risk continue after procurement.
- For financial users: concentration, weather and policy continuity can matter as much as the national crop estimate.

MAIN POINT The commercial edge comes from separating what can grow, what can be procured, what can be processed and what can ultimately be shipped.

MADAGASCAR IN THE GLOBAL CLOVE MARKET

Madagascar cannot be analysed in isolation: Indonesia is simultaneously the largest structural producer and consumer, while other origins create alternative supply and pricing references.



REPORTED CLOVE EXPORT QUANTITIES BY MAJOR ORIGIN, 2020-2024.

SOURCE: DESA/UNSD, UNITED NATIONS COMTRADE DATABASE (HS 090700); ROBUST RESEARCH TEAM ANALYSIS.

- Indonesia is the global system's dominant supply-and-demand variable.
- Madagascar is highly export-oriented and therefore especially exposed to shifts in destination demand.
- Tanzania/Zanzibar, Sri Lanka, Comoros and Brazil remain smaller but commercially relevant alternative origins.
- Madagascar's reported 2022-2023 customs anomaly should be reconciled with physical crop evidence rather than used as a standalone production proxy.

MADAGASCAR SEASONALITY

CROP CALENDAR & SUPPLY TIMING

The South opens the season earlier; the North supplies the principal volume. Procurement, drying and shipment should therefore be read as a sequence rather than a single harvest date.

Commercial stage	Typical timing	What changes commercially
Vegetative recovery / bud formation	Feb-May	Weather conditions influence crop development well before harvest.
Flowering & bud development	May-Aug	Monitoring begins to matter as potential supply becomes visible.
South harvest	Aug-Oct	Earlier crop appears; quality and drying conditions become critical.
North harvest	Oct-Dec	Largest-volume window; procurement competition generally intensifies.
Cleaning / drying / packing	Sep-Jan	Process loss, moisture management and specification risk affect exportability.
Shipment / inventory decisions	From season opening onward	Timing depends on buyer demand, finance, documentation and port execution.

SOURCE: ROBUST MADAGASCAR PRODUCT AND LIFECYCLE INFORMATION; ROBUST-COMMISSIONED FIELD SURVEY; COMMERCIAL OBSERVATIONS.

Weather has opposite commercial effects at different crop stages: moisture supports crop development, but rain immediately after harvest can interrupt sun drying and damage colour and quality.

MAIN POINT Supply availability broadens in stages. The earlier South crop is a market signal; the larger North crop is the principal volume event.

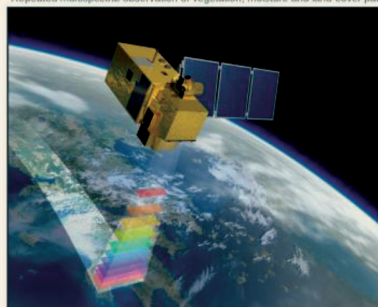
EVIDENCE BASE

HOW THE CROP WAS MEASURED

The research programme combines repeated satellite observation with field validation rather than relying on either source alone.

SENTINEL-2: THE PRIMARY OBSERVATION PLATFORM

Repeated multispectral observation of vegetation, moisture and land-cover patterns



SPECTRAL BANDS
13
Visible, red edge, near- and shortwave infrared
SPATIAL RESOLUTION
10 / 20 / 60 m
Band-dependent ground sampling
OBSERVATION SWATH
290 km
Wide coverage suited to regional mapping
CONSTITUTION REVISIT
5 days
Frequent repeat observation at the equator



SOURCE: ROBUST-COMMISSIONED SATELLITE SURVEY; ROBUST-COMMISSIONED FIELD SURVEY; ESA SENTINEL-2 MISSION SPECIFICATIONS.

- Multi-temporal Sentinel-2 imagery provides repeated, consistent observation across the study area.
- 1,370 recorded ground-control points support classification and validation; unsuitable points were removed through quality control.
- A separate 27-day field campaign in 2025 geotagged 70 clove plantations and recorded age, density, yield, intercrops, condition, post-harvest practice and farmer interviews.
- Physical yield observations link mapped maturity classes to the modelled production benchmark.

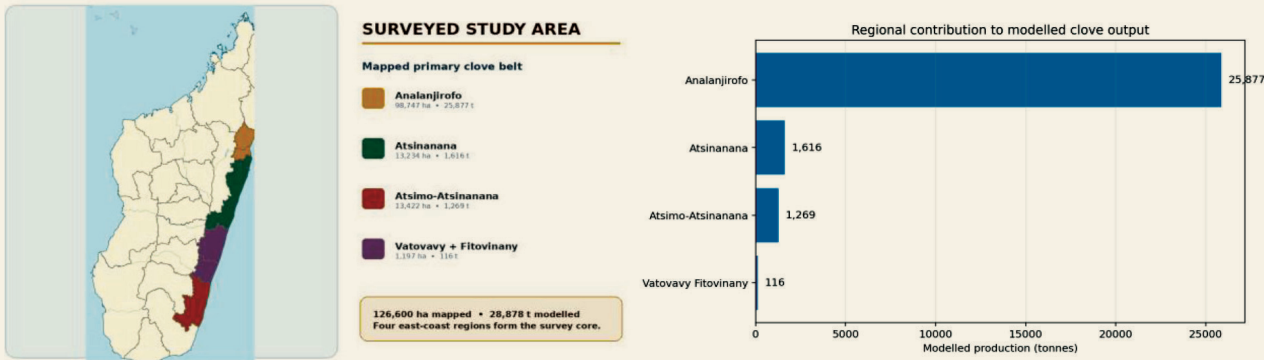
MAIN POINT The credibility of the national benchmark comes from combining large-area observation with farm-level verification.

SUPPLY BASE

NATIONAL PLANTATION & PRODUCTION BENCHMARK

The mapped commercial clove belt is large, but the supply base is highly concentrated by region and maturity.

126,600 ha TOTAL MAPPED AREA Four mapped east-coast regions	98,747 ha ANALANJIROFO Largest regional plantation base	28,878 t MODELLED OUTPUT Mapped-belt production benchmark
25,877 t ANALANJIROFO OUTPUT Largest regional contribution	83,453 ha MATURED AREA Principal productive maturity class	38,564 ha FULLY MATURED AREA Large legacy production base

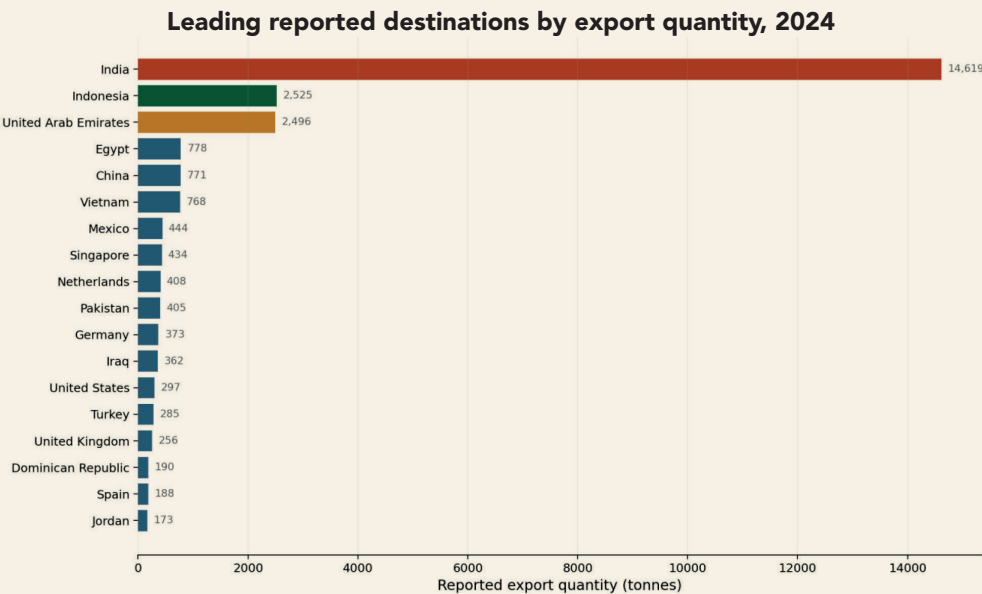


SOURCE: ROBUST-COMMISSIONED SATELLITE SURVEY; ROBUST RESEARCH TEAM ANALYSIS.

MAIN POINT The national production benchmark is directionally concentrated in Analanjiroro; regional weather and execution conditions there can therefore affect the national market disproportionately.

WHERE MADAGASCAR CLOVES GO

Company-level customs visibility varies by jurisdiction, so reporter-side country data provide a broader view of the markets reached by Madagascar-origin cloves.



LEADING REPORTED DESTINATIONS BY EXPORT QUANTITY, 2024.

SOURCE: WITS/UN COMTRADE 2024, MADAGASCAR REPORTER EXPORTS UNDER HS 0907; ROBUST RESEARCH TEAM ANALYSIS.

Madagascar-reported 2024 data show a broad destination footprint across Asia, the Middle East, Europe, Africa and the Americas. India is the largest declared destination in this reporter-side series; Indonesia, Vietnam, China, Egypt, the Gulf, Europe, Russia and other markets also appear in the trade footprint.

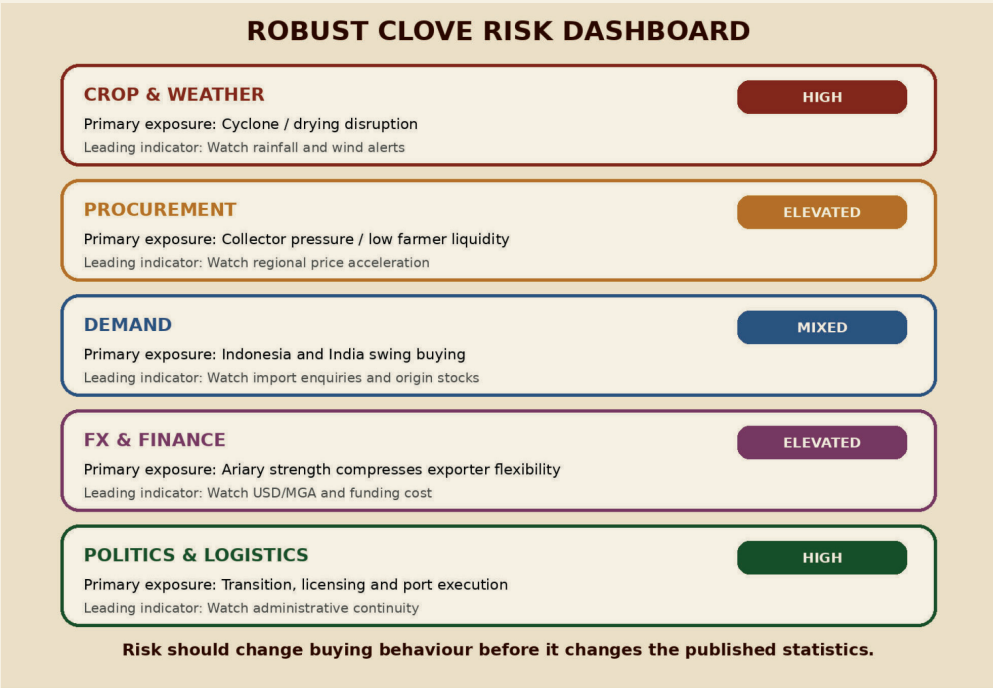
Destination statistics should not automatically be interpreted as final consumption. Trading and redistribution hubs can appear as customs destinations even when cargo ultimately serves another market.

MAIN POINT Madagascar’s addressable export market is wider than the subset of countries with strong named-company customs visibility.

EARLY-WARNING DASHBOARD

COMMERCIAL RISK WATCH

The crop can remain physically available while trade execution deteriorates. Basic Intelligence therefore treats weather, demand, FX, politics and logistics as live decision variables.



ROBUST CLOVE RISK DASHBOARD.

SOURCE: ROBUST RESEARCH TEAM ANALYSIS; PUBLIC WEATHER, CUSTOMS, MACROECONOMIC AND POLICY SOURCES AS CITED IN THE PREMIUM INTELLIGENCE EDITION.

- Weather: harvest-stage rain can damage drying quality after the biological crop is already counted.
- Demand: Indonesia and India can tighten origin quickly - or expose overstocked exporters by waiting.
- FX: Ariary strength can raise USD-equivalent procurement cost even if local prices appear unchanged.
- Execution: roads, documentation, port performance and policy continuity affect financeable shipment availability.

MAIN POINT The most valuable risk signal is the one that changes action before it appears in shipment statistics.

2026/27 MARKET OUTLOOK

Rather than publish a single deterministic forecast, Basic Intelligence uses scenarios to show how crop, demand and execution shocks change the commercial response.

Scenario	Configuration	Commercial reading
Tight balance	Weather damage + active Indonesia/India demand	Earlier buyer coverage; stronger origin competition; less room for delayed execution.
Base case	Normal crop + mixed demand + manageable execution	Selective procurement; market remains sensitive to demand timing and quality.
Supply heavy	Good crop + slower major-market demand	Buyers gain leverage; exporters need stronger discipline on stock, finance and quality.
Execution shock	Normal crop + political / FX / logistics disruption	Physical crop may exist but financeable, shippable availability can tighten suddenly.

What to watch next: Analanjirofo weather, Indonesia crop and inventory signals, Indian enquiry intensity, harvest-stage drying conditions, Ariary direction, licensing continuity and logistics reliability.

Main point The correct strategy depends on whether the shock comes from biological supply, destination demand or physical execution.

NEXT LEVEL OF INTELLIGENCE

YOU HAVE THE MARKET FRAME. CHOOSE HOW DEEP YOU NEED TO GO.

Basic Intelligence is designed to orient the reader. When the next decision involves procurement planning, capital, inventory, margin or counterparty exposure, the paid editions add progressively deeper decision support.

PROFESSIONAL INTELLIGENCE	PREMIUM INTELLIGENCE
For deeper commercial planning	For execution, margin and market-access decisions
Condensed methodology and field/satellite evidence	Everything in Professional, plus the complete evidence base and analytical depth
Full global market dynamics: Indonesia, India, origin competition and customs-data interpretation	Proprietary procurement and sales-realization intelligence
National plantation assessment: mapped area, maturity, production, rainfall, terrain and access	Export-ready cost, margin and seasonal spread analysis
Four condensed regional commercial profiles	Full regional plantation atlas and production construction by region and maturity
Full country-level destination intelligence	Top 50 identified buyers + Top 50 shippers/exporters of record
Expanded weather, FX, political, logistics and demand-risk analysis	Counterparty Intelligence workbook and market-access concentration analysis
Condensed scenario framework and commercial outlook	Trader Timing Playbook and deeper execution scenarios
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Choose Professional when you need to understand the crop and market in enough depth to plan coverage, sourcing, processing or risk exposure.

Choose Premium when the decision moves from planning to execution - when you need proprietary price/cost intelligence, named counterparties, margin timing and the full evidence trail behind the national crop model.

MAIN POINT If your next decision involves capital, inventory, credit, margin or counterparty exposure, upgrade before you commit.

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