B20 BRASIL 2024
INCLUSIVE GROWTH FOR
A SUSTAINABLE FUTURE

WOMEN IN TRADE

CHALLENGES FACED BY WOMEN AND WOMEN-OWNED BUSINESSES IN ACCESSING INTERNATIONAL MARKETS

Report on the results of the survey with the private sector of G20 countries

CNI Brazilian National Confederation of Industry | B20 BRAZIL SECRETARIAT

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EXECUTIVE SUMMARY

1. Executive Summary

Achieving gender parity remains a global challenge, with significant gaps across various dimensions, including economic participation. International trade, however, can be a powerful tool to promote women's economic inclusion.

Companies that engage in global trade have access to various markets, making them more resilient to local economic fluctuations. Additionally, international trade facilitates knowledge and technology transfer, which enhances companies' competitiveness. Research also shows that businesses involved in international trade tend to hire more women and are more likely to offer formal jobs[1].

Therefore, increasing the participation of women-owned and women-led businesses in global trade can help the advancement of women's economic empowerment. Yet, despite these advantages, women-led businesses remain underrepresented in international trade.

Considering this scenario, in 2024, the Trade and Investment Working Group of the G20 prioritized, among its key topics, the promotion of women's participation in international trade[2]. In this context, B20 sought to contribute to the debate by providing inputs from the private sector on this agenda.

To this end, in April 2024, B20 launched a questionnaire to its network of business leaders from all G20 countries to identify the main challenges faced by women and women-owned businesses in international trade. Details about the sample and the methodology used can be found in Chapter 4.

WOMEN REPORT FACING GREATER CHALLENGES THAN MEN IN ACCESSING INFORMATION, BUSINESS OPPORTUNITIES, AND FINANCING FOR INTERNATIONAL TRADE, AS WELL AS IN COMPLYING WITH CUSTOMS PROCEDURES AND REGULATIONS

The survey revealed that women face more challenges than men across all four examined categories: Access to Information, Access to Business Opportunities, Access to Financing, and Compliance with Customs Procedures and Regulations. These categories were chosen as they represent the key barriers identified in previous studies, conducted by plurilateral and multilateral organizations, about female participation in international trade.

In the category of **"Access to Information",** the survey focused on barriers to accessing and completing trainings related to international trade and participating in networking events. More than half of the female respondents (54%) reported facing challenges in accessing training, compared to 36% of men. High costs were cited as a significant barrier for accessing training by almost 20% of women[3], followed and lack of information about these opportunities (13%). The barrier "distant location" was the one with the largest gap between female and male respondents[4].

1 WORLD BANK; WORLD TRADE ORGANIZATION. Women & Trade: The Role of Trade in Promoting Gender Equality.2020. Available at: < https://www.wto.org/english/res_e/booksp_e/women_trade_pub2807_e.pdf>. Acessed on 16 Oct. 2024
2 G20 BRASIL. Trade and Investment Working Group: Issue Note. 2023.
3 Data presented on main barriers to access training opportunities is based on a weighted average calculation.
4 Other barrier with a large gap was "not suitable to SMEs". However, this result may be influenced by the composition of the respondent database.

In terms of **"Networking Opportunities",** nearly 60% of women reported difficulties in accessing these opportunities, compared to 44% of men. The main barriers identified were high costs to attend network events[5] (28%), lack of information about these opportunities (21%), and time constraints due to work commitments (18%). Women also reported care commitments as a challenge nine times more often than men.

Regarding **"Access to Business Opportunities",** six out of ten women reported facing challenges in finding, negotiating, and closing deals internationally, compared to around four out of ten men. The main barriers were lack of information on how to approach international clients and on where and how to promote their businesses[6] (28% and 25%, respectively), and lack of negotiation skills (19%). "Limited time due to care commitments" and "gender bias", although less prominent in absolute terms, are challenges reported three times more commonly by women than men.

In the category of **"Access to Financing",** women and men were asked if they face challenges in securing funding for their businesses. Six out of ten women reported facing challenges, while four out of ten men reported the same. The primary obstacles for women were lack of collateral[7] (34%), lack of information on how to apply (22%) and feeling uncomfortable while pitching (21%). Notably, women reported facing issues with access to digital services nearly five times more often than men. Moreover, harassment and gender bias were significantly more prevalent for women, being reported over twice as frequently compared to men.

In terms of **"Compliance with Customs Procedures and Regulations",** almost 50% of the female respondents reported being impacted by these challenges, twice as much compared to men. High tariffs and fees were cited as the top challenge[8] (26%), followed by lack of information on customs procedures (23%) and regulatory requirements (17%). Additionally, women reported harassment and gender bias significantly more often than men.

Care commitments emerged as a cross-cutting barrier across all categories mentioned above. Nearly 60% of women reported that caregiving responsibilities negatively impacted their ability to engage in international trade, compared to 36% of men.

Nearly 60% of women reported that caregiving responsibilities negatively impacted their ability to engage in international trade, compared to 36% of men.

5 Data presented on main barriers to access networking opportunities is based on a weighted average calculation.
6 Data presented on main barriers to access business opportunities is based on a weighted average calculation.
7 Data presented on main barriers to access to financing is based on a weighted average calculation.
8 Data presented on main barriers related to "Compliance with customs procedures and regulations" is based on a weighted average calculation.

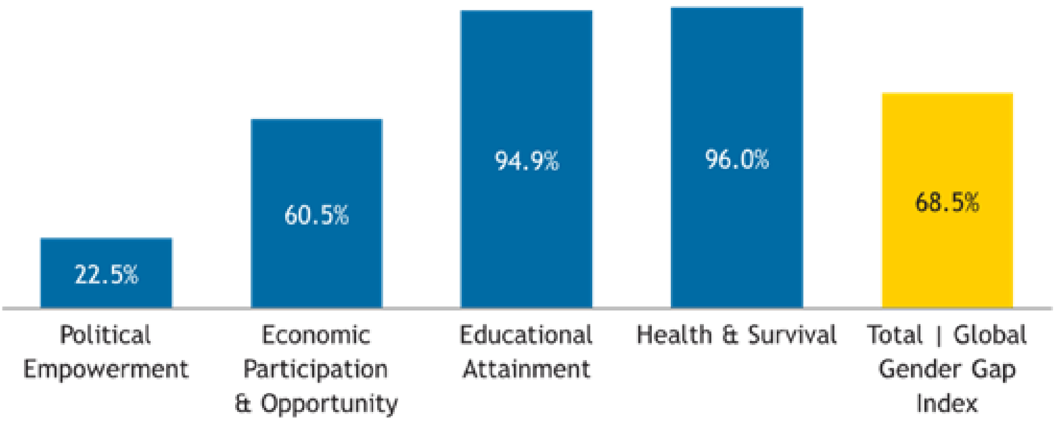
INTRODUCTION

2. Introduction

The pursuit of gender parity remains a challenging journey, with no country having yet achieved full equality, according to the World Economic Forum's (WEF) Global Gender Gap Report[9]. Women continue to face significant disparities compared to men, driven by persistent gender biases across multiple domains.

The WEF's annual assessment[10] examines gender gaps in over 140 countries, focusing on four key dimensions— Economic Participation, Political Empowerment, Health and Survival, and Educational Attainment. While progress varies by dimension, Economic Participation stands out as one of the areas where the gap remains notably wide, as shown in *Exhibit 1.*

Exhibit 1 – Gender Gap per Subindex[11]



Source: WEF (2024). Global Gender Gap Index. Available at: < https://www.weforum.org/publications/global-gender-gap-report-2024/in-full/>.

International trade can be a powerful tool for promoting economic inclusion. Engaging in global markets offers notable benefits: businesses that export are less vulnerable to local economic shifts, therefore enjoying increased resilience[12]. They also benefit from knowledge and technology transfers, which boost their productivity and competitiveness[13] , and from access to various markets. Consequently, fostering the participation of women-owned and women-led businesses in global trade can be a relevant strategy to strengthen women's economic participation and empowerment.

9 WEF (2024). Global Gender Gap Report 2024. Available at: < https://www.weforum.org/publications/global-gender-gap-report-2024/in-full/>.
10 Ibid, p. 13
11 Population-weighted average, 146 countries. Gender gap closed to date.
12 EDC (2017). 7 Reasons why exporters do better. Available at: <https://www.edc.ca/en/blog/why-exporters-are-more-successful.html>
13 World Bank (2001). On "Indirect" Trade-Related R&D Spillovers. Available at: <https://documents1.worldbank.org/curated/zh/198801468779168088/pdf/wps2580.pdf>

However, research shows that women-led businesses engage less in international trade compared to men-led businesses, regardless of their size or sector. For example, an International Trade Centre's (ITC) study across 16 nations revealed that only 22% of women-led companies exported, as opposed to 31% of men-led firms[14]. The OECD also found that, in firms with a Facebook presence across OECD countries, just 11% of women-led businesses exported, compared to 19% of men-led enterprises[15]. Furthermore, the World Trade Organization (WTO) and the World Bank (WB) have identified that women face more trade-related constraints, resulting in higher trading costs for women than for men[16].

Recognizing the importance of addressing these challenges, G20 Brasil has brought the discussion of women's participation in international trade to the forefront, with the Trade and Investment Working Group focusing on producing a compendium of best practices to address these disparities.

This survey, conducted by the B20 this year, aimed to collect and provide updated data from G20 countries and private sector leaders on the challenges and opportunities related to women's participation in trade. The results are presented in this material. Our goal is to provide actionable data to support ongoing G20 discussions and contribute to closing the gender gap in international trade.

We hope this report serves as a catalyst for further actions, driving meaningful progress towards gender equality in global trade.

14 ITC (2023). Women in Trade. New data and new insights. Available at: < https://intracen.org/resources/publications/women-in-trade>
15 OECD (2021). Trade and Gender: A Framework of analysis. Available at: < https://www.oecd.org/publications/trade-and-gender-6db59d80-en.htm>
16 WB, WTO (2020). Women & Trade: The Role of Trade in Promoting Gender Equality. Available at: < https://www.wto.org/english/res_e/publications_e/women_trade_pub2807_e.htm>

RESULTS OF THE SURVEY

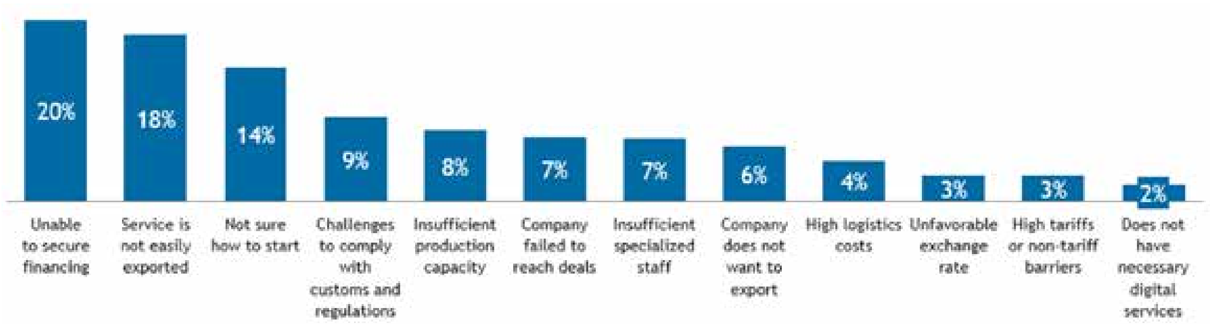
3. Results of the Survey

This report presents the findings based on 1,346 responses to the questionnaire, with a focus on the G20 countries, which are Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russia, Saudi Arabia, South Africa, South Korea, Türkiye, the United Kingdom, and the United States. More details about the sample and the methodology used can be found in Chapter 4.

The questionnaire is divided into four parts. The first part gathers respondent characteristics, including gender, race, education level, role in the business, and hours spent on work and household chores. The second part asks for details about the respondent's company, such as the country of operation, sector, size, engagement in international trade, and leadership structure. The third section investigates challenges faced by the respondents in accessing international trade, focusing on four main categories: access to information, business opportunities, financing, and compliance with customs procedures and regulations. Finally, the last section addresses the broader topic of care commitment.

In part 2, the survey explores the reasons why women-owned companies do not engage in exporting. Approximately half of the weighted responses highlights three main reasons: inability to secure financing (20%), service not easily exported (18%), and uncertainty about how to start (14%), as illustrated in *Exhibit 2.*

Exhibit 2 – Reported reasons for women-owned businesses to not engage in importing or exporting in G20 Countries (Weighted average, in %)[17]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

The first reason, the inability to secure financing, may be due to fewer attempts by women to seek funding or a higher rate of rejections for their requests. Although this survey does not investigate the second aspect— requests' rejection rates— it will be examined, later in this paper, the barriers women face in the process of requesting for financing.

The second reason, "Service is not easily exported", pertains to the nature of the business itself, such as the sector in which women-owned companies operate, which can impose additional challenges for trade. For example, some services may inherently be more difficult to export due to greater regulatory or logistical constraints compared to those imposed on the trade of goods.

17 Question: "Why does your company not engage in importing or exporting? Please select up to 3 reasons and rank them".
Percentage considers data from respondents that answered this question, and it does not consider responses marked as "Other, please specify".

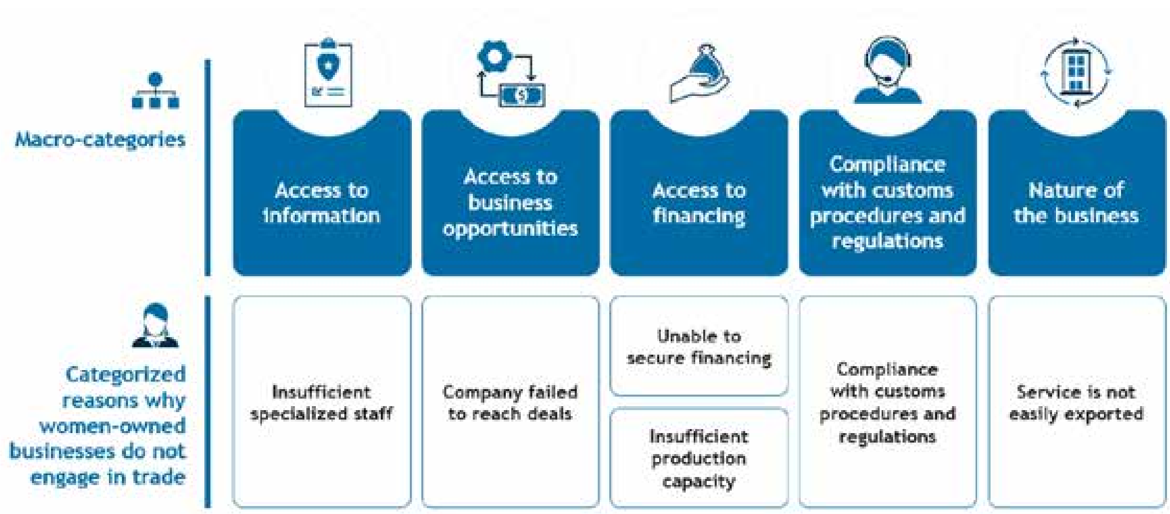
The third factor, "not sure how to start", may be linked to a lack of information. This could be due to insufficient training, lack of support networks, or absence of relevant events. This factor will also be thoroughly investigated later in this paper.

Other reported reasons for not exporting or importing, while less prevalent, still account for more than 5% of the weighted responses each. These include insufficient production capacity (8%), failure to secure deals (7%), lack of specialized staff (7%), and a company's unwillingness to export (6%).

Based on this initial analysis of reasons for women-owned companies to not export and considering previous research from plurilateral and multilateral organizations[18] on the same topic, five macro-categories of challenges were identified for more detailed investigation among respondents. These macro-categories are Access to Information; Access to Business Opportunities; Access to Financing; Compliance with Customs Procedures and Regulations; and the Nature of Women-Owned Business.

These categories of challenges account for more than 80% of the reasons cited by women-owned businesses for not engaging in international trade, as presented in *Exhibit 3*.

Exhibit 3 – Surveyed macro-categories and their connection with mapped reasons for women-owned businesses to not trade internationally



Source: BCG analysis

A. Access to Information

The investigation into challenges related to access to information focused on specific barriers to accessing and completing online and in-person training related to international trade and to barriers to participating in networking opportunities promoted by chambers of commerce, export agencies and business networks or fairs, and events related to international trade.

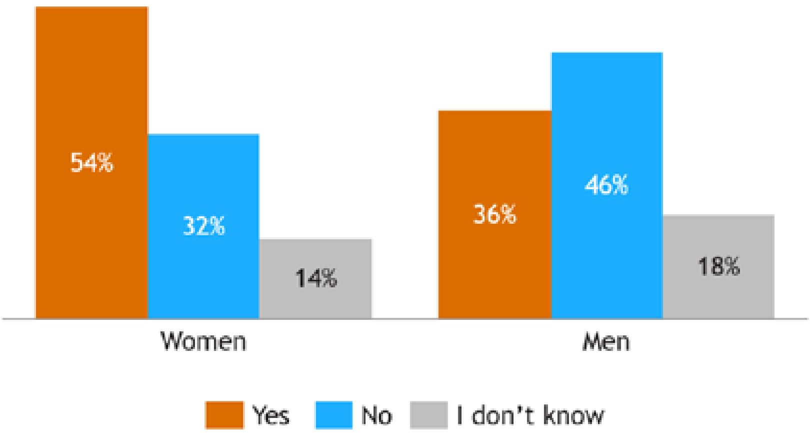
18 To develop the macro-categories, desk research was conducted to map key challenges extensively covered by other studies. Some of the studies used in this initial research were ITC (2024), Women in Trade: New Data and Insight. Available at : https://intracen.org/resources/publications/women-in-trade. World Bank, WTO (2020), Women & Trade: The Role of Trade in Promoting Gender Equality. Available at: https://www.wto.org/english/res_e/booksp_e/women_trade_pub2807_e.pdf. OECD (2021). Trade & Gender: A Framework for Analysis. Available at: https://www.oecd.org/publications/trade-and-gender-6db59d80-en.htm

A1. Access to trainings

In terms access to trainings, both female and male respondents were asked if they experienced any challenges in accessing or completing online or in-person training programs related to international trade. More than half of the female respondents (54%) reported facing challenges, compared to 36% of men, as presented in *Exhibit 4*. Thus, women were 50% more likely than men to report difficulties in accessing and completing training.

More than half of the female respondents reported facing challenges in accessing and completing trainings, compared to 36% of men.

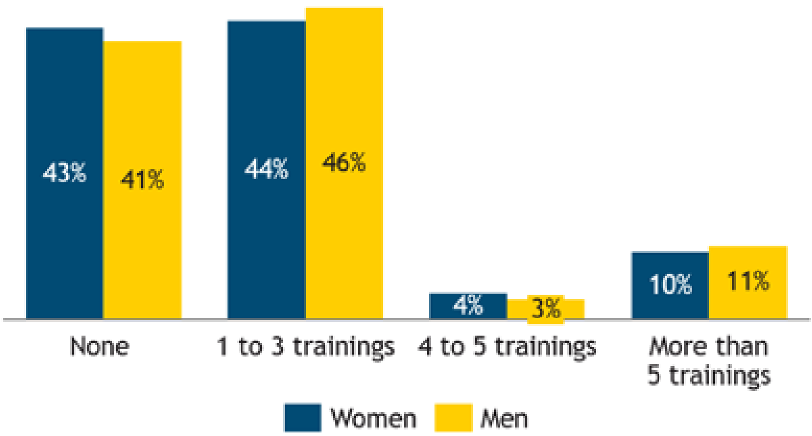
Exhibit 4 – Respondents facing challenges in accessing and completing training in international trade in G20 countries (in %)[19]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

However, when asked about the frequency with which each group completed training on international trade, men and women reported very similar levels of engagement, as shown in *Exhibit 5*. About 44% of women and 46% of men reported having participated in 1 to 3 training programs in the past three years.

Exhibit 5 – Number of women and men that completed trade-related training in the past 3 years in G20 countries (in %)



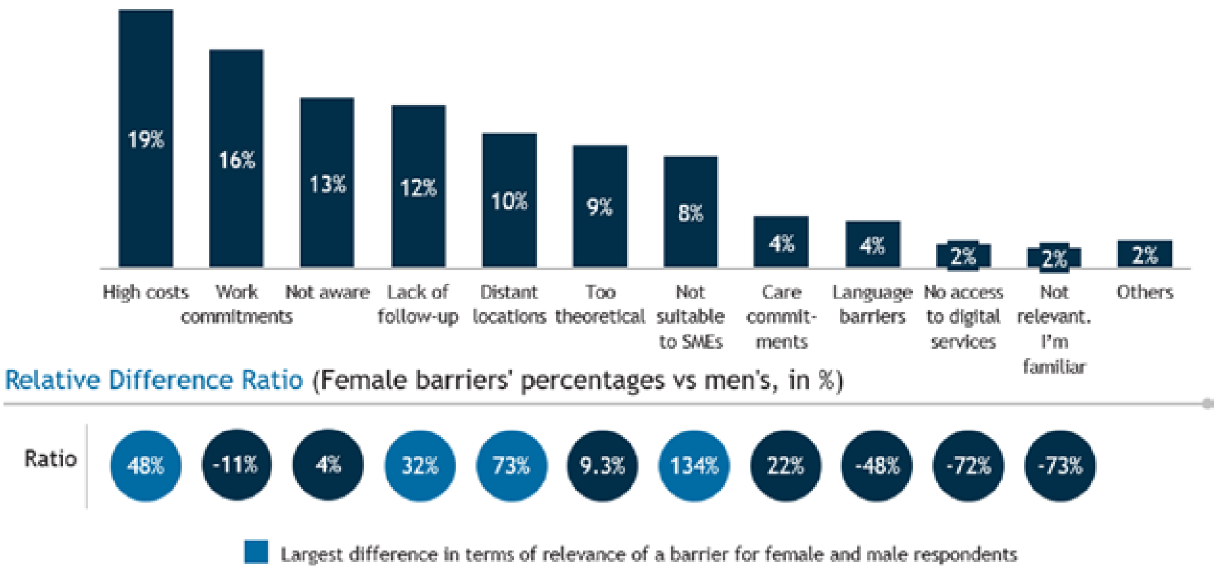
Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

19 Question: "Are you experiencing any challenges in accessing or completing online or in-person training programs related to international trade?". Percentage considers data from respondents that answered this question.

Despite this similar performance, both groups indicated that around 40% of respondents had not participated in any training in the past three years. This is a significant amount, especially considering that this survey was distributed among participants of chambers of commerce and business associations, who typically are more engaged in the topic than the average professional or/and company.

Delving deeper, respondents were asked to rank the main challenges they face in accessing and completing training programs, as shown in *Exhibit 6*. According to the weighted average of the responses, 2 in every 10 women cited high costs as a significant barrier. This was followed by 16% of women who highlighted a lack of time due to work commitments. Additionally, 13% of women reported lacking information about these opportunities, and 12% indicated that not receiving any follow-up support after trainings was a challenge.

Exhibit 6 – Reported challenges for women in accessing and completing international trade trainings in G20 countries (Weighted average, in %)[20]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

When comparing these findings with male responses, several challenges disproportionately impacted women. The most significant gaps were observed in distant location of the training venue, which were cited as a barrier 70% more often by women than men; high costs, mentioned almost 50% more frequently by women; and lack of follow-up support, reported 32% more often by women.

Additionally, the issue of training being "not suitable for SMEs" was over twice as relevant for women compared to men, although this may be influenced by the composition of the respondent database. Specifically, more than 70% of female respondents work in companies with less than 50 employees, whereas around 50% of male respondents report working in similarly sized companies.

20 Question: "What are the main challenges you face when accessing or completing online or in-person training about international trade? Please select up to 3 options and rank them". Percentage considers data from respondents that answered this question, and it does not consider responses marked as "Other, please Specify" or/and "Not Applicable". Note: The relative difference ratio represents the percentage difference in the relevance of each barrier between female and male respondents. Positive values indicate barriers more relevant to female respondents, while negative values indicate barriers more relevant to male respondents.

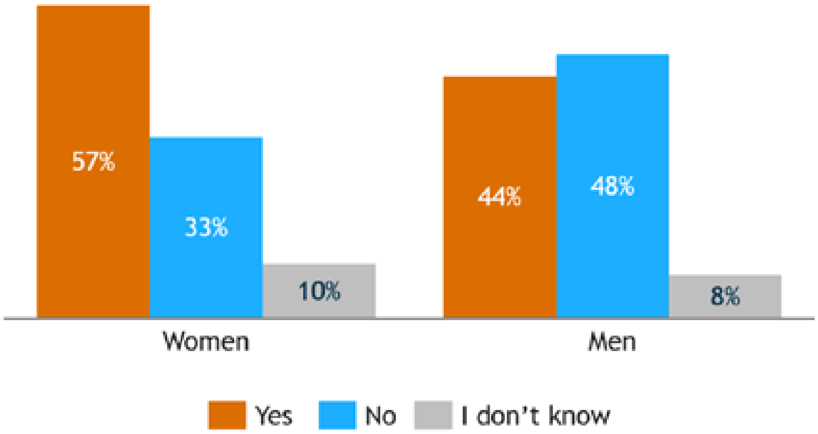
A2. Access to networking opportunities and activities

A second element investigated within the macro-category "access to information" was the reported challenges in accessing networking opportunities and activities organized by chambers of commerce, export agencies, and business networks. These forums are crucial in reducing information asymmetry and providing support for businesses, especially smaller ones, to navigate common problems[21].

When asked if women face challenges accessing these opportunities, nearly 6 in 10 women reported difficulties, compared to about 4 in every 10 men, as shown in *Exhibit 7*.

When asked if women face challenges accessing these opportunities, nearly 6 in 10 women reported difficulties.

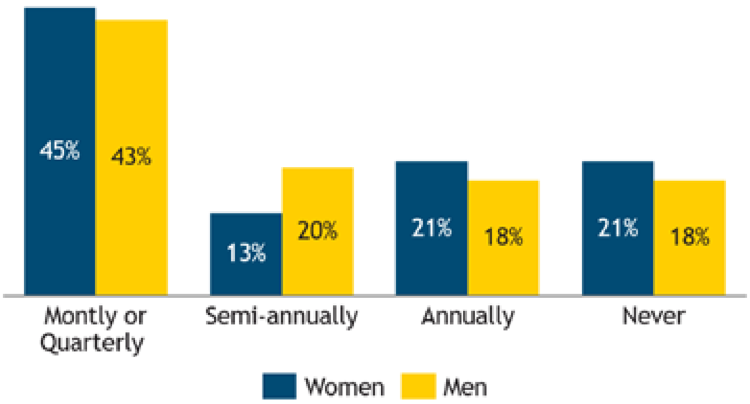
Exhibit 7 – Respondents facing challenges to participate in networking opportunities and events in G20 countries (in %)[22]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

Despite these challenges, both men and women showed similar levels of engagement in these events. Approximately 80% of both genders reported participating in at least one event per year, as presented in *Exhibit 8*.

Exhibit 8 – Number of women and men that participated in networking events and activities related to trade in G20 countries (in %)[23]



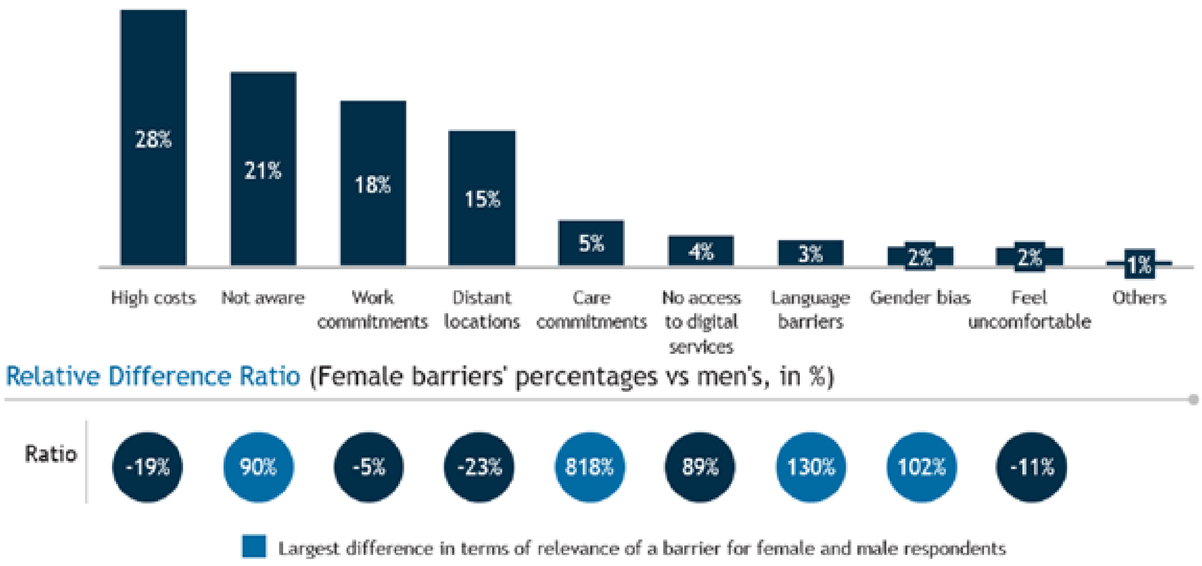
Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

21 OECD (2021). Trade & Gender: A Framework for Analysis. Available at: https://www.oecd.org/publications/trade-and-gender-6db59d80-en.htm
22 Question: "Are you experiencing any challenges in participating in networking opportunities and events organized by chambers of commerce, export agencies and business networks or in events and fairs to promote international trade (Examples of challenges: high costs, distant locations, language barriers, lack of time, etc.)?". Percentage considers data from respondents that answered this question.
23 Question: " How often do you participate in activities organized by chambers of commerce, export agencies, and business networks or in events, such as trade fairs?". Percentage considers data from respondents that answered this question.

When asked about the specific challenges in accessing these networking opportunities, 80% of the responses from female respondents, on a weighted average, were concentrated in four main challenges, as presented in *Exhibit 9*: high costs to attend these events (28%), lack of information about these events (21%), time constraints due to work commitments (18%), and the distance of the events locations (15%).

Specific challenges for women in accessing networking opportunities: high costs, lack of information, time constraints and distance to the locations.

Exhibit 9 – Reported challenges for women in participating in networking activities in G20 countries (Weighted average, in %)[24]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

In terms of differences between the challenges faced by women and men, women attributed roughly double the importance compared to men to language barriers and gender bias, though neither of these were among the primary challenges reported.

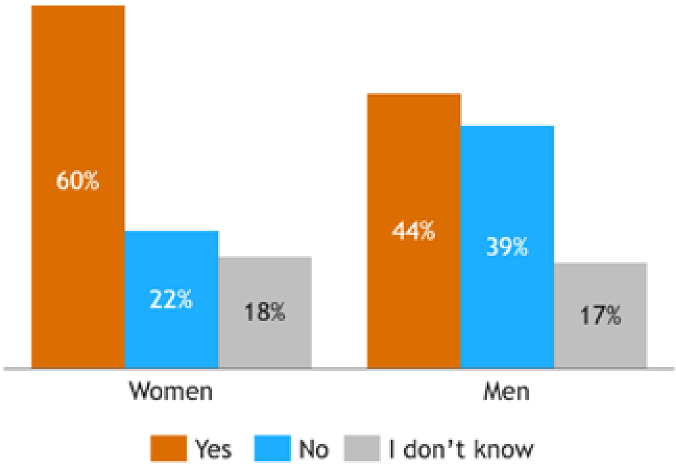
The most significant disparity between female and male perceptions of challenges in accessing networking events concerns care commitments. Women reported this as a challenge nine times more often than men, indicating a barrier that specifically affects women.

B. Access to Business Opportunities

The survey also aimed to determine whether women find it more challenging than men to find, negotiate, and close deals internationally. Six out of ten women reported facing challenges in these areas, compared to around four out of ten men, as shown in *Exhibit 10*.

24 Question: "Are you experiencing any challenges in participating in networking opportunities and activities organized by chambers of commerce, export agencies and business networks or in events and fairs to promote international trade? Please select up to 3 options and rank them". Percentage considers data from respondents that answered this question, and it does not consider responses marked as "Other, please Specify" or/ and "Not Applicable". Note: The relative difference ratio represents the percentage difference in the relevance of each barrier between female and male respondents. Positive values indicate barriers more relevant to female respondents, while negative values indicate barriers more relevant to male respondents.

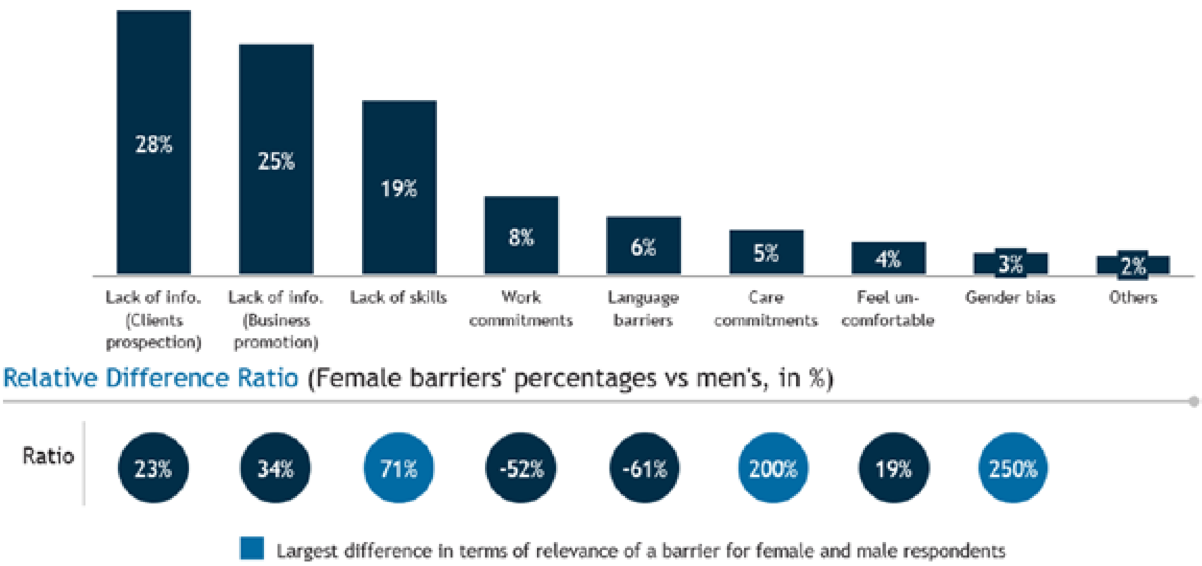
Exhibit 10 – Respondents facing challenges to negotiate and close deals internationally In G20 countries (in %)[25]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

When asked to detail the specific challenges respondents face in accessing business opportunities, more than half of the female respondents, considering a weighted average, mentioned lack of information about where and how to promote their businesses or how to approach international clients or distributors, as presented in *Exhibit 11*. The third most common challenge reported is the perceived lack of negotiation skills, with 20% of women identifying this as a crucial barrier.

Exhibit 11 – Reported challenges for women in finding, negotiating, or closing deals internationally in G20 countries (Weighted average, in %)[26]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

25 Question: "Are you experiencing any challenges in finding, negotiating, or closing commercial deals internationally?" Percentage considers data from respondents that answered this question.

26 Question: "What are the main challenges you face when trying to find, negotiate, or closing commercial deals internationally?" Percentage considers data from respondents that answered this question, and it does not consider responses marked as "Other, please Specify" or/and "Not Applicable". Note: The relative difference ratio represents the percentage difference in the relevance of each barrier between female and male respondents. Positive values indicate barriers more relevant to female respondents, while negative values indicate barriers more relevant to male respondents.

Among these main challenges, the most substantial gap, in percentage, between female and male respondents is in the challenge of "lack of negotiation skills." This obstacle was highlighted by almost 19% of women, compared to around 11% of men, indicating a gap of more than 70% between women and men.

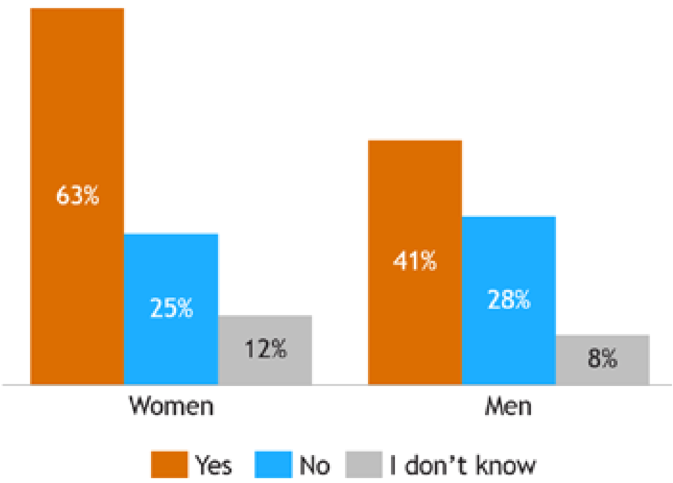
Other challenges also present a significant gender gap. Although less prominent in absolute terms, obstacles such as limited time due to care commitments and gender bias were reported to impact women more than three times as often as men.

C. Access to Financing

Women and men were also asked if they face challenges in securing funding for their businesses. Six out of ten women reported "yes", while four out of ten men reported "yes", as shown in *Exhibit 12*. Among all categories of challenges investigated, "access to financing" was the one with the highest percentage of women that reported facing challenges.

6 out of 10 women report challenges in securing financing for their businesses

Exhibit 12 – Respondents facing challenges to secure financing for their businesses (in %)[27]

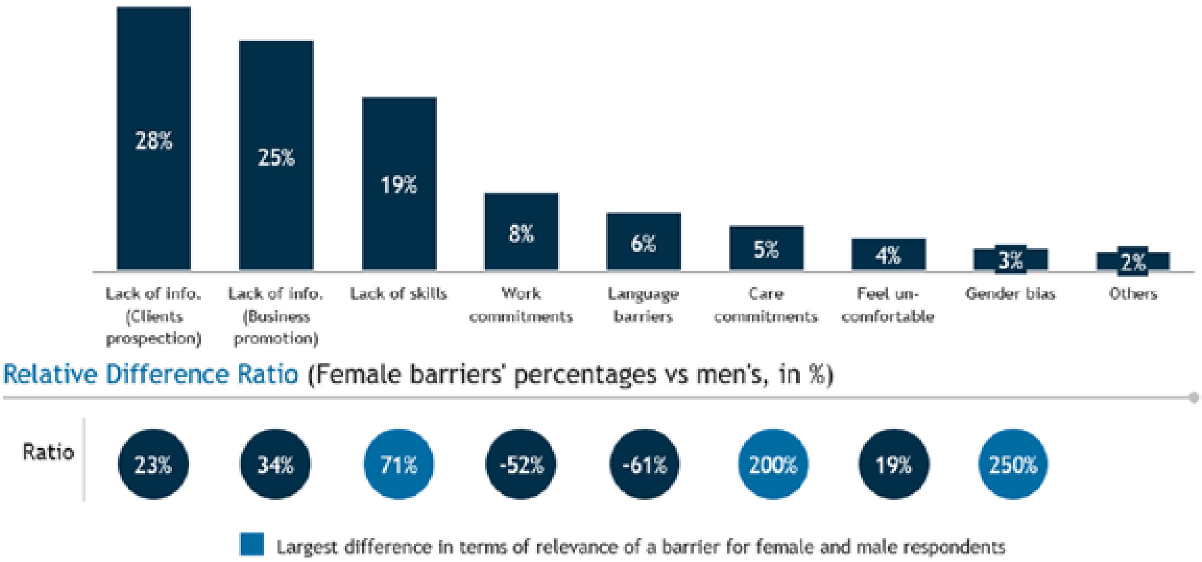


Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

Within this category, women highlighted several main obstacles: 34% mentioned the lack of collateral to support the credit application, 22% cited the lack of information on how to apply, and 21% reported feeling uncomfortable while pitching. These challenges are as relevant for men as they are for women. The numbers are based on a weighted average considering the prioritization done by the respondents and are presented below, in *Exhibit 13.*

27 Question: "Are you experiencing any challenges in finding, negotiating, or closing commercial deals internationally". Considers data from respondents that answered this question.

Exhibit 13 – Reported challenges for women in securing financing for their businesses in G20 countries (Weighted average, %)[28]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

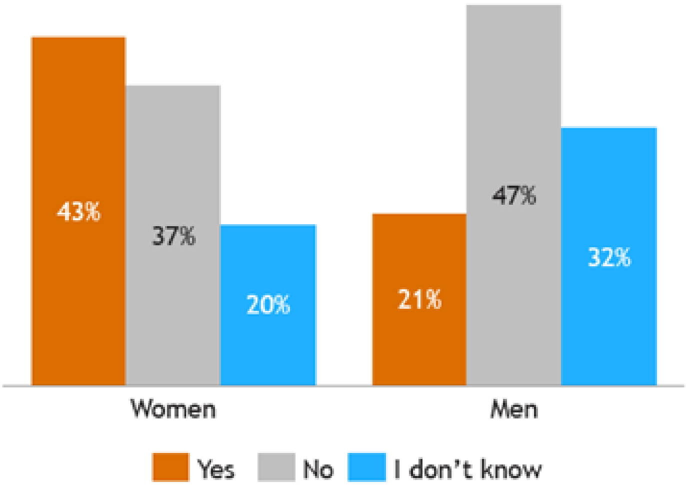
The main differences between the responses of female and male respondents are related to access to digital services and experiences of harassment and/or gender bias. Women reported facing challenges having access to digital services almost 5 times as often as men. Additionally, experiences of harassment and gender bias were reported by women twice as frequently as by men.

D. Compliance with Customs Procedures and Regulations

The final main category is related to challenges in navigating customs procedures and complying with tariff and non-tariff regulations of the country to which the respondent is exporting to or importing from. Female respondents reported being impacted by these challenges twice as much (43% vs. 21%) compared to men, as shown in *Exhibit 14.*

28 Question: "What are the main challenges you face when trying to secure financing for your businesses?". Percentage considers data from respondents that answered this question." Percentage considers data from respondents that answered this question, and it does not consider responses marked as "Other, please Specify" or/and "Not Applicable". Note: The relative difference ratio represents the percentage difference in the relevance of each barrier between female and male respondents. Positive values indicate barriers more relevant to female respondents, while negative values indicate barriers more relevant to male respondents.

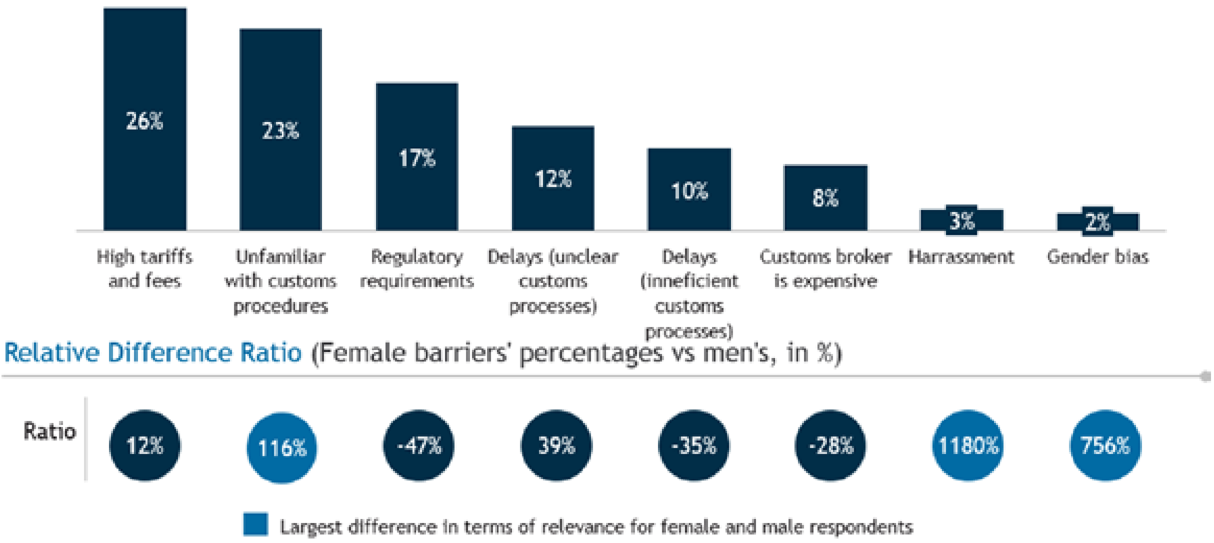
Exhibit 14 – Respondents facing challenges to comply with customs procedures and local regulations (in %)[29]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

When asked to detail and rank the challenges related to compliance with customs procedures and regulatory standards, high tariffs and fees were cited as the top challenge by 26% of women, based on a weighted average. This barrier was similarly relevant among men. This was followed by 23% of women reporting the lack of information on customs procedures as a barrier. Difficulty in complying with regulatory requirements, along with the associated increase in costs, occupied the third position in relevance, with 17% of the responses. Finally, delays due to unclear and inefficient customs processes (12% and 10%, respectively) also appeared as important challenges, as showing *Exhibit 15.*

Exhibit 15 – Reported challenges for women in complying with customs procedures and local regulatory standards in G20 countries (Weighted average, %)[30]



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

29 Question: "Are you experiencing any challenges to comply with customs procedures and local regulatory standards when exporting or importing goods?". Percentage considers data from respondents that answered this question.

30 Question: "What are the main challenges you face with customs procedures and local regulatory standards when exporting or importing goods? Please select up to 3 options and rank them. Percentage considers data from respondents that answered this question, and it does not consider responses marked as "Other, please Specify" or/and "Not Applicable". Note: The relative difference ratio represents the percentage difference in the relevance of each barrier between female and male respondents. Positive values indicate barriers more relevant to female respondents, while negative values indicate barriers more relevant to male respondents.

Among the most significant barriers, the lack of information (stated in the survey as "unfamiliar with customs procedures") showed the largest gap between women and men, with women reporting this challenge approximately twice more frequently than men.

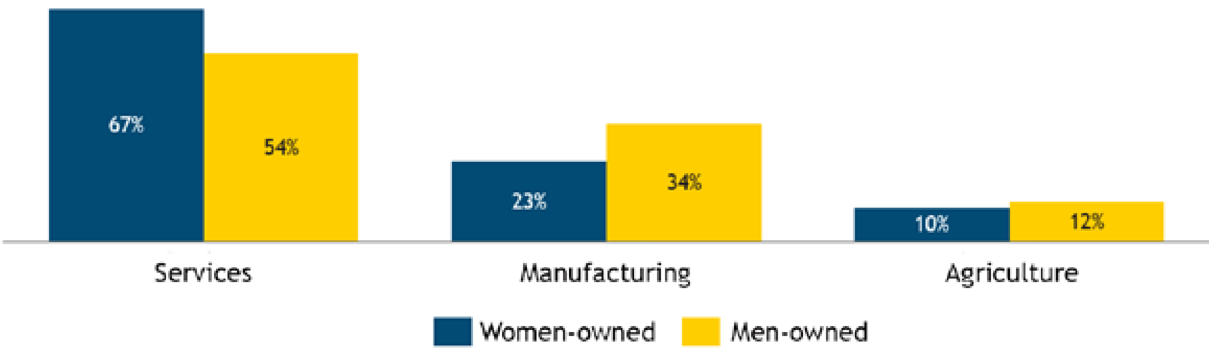
Other challenges with significant gaps between women and men include harassment, reported 20 times more often by women than men, and gender bias, reported more than 8 times more frequently by women than by men.

E. Nature of Women-Owned Businesses

Some characteristics of businesses can impact their ability to trade internationally. The sector in which a company operates, and its size can significantly influence companies' access to international markets, for example.

In this survey with G20 countries, women reported to proportionally own more companies in the services sector than men, as shown in *Exhibit 16.*

Exhibit 16 – Women-owned and men-owned businesses per sector in the G20 countries (in %)[31]



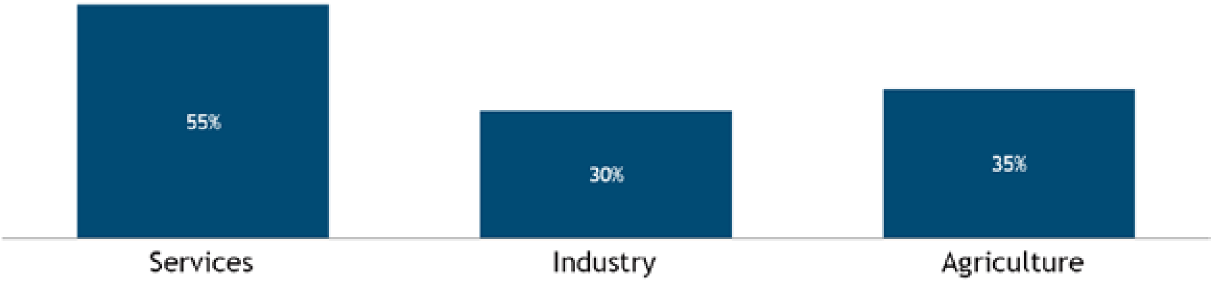
Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

Moreover, the survey also showed that surveyed companies from the services sector tend to engage less in international trade than companies from the manufacturing and agricultural sectors, as shown in *Exhibit 17.*

Among companies that responded to the questionnaire, more than half of the businesses from the services sector said they do not engage in export activities. In contrast, only 30% of manufacturing sector companies reported not engaging in export activities. Similarly, in the agriculture sector, 35% of respondents indicated they did not export their products.

31 Question: " In which sector does your company or employer mainly operate?". Percentage considers data from respondents that answered this question.

Exhibit 17 – Number of companies that does not export in the G20 countries (in %)[32]

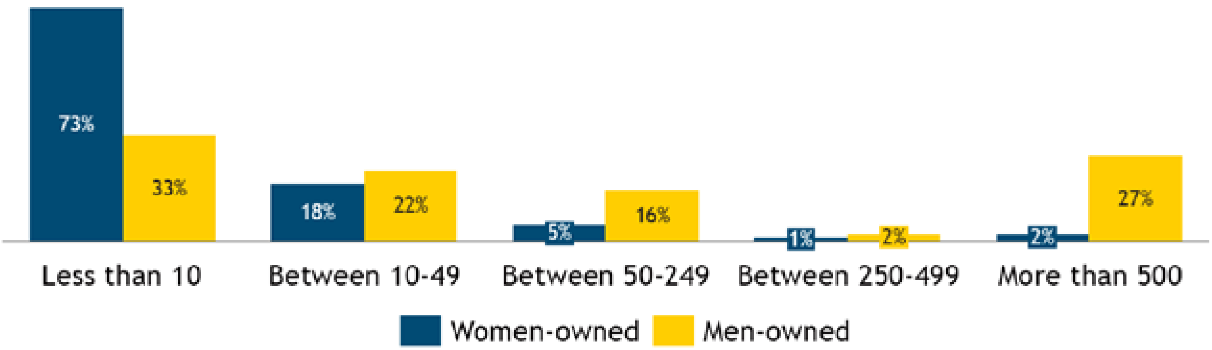


Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

While these numbers do not necessarily reflect the overall reality in G20 countries, they align with other studies indicating that women tend to work and lead businesses in the services sector, which is less involved in international trade[33].

Additionally, in terms of business size, seven out of ten women-owned businesses surveyed in this survey had fewer than ten employees, as shown in *Exhibit 18*. In contrast, only 30% of the men-owned businesses surveyed were micro-enterprises. At the opposite end, among large companies with more than 500 employees, almost 30% of all men-owned companies surveyed were large, while only 2% of women-owned companies fell into this category.

Exhibit 18 – Women-owned and men-owned businesses per size in number of employees, in the G20 countries (in %)[34]

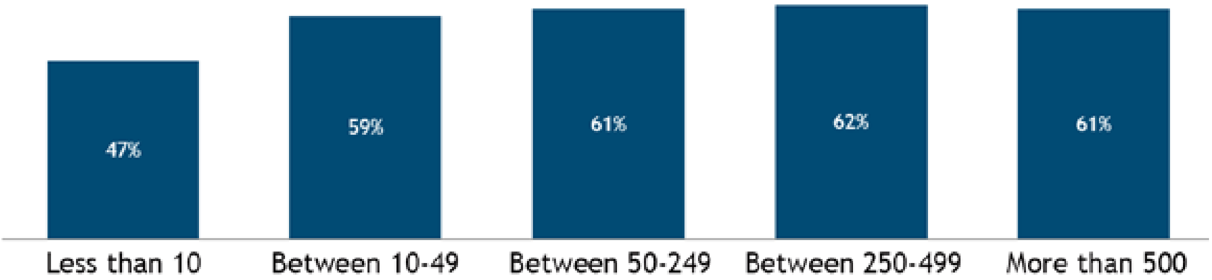


Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

Among companies that participated in the survey, micro-enterprises, with up to 10 employees, export less than medium and large enterprises, with only 47% of micro-enterprises exporting compared to 59% to 62% for larger companies, as shown in *Exhibit 19*.

32 Question: "Which of the following best describes your company's primary engagement in international trade?". Percentage considers data from respondents that answered this question.
33 OECD (2021). Trade & Gender: A Framework for Analysis. Available at: https://www.oecd.org/publications/trade-and-gender-6db59d80-en.htm
34 Question: "How many employees does the company have?". Percentage considers data from respondents that answered this question.

Exhibit 19 – Companies that export in the G20 countries, per size in number of employees (in %)



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis.

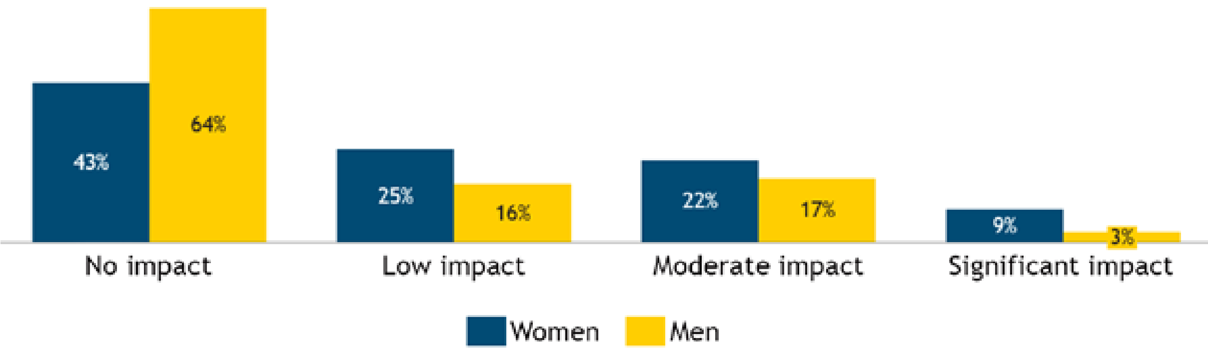
Once again, these numbers should not be taken as a definitive representation of companies size for the G20 countries, but they are consistent with findings from other surveys conducted by multilateral and plurilateral organizations, such as the World Bank and the World Trade Organization[35]. These studies point out that businesses owned by women tend to be smaller than those owned by men. Moreover, smaller businesses face more barriers to international trade due to larger fixed costs, lack of specialized staff, lack of information, and other obstacles[36].

F. Care Commitments

Due to its cross-cutting nature, care commitment emerged as a barrier across all four categories of analysis, helping to explain the challenges women face in accessing information, business opportunities, and financing related to international trade, as well as in complying with regulatory requirements and customs procedures. To capture the impact of this issue more precisely, the survey also brought a specific question on the matter.

Respondents were asked to what extent care commitments hindered their ability to conduct international trade activities. Nearly 60% of women reported that their ability to engage in international trade was negatively affected by caregiving responsibilities. In contrast, only 36% of male respondents reported a similar impact, as shown in the *Exhibit 20* below.

Exhibit 20 – Level of negative impact of care commitment to respondent's ability to conduct international trade activities (in %)



Source: B20 survey with the private sector in G20 Countries. 2024. BCG Analysis

35 World Bank, WTO (2020), Women & Trade: The Role of Trade in Promoting Gender Equality. Available at: https://www.wto.org/english/res_e/booksp_e/women_trade_pub2807_e.pdf.
36 Ibid.

APPENDIX

4. Appendix

4.1 Appendix | Methodology

4.1.1 Surveyed Population

The initial target population of this survey consisted of men and women in leadership positions or those who own companies of all sizes in the G20 countries or blocs, including the European Union and the African Union, as well as in the G20 guest countries for this year's summit.

The survey considered as stratification variables the respondent's gender, whether the company was male or female-owned, and the company's location. The first criterion, gender, was self-reported. The second criterion, company ownership, was defined based on the quantitative criteria of ISO for women's entrepreneurship (ISO IWA 34:2021), which states that women-owned businesses are those with more than 50% ownership by one or more women[37].

For the geographical analysis, countries were grouped as follows:

- **G20 Countries:** Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russia, Saudi Arabia, South Africa, South Korea, Türkiye, United Kingdom, United States.
- **European Union:** Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden.
- **African Union:** Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cape Verde, Cameroon, Central African Republic, Chad, Comoros, Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Republic of the Congo, Rwanda, São Tomé and Príncipe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe.
- **Other G20 Guest Countries (not included in any of the previous analysis groups):** Chile, Colombia, New Zealand, Paraguay, Peru, Uruguay, Switzerland, Singapore and United Arab Emirates

4.1.2 Data Collection Procedure

The survey was conducted through a web-based questionnaire (See appendix 3.2). The questionnaire was primarily distributed among chambers of commerce, business organizations, and industry confederations. As a result, the responses are more likely to come from companies that are already engaged in exporting or importing activities.

4.1.3 Sample Size

There were 2,013 responses, all of which included country information. However, 80 responses were excluded as they did not pertain to any of the selected countries or blocs, resulting in a total sample of 1,933 responses.

37 Complete standard available at: < https://www.iso.org/standard/79585.html>

Considering the geographical divisions of the survey, the distribution was as follows:

- **G20 Countries:** 1,346 responses
- **European Union:** 199 responses
- **African Union:** 522 responses
- **Other G20 Guest Countries:** 66 responses

The sum of responses per group exceeds the total number of responses because some countries are counted in more than one analysis group. These countries are France (28 responses), Germany (18 responses), Italy (31 responses), and South Africa (123 responses).

Due to the small number of respondents from the group **"Other G20 Guest Countries",** this subset was not included in the final analysis. Additionally, for the **European Union and the African Union,** the available sample did not encompass all member countries of these blocs. Consequently, the results for these groups would not provide a comprehensive view of the entire blocs but rather a snapshot from the countries with significant representation. Consequently, these groups were not included in the analysis either.

Thus, the final sample used consisted of 1,346 responses and included responses from the G20 countries, which are: Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Russia, Saudi Arabia, South Africa, South Korea, Türkiye, United Kingdom, United States.

4.1.4 Data Processing

Weighting was used to ensure the sample accurately represented the real-world distribution. The following factors were considered for calculating the weights:

- The percentage of companies in each country relative to the total number of companies in the entire group of G20 countries.
- The ratio of women-owned to men-owned companies in each country.
- The ratio of women to men occupying positions in the labor market in each country.

Based on these ratios, we applied the following weights per country:

	Section B of the Questionnaire Questions related to the company	**Sections A & C of the Questionnaire** Questions related to the respondent
Argentina	0.5	0.5
Australia	3.0	0.6
Brazil	0.6	0.5
Canada	3.0	1.9
China	3.0	3.0
France	3.0	1.1
Germany	3.0	2.0
India	0.5	3.0
Indonesia	3.0	3.0
Italy	3.0	1.3
Japan	3.0	1.9
Mexico	3.0	1.5
Russia	3.0	3.0

Saudi Arabia	1.8	1.2
South Africa	0.5	0.5
South Korea	0.5	0.5
Türkiye	0.8	0.8
United Kingdom	3.0	1.5
United States	3.0	3.0

The survey included questions related to the company (Section B) and questions related to the respondent (Sections A and C). For Section B, the weights from the first column were used, while for Sections A and C, the weights from the second column were applied.

The weights ranged from 0.5 to 3 to maintain the accuracy of the study. Despite these constraints, China, Canada, and Indonesia remained underrepresented in the sample.

4.1.5 Margin of error

The survey shows a margin of error of 3% with a 95% confidence level for the analysis group "G20 Countries". However, it is important to note that the sample was not fully representative of all countries due to distortions from China, Indonesia and Canada.

4.2 — Appendix | Questionnaire

Section A: About the respondent

A1. What is your gender?

a. Man

b. Woman

c. I prefer not to say.

d. Other (please specify)

A2. Which of the following best describes your race or ethnicity?

a. Asian

b. Black

c. Indigenous/Native population

d. Mixed race

e. White

f. I don't know.

g. I prefer not to say.

h. Other (please specify) [Open a text box in case the respondent selects this option]

A3. What is the highest level of education that you have completed?

a. No formal education

b. Primary education

c. Secondary education/ high school

d. Vocational or technical training

e. Bachelor’s degree

f. Master’s degree

g. Doctoral or professional degree (or equivalent)

h. Other (please specify)

A4. What is your role in the business that you work or own?

If the exact name of your position is not listed, please choose the most similar option based on your responsibilities.

In case you work in a business and own another, please answer all the following questions considering the organization that you own.

a. Owner, President, CEO or Chief

b. Vice-president, director, or any position directly below the president

c. Other management position (please specify)

d. Analyst or other technical position

e. Not applicable. I am currently unemployed/retired.

f. Not applicable. I am a student.

g. Other (please specify)

A5. How many hours do you typically work per week at your company or place of employment? If the exact number of hours is not listed below, please select the closest option.

a. Less than 20 hours per week

b. Between 20 and 30 hours per week

c. Between 31 and 40 hours per week

d. Between 41 and 60 hours per week

e. More than 60 hours per week

A6. How many hours do you spend on household tasks per week? (For example: cleaning, cooking, doing dishes, laundry, grocery shopping, and assisting children with schoolwork).

a. Less than 7 hours (on average, less than 1h per day)

b. Between 7 hours 14 hours (on average, 1h to 2h per day)

c. Between 15 hours and 21 hours (on average, 2h to 3h per day)

d. Between 22 hours and 28 hours (on average, 3h to 4h per day)

e. More than 28 hours (on average, more than 4h per day)

Section B: About the company

About the company that you work for or own

Now we would like to learn more about the company that you work or own.

In case you work in a business and own another, please answer all the following questions considering the organization that you own.

B1. Where is based the company or local subsidiary you work for? Please specify the country where your workplace is physically located.

a. Algeria

b. Angola

c. Argentina

d. Australia

e. Austria

f. Belgium

g. Benin

h. Botswana

i. Brazil

j. Bulgaria

k. Burkina Faso

l. Burundi

m. Cabo Verde

n. Cameroon

o. Canada

p. Central African Republic

q. Chad

r. China

s. Comoros

t. Congo

u. Croatia

v. Cyprus

w. Czech Republic

x. Democratic Republic of the Congo

y. Denmark

z. Djibouti

aa. Egypt

ab. Equatorial Guinea

ac. Eritrea

ad. Estonia

ae. Eswatini

af. Ethiopia

ag. Finland
ah. France
ai. Gabon
aj. Gambia
ak. Germany
al. Ghana
am. Greece
an. Guinea
ao. Guinea-Bissau
ap. Hungary
aq. India
ar. Indonesia
as. Ireland
at. Italy
au. Ivory Coast
av. Japan
aw. Kenya
ax. Latvia
ay. Lesotho
az. Liberia
ba. Libya
bb. Lithuania
bc. Luxembourg
bd. Madagascar
be. Malawi
bf. Mali
bg. Malta
bh. Mauritania
bi. Mauritius
bj. Mexico
bk. Morocco
bl. Mozambique
bm. Namibia
bn. Netherlands
bo. Niger
bp. Nigeria
bq. Poland
br. Portugal
bs. Romania
bt. Russia
bu. Rwanda
bv. Sao Tome and Principe
bw. Saudi Arabia
bx. Senegal
by. Seychelles
bz. Sierra Leone
ca. Slovakia
cb. Slovenia
cc. Somalia
cd. South Africa
ce. South Korea
cf. Spain
cg. Sudan
ch. Sweden
ci. Tanzania
cj. Togo
ck. Tunisia
cl. Türkiye
cm. Uganda
cn. United Kingdom
co. United States
cp. Zambia
cq. Zimbabwe
cr. Other (Please specify)

B2. In which sector does your company or employer mainly operate?

a. **Accommodation and food services** (Examples: restaurants, hotels, bed & breakfast, event catering)

b. **Administrative and support service activities** (Examples: Car renting business, travel agency, cleaning company, call centers)

c. **Agriculture, fishing and forestry** (Examples: family-owned farms, local nurseries, fisheries)

d. **Arts, entertainment, and recreation** (Examples: art restauration, parks, sports clubs)

e. **Construction** (Examples: residential building contractors, electrical and plumbing services)

f. **Education** (Examples: training centers, private schools, tutoring services)

g. **Electricity, gas, steam and air conditioning supply** (Examples: Power generation and distribution, gas distribution)

h. **Financial and insurance services** (Examples: Insurance companies, banks)

i. **Human health and social work activities** (Examples: Dental practices, home care services, medical clinics)

j. **Information and communication** (Examples: Telecommunications providers, internet providers, book publisher, video producer, radio, software developers, journalists)

k. **Manufacturing** (Examples: textile and apparel production, food processing, production of metallic and plastic goods)

l. **Mining and quarrying** (Examples: Mineral extraction, processing and refining of minerals)

m. **Personal services** (Examples: Clinics, beauty salons)

n. **Public administration and defense** (Examples: public services, public administration, foreign affairs, military)

o. **Professional, scientific and technical activities** (Examples: Law firms, consulting businesses, architecture firms, accounting firms, advertising companies)

p. **Real estate** (Examples: Facilities management, real estate agency)

q. **Transportation and storage** (Examples: Taxis, delivery services, courier services)

r. **Water Supply, sewerage, waste management and remediation services** (Examples: water supply and treatment, sewage treatment, waste disposal)

s. **Wholesale and retail, repair of motor vehicles or motorcycle** (Examples: stores, e-commerces, distributor, supermarkets, auto repair shop)

t. **Other** (please specify)

B3. How many employees does the company have?

a. 1 employee (only me)

b. Between 2 and 9 employees

c. Between 10 and 49 employees

d. Between 50 and 249 employees

e. Between 250 and 499 employees

f. Between 500 and 999 employes

g. Between 1000 and 4999 employees

h. More than 5000 employees

B4. Is the company owned by any females? Please specify the percentage of the company that is owned by females.

a. 0% (No female ownership)

b. Less than 25%

c. Between 25% and 50%

d. More than 50%

e. Not applicable. The company is publicly traded.

f. I don't know.

B5. What proportion of the top management positions (the CEO, president or chief and the levels directly below the president) in your company are held by women? Please select the option that best describes your company:

a. % (No female in the top management)

b. Less than 25%

c. Between 25% and 50%

d. More than 50%

e. I don't know.

B6. Which of the following best describes your company's primary engagement in international trade? Please select the option that most accurately reflects your company's main activity.

a. Primarily an exporter (Our main business activity involves exporting goods or services abroad)

b. Primarily an importer (Our main business activity involves importing goods or services from abroad)

c. Both exporting and importing are significant (We engage similarly in exporting and importing)

d. Neither (We do not engage in either exporting or importing)

B7. How would you classify your company's international export/import activity? Select the option that best describes your situation:

a. **Previously exporter/importer** (it has not exported/imported in the last 3 years)

b. **Beginner exporter/importer** (exports/imports occasionally to take advantage of opportunities)

c. **Intermediate exporter/importer** (exports/imports frequently. But it's a minor part of overall sales/purchases)

d. **Experienced exporter/importer** (exports/ imports continuously, with significant foreign sales/purchases)

e. **Established exporter/importer** (exports/imports continuously. It has established operations abroad or its products are listed on international marketplaces)

B8. Why does your company not engage in importing or exporting?

Please select up to 3 reasons and rank them, with 1 being the most significant one and 3 the least significant one.

a. Not sure how to initiate the process.

b. The company does not want to export.

c. The company does not have access to the necessary digital services (example: fixed broadband).

d. Insufficient production capacity to meet export demand.

e. Insufficient specialized staff to manage the process.

f. Product or service is not competitive abroad due to high tariffs or non-tariff barriers (Examples: subsidies)

g. Product is not competitive abroad due to high logistics costs.

h. Product or service is not competitive abroad due to unfavorable exchange rates.

i. Service provided in not easily exportable (Example: beauty care, hairdressing services)

j. The company failed to reach deals with clients and/or suppliers abroad.

k. Unable to secure financing.

l. Challenges to comply with customs procedures and countries' specific regulations and standards.

m. Other (Please specify)

n. I do not know.

Section C – Challenges to access international trade

This is the last section of our survey. Now we would like to hear about potential challenges to trade internationally.

Access to Information

C1. Are you experiencing any challenges in **accessing or completing online or in-person training programs** related to international trade? (Examples of challenges: high costs, distant locations, language barriers, lack of time, etc.)

a. Yes

b. No

c. I don't know.

C2. What are the main challenges you face when accessing or completing **online or in-person training about international trade?**

Please select up to 3 options and rank them, with 1 being the most significant challenge and 03 the least significant challenge.

a. I am not aware of training providers.

b. High costs associated with the training.

c. In-person trainings are in distant locations.

d. Language barriers (Language I don't speak or can't understand well)

e. No access to the necessary digital services (Example: fixed broadband) to participate in online activities.

f. Trainings are too theoretical.

g. Trainings are not suitable for small and medium-sized businesses.

h. Lack of follow-up support after training completion.

i. Work commitments limit my available time.

j. Care commitments (Examples: household tasks, family care) limit my available time.

k. I feel uncomfortable and unwelcome in this environment.

l. I have faced gender bias (being treated differently because of gender) in this environment.

m. I have faced situations of harassment in this environment.

n. Training is not relevant. I'm already familiar with the subject.

o. Not applicable. In my company, I am not responsible for this activity.

p. Other (please specify).

C3. Over the past 3 years, how many trainings, workshops or courses related to international trade, exporting, or importing have you completed?

a. None

b. One

c. Two

d. Three

e. Four

f. Five

g. More than five.

Access to businesses opportunities

C4. Are you experiencing any challenges in participating in **networking opportunities and activities** organized by chambers of commerce, export agencies and business networks or in **events and fairs** to promote international trade (Examples of challenges: high costs, distant locations, language barriers, lack of time, etc.)?

a. Yes

b. No

c. I don't know.

C5. What are the main challenges you face when participating in **networking opportunities and activities** organized by chambers of commerce, export agencies and business networks or in **events and fairs** to promote international trade?

Please select up to 3 options and rank them, with 1 being the most significant challenge and 03 the least significant challenge.

a. I am not aware of these events.

b. High costs of attending in-person events.

c. Events are in distant locations.

d. Language barriers (Language I don't speak or can't understand well)

e. No access to the necessary digital services (example: fixed broadband) to participate in online activities.

f. Work commitments limit my available time.

g. Care commitments (Examples: household tasks, family care) limit my available time.

h. I feel uncomfortable or unwelcome in this environment.

i. I have faced gender bias (being treated differently because of gender) in this environment.

j. I have faced situations of harassment in this environment.

k. The events are not relevant. I'm already familiar with the subject and we already have enough clients.

l. Not applicable. In my company, I am not responsible for this activity.

m. Other (please specify).

C6. How often do you participate in activities organized by chambers of commerce, export agencies, and business networks or in events, such as trade fairs?

Please select the option that best describes your participation frequency:

a. Never

b. Monthly

c. Quarterly

d. Semi-annually

e. Annually

C7. Are you experiencing any challenges **in finding, negotiating, or closing commercial deals internationally?**

a. Yes

b. No

c. I don't know.

C8. What are the main challenges you face when trying to **find, negotiate, or closing commercial deals internationally?**

Please select up to 3 options and rank them, with 1 being the most significant challenge and 03 the least significant challenge.

a. I lack proficiency in a second language needed to negotiate with an international client.

b. I do not know how and where to promote my business.

c. I do not know how to find and approach potential distributors and/or clients abroad.

d. I feel that I lack the necessary skills to succeed in these negotiations (Examples: negotiation skills, networking, leadership).

e. No access to the necessary digital services (example: fixed broadband) to participate in online activities.

f. Work commitments limit my available time to engage in negotiations.

g. Care commitments (Examples: household tasks, family care) limit my available time engage in negotiations.

h. I feel uncomfortable in these negotiation settings.

i. I have faced gender bias (being treated differently because of gender) in these contexts.

j. I have faced situations of harassment in these contexts.

k. Not applicable. In my company, I am not responsible for this activity.

l. Other (please specify).

Access to financing

C9. Are you experiencing any challenges in **securing financing for your business?**

a. Yes

b. No

c. I don't know.

C10. What are the main challenges you face when trying to **secure financing** for your business? Please select up to 3 options and rank them, with 1 being the most significant challenge and 03 the least significant challenge.

a. I do not know how to apply for financing.

b. I do not have any collateral to offer as security for loans (I don't have any property in my name).

c. No access to the necessary digital services (Example: fixed broadband) to manage online processes and procedures.

d. Work commitments limit my available time to look and apply for financing.

e. Care commitments (Examples: household tasks, family care) limit my available time to look and apply for financing.

f. I feel uncomfortable pitching for financing.

g. I have experienced gender bias during these processes (Examples: Intrusive personal questions).

h. I have faced harassment during these processes.

i. Not applicable. I am not responsible for this activity in my company.

j. Other (please specify).

Compliance with customs procedures and regulations

C11. Are you experiencing any challenges to comply with **customs procedures and local regulatory standards** when exporting or importing goods?

a. Yes

b. No

c. I don't know.

C12. What are the main challenges you face with **customs procedures and local regulatory standards** when exporting or importing goods?

Please select up to 3 options and rank them, with 1 being the most significant challenge and 03 the least significant challenge.

a. I am unfamiliar with required customs documentation and procedures.

b. Hiring a customs broker is expensive.

c. Delays due to unclear, non-standard customs processes.

d. Delays from inefficient, excessive customs processes.

e. High fees or tariffs that make exporting/importing costly.

f. Regulatory requirements (Examples: sanitary and phytosanitary measures; technical norms) that make exporting/importing costly.

g. I have experienced gender bias (being treated differently because of gender) in interactions with customs officials.

h. I have faced harassment in interactions with customs officials.

i. Not applicable. I face no challenges with customs procedures.

j. Not applicable. I am not responsible for customs procedures in my company.

k. Other (please specify).

Additional information

C13. Considering the stages of international trade access outlined in this survey, please rank them according to the level of difficulty you face at each stage.

Please rank the four options, with 01 being the most challenging stage and 04 the least challenging one.

a. Access to information

b. Access to business opportunities

c. Access to finance

d. Compliance with customs procedures and regulations

C14. To what extent have care commitments (e.g., household tasks, family care) hindered your ability to conduct international trade activities?

a. No impact – My care commitments have not affected my company's access international markets.

b. Low impact – My care commitments have let to additional challenges to my company to access international markets.

c. Moderate impact – My care commitments have caused noticeable challenges for my company in accessing markets.

d. Significant impact – My care commitments have restricted my company's access to international markets.

e. Not applicable

C15. Are there any other challenges you face in the export process that have not been covered in this survey? Please list and describe any additional issues you would like to mention.

Section D - Closing

Thank you for participating in our survey!

Thank you for taking the time to complete this survey. Your feedback is crucial for helping us understand the challenges faced by companies when trading internationally. We appreciate your contributions to this study.

4.3 — Appendix | Acknowledgements

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