



MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico

**Opportunities
and Challenges**

In partnership with



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Introduction

Micro-, small-, and medium-sized enterprises (MSMEs) are the cornerstone of Latin American economies, but their contribution to international trade remains limited. More than 99% of businesses in Latin America are MSMEs, generating 60% of productive employment (OECD, 2019). However, despite their contribution to the region's economies, their participation in exports and global markets remains low. Only 13% of MSMEs are engaged in exports, and their exports account for 5% of the total exports in the region, compared to 40% in Europe (Sergio Díaz-Granados, 2023). Additionally, the vast majority export few products and do so in a very limited number of markets.

Therefore, the internationalisation of MSMEs has been a key priority for policymakers in the region.

Access to global markets creates new business opportunities that allow MSMEs to expand and improve their productivity, fostering innovation and the diffusion of technologies and skills (OECD, 2019). International trade can be a significant driver of growth and employment at the national and regional levels. Therefore, many governments in the region are emphasising the internationalisation of MSMEs given their potential to drive economic and social development. These include initiatives such as BANCOMEXT in Mexico, Promperú in Peru, and ExportaFacil in Colombia, among others. Moreover, many regional organisations, such as the Inter-American Development Bank with its Integration and Trade Sector and the United Nations Economic Commission for Latin America and the Caribbean through its Division of International Trade and Integration, work to support MSMEs and promote growth through regional and international trade.

Fundamentally, digital tools and technologies can facilitate MSMEs' access to international markets.

Digital technologies and tools can help MSMEs reduce barriers to global markets, facilitate the search for foreign customers, and integrate global value chains. However, most MSMEs have yet to leverage the full potential of digital trade compared to their larger counterparts, and the gaps in digital adoption are widening (OECD, 2021).

In this context, this report aims to:

- Provide an overview of MSMEs exports in four key markets: Argentina, Brazil, Colombia, and Mexico;
- Identify and better understand the barriers preventing MSMEs from exporting;
- Analyse how MSMEs can leverage digital technologies to boost their exports.

With this report, the International Chamber of Commerce (ICC) seeks to contribute to discussions and initiatives in the region to improve the export capacity of MSMEs. Additionally, ICC aims to complement these discussions with the development of customised training programmes for MSMEs in the region.

Key insights

The COVID-19 pandemic: a turning point

- The region is still to recover from a drop in employment. 4 out of 10 surveyed MSMEs stated that their number of employees has decreased.
- The pandemic significantly impacted MSMEs export capacity and their export destinations.
- The COVID-19 pandemic has fostered the use of digital tools and technologies for 80% of surveyed MSMEs. But Colombia continues to lag behind.
- During the pandemic, online trade emerged as an opportunity for both formal and informal MSMEs. Over 75% of MSMEs in Argentina, Brazil, and Mexico began buying or selling products and services online during the pandemic.

Barriers to exports persist

- 70% of MSMEs surveyed in Argentina, Brazil, Colombia, and Mexico express interest in exporting within Latin America, while 50% show interest in exporting to North America.
- The three main barriers to exporting stated by surveyed MSMEs are language, lack of resources, and the regulatory environment. For micro-entrepreneurs, high competition and the complexity of the regulatory environment are the most challenging barriers.

Digital tools: a key driver for exports

- Both internet access and service quality tend to be unreliable and problematic according to one-third of surveyed MSMEs.
- The degree of familiarity with digital tools varies significantly across countries and business sizes.
- Online commerce is becoming more widespread, but obstacles remain.
- The main digital platforms for online sales include WhatsApp, Mercado Libre, Instagram, Facebook Marketplace, and Amazon.
- MSMEs continue to face challenges in boosting online sales, especially looking at managing logistics, the regulatory environment, and payment systems.
- Nearly 70% of surveyed MSMEs are primarily seeking training in digital marketing, while 50% are searching for insights to identify market opportunities.

1. Survey methodology

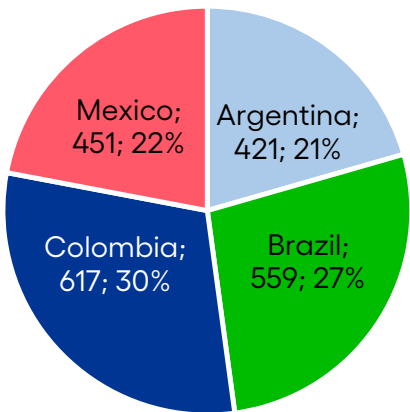
a. Sample and data compilation

ICC designed and conducted an online survey between June 2023 and August 2023 with the support of its network of national committees (NCs) and chambers of commerce, and in collaboration with GeoPoll, a mobile survey platform that distributed the survey through a mobile weblink. GeoPoll used a random sampling technique to administer survey links to different respondents from the four markets to achieve predetermined response targets. Respondents were given the option to answer the survey in their local language (Spanish or Portuguese).

This report presents the results of this survey in four Latin American markets: Argentina, Brazil, Colombia, and Mexico. The survey, which includes 38 questions (see Annex), was fully completed by 2,048 MSMEs. Colombia accounts for 30% of the responses, Brazil for 27%, while Argentina and Mexico each represent close to 20% of responses (Figure 1). The report focuses solely on MSMEs, defined as respondents who identified themselves as owners or managers of a business with fewer than 250 employees (Table 1).

Figure 1. Number of survey respondents from Mexico, Argentina, Colombia and Brazil

Number of respondents by country and % of the total sample



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

Table 1. Survey data

Country	Number of submissions	Number of responses	Response rate	Number of MSMEs
Argentina	1,177	421	36%	2,185,977
Brazil	1,597	559	35%	18,922,042
Colombia	1,628	617	38%	5,698,132
Mexico	1,456	451	31%	4,890,200
Total	5,858	2,048	35%	

Sources: INEGI with data on Mexico from 2021, DANE with data on Colombia from 2021, INDEC with data on Argentina from 2019, IBGE with data on Brazil from 2021 that includes microentrepreneurs

b. Research limitations

When considering the results of the survey, the following factors should be taken into account:

- The sample represents MSMEs that are accessible via the network of ICC national committees (NCs) and chambers of commerce affiliated with ICC, as well as MSMEs listed in the Geopoll database. Additionally, the sample focuses on MSMEs that actively export or are planning to export, which impacts the sectors of activity that are represented in our research (Figure 3). Therefore, the sample only captures a partial view of MSMEs present in each country.
- It is important to note that the survey sample is not evenly distributed among the four markets. The sample includes a significantly larger number of MSMEs from Colombia (617 respondents) and Brazil (559 respondents) than from Argentina (421 respondents) and Mexico (451 respondents). The report shares conclusions at the regional level based on this sample in addition to national-level insights which highlight differences and specificities across markets.
- In this report, MSMEs are defined as companies with fewer than 250 employees. There are three subcategories: micro-enterprises with one to nine employees, small enterprises with 10 to 49 employees, and medium-sized enterprises with 50 to 249 employees. Micro-entrepreneurs are therefore included in the sample. However, the annual revenue criterion was excluded, as surveyed executives tend to be unaware of that information or provide a false estimate. Crucially, the definition used for the purposes of this report may differ from other sources, limiting comparison with other studies (Figure 2).
- The report presents results by country, company size, or sector as simple averages between categories.
- When comparing results between countries, it is important to consider that variations and differences between countries may be due to numerous factors. These could include the sectoral composition of an economy and local policies implemented during the pandemic, among many others.
- If this report aims to highlight relationships of interest, causality cannot and should not be inferred. We encourage additional research on all relationships mentioned in this report.

Figure 2. What is the number of employees in your company? % of the total by country

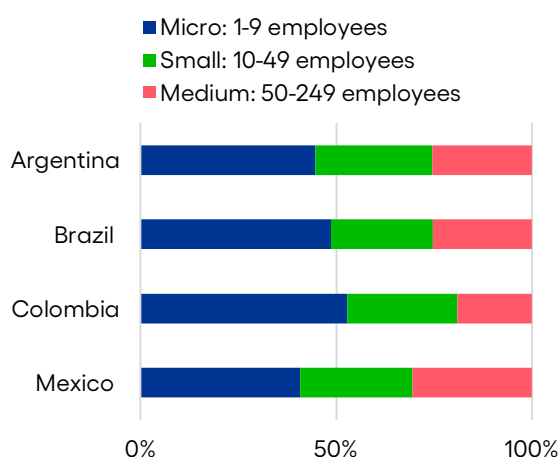


Figure 3. What is the main sector of activity of your company? Number of respondents



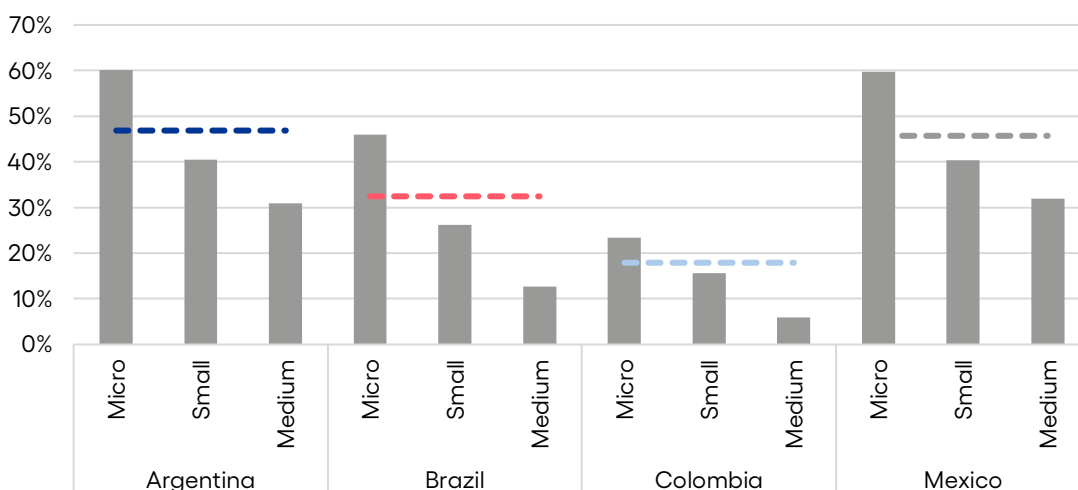
Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

2. The profile of MSMEs in the region

Although the survey captures a significant degree of informality, the majority of the surveyed MSMEs are formal. Throughout this report, we will use the unique identification code as a proxy to gauge the level of informality. Almost 40% of the MSMEs in our sample do not have a unique identification code. The level of informality is much higher for microenterprises, reaching up to 60%. In our sample, over half of the Argentine and Colombian MSMEs appear informal, compared to 32% in Brazil and 18% in Mexico (Figure 4). The relatively lower proportion of informal MSMEs in Mexico and Colombia can be explained by the methodology used in this survey. In Colombia, most of the companies that responded to the survey were affiliated with the Bogotá Chamber of Commerce, hence they have a unique identification code. In Mexico, many of the surveyed companies already had experience exporting to the United States, which requires having a unique identification code. Additionally, ICC targeted export-oriented MSMEs (or MSMEs planning to export), resulting in a sample with a high proportion of MSMEs operating in the trade and information technology sectors.

Figure 4. Does your company have a unique identification code?

Response: No, % total responses by country and company size



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

Almost half of MSMEs in our sample are currently exporting. On average, MSMEs in our sample are already exporting (48%) or planning to do so (52%), with little difference between countries (Figure 5). Formal MSMEs are more likely to export than informal ones. Only 32% of informal MSMEs export, compared to 58% of companies with a unique identification code. Additionally, the larger the MSME, the more likely it is to export. Among microenterprises, 40% are already exporting, while this proportion rises to 65% for medium-sized MSMEs (50 to 249 employees).

However, while a significant portion of MSMEs export, they still rely primarily on their domestic market. The vast majority of MSMEs export less than half of their production. While this holds true in all markets, there are some notable differences between them. MSMEs in Argentina, Brazil, and Mexico are more export driven than Colombian MSMEs. Among exporting companies in Argentina, Brazil, and Mexico, the majority exports more than 25% of their production, while in Colombia the majority exports less than 25% of their production (Figure 6).

Figure 5. Does your company export goods and services? % total responses by country

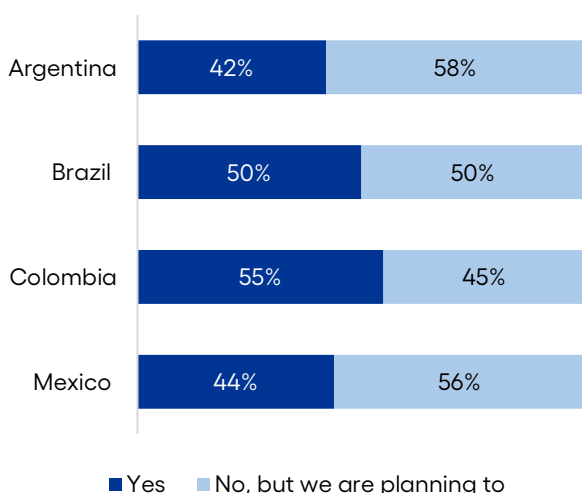
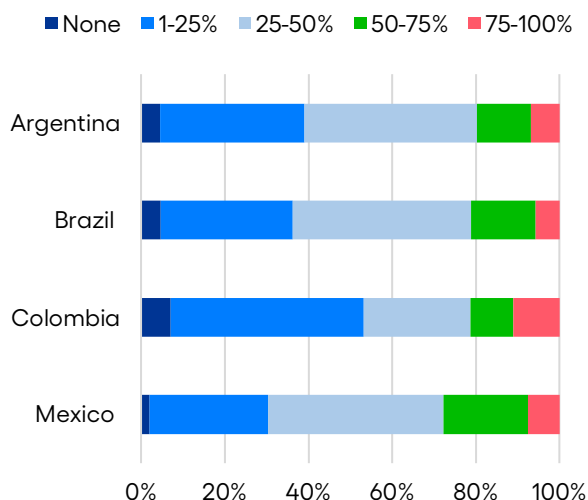


Figure 6. What percentage of your production is exported? % total of exporting MSMEs by country



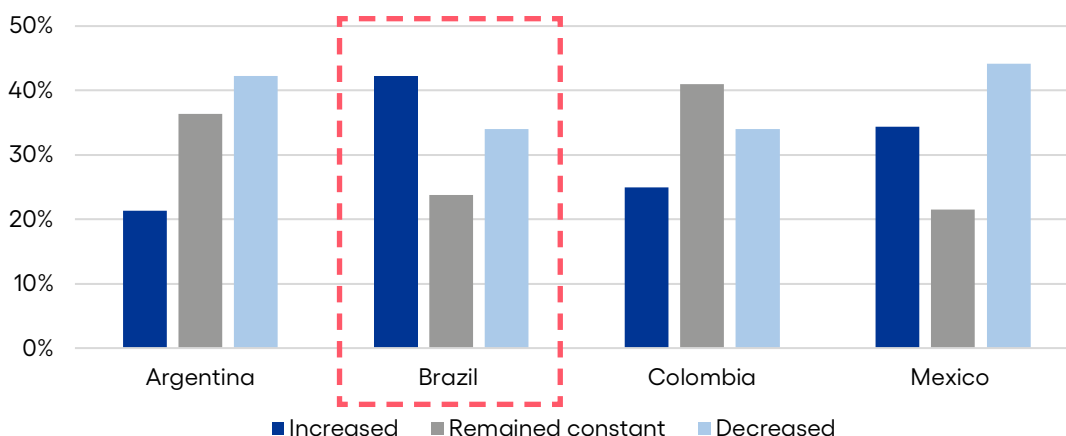
Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

3. The impact of the Covid-19 pandemic: an inflection point

a. A drop in employment that has yet to recover

The pandemic resulted in a loss of employment across MSMEs in the region, except for Brazil, which is already in the process of recovery. Compared to 2019, 38% of surveyed MSMEs stated that their number of employees has decreased, and 30% have been unable to expand their workforce. The drop is more pronounced in small companies (10-49 employees), with 41% of them stating that the number of employees has decreased compared to 2019. This represents a difference of 4-5 percentage points compared to micro- and medium-sized enterprises. Brazil is the only country where 42% of the surveyed companies claim that their workforce has grown compared to the year 2019, a percentage that is higher than in other countries (Figure 7). This could be explained by the less severe closures and lockdowns in Brazil during the pandemic, allowing for a faster economic recovery.

Figure 7. Compared to the year 2019, has the number of employees increased, remained constant or decreased? % total responses by country



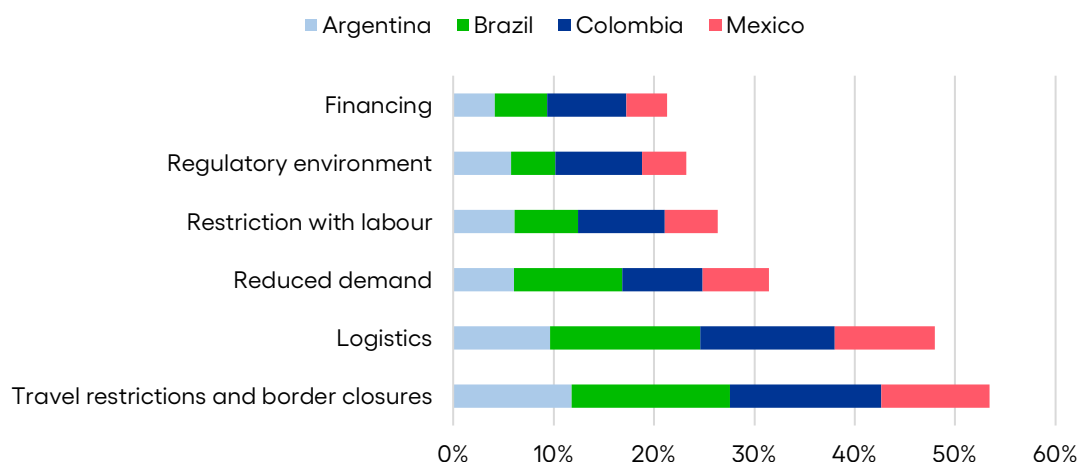
Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

b. A constrained ability to export

The pandemic has significantly limited MSMEs' ability to export. Just over two-thirds of the companies stated that the COVID-19 pandemic has had an impact on their export capacity. When analysing the main export challenges, MSMEs reported that travel restrictions or lockdowns (53%) as well as logistical issues (48%) were particularly problematic. This trend remained consistent across all countries with little variation among the markets analysed (Figure 8).

Figure 8. During the COVID-19 pandemic, which barriers to exporting did you face?

% of total responses by country



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

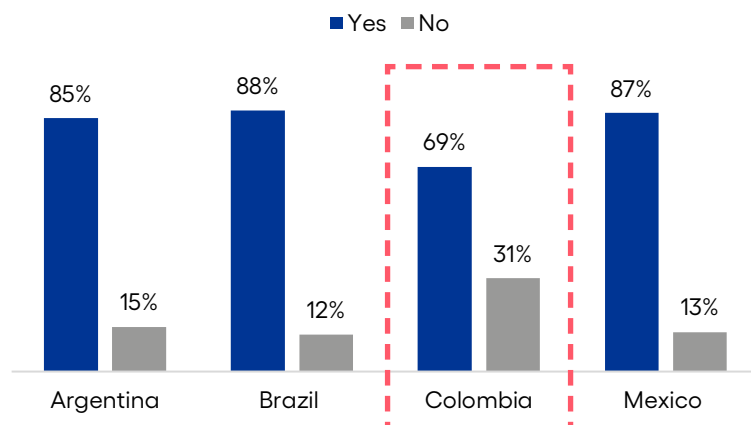
c. An increase in the use of digital tools ...

The COVID-19 pandemic has also led to a significant increase in the use of digital tools and technologies. The increase in the use of digital tools was particularly notable for medium-sized MSMEs: 88% of medium-sized businesses increased their use of digital tools compared to 76% of microenterprises. This is a trend observed across all markets, as the pandemic presented an opportunity for many MSMEs in Argentina, Brazil, and Mexico to use more digital tools (Figure 9).

However, Colombia is lagging behind. The uptake of digital tools was less pronounced in Colombia, where only 69% of surveyed companies reported an increase, marking a decline of more than 15 percentage points compared to the other markets. This trend could be related to the lower level of digitisation in Colombia: 40% of surveyed companies in Colombia stated that they are not proficient in digital tools. This represents a difference of 10 percentage points compared to Argentina and Mexico, and 25 points compared to Brazil (Figure 16).

Figure 9. Has your use of digital tools to support exports increased since the pandemic?

% of total responses by country



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

d. ... and of online trade

For many MSMEs, the pandemic presented an opportunity to develop online trade. Over 75% of MSMEs in Argentina, Brazil, and Mexico began buying or selling products and services online during the pandemic. Overall, the rapid adoption of digital tools and technologies has allowed MSMEs to initiate or boost their online sales. It is worth highlighting the efforts made by informal MSMEs in Argentina and Mexico, which significantly contributed to the adoption of online services. At the country level, this trend was less pronounced in Colombia (Figure 10). In fact, around 60% of surveyed Colombian companies estimate that their online sales grew modestly (less than 25%) compared to 2019. Brazil and Argentina took greater advantage of the pandemic to increase their online sales: 25% of surveyed Brazilian and Argentine companies responded that their online sales increased by at least 50%, compared to 2019 (Figure 11).

Figure 10. Has your company started buying or selling goods or services online during the pandemic? % of total responses by country

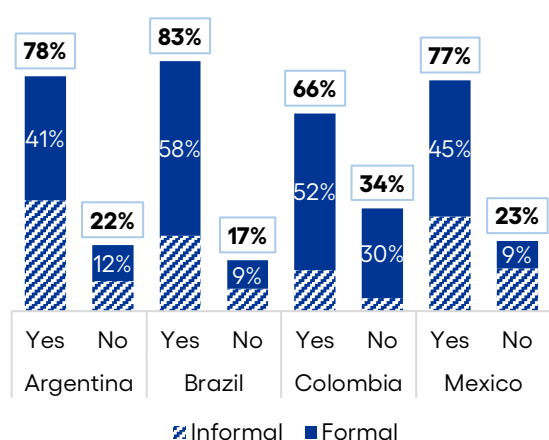
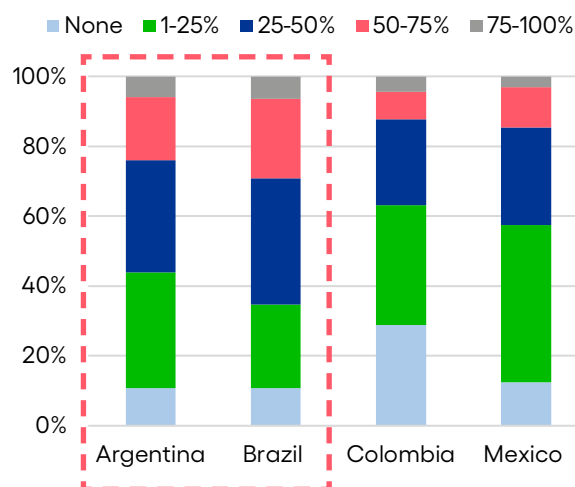


Figure 11. Compared to 2019, how much did your online sales of goods and services grow? % of total responses by country



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

Similarly, this phenomenon has had an impact on the destination of exported goods and services.

Faced with increased costs combined with multiple export restrictions or trade barriers, many MSMEs in Brazil and Mexico decided to change the destination of their exports (Figure 12). Among the companies that changed their destination, 74% and 67% of surveyed companies in Brazil and Mexico, respectively, mentioned increased costs as the primary factor that motivated the change in destination (Figure 13).

Figure 12. Did you change the destination of your exports due to the COVID-19 pandemic?

% of total responses by country

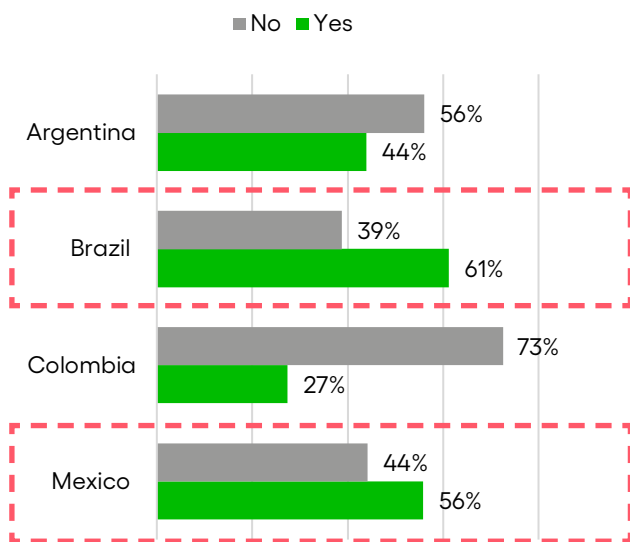
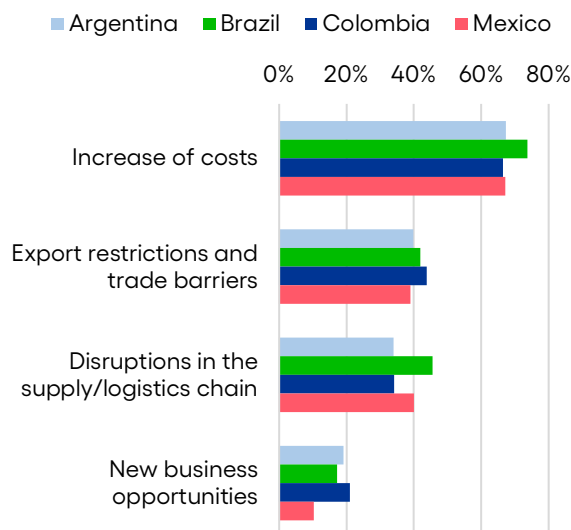


Figure 13. In case your response was Yes, what factors motivated the change in destination?

% of those who changed destination by country

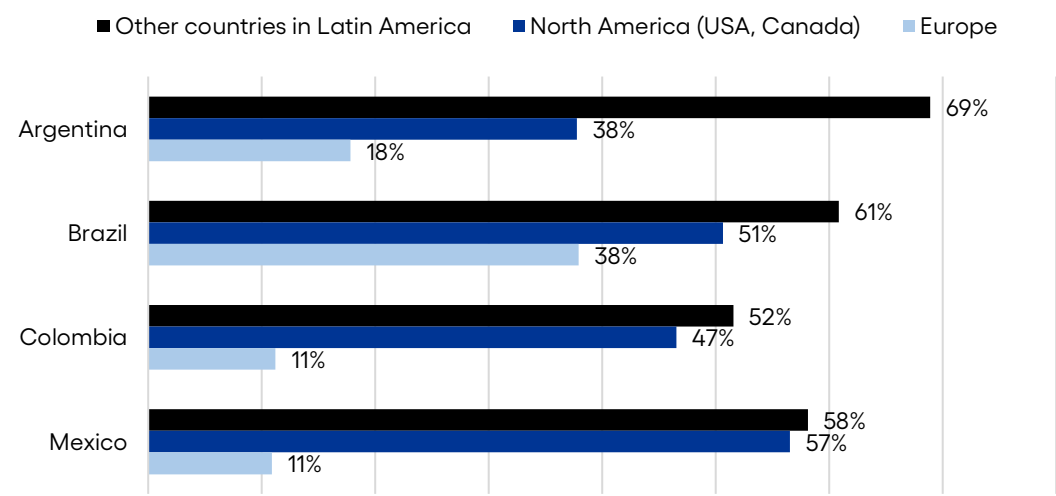


Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

4. Export barriers limit opportunities and development of MSMEs

The majority of MSMEs are interested in exporting at the regional level. 46% of surveyed MSMEs want to export to other Latin American countries, and 36% also target North America. In Brazil in particular, MSMEs are interested in exporting both regionally and globally. Indeed, nearly 4 out of 10 MSMEs surveyed in Brazil want to export to Europe, compared to 1-2 out of 10 MSMEs surveyed in the other countries. Argentine MSMEs, on the contrary, primarily focus on Latin American countries (Figure 14).

Figure 14. If you could increase your exports, which markets would you be most interested in exporting to? % of total responses by country



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

The top three export barriers in the surveyed countries are: language, lack of resources, and the regulatory environment. Since 40-60% of surveyed MSMEs in Argentina, Brazil, and Mexico are interested in the North American market, language proficiency appears to be the primary barrier to exporting. Similarly, the lack of resources (time, labour, capital) emerges as the second most mentioned barrier by MSMEs in the sample. It is worth noting that respondents from Brazil and Mexico highlighted a lack of knowledge in marketing as one of the main barriers to exporting. Colombia, on the other hand, stands out with businesses primarily reporting competition and exchange rates as the primary barriers (Table 2).

Table 2. What are the top three barriers to increasing your exports ?

	Argentina	Brazil	Colombia	Mexico
Language	☆☆☆	☆☆☆		☆☆☆
Resources	☆☆	☆☆		☆☆
Regulatory Environment	☆		☆☆☆	
Marketing		☆		☆
Competition			☆☆	
Exchange rate			☆	

Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

The stars indicate the level of importance of the barriers. The barrier that received the highest score has three stars, while the second and third most important ones have two and one star(s), respectively.

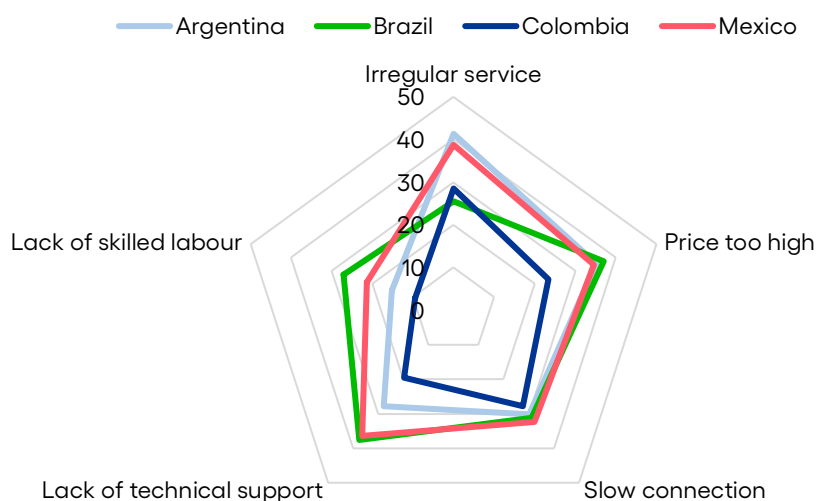
Export barriers vary depending on the size of MSMEs. Language remains one of the main barriers regardless of business size. However, for microenterprises (less than 10 employees), high competition and the complexity of the regulatory environment are the main export barriers. For small- and medium-sized businesses, the lack of resources and knowledge in marketing represents a more significant barrier. Colombian and Argentine microenterprises also suffer from exchange rate levels and volatility, which represents the second or third most important barrier.

5. How digital tools facilitate MSMEs exports

a. Internet access remains limited and unsatisfactory

Both Internet access and service quality are unreliable and problematic for many MSMEs. Internet access is very important for 90% of the surveyed MSMEs. However, they consider Internet access to be too expensive and are dissatisfied with the quality of service, especially service irregularity, slow connection, and lack of technical support (Figure 15).

Figure 15. Does your company experience any of the following barriers when accessing the Internet?
% of total responses by country



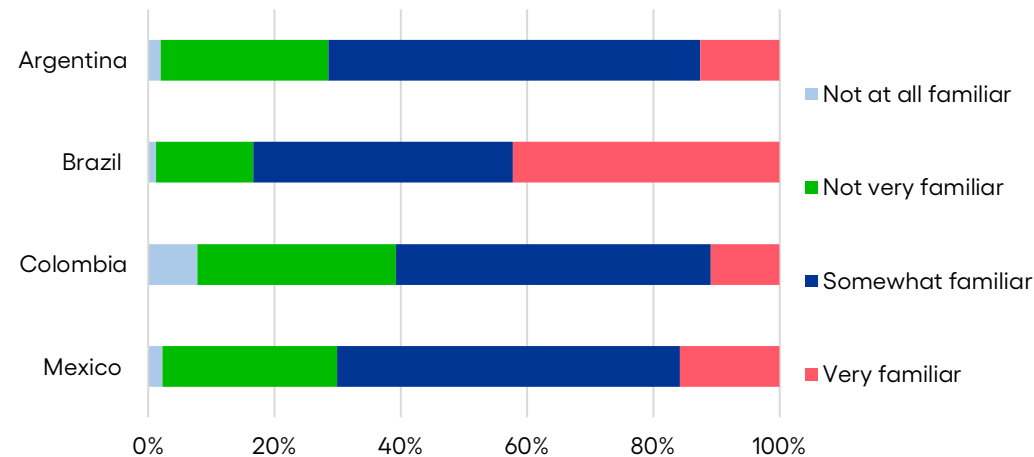
Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

b. The use of digital tools remains very heterogeneous

The degree of familiarity with digital tools is very heterogeneous between countries. More than 42% of Brazilian MSMEs consider themselves experts in digital tools, compared to 11-16% of respondents from other countries (Figure 16). The degree of familiarity also depends on the size of business: the proportion of micro-enterprises lacking technological knowledge is almost double that of medium-sized MSMEs.

Figure 16. How familiar are you with using technological tools to export your products or services?

% of total responses by country



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

The use and diversity of digital tools increases with the size of the MSMEs. Micro-enterprises use social media more due to lower costs, while medium-sized businesses use their own website. Overall, the main digital tools and technologies used by MSMEs are social media, their own website, search engines, online platforms, and digital banking and payments.

Digital tools are used to expand into new markets. Accessing new markets is the main reason behind the adoption of digital tools, while high costs are the main barrier (particularly for Brazil). It is also noteworthy that Mexican respondents disproportionately report a lack of skills and knowledge.

c. Online trade is becoming more widespread, but obstacles remain

Overall, many MSMEs already sell their products online, although MSMEs from Colombia tend to lag behind. Nearly 80% of the surveyed MSMEs in Argentina, Brazil, and Mexico claim to sell their products online, while only 63% of Colombian MSMEs claim to do so. The main digital tools for online sales are WhatsApp (64% of respondents), Mercado Libre (55%), Instagram (50%), Facebook Marketplace (46%), and Amazon (32%). Mercado Libre is the primary online trade platform for MSMEs in Argentina and Mexico. Medium-sized businesses use Mercado Libre more as a selling platform, while micro- and small-sized enterprises prefer free platforms, particularly WhatsApp (Table 3).

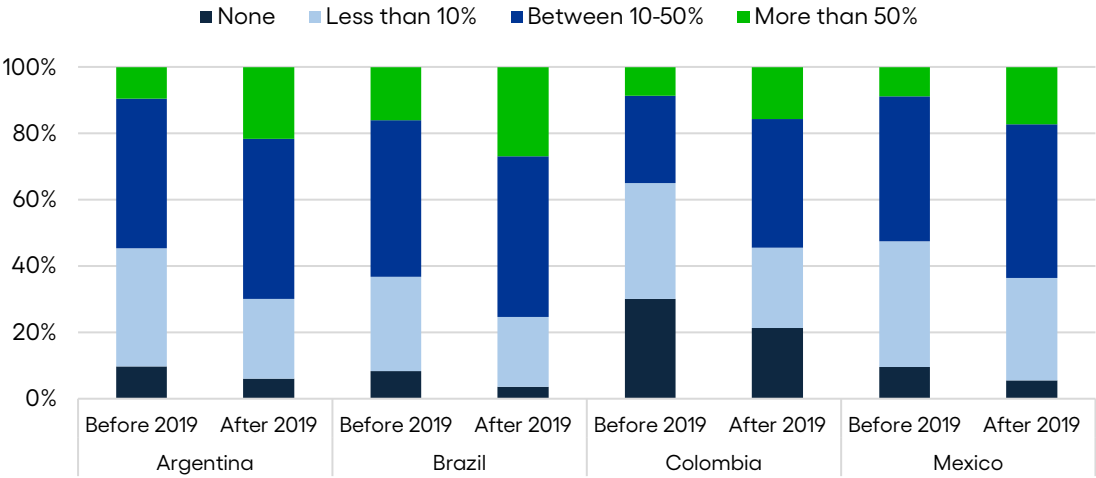
Table 3. Top five online trade platforms used by MSMEs to sell products

	1	2	3	4	5
Argentina					
Brazil					
Colombia					
Mexico					

Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

The pandemic has fostered the use of digital tools and the growth of online trade, particularly in Brazil and Argentina. A larger share of MSMEs sales is now conducted via digital tools or online platforms. 22% and 27% of surveyed MSMEs in Argentina and Brazil, respectively, stated that they use digital tools or online trade platforms for more than half of their sales. This corresponds to an increase of 12 and 11 percentage points compared to 2019, respectively. Similarly, 17% of Mexican MSMEs now use digital tools and platforms for more than half of their sales, compared to 9% before the pandemic. In Colombia, the increase is more moderate. Indeed, 39% of surveyed MSMEs in Colombia claim that between 10 and 50% of their sales are conducted through digital platforms or tools, compared to 26% in 2019 (Figure 17).

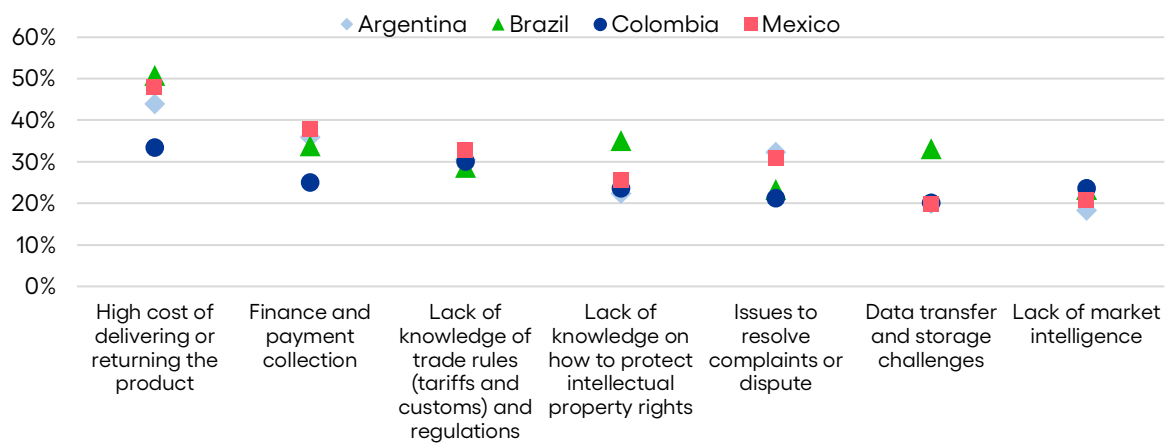
Figure 17. What percentage of your sales were made through online trade platforms/digital tools before and after 2019? % of total responses per country



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

MSMEs still face challenges when selling online, such as logistics, the regulatory environment, and payment systems (Figure 18). 44% of surveyed companies point to the cost of delivery or return, and nearly 30% indicate difficulties in collecting payment, as well as a lack of knowledge of rules and regulations. The high cost of delivery and return is problematic for half of MSMEs in Argentina, Brazil, and Mexico, and for a third of Colombian MSMEs. Postal services often remain slow and deficient. This is one of the reasons why Mercado Libre launched its own logistics branch. Between 35% and 40% of Mexican and Argentine MSMEs mention finance and payment collection as a challenge for selling online. The regulatory environment is the second most important challenge identified by Colombian MSMEs (30% of respondents mention it).

Figure 18. What are the main challenges when selling online? % of total responses per country



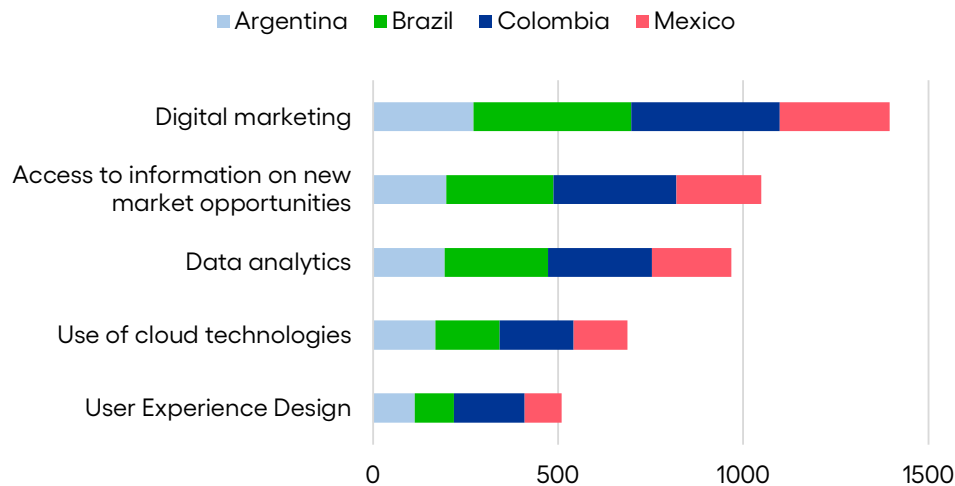
Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

d. Strengthening digital marketing capabilities is a priority for MSMEs

Companies seek training in digital marketing, market opportunity intelligence, and data analysis.

Almost 70% of surveyed MSMEs mention that they need training in digital marketing, and about half seek to improve their skills to find new business opportunities and analyse data. These needs are distributed evenly across all MSMEs, with the only exception of data analysis, which is more often requested by medium-sized businesses (Figure 19).

Figure 19. If they could receive training support on new digital skills to help increase their exports, what skills would be most valuable? Number of responses



Source: ICC Survey on MSMEs Digital Exports in Argentina, Brazil, Colombia and Mexico, 2023

Annex

Part A: Situation of MSMEs in the region

1. Where is your company located?
 - Argentina
 - Brazil
 - Colombia
 - Mexico
2. Is the headquarters of your business located in the capital?
 - Yes
 - No
3. Does your company have a unique identification code/tax identification number/national registry of legal entities?
 - Yes
 - No
4. What is your main sector of activity?
 - Agriculture, fishing
 - Mining
 - Manufacturing
 - Construction
 - Supply of electricity, water, and sanitation
 - Retail or wholesale trade
 - Transportation and storage
 - Accommodation and food services
 - Information and communication technologies
 - Real estate, rental, and business activities
 - Health, education, or other social services
 - Other: Specify
5. What is the number of employees in your company?
 - 1-9 employees
 - 10-49 employees
 - 50-249 employees
 - 250+ employees [End of survey if +250 employees]
6. Does your company export goods and services?
 - Yes, we are exporting goods and services
 - Not now, but we are planning to export goods and services
 - None [End of survey if the answer is None]
7. What is the percentage of your production that is exported?
 - None
 - 1-25%
 - 25-50%
 - 50-75%
 - 75-100%
8. What percentage of your exports is destined for the Latin American region?
 - None
 - 1-24%
 - 25-49%
 - 50-74%
 - 75%-100%
9. What percentage of your income is generated through exports?
 - None
 - 1-24%
 - 25-49%
 - 50-74%
 - 75%-100%

Part B: Impact of COVID-19

Impact of COVID-19 on your business

10. Has the COVID-19 pandemic had a negative impact on your revenue generation?
 - Yes
 - No
11. Has the COVID-19 pandemic increased costs for your business?
 - Yes
 - No
12. Compared to the year 2019, has the number of employees...
 - Increased
 - Decreased
 - Remained constant

Impact of COVID-19 on the use of digital tools

13. Has your company started selling/buying goods or services online during the pandemic?
 - Yes
 - No
14. In comparison with 2019, how much more of your total sales of goods and services came from online sales? (if answered 'Yes' to the previous question)
 - None
 - 1-25%
 - 25-50%
 - 50-75%
 - 75-100%
15. Has the use of digital tools to support exports increased since the pandemic?
 - Yes
 - No

16. Have you used any of the following digital tools for your business operations during the COVID-19 pandemic? (Select all that apply)
 - Your website
 - Your digital application
 - Cloud services
 - Video conferencing (Teams, Zoom, Google videos)
 - Digital ads
 - Business/data analytics tools
 - Amazon Marketplace
 - Google
 - Facebook Marketplace
 - YouTube
 - Instagram
 - WhatsApp
 - Alibaba
 - eBay
 - PayPal

Impact of COVID-19 on exports (if exporting)

17. Has the COVID-19 pandemic impacted your ability to export goods or services?
 - Yes
 - No
18. During the COVID-19 pandemic, what were your challenges for exporting? (Select all that apply)
 - Travel restrictions and border closures
 - Logistics (delays, infrastructure closure, increased transportation costs)
 - Reduced demand or delayed payments
 - Labour restrictions
 - Inability to obtain financing/credit
 - Regulatory environment (new tariffs, customs procedures)
19. Did you change the destination of your exports as a result of the COVID-19 pandemic?
 - Yes
 - No

20. If yes, what factors motivated the change of destination? (Select all that apply)
- Supply chain/logistics disruptions
 - Increased costs
 - Export restrictions and trade barriers
 - New business opportunities

Part C: Barriers to exporting

21. If you could increase your exports, which markets would you be most interested in exporting to?
- Other countries in Latin America
 - North America (United States, Canada)
 - Europe (Spain, France, Germany...)
 - Other, please specify
22. What are the barriers to exporting more? (Select all that apply)
- Regulatory environment (unfavourable tariffs and customs procedures, lack of preferential access, complex licenses)
 - Payment method challenges
 - Logistic costs and delays
 - Market distribution challenges
 - Lack of marketing information
 - High competition in international markets
 - Resource constraints (time, labour, capital)
 - Language barrier

Part D: The role of digital tools and technologies in enabling exports

Access to Internet

23. How important is Internet access/ bandwidth for your business?
- Very important
 - Somewhat important
 - Not important
24. Does your company experience any of the following barriers to Internet access?
- Too expensive
 - Irregular service
 - Lack of technical support

- Lack of skilled labour
- Too slow connection
- Other, please specify

Reasons for using ICTs

25. What are the main reasons behind your adoption of digital tools? (Select all that apply)
- Access to new markets
 - Cost reduction
 - Increased productivity
26. What factors hinder or have hindered the adoption of digital tools for your company? (Select all that apply)
- High costs
 - Lack of skills and knowledge
 - Lack of infrastructure
27. What digital tools and technologies does your company use? (Select all that apply)
- Own website
 - Own digital application
 - Social media (Facebook, Instagram, WhatsApp, YouTube)
 - Search engines (Google)
 - Online purchases (Mercado Libre, Amazon, Alibaba)
 - Online sales (Amazon, Mercado Libre, Alibaba)
 - Cloud computing
 - CRM
 - Digital supply chain management tools
 - Video conferences (Teams, Zoom, ...)
 - Online banking or digital payments
 - Other, please specify

Online trade

28. Do you sell your products or services through your website?
- Yes
 - No

29. If not, what are the main reasons for not having one?
- Not necessary
 - High installation and maintenance costs
 - Lack of internal expertise
 - Other, please specify
30. How familiar are you in general with technological tools to export your products or services?
- Very familiar
 - Somewhat familiar
 - Not very familiar
 - Not familiar at all
31. How would you rate your access to technological tools to export your products and services?
- Excellent access
 - Good access
 - Moderate access
 - Poor access
 - No access
32. What online trading platforms are you using? (Select all that apply)
- Mercado Libre
 - Amazon
 - Facebook Marketplace
 - OLX
 - Instagram
 - WhatsApp
 - TikTok
 - YouTube
 - Alibaba
 - eBay
 - PayPal
33. What percentage of your sales were made through online trading platforms/digital tools before 2019?
- None
 - Less than 10%
 - Between 10-50%
 - More than 50%
34. What percentage of your sales are made through online trading platforms/digital tools now?
- None
 - Less than 10%
 - Between 10-50%
 - More than 50%
35. What are the main challenges when selling online? (Select all that apply)
- Financial transactions and sales collection
 - High delivery or product return costs
 - Lack of knowledge of trade rules and regulations (tariffs and customs)
 - Lack of knowledge on how to protect intellectual property rights
 - Lack of market intelligence
 - Data storage and transfer
 - Resolving claims and complaints
 - Other, please specify

Skills and training in ICT

36. Has your business required new hires to access specific digital skills?
- Yes
 - No
37. If you and your company could receive training support on new digital skills to help increase your exports, what skills would be most valuable?
- Access to information on new market opportunities
 - Data analysis
 - Use of cloud technologies
 - User experience design
 - Digital marketing

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