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Gendered Impacts – Blind Responses

The 2025 Tariff Crisis and the Case for Gender-Transformative Reforms



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Contents

Executive Summary 4

Introduction 6

1. Setting the Scene
Foundational Concepts and Analytical Frameworks 9

2. Trade and Gender
Channels of Interaction 11

3. Gendered Costs of the US Tariff Shock in South Africa's
Export Citrus Sector 15

4. Gendered Impact of Dual Trade Shocks in the Garment
and Textiles Sector in Madagascar 27

5. Women Workers in a Continuum of Risks
Impacts of Tariff Shocks in the Garment Sector in Bangladesh and India 34

6. An Analysis of the New Geoeconomic Order for Vietnam's Women 45

7. Indirect Impacts of the Tariffs on Women in the Informal
Sector in Zimbabwe 56

8. Gendered Impacts and Policy Responses
Shared Findings, Broader Issues, and the Structural Case for Reform 62

Recommendations 70

About the Authors 74

Executive Summary

Caroline Dommen

This publication examines how the dramatic US tariff increases announced in April 2025 have affected women and gender justice across six Global South countries: Bangladesh, India, Madagascar, South Africa, Vietnam, and Zimbabwe.

Context and Purpose

The 2025 tariff shock was unprecedented in scale and occurred in the context of broader changes underway in the global trading system: declining multilateralism, growing geo-economic tensions, rising acceptance of industrial policy, and attention to distributional impacts of trade. Amidst these risks and opportunities, this publication draws on feminist political economy frameworks to identify how the tariff uncertainties affect gender justice, the extent to which governments took gender into account in their responses to the tariff shocks, and what gender-transformative changes to trade policy would ensure gender justice for the future.

Focus and Relevance

The case studies focus on sectors in which the majority of workers are women: garments and textiles in Bangladesh, India, and Madagascar; export citrus in South Africa; informal cross-border trade and vending in Zimbabwe; and several export sectors in Vietnam. The gender lens is of broad relevance as it focuses attention on structural injustices in the trading system: Countries and workers dependent on labour-intensive exports are often the most vulnerable to global economic shocks, while profits flow upwards to importing countries and brands. A gender lens directs our attention to the pressing need for structural transformation of economies if gender justice and economic justice objectives are to be achieved.

Shared Findings on Impacts

Across all six countries, pre-existing structural inequalities amplified the impacts on women of the 2025 tariff uncertainties and women disproportionately bore the weight of the tariffs. The research on Bangladesh and India found that women garment workers faced job losses, reduced overtime, and the erosion of employer-provided work-related services, with factories exploiting the atmosphere of uncertainty to weaken workers' bargaining power. In Madagascar, ostensibly gender-neutral layoff procedures translated into disproportionate job losses for women, who are overrepresented in short-term contractual arrangements. The South African study documented how women seasonal citrus workers in the lowest-paid, most precarious roles were the first to lose employment when export volumes fell, with this loss compounded by their structural exclusion from unemployment insurance. Research in Vietnam showed that shifts in investment and production due to geo-economic tensions can provide employment opportunities for women in some countries and some sectors, but that deliberate policy measures are needed to ensure that these translate into gender-just outcomes. Despite minimal exports to the US from Zimbabwe, women in the informal sector there suffered indirect knock-on effects, including rising prices, income loss, and heightened exposure to gender-based violence. Across the countries studied, tariff-related disruptions have compounded the pre-existing structural inequalities that leave women disproportionately exposed to trade shocks. Income loss intensified women's informal or social reproduction workload, as well as reducing household spending on food, health, and children's education; the effects of this may extend well beyond temporary income loss into longer-term economic and social harm.

Consistently Gender-blind Government Responses

None of the governments studied implemented gender-specific measures or took women into account in elaborating their responses. Policy attention focused almost exclusively on trade diplomacy, export diversification, and firm-level support. The studies uncovered no evidence that governments conducted gender impact assessments, provided worker-directed relief, or included women's organisations in negotiations. This shows that trade policy continues to overlook the needs of women in all their diversity and is treated as a technical domain that only considers a very narrow range of actors and expertise as relevant, yielding trade policy results skewed in favour of those who hold economic power.

Broader Structural Questions

The studies show that the 2025 tariffs deepened competition among countries that export to the US, as well as between sectors and workers, undermining the collective action needed to counter asymmetric trade power. They reveal how deeply entwined gender and economic inequalities are in the international division of labour, raising fundamental questions about the terms on which women and export-dependent countries are included in the global economy,

and complicating the argument that trade is positive for women. Similar dynamics to those described in the country studies have played out in previous crises, from the 2008 financial crisis to the COVID-19 pandemic, showing that current efforts within trade policy fora in favour of gender equality in trade are failing to address the structural vulnerabilities that most affect women. More broadly, the studies highlight how unequal international trade and investment rules are, underscoring that gendered vulnerabilities will continue, particularly in developing countries and Least Developed Countries (LDC) if these structural economic inequalities are not redressed.

Recommendations

The studies put forward a broad spectrum of recommendations for measures that governments, intergovernmental bodies, businesses, or unions can implement to achieve gender justice in trade. Recommendations range from short-term gender-responsive actions – such as conditioning emergency support to businesses on implementation of measures in favour of women workers – to longer-term gender-transformative proposals to address structural causes of gender inequalities – like integrating care into trade policies. Other recommendations include closing data gaps by collecting gender-disaggregated statistics; reflecting informal and social reproduction work in official trade and employment data; extending social protection to informal and seasonal workers; requiring foreign investors and other company owners to contribute to worker relief funds during crises, and broadening the scope of intergovernmental bodies' work on trade and gender to address structural factors that perpetuate inequalities between and within countries. Taken together, the studies' findings and recommendations suggest that incremental measures are insufficient: Gender justice in trade requires a fundamental rethinking of how trade policy is designed, by whom, and for whose benefit.

Introduction

Caroline Dommen

1. Gender Justice in the New Era of International Trade

We are entering a new era of international trade. Upheavals since 2025 have been abrupt and stark, making it easy to overlook the profound changes already unfolding in the global trading system. As well as the gradual shift away from multilateralism toward bilateral and regional trade frameworks, the past decade has seen growing recourse to industrial policies and protectionist measures, determined efforts to shorten supply chains, rising geopolitical tensions, and weakening of global trade institutions. These trends are forcing a rethink of international trade patterns and governance and even of the fundamental principles that had underpinned the trading system since the 1940s (Goldberg and Ruta, 2025; Tiwari, 2025; Bounds and Foster, 2026). Even if this transformative moment in global trade governance could result in a less democratic, more nationalist and unequal international economy, it is opening up space for new ideas about how to achieve a fairer international trade regime.

Over the last decade, states have also adopted a range of measures to increase women's access to the benefits of international trade, including specific gender-related provisions in trade agreements (Dommen, 2026). This reflects a relatively recent acknowledgment in trade policy circles that not everyone benefits equally from trade and trade rules, and that it is both legitimate and necessary to take steps within the trading system to address the uneven impacts. In spite of these efforts, trade policy generally overlooks the needs of women in all their diversity, and women[1] are still often the most vulnerable to trade shocks. As the international trading system reinvents itself in the wake of the current crises, it must reckon with the factors that have impeded economic and gender justice and embed solutions in its very structures.

2. Context and Aim of This Publication

On 2 April 2025, the US administration announced dramatically increased tariffs on imports from most countries. Since then tariff rates have fluctuated,[2] accentuating trade uncertainties that are compounded by other global factors such as the conflicts in the Middle East.

Soon after the April tariff announcement, studies began modelling expected impacts of the tariffs on a range of factors such as output, trade flows, employment, wages, inflation, or global supply chains (Rodríguez-Clare *et al.,* 2025; Scealy and Gunasekera, 2025; Zhao, 2025). More recently, research has gathered empirical evidence of the observed effects of the 2025 tariff changes (Ernst *et al.,* 2025; Matschke and Dzholos, 2025). Even though these studies findings have clear gendered implications, they lack the data and analysis[3] needed to understand the full impacts of the tariff uncertainties. Apart from a recent study on the impacts of the tariff shock on women in Cambodia and Lesotho (Belrhiti *et al.,* 2026), consideration of gendered consequences of the tariffs is mostly found in media reports and policy commentary (Choong Weng Wai and Alya, 2025; Cozens, 2025; Dommen, 2025; Sharma, 2025).

This publication contributes to filling the knowledge gap, bringing together new data and insights on how trade disruptions following the 2025 tariff increases affect women and gender justice in six Global South countries, and on the gendered nature of governments' responses. These data and insights serve as prompts to consider what types of measures could ensure that trade and trade rules advance gender justice objectives in a way that is robust enough to withstand economic shocks. In other words, drawing on recent experience, this publication identifies approaches to trade policy that address and redress the structural root causes of gender inequalities.

3. Publication Summary

→ Chapter 1 sets out the foundational concepts and analytical frameworks, chapter 1 sketches out what is known about the linkages between trade and gender justice and describes ways that trade fora are addressing gender equality. This sets the scene for the country case studies.

Four of these examine how the changed tariff rates have affected women working in export-oriented sectors with various different labour market dynamics: garments and textiles in Bangladesh and India (→ chapter 5) as well as

1 We follow the views expressed by the Committee on the Convention against all Forms of Discrimination against Women in CEDAW/C/81/D/134/2018 article 7 (3) of the Optional Protocol, concerning Communication No. 134/2018. 'Women' thus includes all women, including lesbian, bisexual, transgender, and intersex women.

2 As illustrated by the tables on pages 18, 37 and 51.

3 For instance, the studies that consider employment focus on the numbers of jobs, rather than on the quality of employment.

in Madagascar (→ chapter 4), citrus fruit in South Africa (→ chapter 3) and what possible impacts might be across several export sectors in Vietnam (→ chapter 6).[4] The fifth case study illustrates the global ripple effects of trade shocks. It examines how trade shocks have pushed women into informal work in Zimbabwe (→ chapter 7), with the recent tariff uncertainty exacerbating the situation for many. The case studies show that governmental responses to the 2025 tariff increases were overwhelmingly gender-blind.

The country study teams blended quantitative and qualitative approaches. Qualitative approaches provide insights that statistical data alone cannot offer – such as on governance, power dynamics, or women's non-market roles. For these studies, qualitative insights also help fill data gaps. Official employment, household, and related statistics for 2025 and 2026 are not available for all the countries that this publication focuses on. The information available — such as trade data — is not always sufficiently disaggregated for gendered analysis. In addition, the case studies needed to compensate for data gaps in various ways due to the evolving nature of the tariff changes, along with the months or even years it may take before many of the social impacts that flow from them become manifest.

As well as drawing on official statistics, the research teams undertook careful reading of how the mechanisms that had played out elsewhere or in previous crises may be expected to play out in the countries addressed. The authors of the Bangladesh and India (→ chapter 5) case study carried out interviews with union leaders and researchers. The South Africa (→ chapter 3), Madagascar (→ chapter 4), and Zimbabwe (→ chapter 7) study authors interviewed sector experts, including governmental officials, employers, and worker representatives. For the Vietnam (→ chapter 6) study, the authors adopted a primarily quantitative economic approach, analysing household survey data alongside trade and investment figures as a basis for understanding the structural dynamics in place prior to the 2025 tariff shock. From this they infer how the new tariffs and geo-economic uncertainties may affect the quality and quantity of jobs for women.

The studies are complementary in that they use different analytical lenses. The Madagascar and Zimbabwe study authors adopted a feminist political economy lens, whilst the South African study draws explicitly on the Moser Triple Role Framework and the International Labour Organization (ILO) Decent Work Agenda. With the exception of the Vietnam study, which adopted a gender-responsive approach, all the country studies applied a gender-transformative lens (→ Chapter 1, Box 1 on page 9 for definitions).

The studies' scope prevented detailed analysis of intersectional aspects (→ Chapter 1, page 10 for definitions) and impacts in the non-market sphere. Nevertheless, they all gather indications that women's care burdens intensified following the 2025 tariff changes and point to factors that compound gender inequalities. The South Africa study for instance documents how race and geographical location intersect with gendered vulnerabilities, the Vietnam study points out that economic vulnerability is often concentrated among ethnic minorities, and evidence from India shows that migrant women are particularly vulnerable.

The case studies review responses to the tariff shocks for each country, to gauge whether these reactions considered the gendered impacts of the tariffs or had gender equality as an objective, finding that none did. Each study puts forward recommendations for designing domestic and international policies to strengthen women's resilience to present and future trade uncertainties and ensure gender-just outcomes from trade.

→ Chapter 8 draws together the common threads emerging from the country-based research, identifying shared features and differences in gendered impacts, comparing government responses from a gendered perspective, and identifying broader questions that the research raises for gender-transformative trade policy. Finally, the last chapter compiles → the recommendations. Some of these are implementable in the short-term, while others point to longer-term, gender-transformative structural changes that are needed for gender justice.

4 In other sectors or countries men might have been found to be more affected. This publication has chosen to focus on sectors in which women have a strong presence.

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1.
Setting the Scene

Foundational Concepts and Analytical Frameworks

Caroline Dommen

1.1 Foundational Concepts

This publication considers the topic from a gender-transformative perspective (see Box 1). In that spirit, it draws on a feminist political economy approach that considers market as well as non-market spheres of economic activity (see page 10), exploring root causes of gender inequalities and paying attention to power relations and historical context. It seeks to centre the voices and perspectives of the people involved – questioning why some are heard and others are overlooked.Gender-responsive trade policy seeks to help women cope or compete better within the existing framework with tools such as training, facilitated access to credit, or minimum wage rules, whereas gender-transformative trade policy challenges harmful gender norms and power relations, while also seeking to reshape the structural inequalities that produce inequality in the first place.

Gender Equality and Gender Justice

Gender equality refers to the equal rights, responsibilities, and opportunities of people of all genders. It implies that the interests, needs, and priorities of women and men are taken into consideration, and recognises the diversity of different groups of women and men (UN Women, 2011). The concept of gender justice underlines the link between gender equality and social justice. The two concepts may be used interchangeably throughout this publication.

Applying a gender-justice lens to analysis of economic policy directs attention to outcomes – beyond economic growth measured by GDP – and intersecting patterns of inequality, recognising that economic outcomes may affect women differently depending on factors such as their race, class, education, geographical location, or sexual orientation. Efforts in favour of gender justice require disaggregated analysis to understand the distributional effects of trade – between women and men and also between other groups such as skilled and unskilled workers or between urban dwellers and people in rural regions.

Working towards gender equality is a legal obligation in all parts of the world, binding on the 189 states that have ratified CEDAW, the Convention on the Elimination of All Forms of Discrimination against Women.1 CEDAW specifically mandates »substantive equality« (equal results in practice, not just in law), calls for mechanisms to guarantee women's rights, including addressing structural inequalities or gender stereotyping, and mandates accountability for infringements of women's rights.

Box 1

From gender-blind to gender-transformative approaches

Gender-blind: *ignores gender norms, roles, relations, and power structures, and in so doing often reinforces gender-based discrimination.*

Gender-neutral: *is sometimes presented as being ›fair‹ by treating everyone the same but in practice is often actually gender-blind.*

Gender-aware: *is conscious of the fact that men and women have different roles, needs, and responsibilities.*

Gender-sensitive: *identifies and acknowledges existing differences and inequalities between women and men, without necessarily addressing inequality or proposing remedial actions.*

Gender-responsive: *identifies and acknowledges existing differences and inequalities between women and men and articulates measures, policies, or initiatives that aim to mitigate harm or achieve equality.*

Gender-transformative: *analyses and challenges the underlying structures of gender inequalities and aims at long-term structural change in favour of justice, equality between genders, and a better quality of life for all.*

Source: the author, drawing on UN Women and DWYPD, 2025

1 All the countries studied for this publication have ratified CEDAW *(Ratification Status for CEDAW – Convention on the Elimination of All Forms of Discrimination against Women* (United Nations Human Rights, 2026)). The US has signed the Convention, but not ratified it. Under international law this means that the US is bound to refrain from acts that would defeat the core object and purpose of CEDAW.

The Economy as a Gendered Structure

Gender inequalities are embedded in the economy due to gendered societal norms and expectations and the different roles men and women play in society. Gender inequalities are thus also embedded in trade-related processes and institutions. International policy has tended to assume that trade and related rules and policies are gender-neutral, which in practice reflects a gender-blind perspective (see Box 1) that fails to recognise gender specificities and take the requisite action to avoid them. Recognising the economy as a gendered structure is an essential step towards identifying the gendered power relations that underpin economic institutions, policies, and transactions and developing the changes needed to achieve gender justice (Elson and Çağatay, 2000).

1.2 Analytical Frameworks

In order to understand the ways that trade and gender inequality interconnect, it is useful to consider some of the main frameworks for analysing gender inequalities in the economy (UNCTAD, 2022).

Intersectionality

International trade policy frequently considers women as a homogenous group, whereas in fact women and their position in the economy will vary depending on a range of factors. Geographical location, class, ethnicity, religion, or migration status can intersect with gender to produce stark differences in women's ability to access education, markets, credit, land, or networks. → Chapters 3 and → chapter 5 illustrate, for instance, how migrant women may be more vulnerable to trade shocks than other groups of women.

Women's Multiple Roles

Recognising women's multiple roles in the economy is necessary for a comprehensive understanding of how trade and trade rules affect gender equality. Just like a man, a woman may be a worker, producer, entrepreneur, trader, consumer, carer, decision-maker, rights-holder, user of public services, or taxpayer. Women usually occupy several roles at the same time: A woman who works will be a rights-holder and a user of public services. As discussed below, trade-related economic changes can deploy their effects through different channels of interaction, most notably employment, consumption, and public provision, each of which can have a positive or a negative impact on the same woman.

Macro, Meso, and Micro Levels of Analysis

The linkages between trade and gender equality play out on various interconnected levels. The case studies show how the impacts of macro-economic changes (such as trade shocks) are distributed through markets and institutions (meso level) that are already structured by gender roles and gender inequalities, and are absorbed through social and household structures (micro level) in which gendered dynamics also operate.

Market and Non-market Factors

Understanding the interdependence between non-market activities (»unpaid care work« or »social reproduction«) and market activities (›production‹), and the gendered division of labour within these, is crucial for gendered analysis of trade policy. Goods and services are produced through paid (›market‹ or ›productive‹) work as well as through unpaid labour, which includes time spent on procuring and preparing food, collecting water or fuel, household chores, or taking care of children or disabled adults. Women undertake these unpaid and often invisible activities to a much greater extent than men in all parts of the world, spending on average 2.5 times longer each day on care and domestic tasks. This is a main factor in women's »time poverty«, which limits their actual or perceived availability for paid work, learning, rest, or civic and political participation (International Labour Organization, 2024). More broadly, social reproduction can be understood as encompassing all the activities and processes necessary for sustaining and perpetuating life and the economy, including ecosystem services and care for natural systems (Cantillon *et al.,* 2023; Naidu, 2023).

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2.
Trade and Gender

Channels of Interaction

Caroline Dommen

The impact of trade or trade-related rules on women and on gender equality can vary widely, exerting different – positive or negative – effects depending on geographical region, the sector, the time frame (Engel *et al.,* 2021), or channel of impact considered, as well as on factors such as education and training policy, care infrastructure, and local attitudes to gender roles. Data are available on gendered impacts of trade or trade rules for a variety of outcomes such as health, fertility, autonomy within the household, income levels, economic growth, labour force participation, or the gender wage gap (Braunstein *et al.,* 2019; Do *et al.,* 2015; Rocha and Piermartini, 2023). Some studies report positive gender justice outcomes associated with international trade (World Bank and World Trade Organization, 2020); others point to negative gender equality or women's rights consequences (AlAzzawi, 2014).

The one overarching inference from this large body of work is that no general conclusion can be drawn about the gender-justice impacts of trade. Conversely though, research repeatedly shows that women around the world face similar challenges because of enduring gender stereotypes, fewer legal rights than men, and because they spend more time than men on unpaid social reproduction tasks. These factors hinder many women's ability to benefit as much as men from international trade opportunities and leave them more exposed to trade-related policy changes.

2.1 The Two-way Relationship between Trade and Gender

The relationship between trade and gender (in)equality plays out in two directions (Elson *et al.,* 2007) (see Figure 1).

Fig. 1

The two directions of the trade-gender relationship

Trade and trade rules → *gender inequalities*

Gender inequalities → *outcomes from trade and trade rules*

Impact of Trade and Trade Rules on Gender Inequalities

One direction looks at how trade and trade rules affect women and gender equality. For instance, increased competition through trade may result in lower prices and be of economic advantage to women by reducing the costs of goods and services (OECD, 2020). The impacts on women and men will differ as women generally spend a higher proportion of their income on goods and services for the home and family, and can thus be expected to benefit more from lower prices (World Bank, 2012). However, the same women may sell goods on the local market where competition from cheaper imported goods results in their income from sales being diminished (UNCTAD, 2022). Furthermore, as the next chapters in this publication discuss, trade-related economic changes can affect employment, with the specific gendered effects depending on women's presence and roles in a given sector.

Trade, trade rules, and trade-related measures also affect women who are not engaged in trade. Women may participate indirectly, through activity in sectors that provide goods or services to sectors that export (OECD, 2021). At a broader level, trade-related changes can affect women in their roles other than as workers, traders, or consumers. For example, changes in tariff and corporate tax rates can cause changes in government revenues. If this alters the government's ability to provide public services, it may affect women more, as they tend to rely on and work in public services to a greater degree than men (Williams, 2003; Dommen, 2021).

Impact of Gender Inequalities on Trade Outcomes

In the other direction, gender inequalities may affect a country's competitiveness and export performance. Two aspects of this dynamic are commonly documented: (1) women as sources of competitive advantage, referring to the relatively lower cost of women's labour, which has been a factor in developing countries' export competitiveness (Standing, 1989; UNCTAD, 2022), as discussed in greater detail in section 2.2 and chapters 3, 4 and 5; and (2) women as underachievers of competitive advantage, meaning that gender inequalities may limit women's ability to benefit as much as men from the opportunities that trade offers.

Indeed, fewer women-run businesses engage in international trade than businesses headed by men (ITC, 2024a). Women's enterprises face shared barriers to accessing international markets: They tend to be smaller-scale and are typically concentrated in lower value-added sectors

such as garments, handicrafts, or food processing (Hallward-Driemer, 2011). Those that are able to achieve the scale needed to consider exporting confront gendered structural disadvantages: Women often have more difficulty accessing finance and enjoy fewer connections to buyers, suppliers, or support organizations (OECD, 2025). Even though gaps remain, many parts of the world have seen an increased number of women exporters in recent years and several countries are dedicating resources to improving access of women-run businesses to international markets (ITC, 2024b).

2.2 Export-oriented Jobs and Conditions of Participation

Trade and Opportunities for Women

As trade liberalization took off from the 1960s, it was expected that international trade would create many new jobs, that many of these jobs would go to women, and that international competition would smooth out wage and employment discrimination between women and men around the world (Nordås, 2003). New trade opportunities did create large numbers of jobs for women, particularly in the Global South, often drawing them into paid work for the first time (Joekes, 1989; Chen *et al.,* 2026) but the terms of this inclusion have not always been consistent with gender justice or women's rights' objectives, as the following chapters illustrate.

Evidence from different regions indicates that growth in export-oriented services and manufacturing sectors was based largely on the availability of cheap, often female, labour. Even when they paid women less than men (see e.g. Hein, 1984; Kabeer, 2004), these jobs yielded benefits, bringing women new income, leading to greater autonomy and bargaining power in the household, with positive society-wide repercussions. For example, girls' new prospects for formal employment meant that families were more inclined to keep their daughters in education longer or delay their marriage. The resulting demographic changes led to poverty reduction and improvements in education and health outcomes (Amin *et al.,* 1998; Heath and Mobarak, 2015; Majlesi, 2016; Kis-Katos *et al.,* 2018; Estefan, 2025).

Today, sectors with a higher share of trade-linked employment report lower rates of informality, better pay, and more employment opportunities for women, in comparison to sectors that are less dependent on foreign demand (International Labour Organization, 2026). The bulk of studies analysing the manufacturing sector in many parts of the Global South find that women tend to earn more in export-oriented sectors than in the alternatives available to them, even if they do earn less than men and the working conditions are often harsh (Robertson and Trigueros-Arguello, 2009; Cirera and Lakshman, 2017; Distelhorst and Fu, 2018; Kabeer and Mahmud, 2004; Tafese *et al.,* 2025).

Research on the quality of employment in the export sector presents divergent findings. Indeed, as chapters 3 and 5 further underline, there are repeated reports of decent-work deficits in export-oriented production including unsafe or unhealthy working conditions, lack of freedom of association, high levels of informality, and lack of social protection coverage (International Labour Organization, 2021). This is one reason why increasing numbers of women in the paid workforce is not in itself a sufficient indicator of gender justice: The number of jobs does not tell us much about their quality. Another reason is that women continue to bear the lion's share of social reproduction work, notwithstanding their employment status (International Labour Organization, 2024) as described in the Bangladesh study (→ section 5.2.2, page 35). Crucially, a gender justice lens considers whether an increase in women's labour force participation is accompanied at the macro level by care policies aimed at redistributing the unpaid workload or at the household level by a redistribution of social reproduction activities. It also looks at the terms of labour market participation and its evolution over time.

Initial gains in women's employment in export-oriented production appear to have stalled in many parts of the world. Instead of progressing into higher-skilled and higher-paid roles, women often remain concentrated in lower value-added sectors (Berik and Rodgers, 2017) and lower-skilled occupations, with more precarious employment conditions than men (Barrientos, 2019; Bataka, 2024; UNCTAD, 2025). Most research shows that in export sectors where production became more technology-based or capital-intensive, opportunities for women in low-skill and medium-skilled functions decreased (Seguino and Braunstein, 2019; Tejani and Kucera, 2021). Gender wage gaps persist – and sometimes increase – regardless of trade openness (Borrowman and Klasen, 2020). The picture appears similar for export-oriented services and for goods (Tejani and Fukuda-Parr, 2021).

This brief overview of the extensive corpus of research shows that while trade liberalization has created new opportunities for women around the world, these have not always resulted in progress towards gender equality in labour markets. Policies seeking economic growth through exports often treat women's labour as a means to an end, rather than as a path towards lasting gender justice (Kabir and Islam, 2025). It follows that the potential of export-oriented jobs to advance gender justice is not realised automatically but depends on a range of other policies and factors.

Barriers to Export-led Gender Justice

As noted at the outset of this chapter, research – including for this publication – consistently finds that women's social reproduction roles, higher prevalence in precarious work arrangements, lower bargaining power, as well as sectoral and occupational segregation constitute barriers to the gender-justice potential of export-oriented jobs.

The country studies in chapters 3–6 and chapter 8 illustrate these barriers as well as how they play out within an international division of labour in which those countries, suppliers, or workers at the labour-intensive end of supply chains are the most vulnerable. Value flows upwards to the wealthy countries or corporations that control the supply chains (Gereffi, 2018; Hickel *et al.,* 2024; Heintz and Milberg, 2025) and power is exerted downwards to countries, suppliers, and workers. Productivity gains are passed on through lower prices for consumers or higher shareholder returns, but less frequently through higher wages for workers. Economies that are highly dependent on labour-intensive export sectors – whether goods (such as garments, electronics assembly, or horticulture) or services (IT or Business Process Operations) – find their productive capacity oriented toward benefiting foreign consumers and shareholders rather than domestic development, reflecting investors' priorities. This limits countries' ability to progress into higher-value segments as well as to achieve gender justice. For developing countries and LDCs, these structural inequalities constrain broader development and adversely affect women in their multiple roles as workers, entrepreneurs, caregivers, patients, and stewards of natural resources.

This context is important for understanding how entwined gender and economic inequalities are in the global division of labour that international trade and investment enables: Women's low-cost labour at lower ends of global supply chains is most essential to employers in export sectors where low wages are the main factor in competitivity and often essential to companies' survival. Women's role at the bottom, with a lack of power, reflects countries' role at the bottom, with limited power.

The Limited Effectiveness of »Trade and Gender« Initiatives

Over the past decade, an increasing number of countries have recognised the need to address gender inequality in trade policy. New Preferential Trade Agreements (PTAs) routinely contain »trade and gender« provisions. These typically reaffirm women's rights or labour rights obligations and mandate capacity-building, cooperation, and information exchange between states (Dommen, 2026). Labour-related provisions encourage parties to promote or ratify relevant ILO conventions, or recognise that it is not appropriate to encourage trade and investment by weakening the levels of protection afforded in domestic labour law (see e.g. Free Trade Agreement between the European Union and the Socialist Republic of Viet Nam, 2020). A few PTAs recognise women's role as carers; the trade and gender chapter of the Argentina-Chile agreement identifies »care policies and programs with a gender perspective and social co-responsibility and reconciliation of working life with parental co-responsibility« as a potential area of cooperation between the Parties. These provisions are generally operationalized through cooperation and information-exchange activities, which focus almost exclusively on the challenges that women's businesses face in accessing international markets.

This is also the case for the Informal Working Group (IWG) on trade and gender that was established in 2020 in the World Trade Organization (WTO). The mandate of the IWG – in which 130 of the WTO's members participate[1] – is to intensify efforts to increase women's participation in global trade (WTO, n.d.), primarily through sharing experiences and best practices.

This attention to gender issues has been valuable for raising the profile of gender equality and women's economic empowerment in the trade policy context. It has provided a welcome basis for cooperation and research on gender equality in trade. Yet the focus of trade and gender initiatives is narrow: They only address a small sub-set of barriers to gender justice in international trade. They avoid engaging with the gendered impacts that flow from the global trading system and unequal trade and investment rules per se.

The case studies for this publication provide further evidence that concern for gender equality has not taken root in countries' policy-making, as the responses to the tariff uncertainties were overwhelmingly gender-blind. This gives credence to the view that the trade and gender agenda in its current form fails to address the structural roots of gender inequality in international trade or even to protect women from trade shocks. Its primary focus on facilitating women's access to the international trading system contributes to entrenching the dominant trade orthodoxy which enables existing inequalities to continue (Hannah *et al.,* 2022).

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1 Of the countries studied for this publication, only Madagascar and Vietnam participate in the IWG. The US joined the IWG in 2022 but has not been active since 2024 (VietnamPlus, 2020; personal communication).

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3.
Gendered Costs of the US Tariff Shock in South Africa's Export Citrus Sector

Vahini Naidu and Sylvester Wullo Bagooro

Abstract

The 30 per cent unilateral tariff on South African exports to the US in August 2025 exposed structural asymmetries obscured by aggregate trade data. The citrus sector's competitive advantage, a feminised seasonal workforce, sees women concentrated in the lowest-paid, least secure roles. Ownership in the sector is overwhelmingly male-dominated. The study shows that women workers and producers bear concentrated adjustment costs yet remain invisible to gender-blind governmental responses. US Executive Order 14168 (2025) further narrows scope for gender-transformative provisions in any successor to the African Growth and Opportunity Act (AGOA).

3.1 Introduction

In 2025, the South African citrus sector packed a record 203.4 million 15-kilogram cartons (Citrus Growers' Association of Southern Africa (CGA) 2025). Citrus is the country's largest agricultural export category by value and the United States is one of the sector's premium overseas markets, although the Netherlands remains the largest destination by volume (USDA FAS 2025; Chisoro / Landani 2024). The CGA reported export earnings for the 2025 season[1] of approximately 2.47 billion US dollars (CGA 2025). Against the backdrop of this record, the Trump administration's announcement on 2 April 2025 of a 30 per cent unilateral tariff introduced a structural shock whose costs, while not fully visible in the data for the 2025 season, are disproportionately borne by women workers and producers in the sector.

The sector's production base is also marked by a sharp racial and gender skew. In 2023 only 117 of the approximately 1 200 commercial citrus growers in South Africa were Black, accounting for 10 per cent of the industry by number, eight per cent by area planted, and six per cent by total exports. Only eight of those 117 were women (Chisoro / Landani 2024, citing CGA 2023). Drawing on sixteen semi-structured interviews with Black growers and industry stakeholders across Limpopo and the Eastern Cape, Chisoro / Landani (2024) conclude that citrus production and markets continue to be dominated by white male-owned and managed farms, with limited entry and expansion of Black male and women-owned farming businesses, »perpetuating a distinct race and gender gap«. The case study integrates this ownership-level analysis with the workforce-level analysis below, since the costs of a trade shock fall across both.

What aggregate trade statistics do not reveal is that the sector's competitive advantage is structurally dependent on a feminised seasonal workforce. In a 2026 status report on women's work across agrifood systems in sub-Saharan Africa, the Food and Agriculture Organization of the United Nations (FAO), together with the Natural Resources Institute (NRI), and African Women in Agricultural Research and Development (AWARD), finds that women constitute close to 50 per cent of the agrifood-system's workforce in the region, nine percentage points above the global average (FAO / AWARD / NRI 2026). Within South Africa, Statistics South Africa (Stats SA) 2024 Agricultural Survey indicates that approximately 40 per cent of commercial agricultural workers are women, with a disproportionate concentration in seasonal, low-wage roles without job security or social protection (Stats SA 2024; Commission for Gender Equality (CGE) 2025; for a note on data limitations, (→ Annex A on page 24)). Vulnerability is not evenly distributed. Race, geography, migration status, and household composition intersect with gender to produce concentrated disadvantage among Black women in rural Western Cape and Limpopo, including undocumented migrant workers from Zimbabwe and other neighbouring states (Naidu / Ossome 2018; Cousins *et al.* 2018; Chisoro / Landani 2024). These workers are hired predominantly on daily or piece-rate contracts, frequently excluded from Unemployment Insurance Fund (UIF) contributions (UNCTAD 2022; Sibeko / Phalatse / Ossome 2021). Like women agricultural workers across the Global South, they also carry the double burden of unpaid reproductive work such as childcare, cooking, eldercare, and household maintenance, alongside their paid harvest labour (UNCTAD 2022; Sibeko / Phalatse / Ossome 2021).

This case study addresses a central question. When the sector absorbs an external trade shock, who bears the costs and why are those costs distributed as they are? The analysis draws on three interlocking frameworks: the Moser Triple Role Framework (Moser 1993), which disaggregates women's labour into productive, reproductive, and community management roles; the ILO Decent Work Agenda (ILO 1999), the normative standard against which seasonal

1 The South African citrus export season runs approximately from April to October, with peak packing and shipping concentrated in the July–September period.

employment conditions should be evaluated; and UNCTAD's (2022) gendered economy framework, which contextualises the trade-gender nexus at macro, meso, and micro levels. Following the analytical vocabulary set out in → Chapter 1, the case study assesses whether the South African government's response is gender-blind, gender-responsive, or gender-transformative. It also engages with US Executive Order 14168 (2025), which directs federal agencies to remove gender ideology from official policy language and narrows the space for gender-sensitive provisions in any trade instrument negotiated with the United States, including any AGOA successor arrangement. Methodologically, the case study integrates secondary literature, official statistics, the published findings of the CCRED-Oxfam working paper on inclusion in the citrus industry (Chisoro / Landani 2024), and original semi-structured interviews conducted with sector experts in 2026. This case study focuses primarily on women in their role as workers including as farm owners in the citrus value chain. It does not claim to tell the whole story of how trade shocks affect women, since labour market figures alone do not capture impacts on unpaid care work, food security, or community life. These broader dimensions are addressed through the Moser framework in the analysis that follows.

3.2 Participation Without Power. Moser, Decent Work, and Seasonal Citrus Labour

The Moser Triple Role Framework Applied

Moser's Triple Role Framework (Moser 1993) identifies three simultaneous domains of women's labour. The productive role covers income-generating market work. The reproductive role covers domestic and care work that sustains the labour force. The community management role covers voluntary work that compensates for absent public services. While satellite accounts increasingly attempt to measure unpaid household and care work, the productive role remains the only domain systematically recognised in core national accounts, labour law, and trade policy; drawing on Moser's framework, the reproductive and community management roles are structurally marginalised in the institutions that govern employment and commerce (UNCTAD 2022). The framework's critical insight is that these roles are mutually constraining. A reduction in seasonal employment is never simply a job loss but a compound disruption across all three spheres.

In the productive sphere, women are concentrated in picking, sorting, packing, and post-harvest processing, the most physically intensive, lowest-paid, and least secure positions in the value chain. CGE (2025) confirms women farmworkers are disproportionately concentrated in these roles, while men hold a disproportionate share of supervisory, machine-operating, and year-round permanent positions. The National Agricultural Marketing Council (NAMC 2023) reports that only 15.2 per cent of farm managers in commercial agriculture are female. The CCRED-Oxfam study finds that on Black-owned citrus farms women hold administrative, production-management, and farm-management positions but rarely directorships, also noting that male citrus farmers tend to view women as core support systems rather than fellow farmers (Chisoro / Landani 2024). This exemplifies vertical segregation, the element of gender inequality within that distribution whereby women are systematically excluded from the most senior and advantaged positions (Blackburn and Jarman, 2005; UNCTAD 2022). In the reproductive sphere, the same women return from harvest shifts to perform unpaid childcare, eldercare, and household maintenance. In South Africa in 2023, the gender gap in time spent on unpaid domestic and care work stood at 9.1 percentage points of a 24-hour day, equivalent to women spending on average over two hours per day more than

Tab. 1

Moser Triple Role Framework Applied to Women Seasonal Citrus Workers

Moser Role	Activities in Citrus Sector	Impact of Tariff Shock	Policy Gap
Productive	Picking, sorting, packing, processing (piece-rate / daily wage)	Reduction in seasonal hiring; loss of income; no UIF access	No income protection measure in government response
Reproductive	Childcare, cooking, eldercare, household maintenance after / between shifts	Income loss intensifies unpaid burden; reduced household food consumption; withdrawal of children from school	No recognition in trade adjustment data or policy
Community Management	Voluntary welfare activities; compensating for absent public services through community support	Income loss triggers expanded community role: women assume household crisis management, increase subsistence activities, and take on additional informal work to compensate for lost wages	Entirely absent from policy framework

men on tasks including cooking, cleaning, childcare, and eldercare (World Bank Gender Data Portal 2025, drawing on UN Statistics Division data). Sibeko / Phalatse / Ossome (2021) demonstrate that the persistence of unpaid household production allows employers to expect the reproduction of labour in the absence of a living wage, since household production, encompassing cooking, cleaning, childcare, and eldercare, absorbs subsistence costs the wage does not cover. South Africa's competitive advantage in premium export markets is, in part, subsidised by the unpaid reproductive labour of the women who work across its value chain.

A critical comparative question the framework surfaces concerns men in the off-season. CGE (2025) and Sustainability Initiative of South Africa (SIZA) (2025) data indicate that male workers in agriculture are more frequently retained on year-round contracts for orchard maintenance and mechanised tasks. Men thereby accumulate continuous Unemployment Insurance Fund (UIF) contributions, longer employment records, and housing benefits tied to permanent employment, while women are cyclically released and rehired without accruing equivalent entitlements. It is crucial to reference this structural asymmetry when evaluating whether seasonal work is worthwhile for women.

Is a Seasonal Job a Decent Job?

The ILO defines decent work as productive work for women and men in conditions of freedom, equity, security, and human dignity, organised around four pillars: employment creation, rights at work, social protection, and social dialogue (ILO 1999).

Applied to seasonal citrus farmworkers, a systematic deficit is evident across all four pillars. From 1 March 2026 the South African National Minimum Wage stands at 30.23 rand (approximately 1.55 euro at early-2026 exchange rates) per hour following the increase gazetted in Government Gazette 54075 (Department of Employment and Labour 2026). Compliance gaps in the seasonal agricultural sector are documented through SIZA's social and environmental monitoring programme (SIZA 2025). ILO Convention C184 on Safety and Health in Agriculture (2001), the benchmark for occupational protection, has not been ratified by South Africa. The rights of seasonal workers under the Basic Conditions of Employment Act (BCEA) are formally recognised but de facto enforcement is constrained by contract type and geographical isolation (SAHRC 2019).

Social protection exclusion is the most acute failure. Seasonal workers on daily or piece-rate contracts frequently do not have UIF contributions remitted, which means that when employment is curtailed they have no recourse to unemployment insurance. Structural exclusion of seasonal agricultural workers from UIF arises in part because South Africa's social protection architecture was designed around the standard employment relationship of continuous, formal employment, a design that treats seasonal and piece-rate work as exceptional rather than structural (Ncamane 2024). This is a wider pattern across informal work in the South African economy. In 2024, informal employment accounted for 29.8 per cent of total employment, with women and men roughly equally represented quantitively (27.8 per cent and 31.5 per cent respectively), but women disproportionately concentrated in the lowest-paid informal occupations, including domestic work, elementary labour, and seasonal agricultural roles (Stats SA 2025a). UK supermarket supply-chain studies have documented women grape pickers in South Africa going hungry despite full-time work, because their wages fall below a living-wage threshold (Wilshaw 2018). Occupational health is a further dimension the regulatory architecture leaves under-protected. Studies of women workers on South African commercial farms record dermal

Tab. 2

ILO Decent Work Pillars Applied to Seasonal Citrus Workers

ILO Pillar	Normative Standard	Condition in Seasonal Citrus	Key Source
Employment Creation	Productive work with adequate income	Seasonal; piece-rate; national minimum wage 30.23 rand / hour (from 1 March 2026) frequently not enforced	SIZA (2025); CGE (2025); Dept of Employment and Labour (2026)
Rights at Work	ILO C184; BCEA; Core Labour Standards	South Africa has not ratified C184; enforcement limited for seasonal workers	South African Human Rights Commission (SAHRC) (2019); ILO (2001)
Social Protection	UIF; occupational health coverage; social security	UIF contributions frequently not paid for daily / piece-rate workers; no sector-specific safety net	CGE (2025); SAHRC (2019)
Social Dialogue	Collective bargaining; trade union representation	Low collective bargaining coverage; no seasonal agricultural bargaining council	CGE (2025); Labour Relations Act 66 of 1995

symptoms, respiratory irritation, and cholinesterase abnormalities consistent with sustained pesticide exposure (Atinkut Asmare *et al.* 2022). The CGE (2025) documents social protection exclusion as structural; the administrative architecture is calibrated to the standard employment relationship that does not encompass seasonal workers. Social dialogue is effectively absent. Collective bargaining coverage is low and there is no sector-specific bargaining council for seasonal agricultural workers (CGE 2025; Labour Relations Act 66 of 1995).

3.3 The Tariff Shock and Its Gendered Employment Effects

Prior to the April 2025 announcement, South Africa exported approximately 119 million US dollars in citrus to the United States annually (California Citrus Mutual 2025), representing approximately 6.58 million standard 15-kilogram export cartons. Within the US market for Southern Hemisphere counter-seasonal citrus, South Africa held a share of approximately 13.9 per cent, ranking behind Chile, Peru, and Argentina (Walsh 2025). The 30 per cent tariff entered into force on 8 August 2025 under Executive Order 14326 (The White House 2025a). On 14 November 2025, a US Executive Order issued retroactively to 13 November 2025 exempted fresh oranges from Trump's unilateral tariff regime. Mandarins, a significant component of the premium US-bound export basket, were excluded from the exemption (The White House 2025b; Fresh Fruit Portal 2025). In February 2026, the United States reduced tariffs to approximately 10 per cent for most South African goods not subject to other measures, though mandarins remained subject to the 30 per cent tariff throughout the 2026 citrus season (California Citrus Mutual 2026; NAMC 2025).

The African Growth and Opportunity Act (AGOA) is a United States trade preference programme that grants qualifying sub-Saharan African countries duty-free access to the US market for a broad range of goods, including citrus. South Africa has been a beneficiary since 2001. AGOA expired on 30 September 2025 and was reauthorised through 31 December 2026 by H.R. 7148, signed by President Trump on 3 February 2026 (Brownstein 2026; Agbiz 2026). The one-year extension leaves open the question of longer-term renewal. Following the US Supreme Court's ruling limiting the executive's unilateral use of tariffs, trade preferences such as AGOA may increasingly serve as instruments of bilateral leverage rather than stable long-term arrangements, making a multi-year renewal unlikely in the near term. Since women seasonal workers are the first to lose employment when growers reduce US-bound export volumes, the resulting uncertainty compounds the gendered employment effects documented in this case study. See Table 3 for the full tariff chronology.

The distributional pattern documented by Engel *et al.* (2021) confirms that trade shocks produce impacts that are large, geographically concentrated, and long-lasting, with adjustment costs disproportionately borne by vulnerable groups. Two factors explain why the overall impact of the 2025 tariff on employment was not immediately visible in sector data. Sector experts interviewed for this case study, in observations consistent with the broader market analysis in Chisoro / Landani (2024), note that the tariff coincided with the South African harvest and trade season, so contracts and shipping for the 2025 crop were largely already underway, and that the Netherlands and other European destinations absorb larger absolute shares than the US (interviews 2026; Chisoro / Landani 2024; USDA FAS 2025). Sector experts interviewed for this case study further noted that the US tariff shock compounded a series of pre-existing trade pressures, including Southern African Development

Tab. 3

Trump Tariff Chronology for South African Citrus, 2025–2026

Date	Event	Tariff Rate	Product Scope
2 Apr 2025	»Liberation Day« announcement (EO 14257)	30 % (post 90-day pause)	All South African goods
8 Aug 2025	30 % reciprocal tariff enters into force (EO 14326)	30 %	All South African goods
30 Sep 2025	AGOA expired	AGOA preferences suspended	All AGOA goods
13–14 Nov 2025	Agricultural exemption EO issued	0 % (duty-free)	Fresh oranges only (mandarins excluded)
3 Feb 2026	AGOA reauthorised through 31 Dec 2026 (H.R. 7148)	AGOA preferences reinstated	All eligible goods except tariff-overridden lines
Feb 2026	Reciprocal tariff reduced for most South African goods	~10 % (most goods); 30 % retained on mandarins through 2026 citrus season	Most South African goods; mandarins exempted from reduction

Community (SADC) market disruptions and the EU's citrus black spot phytosanitary regime, with women seasonal workers and undocumented migrants from neighbouring states identified as the most exposed groups across all of these shocks. The more severe consequences and their distributional impacts will materialise in the 2026 season; the absence of a documented impact to date should not be read as the absence of structural exposure. NAMC (2025) recorded a year-on-year decline of approximately 15 000 agricultural jobs as of Q3 2025, even as quarter-on-quarter agricultural employment in the sector rose by 14 000 during Q3, a recurring seasonal pattern driven by the annual peak in hiring for fruit, vegetable, and field crop harvests, which concentrate labour demand in the July–September period. NAMC does not disaggregate these figures by subsector or sex (see Annex D).

UNCTAD (2022) observes that women who mostly hold part-time and seasonal or temporary jobs are dismissed first, also noting that women, who make up a large percentage of the informal workforce, cannot access economic rescue packages. When a grower reduces packing volumes, the first operational adjustment is most likely a reduction in seasonal packing staff, the domain most densely occupied by women, while the male-dominated permanent workforce is insulated by contract. The shock thus operates at all three levels of the analytical framework presented by UNCTAD (2022), drawing on Elson *et al.* (1997): At the macro level it depresses sector revenue and aggregate employment; at the meso level firms reallocate risk away from permanent contracts onto piece-rate ones; at the micro level, income loss in the productive sphere triggers intensification of unpaid reproductive labour, such as substitution of purchased food with home production and increased community reciprocity (UNCTAD 2022; Sibeko / Phalatse / Ossome 2021); the mechanisms through which this occurs at the household level are discussed in → section 3.2. The pattern echoes the FAO's findings on Senegal's export horticulture (FAO / AWARD / NRI 2026), suggesting a regional rather than country-specific structural feature.

The distributional and developmental consequences of such a shock extend well beyond sector-level trade and employment indicators. Drawing on comparable cases, the GIZ / LSE study on the 2025 US tariff shock in Lesotho and Cambodia (Belrhiti *et al.* 2026) documents a pattern of household adjustment whose logic is structurally applicable to South Africa's citrus regions. Income loss triggers immediate cuts to protein-rich food and preventive healthcare, withdrawal of children from school, and the relocation of children to rural areas where grandparents absorb care costs (Belrhiti *et al.* 2026). Women assume the role of household crisis managers, simultaneously combining additional informal work, subsistence activities, and expanded caregiving, with unpaid care work intensifying both in hours and psychological strain. South Africa-specific evidence from the COVID-19 shock, a comparable sudden income disruption, confirms this pattern. Casale and Posel (2020) find that women accounted for two-thirds of net job losses in the early lockdown period, while simultaneously absorbing a disproportionate share of increased childcare and household work, with the burden falling most heavily on African women in lower earnings brackets. Extrapolating from the GIZ study and comparable data for the agricultural sector, indirect job losses in transport, street vending, or rental housing can be estimated for each dismissed worker as a result of reduced purchasing power in the local economy (Belrhiti *et al.* 2026). The knock-on effects of income loss in agricultural labour markets are more limited than in manufacturing, where local employment multipliers are typically substantially higher (Belrhiti *et al.* 2026). In South Africa's citrus-growing regions, the more significant second-order effects are those discussed below, namely informal-sector contraction, labour-force exit, and geographic concentration of adjustment costs in former homeland municipalities.

In South Africa's specific institutional context, these dynamics are compounded by two structural features. First, poor rural and peri-urban households in the citrus-growing regions of the Western Cape and Limpopo already depend on diversified livelihoods, combining wages with subsistence agriculture, petty trade, and communal resource access rather than wages alone. When the wage component falls, the remaining strategies are activated but are not adequate substitutes, and the burden of managing that gap falls disproportionately on women (Sibeko / Phalatse / Ossome 2021). Second, South Africa's labour market is characterised by high structural unemployment, a small informal sector, rigid wages, and historically low inter-regional mobility, particularly in former homeland municipalities where the greatest concentration of agricultural labour is found. World Bank evidence on earlier trade shocks in South Africa shows that income per capita in former homeland municipalities fell 3.7 per cent per 10 per cent tariff-linked employment contraction, compared to 1.4 per cent in other municipalities, and that displaced workers in these areas were more likely to exit the labour force altogether than to find alternative employment (Erten, Leight, and Tregenna 2019; Bastos and Santos 2021). These dynamics suggest that the second-order effects of a sustained export shock in the citrus sector would be geographically concentrated, long-lasting, and disproportionately borne by women in already-marginalised rural communities.

3.4 Government and Industry Responses. Policy Without a Gender Lens

The Five-Element Government Response

On 4 August 2025, the Department of International Relations and Cooperation (DIRCO) and Department of Trade, Industry and Competition (DTIC) issued a joint media statement organising the government's response around five key elements. These were continued engagement with the United States, export diversification, an economic response package, trade defence and competitiveness measures, and demand-side interventions, including facilita-

tion of AGOA renewal (DIRCO / DTIC 2025). The statement committed to »protect jobs and productive capacity in South Africa« (DIRCO / DTIC 2025). None of the five elements contained a gender-specific measure. There was no requirement for working-capital recipients to demonstrate minimum wage compliance for seasonal workers, no gender impact assessment of diversification measures, and no UIF access provision for workers whose seasonal employment was curtailed. In terms of the analytical typology adopted in the joint media statement, the response is gender-blind: an apparently neutral package distributing adjustment costs unevenly because women and men have different roles, needs, and exposures. Parliament's Select Committee on Economic Development and Trade welcomed the AGOA reauthorisation on 5 February 2026 but raised no question of gendered employment impacts (Parliament of South Africa 2026). UNCTAD (2022) identifies this pattern as a structural failure: mainstreaming gender in trade policy requires consideration at every stage of the process, but in practice rarely occurs.

The response also fails to acknowledge the structural hierarchy of inequality on which the sector rests. Sector experts interviewed for this case study describe Black women as being located at the bottom of the social hierarchy in commercial citrus, with race and geography compounding gender, in observations consistent with the producer-level findings of Chisoro / Landani (2024) (interviews 2026; Chisoro / Landani 2024). Black women growers face barriers in accessing capital and property equity not faced by white growers, partly because property values in townships are systematically lower and the collateral basis for borrowing is weaker. They also lack the established industry networks, packhouse relationships, and marketing-agent connections through which white commercial growers access production loans, market information, and export logistics. Industry transformation funding is real but limited. The CCRED–Oxfam study estimates that the 20 per cent transformation share of the citrus industry's statutory export levy works out to approximately 549 000 rand (29 000 US dollars) per Black grower per year, against working capital requirements of 9 to 20 million rand for a 100-hectare farm in a single season (Chisoro / Landani 2024). The CGDC has consequently begun shifting strategy from supporting all 117 Black growers towards concentrating on roughly 19 judged most likely to become commercially sustainable. This shift is itself a distributional choice with gendered consequences that the government's tariff response does not address.

The Gender Language Constraint: Executive Order 14168

The government's response must be situated within a contested international landscape around gender language. United States Executive Order 14168, signed on 20 January 2025 declares it the policy of the United States to recognise two sexes that are »not changeable and are grounded in fundamental and incontrovertible reality«, directs federal agencies to remove and cease issuing materials that »promote or otherwise inculcate gender ideology«, and stipulates that federal funds shall not be used to promote »gender ideology« as defined in Section 2(f) of the Order (Executive Order 14168 2025). Implementing guidance issued by the Office of Personnel Management has, in practice, replaced ›gender‹ with ›sex‹ across federal Human Resources and forms infrastructure. Any trade instrument engaging with the United States that incorporates gender-sensitive provisions or references the Beijing Declaration and Platform for Action (1995) is, from the US federal perspective, ideologically contestable and would potentially be precluded from negotiations. The Beijing Declaration was adopted by consensus by representatives of 189 governments and is foundational to international work aiming to advance equality and full human rights for women. EO 14168 in effect instrumentalises international legal vocabulary against the gender justice agenda it was designed to advance.

This constraint is directly relevant to any AGOA successor arrangement. It is not only that trade-related policies and measures tend to be gender-blind; EO 14168 introduces a further layer of deliberate foreclosure. Its characterisation of gender as ideology is at odds with the standard analytical definition.

A second dimension of the US policy environment compounds this constraint. In March 2026, the Office of the United States Trade Representative (USTR) initiated Section 301 investigations into 60 economies, including South Africa, citing their failure to ban imports of goods produced with forced labour (USTR 2026a). In June 2026, the USTR proposed an additional 12.5 per cent tariff on South African goods on this basis, finding that South Africa had not imposed an effective forced labour import prohibition (USTR 2026b). The South African government rejected the finding, noting its ratification of key ILO conventions and existing enabling legislation (DTIC 2026b). The irony is considerable. The same US administration that invokes workers' rights as grounds for new tariffs on South African exports simultaneously forecloses gender-sensitive provisions in trade instruments through EO 14168 and imposes trade shocks whose adjustment costs are borne disproportionately by the women workers it purports to protect. Labour standards, in this context, function as a tool of trade leverage rather than as a normative commitment to workers' rights.

3.5 Towards Gender-Transformative Reforms

Sector experts interviewed for this case study emphasised that addressing the differential impacts of trade shocks requires state intervention at the granular level, targeted at gender-specific needs, rather than sector-wide support measures that leave the underlying structure of inequality intact. Reforms must be sequenced from the immediately achievable to the strategically ambitious. The foundation is data. As Engel *et al.* (2021) demonstrate, proactive policy design requires understanding distributional impacts before

or during a shock, not after it. The government should require citrus exporters receiving working-capital or market-diversification support to submit sex-disaggregated employment data by contract type and province as a condition of eligibility. Standardising reporting requirements across NAMC, the CGDC, and SIZA would close the principal data gaps documented in Annex A.

When it comes to social protection and decent work, the most achievable immediate reform is extension of UIF access to seasonal agricultural workers through a simplified registration mechanism independent of continuous formal employment. Minimum wage compliance, verified through SIZA social-standards audits, should be a condition of access to export-facilitation support, including access to the zero-tariff Chinese agricultural market available from 1 May 2026 under the bilateral framework signed in February 2026 (DTIC 2026; Xinhua 2026). Active labour market policies should be designed to address compound shocks, including tariffs, climate disruption, and phytosanitary trade interruptions such as the European Union's citrus black spot regime, rather than considering each shock in isolation. The government should also support extension of collective bargaining coverage to seasonal agricultural workers, addressing the absence of social dialogue identified as a structural decent work deficit (UNCTAD 2022).

Three measures pertaining to producer-level inclusion are achievable within the existing legislative framework. First, the Citrus Transformation Scheme being designed by NAMC with the citrus industry should pool provincial transformation funds and earmark a share for Black women growers, with disbursements conditional on access to working capital at scale rather than grant-based piecemeal support (Chisoro / Landani 2024). Second, partnership agreements between Black growers and white commercial farmers, packhouses, or marketing agents should be brought within NAMC's statutory levy conditions, requiring transparent disclosure of production loan terms, sale proceeds, and management fees, since without such transparency partnership-based inclusion produces dependence rather than financial independence (Chisoro / Landani 2024). Third, market intelligence and network access for Black women growers, including in the Asian markets toward which NAMC has been steering diversification, should be embedded in publicly funded export promotion. Sector experts cautioned that NAMC's market expansion initiatives in Asian markets have so far operated at an aggregate industry level, with benefits accruing primarily to large-scale commercial producers rather than to Black women farmers or seasonal workers.

At the strategic level, South Africa's announcement of intention to ratify the African Continental Free Trade Area (AfCFTA) Protocol on Women and Youth in Trade in June 2025 (APAnews 2025) creates a domestic legal hook for gender-transformative provisions in regional frameworks. The Protocol specifically requires AfCFTA state parties to address financial access barriers for women traders, including collateral requirements that disadvantage women where customary land tenure limits women's inheritance and ownership rights (Africa Trade Policy Centre 2025).

The reform package above is sequenced along the spectrum set out in → Chapter 1: Sex-disaggregated data requirements move the response from gender-blind to gender-aware; conditional UIF, minimum-wage compliance, and the Citrus Transformation Scheme's earmarking of funds move it to gender-responsive; non-regression and reporting clauses in trade instruments, partnership-agreement transparency, and extension of collective bargaining coverage move it toward a gender-transformative approach. Given the EO 14168 environment, the AfCFTA route and the Economic Partnership for Shared Prosperity (CAEPA) framework are likely to be more productive negotiating venues for these provisions than any AGOA successor in the short term.

3.6 Recommendations

Government (DIRCO, DTIC, Department of Employment and Labour)

- → Require sex-disaggregated employment data by contract type and province as a condition of eligibility for working-capital or market diversification support.
- → Establish a simplified UIF registration mechanism for seasonal agricultural workers independent of continuous formal employment.
- → Link access to the zero-tariff Chinese agricultural market under CAEPA (from 1 May 2026) to minimum wage compliance verified through SIZA audits.
- → Route gender-transformative provisions in trade frameworks through AfCFTA and CAEPA rather than any AGOA successor.

Sector (CGA, Citrus Growers Development Chamber, NAMC, packhouses)

- → Pool provincial transformation funds and earmark a dedicated share for Black women growers, disbursed at working-capital scale (9–20 million rand) rather than grant-based piecemeal support.
- → Require transparent disclosure of production loan terms, sale proceeds, and management fees in partnership agreements between Black growers and commercial farms / packhouses.
- → Extend market-intelligence and trade-facilitation support for Asian markets explicitly to Black women producers.

Trade unions and workers‘ organisations

→ Support establishment of a sector-specific bargaining council for seasonal agricultural workers.

→ Run targeted UIF registration campaigns in the Western Cape and Limpopo during the pre-season period (April to June), before seasonal contracts begin.

Women‘s rights bodies (CGE, civil society)

→ Advocate for a standing requirement for pre-implementation gender impact assessment of government trade adjustment packages.

→ Ensure undocumented migrant women workers from neighbouring states are included in any UIF extension mechanism.

International and multilateral bodies (ILO, UNCTAD, FAO)

→ Support South Africa toward ratification of ILO Convention C184 on Safety and Health in Agriculture, with technical assistance for implementation.

→ Synthesise findings from South Africa, Senegal, Lesotho, and Cambodia into a common framework to protect seasonal women workers in agricultural export value chains.

Conclusion

The US tariff shock for South African citrus is, at its distributional core, a gender shock with a racialised geography. The Moser framework reveals that women seasonal workers are not simply employees whose hours have been reduced. They are the load-bearing structure of a household and community economy whose productive, reproductive, and community management roles are simultaneously destabilised by income loss. The ILO Decent Work standard demonstrates that the employment they hold, even in normal times, falls below the threshold of productive work in conditions of freedom, equity, security, and human dignity. At the producer level nationally, eight Black women growers operate against an ownership structure dominated by white male-owned farms, with the shock exacerbating capital, network, and infrastructure asymmetries.

Government and industry responses were calibrated to the sector and the firm: taking export volumes, market diversification, diplomatic engagement, and grower cash flow into account, but not the income security of women seasonal workers, structural exclusions from social protection, or the racialised gender gap in producer-level inclusion. As UNCTAD (2022) notes, »trade policy affects women and men in structurally distinct way« and frameworks that fail to incorporate a gender dimension reproduce existing inequalities. Addressing these structural drivers would require state intervention not only at the broader industry level but also at the granular level where gender-specific needs can be targeted.

EO 14168 adds a further constraint negotiators must address. Securing gender-just provisions through AfCFTA and CAEPA, where the AGOA route is constrained, is as much a negotiating objective as any tariff schedule.

Unless sex-disaggregated employment and ownership data are collected at the subsector level, the costs of trade shocks will remain invisible. Taking such data as a foundation, income protection, decent work standards tied to export facilitation, transformation-oriented funding earmarks, partnership-agreement transparency, and gender-transformative provisions in regional trade arrangements can be devised and implemented. The sector’s record harvest of 2025, achieved partly thanks to the labour of underprotected women workers and the marginal participation of Black women producers, should provide the resources and the moral imperative to begin.

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Annex A: Methodological Note on Data Gaps

1. Sex-disaggregated seasonal employment data (citrus-specific): no such published, regularly updated figures for the citrus subsector are available. SIZA audits contain occupational disaggregation but are not publicly available in disaggregated form. The 40 per cent figure for women in commercial agriculture cited in Section 3.1 is drawn from broader Stats SA agricultural data (Stats SA 2024) and should not be treated as a citrus-subsector-specific figure.

2. Female farm manager classification: NAMC (2023) reports that 15.2 per cent of farm managers in commercial agriculture are female, the most recent disaggregated figure available. Citrus-subsector-specific data on women in supervisory positions remain unpublished. The CCRED-Oxfam study (Chisoro / Landani 2024) provides qualitative evidence on women holding farm-management, production-management, and administrative positions but rarely directorships.

3. Post-season employment audit: NAMC's Q3 2025 report records a year-on-year decline of approximately 15 000 agricultural jobs, while Q3 2025 quarter-on-quarter agricultural employment rose due to horticultural harvest demand (NAMC 2025). The figures are not disaggregated by subsector or sex. A targeted post-season audit of citrus employment changes disaggregated by contract type and sex is required.

4. Income loss quantification: No study has quantified income loss for women seasonal workers attributable to the tariff shock. Given the absence of UIF records for piece-rate workers, this requires primary data collection.

5. Female ownership at the producer level: the previously unverifiable ownership figure has now been resolved. Chisoro / Landani (2024), drawing on CGA (2023) data, document that of approximately 1 200 commercial citrus growers in South Africa, 117 were Black growers and only eight were women. Disaggregation by both race and gender at the level of total commercial growers (across white-owned and Black-owned farms combined) remains unpublished.

6. SIZA Critical Alerts: The two Critical Alerts against citrus suppliers for failure to pay the seasonal minimum wage are documented in the SIZA Social Monitoring and Evaluation Report, Q4 2024–2025 (SIZA 2025).

7. Absence of gender impact assessment as a finding: the lack of a gender impact assessment of the government's five-element response is itself evidence of structural institutional design failure, not merely a data gap.

Annex B: Responses to the US Tariff Shock in South Africa's Citrus Sector

Tab. A

Government Responses

Response area	Content	Women's involvement or gendered dimension
Vis-à-vis the USA	Continued diplomatic engagement with the US; facilitation of AGOA renewal, secured through H.R. 7148 (signed 3 February 2026) extending AGOA through 31 December 2026 (DIRCO / DTIC 2025)	No gender-specific conditions attached to engagement; women seasonal workers not mentioned in parliamentary debate on AGOA reauthorisation (Parliament of South Africa 2026)
Vis-à-vis domestic industry	Five-element response package: export diversification, economic response package, trade defence and competitiveness measures, working-capital support, AGOA facilitation (DIRCO / DTIC 2025); CAEPA bilateral framework with China signed February 2026 opening zero-tariff agricultural access from 1 May 2026 (DTIC 2026)	No gender impact assessment of diversification measures; no minimum wage compliance requirement linked to working-capital support; NAMC's Asian-market initiatives have benefited large-scale commercial producers rather than Black women growers (interviews 2026)
Vis-à-vis workers	No specific worker-directed measure included in the five-element response; no UIF access provision for workers whose seasonal employment was curtailed	Response is gender-blind: an apparently neutral package that distributes adjustment costs unevenly because women and men have different roles, needs, and exposures (UNCTAD 2022). No women's organisations or gender bodies were consulted in preparing the response

Tab. B

Industry Responses / Demands

Actor	Response	Gendered dimension
CGA / CGDC	CGA documented record 2025 season (203.4 million cartons; 2.47 billion US dollars export earnings); CGDC shifted strategy from supporting all 117 Black growers toward concentrating resources on approximately 19 growers judged most commercially viable (Chisoro / Landani 2024)	CGDC's concentration strategy is a distributional choice with gendered consequences: the eight Black women growers are less likely to meet commercial viability thresholds, given capital and network barriers.
NAMC	Began designing a Citrus Transformation Scheme; steered market diversification toward Asian markets	Asian-market initiatives operate at aggregate industry level; benefits accrue primarily to large-scale commercial farms rather than Black women producers or seasonal workers (interviews 2026).
Packhouses / commercial growers	Expedited 2025 shipments ahead of tariff entry into force; absorbed tariff shock in 2025 through pre-existing contracts	Where cost pressure is absorbed at farm level, the adjustment mechanism is typically contract degradation i.e., shifting workers from permanent to piece-rate arrangements, which disproportionately affects women.
SIZA	Continued social and environmental monitoring programme; two Critical Alerts issued against citrus suppliers for failure to pay the seasonal minimum wage (SIZA 2025)	Audit findings are not publicly available in sex-disaggregated form; women's concentration in piece-rate roles means non-compliance with minimum wage provisions affects them disproportionately.

Worker Responses / Demands

Tab. C

Actor	Response	Gendered dimension
Trade unions	No sector-specific bargaining council for seasonal agricultural workers exists; collective bargaining coverage in seasonal agriculture is low (CGE 2025; Labour Relations Act 66 of 1995).	Absence of social dialogue infrastructure means women seasonal workers, the most numerous and most precarious group, have no formal mechanism through which to raise tariff-related employment concerns.
Seasonal workers	No documented collective response; individual coping strategies consistent with GIZ / LSE (2026) findings include cuts to food and healthcare, withdrawal of children from school, intensification of subsistence activities, and increased reliance on community reciprocity networks.	Women assume the role of household crisis managers across all three Moser roles simultaneously; unpaid care work intensifies in both hours and psychological strain when income falls.
Black women growers	Operating within existing CGDC and NAMC frameworks but facing capital, collateral, and network barriers that limit effective participation in tariff-response initiatives	The country's eight Black women growers face a compound disadvantage: the tariff shock exacerbates pre-existing asymmetries in capital access, packhouse relationships, and market intelligence that white commercial growers do not face (Chisoro / Landani 2024).

4.
Gendered Impact of Dual Trade Shocks in the Garment and Textiles Sector in Madagascar

Sabrina Salameh

Abstract

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

4.1 Introduction

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

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

Box 1

A note on data

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

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

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

Madagascar launched its Zone et Entreprises Franches (ZEF) programme in 1989 to diversify from agricultural commodities into manufacturing (Bernard, 2011).[1] With ZEF's establishment, the G&T sector rapidly grew into the country's largest formal employer, driven by low wages and preferential US market access under AGOA, conditional on low-value-added supply (Bernard, 2011; Marslev & Whitfield, 2023). These conditions locked Madagascar's sector into the cut-make-trim (CMT) assembly stage of the global value chain (Morris & Staritz, 2014; ILO, 2023), positioning supplier firms as low-cost assemblers in relationships defined by buyer dominance, with competition on labour costs alone (Gereffi & Frederick, 2010). Today, ZEF firms employ 180,000 workers, 57 per cent of whom are women,

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

Box 2

A Snapshot of Madagascar's Garment and Textile Sector

2nd largest sub-Saharan garment exporter to the US market	**Garment and textile sector accounts for 20 %** of the country's GDP (2021)	**Madagascar exported approximately 401.5 million** US dollars in G&T goods to the US (2025)	**Garment and textile sector directly employs 180 000** workers, and 400 000 indirectly (2021)	**Women workers represent 57 %** of the sector's workforce (2024)

mostly based in the capital, Antananarivo (GEFP, 2024; Nicita, 2008).[2]

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

Insufficient Income Levels

Employment in ZEF firms has brought measurable improvements for women workers relative to their most likely alternative: the informal sector. ZEF hourly earnings are 77 per cent higher than informal wage work (Glick & Roubaud, 2006). At the same time, approximately 43 per cent of workers across the value chain remain below the poverty line, against a national backdrop in which 80 per cent of Madagascar's population lives in extreme poverty (ILO, 2023; Poverty Evidence, 2026). This suggests that employment gains remain real but insufficient to lift most workers out of poverty. Wages are rarely enough for workers who support more than one dependent alone and afford little protection against economic shocks – a vulnerability corroborated by one government official, who noted in an interview that any shock risks pushing workers back into extreme poverty (Marslev & Whitfield, 2023; KII1).[4] To compensate for insufficient incomes, most workers resort to paid overtime, with women accounting for 67 per cent of those who work extra hours (ILO, 2023).

Precarious Working Conditions

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

Limited Career Progression

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

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

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

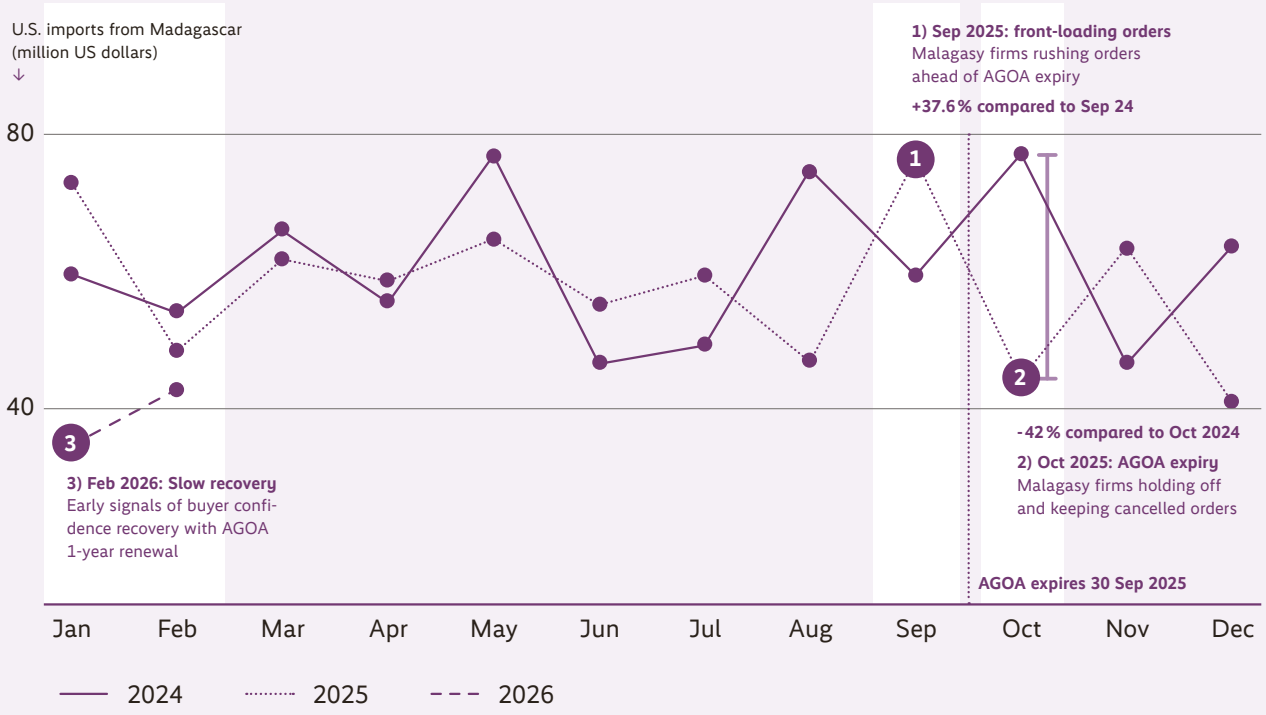
4 Interview conducted with a representative of Ministry of Industrialisation, Trade and Consumer Affairs and former chair of WTO National Trade Facilitation Committee.

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

Fig. 1

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

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



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

Limited Worker Bargaining Power

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

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

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

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

Trade Impacts

Figure 1 traces US imports from Madagascar between January 2024 and February 2026, revealing a pattern of volatility driven by US tariffs as well as by their interaction with AGOA

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

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

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

ZEF Firms' Response to Dual Trade Shock

US-dependent supplier firms reported being compelled to accept renegotiated terms heavily skewed toward US buyers, such as absorbing legal and logistics costs previously covered by buyers to avoid losing orders (KII3).[10] This reflects a broader pattern in asymmetrical buyer-supplier relations, whereby suppliers routinely accept unfavourable terms during economic shocks (Venis, 2020).

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

Impacts on Women Workers and Society

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

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

Box 3

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

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

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

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

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

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

12 This is a common phenomenon.

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

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

15 Interview with a Malagasy feminist economist (KII5).

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

4.4 Trade Policy Response: Negotiations and Missing Worker Perspectives

Madagascar's Diplomatic Efforts

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

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

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

Collective Organising and Women Workers' Absence from Trade Negotiations

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

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

4.5 Gender-transformative Solutions to Trade

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

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

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

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

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

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

1. **Strengthening existing social protection policies and programmes.** This involves enhancing enforcement of labour laws and social protections (e.g. National Social Insurance Fund (CNAPS), Malagasy Professional Training Fund (FMFP)) led by tripartite actors (i.e. government, employers' and workers' organisations); improving the safety nets provided to workers by introducing shock-responsive social protection measures that shield workers from bearing the personal cost of macroeconomic volatility and backsliding into extreme poverty; leveraging tax-incentive conditionalities stipulated for Export Processing Zone (EPZ) firms to generate revenue for social protection and care infrastructure (KII6).[21]

2. **Trade architecture and negotiation.** This involves strengthening Madagascar's negotiating position by building bloc-level bargaining through the Southern African Development Community (SADC) and the African Continental Free Trade Area (AfCFTA); creating space for feminist, worker-centred perspectives in trade negotiation channels, while ensuring employer proactivity in securing trade deals for the country. This also requires rethinking trade success measures beyond export volume alone, instead considering the well-being of the workers who generate it.

3. **Market diversification and upskilling.** This entails departing from US dependence in Madagascar's export industries by diversifying products and markets over time. Diversification toward the EU and intra-African trade offers a path toward greater resilience, but only if the transition is strategically planned with gender justice and long-term economic resilience in mind. Beyond diversifying its export markets, Madagascar's offer should be improved by upgrading its position in value chains to reduce price-taker status and increase bargaining power with buyers. Upskilling women into higher-value roles is one way to reduce their vulnerability and strengthen their individual and collective bargaining position, requiring the redesign of national training schemes such as FMFP to reflect this decisive gendered direction.

4. **Collective bargaining and voice.** That involves strengthening worker voices in trade and labour policy channels, and workers' rights for freedom of association and collective bargaining. Strengthening organised action, addressing union fragmentation, and creating formal channels for worker representation in trade negotiations are all necessary steps.

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

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5.
Women Workers in a Continuum of Risks

Impacts of Tariff Shocks in the Garment Sector in Bangladesh and India

Ranja Sengupta and Shraddha Chigateri

Abstract

This paper[1] examines the gendered impacts of the unilateral tariffs imposed by the Trump regime on the feminised, export-oriented garment sectors in India and Bangladesh. Injecting further volatility into a systemically unequal and fragile multilateral trade system, they disproportionately impact women workers. As costs and production pressures are pushed down the global garment supply chain, women workers in both countries face loss of jobs, uncertainty, lower social security benefits, and weaker bargaining power. Seeking to address and reverse these gendered impacts, the paper proposes a multi-pronged gender-transformative approach, including fair trade agreements, greater brand accountability, and stronger regional and global workers' alliances.

5.1. Introduction

The tariffs imposed unilaterally by the Trump regime since 2025 have wreaked havoc and increased volatility in an already systemically unequal, fragile multilateral trade system. They have exacerbated the vulnerability of many women working in precarious conditions in export-oriented markets in the Global South, who already face the differentiated impacts of unequal trade regimes. While emerging evidence has pointed to the tariffs' significant impacts in this context, including in export-oriented, labour-intensive sectors such as the ready-made garment (RMG) sector (Raman, 2025; Preetha, 2025; News Desk, 2025; Belrhiti *et al.,* 2026), these impacts have not been probed further in South Asia. This paper seeks to remedy this by contextualising and examining the tariffs' gendered impacts on the garment sector in India and Bangladesh. The sector was chosen as it is a significant export-oriented sector that has faced high tariffs since 2025, as well as being highly feminised, employing high proportions of marginalised women in low-skilled, low-paying jobs.

Drawing on both secondary research as well as seven Key Informant Interviews (KIIs) with researchers and leaders of collectives and unions in the sector who work alongside women workers in the two countries, the paper centres women' experiences at work to understand how the risks, pressures, and costs of trade uncertainty are gendered and unevenly distributed.[2] It examines how women workers face further precarity during crises, such as the recent imposition of tariffs, when cost and production pressures are pushed down the garment supply chain in a global trading system that relies on extractive, exploitative monopsonistic relationships between brands (buyers) and contract manufacturers (suppliers), and between manufacturers and a feminised workforce (Nathan *et al.,* 2025; Mezzadri and Srivastava, 2015). Through this analysis, the paper contributes to existing research on unfair impacts of trade regimes and how weaponisation of tariffs impacts the lives and livelihoods of women workers in export-oriented sectors in the Global South.

5.2 Gendered Work in the Garment Sector in Bangladesh and India

5.2.1 The Garment Sector in Bangladesh and India: An Overview

The ready-made garment sector forms the backbone of Bangladesh's economy, employing about four million workers in nearly 4,000 factories (Akbar, 2025). Its importance for Bangladesh's economy has grown over the last few decades, exponentially increasing its contribution to the country's total export earnings from about four per cent in 1984–85 to approximately 81.5 per cent in 2024–2025 (BGMEA, 2026). In 2024–25, Bangladesh was the world's second largest garment exporter (News Desk, 2025), earning 39.35 billion US dollars from RMG exports which constituted approximately 8.5 per cent of the country's nominal GDP (Nasrin, Hossain, and Ahmed, 2025). These RMG exports are primarily geared towards the European Union (EU) (approximately 50 per cent), with the US and UK also constituting significant proportions of the trade at 20 per cent

1 We gratefully acknowledge input and feedback on earlier drafts of this publication from Fahmida Khatun. The authors bear sole responsibility for the opinions expressed in this publication and any errors.

2 See appended list of interviews. Given the time constraints for the research, the study draws on the experiences of people who work with garment workers in the two countries to provide a bird's eye view of conditions for women rather than direct interviews with the women workers. While the paper draws primarily on the interviews to understand the tariff regime's impacts, it also triangulates this information through both secondary data and analyses (where available), including a survey of workers by Asian Floor Wage Alliance (Najib 2026), as well as through corroboration between interviews.

and eleven per cent respectively (BGMEA, 2026). Garment imports from Bangladesh constitute over 10.5 per cent of total US apparel imports (Mirdha, 2026).

In India, although the textile and garment industry accounts for a smaller share of exports than in Bangladesh, the sector nevertheless plays a significant role for the national economy, accounting for roughly 2.3 per cent of India's GDP and 13 per cent of industrial production (Press Information Bureau, 2025b). In 2024–25, India's textile and apparel exports were approximately 37.8 billion US dollars, about 8.6 per cent of India's total exports (Fair Wear Foundation, n.d.). An estimated 45 million people are directly employed in the sector and a further 60 million are indirectly employed across the supply chain, with 80 per cent of the sector's capacity in thousands of micro, small, and medium enterprise (MSME) clusters across the country (Press Information Bureau, 2025b). The sector in India is characterised by regionally specialised production clusters engaged in diverse production and labour practices and differentiated product specialisation (Mezzadri, 2014; Fair Wear Foundation, 2016).[3] In 2024, the US was the largest market for Indian textiles and garment exports, with a share of about 28.51 per cent, followed by the EU (19.57 per cent) (CITI, n.d.). In value terms, India's dependence on US markets is high with 10.47 billion US dollars' worth of textiles and garments exported to the US in 2024 (Ibid). Imports of Indian apparel constitute approximately 6.6 per cent of total US apparel imports.

The garment industry in India and Bangladesh is shaped by a buyer-driven value chain; clothing brands, mostly multinational companies (MNCs), drive the entire system, and largely determine production, employment, and export outcomes.

5.2.2 Gendered Dimensions of the Garment Sector

Growth in Bangladesh's garment sector over the last few decades has generated substantial employment opportunities for women, significantly contributing to higher overall female labour force participation.[4] In recent years, however, the proportion of women workers in the sector has steadily declined.[5] Women exit the sector largely due to the difficulty of balancing their paid work and unpaid care work responsibilities, as well as the poor conditions in their workplaces, including harassment, long working hours, and low salaries (Rahman *et al.,* 2023; Matsuura and Teng, 2020).[6] Discriminatory and hostile conditions for women at work include a lack of basic facilities, such as safe accessible toilets, access to clean drinking water, and menstrual hygiene facilities (Akbar, 2025). Although notoriously underreported, gender-based violence is a significant issue in the sector (Staff Reporter, 2023; Akbar, 2025). Women workers also contend with deep-seated systemic issues including unequal care burdens and insufficient daycare in factories, with reports that women had to leave two to three-month-old babies at home while working (KII 1).[7] Additionally, many women lack financial literacy skills, or a complete primary education, which leaves them vulnerable to economic shifts (Akbar, 2025).

The sector is also characterised by gendered occupational segregation with women working mainly in sewing, winding, and finishing; 85 per cent of women work in low-paid roles with far fewer women in managerial and staff positions (ILO, 2017; Matsuura and Teng, 2020). Studies estimate that the wage disparity between women and men is between eleven and 30 per cent (ILO, 2017; Akbar, 2025). Notwithstanding its vital contribution to the economy, the sector continues to be besieged by exploitative working conditions: unlawful firing, wage theft, excessive work hours along with denial of leave and rest, poor occupational health and safety, as well as restricted rights to freedom of association (FOA) and collective bargaining in supplier factories (Islam, 2022). Although legal and administrative reforms were undertaken after the Tazreen Group factory fire in 2012 and the Rana Plaza tragedy in 2013, enforcement of regulations is hindered by legal ambiguities and insufficient administrative resources (Sarwar, 2025).

In India, significant numbers of women work in the garment sector, with differing proportions in the various garment clusters around the country. In northern India, the sector employs more male workers, whereas in the south, about 80–90 per cent of workers are women (Fair Wear Foundation, 2016; Mezzadri, 2014). Even in the northern clusters, however, there are significant numbers of women workers, mainly in home-based production, as family helpers, or as individual homeworkers for specialised tasks such as embroidery, and thus obscured by statistics. In factories, women mainly take on semi-skilled roles, such as checking, thread cutting or packing, with very few employed as tailors (Mezzadri, 2016). In this sense, the garment sector in India displays both »the feminisation of factory production

3 In the north in Delhi National Capital Region (NCR), the cluster comprises a mix of formal and informal, factory-based and workshop or home-based units, whereas in clusters in the south such as in Bangalore, work is mostly in factories employing on average 2,000 workers, with a workforce of 500 to 1,000 in smaller factories (Mezzadri, 2014; Fair Wear Foundation, 2016). This has begun to change in Bangalore, with more piece-rate workers in factories (KII with Deepika Rao, Executive Director, CIVIDEP, 14 April 2026, hereinafter KII 2).

4 In 2025, the labour force participation rate (LFPR) for women stood at 39 per cent after having peaked at 44 per cent in 2022 from a low of 24 per cent in 1990 (World Bank, 2026).

5 A recent estimate shows a decline from 80 per cent in the 1980s and 1990s to 53.65 per cent in 2021 (Rahman *et al.,* 2023).

6 Additionally, although automation in the sector is still low to medium in Bangladesh and varies across tasks and apparel types, it has disproportionate impacts on women, unskilled, and older workers who face heightened vulnerability to worker displacement (Rahman *et al.* 2025; also KII with Nazma Akter, Executive Director, Awaj Foundation, 11 April 2026, hereinafter KII 1).

7 A recent time-use survey highlighted the extent of the unequal care burdens faced by women. It found that women in Bangladesh spend 7.3 times as long on unpaid care and domestic work as men per day (Bangladesh Bureau of Statistics, 2023).

(in the south), and the feminisation of processes of value addition (in the north)« (Mezzadri 2016, 8).[8]

As in Bangladesh, in India intense competition for export markets, companies' profit-driven targets, purchasing practices as well as gender norms result in exploitative working conditions in the sector (Nathan *et al.,* 2025). This is manifested in low wages and minimum wage violations, long working hours, inadequate breaks, non-payment, underpayment, or delayed payment of wages, unpaid forced overtime, occupational health and safety hazards, poor care facilities at work, and high levels of verbal abuse and threats (Ceresna-Chaturvedi and Kumar, 2015; Sisters for Change, 2016; Nathan *et al.,* 2025).[9] Physical violence and sexual harassment of women is widespread (Sisters for Change, 2016; Saha, 2014). Women workers also face high levels of surveillance, including through the use of Artificial Intelligence (KII with A, Executive Director, Social Organisation for Garment Workers, 17 April 2026 and KII with Raju, General Secretary, Karnataka State Garment and ›Textile Workers' Union‹, 27 April 2026).[10] Exploitative wage structures are also rampant in the industry, with differential wages in the sector, not just in terms of differentials between men and women, but also between one industrial cluster and another (Ganguly, 2013).

5.3. Impacts of US Tariffs

From March 2025, US President Donald Trump announced plans for broad-based tariffs on most US trading partners, triggering a major shock to global trade that persists to date.

5.3.1 The US Tariff Regime

Table 1 below shows the changing US tariff rates for Bangladesh and India between 2 April 2025 and March 2026.

Both Bangladesh and India faced significant uncertainty due to the imposition of high ›reciprocal‹ tariffs between April 2025 and February 2026, although these were not fully implemented initially and were later reduced for Bangladesh. At first India was in a relatively favourable position compared to competitors such as Bangladesh, Indonesia, Sri Lanka, and Vietnam. However, this advantage quickly disappeared when India was subjected to an additional 25 per cent tariff in August 2025 after progress on the proposed bilateral deal slowed,[11] and as a punitive response to India's purchase of Russian oil.

These additional tariffs remained in force until they were struck down by the US Supreme Court on 24 February 2026. The US administration subsequently introduced a ten per cent tariff on an MFN basis under Section 122 of the 1974 Trade Act, effective until 24 July 2026, resulting in a total average tariff burden of around 25 per cent (15 plus 10) for both Bangladeshi and Indian garment exports.[12]

India experienced a longer period of very high US tariffs, especially between August 2025 and February 2026, and had substantial dependence on the US market, with a 29–30 per cent share in total Indian textile and garment exports. Bangladesh's exposure to the threat of a 37 per cent tariff was comparatively shorter and later its 20 per cent tariff remained relatively competitive. However, Bangladesh was vulnerable given the garment sector's extremely high share in its total exports.

Overall, the US tariffs severely exacerbated tensions and competition among garment and textile exporting countries in Asia, which account for 60.72 per cent of global exports, including Bangladesh, India, Vietnam, China, Cambodia, Pakistan, Sri Lanka, and Indonesia. This shifted countries further away from collaborative approaches and pushed them towards securing trade deals with the US (→ section 5.3.3 on page 38) at any cost.

5.3.2 Impacts on the Garment Sector in Bangladesh and India: Volatility, Uncertainty, Production, and Employment

According to data from the US Office of Textiles and Apparel (OTEXA), Bangladesh garments exports to the US fell by around 11.6 per cent (647.7 mil US dollars) year on year in October 2025 (TBS Report, 2026b), and by 14.5 per cent (USD 526.5 mil US dollars) year on year in November 2025 (Munni, 2026), due to the tariffs. There is no clear secondary data but there seemed to be a moderate decline in production leading to a slowdown. The main impact on production and exports stemmed from cancelled orders and in some instances, demands for discounts from the brands. Already finalized shipments were in some cases cancelled with stocks left lying at the ports (KII with Wiranta Ginting, Abhiramy S, and Haris Najib, Asia Floor Wage Alliance, 14 April 2026).[13] As orders have a lead time, production continued between April and early August 2025, but order cancellations due to the uncertainty created by the threat of a 37 per cent tariff affected most supplying companies, with resultant threats of job losses (Paul and Johora, 2025). There were some reports

8 The number of migrant women in garment work has also grown significantly, particularly in the clusters in Bangalore; in garment factories young women migrants from rural parts of Jharkhand, Bihar, Odisha, West Bengal, Uttar Pradesh face both poor working and living conditions, with surveillance and severe restrictions on mobility (Fair Wear Foundation, 2016; Ray and Peepercamp, 2017).

9 Similar to Bangladesh, the latest time-use survey in India has found that the burden of care falls disproportionately on women, who spend an average of 7.1 hours per day on unpaid care and domestic work, compared to 2.7 hours for men (Press Information Bureau Delhi, 2025).

10 Hereinafter KII 4 and KII 7 respectively.

11 One of the key reasons was India's sensitivity in agreeing to tariff cuts demanded by the US for its agriculture and dairy sectors which impact millions of small-scale producers and workers.

12 This study does not cover the period after announcement of the Section 301 investigations.

13 Hereinafter KII 3, which also included information based on primary research done by AFWA across Bangladesh, India, Sri Lanka, Vietnam, Indonesia, and other countries.

Tab. 1

A Chronology of US Tariffs Imposed on Bangladesh and India (April 2025 to March 2026)

Country	Date	US tariff rate announced	Description	Effective period
Bangladesh, India	–	0–32 % (avg. 15 %) Most Favoured Nation (MFN) rate in garments sector	–	Prior to 5 April 2025
Bangladesh	2 April 2025	MFN + 10 % baseline tariff + 37 % ›reciprocal‹ tariff (Executive Order (EO) 14257)	›Reciprocal‹ tariff was announced but on hold till 7 August 2025	5 April to 7 August 2025
	31 July 2025	MFN + 20 % ›reciprocal‹ tariff (EO 14326)	Applied; reduction based on the start of talks on a bilateral trade deal	7 August 2025 to 24 February 2026
	9 February 2026	MFN + 20 % ›reciprocal‹ tariff (19 % tariff rate announced under trade deal but not implemented)	Announced: further reduction under a bilateral trade deal	–
India	2 April 2025	MFN + 10 % baseline tariff + 26 % ›reciprocal‹ tariff (EO 14257)	›Reciprocal‹ tariff was announced but on hold till 7 August 2025	5 April to 7 August 2025
	31 July 2025	MFN + 25 % ›reciprocal‹ tariff (EO 14326)	Adjusted ›reciprocal‹ tariff rates	7 August to 27 August 2025
	6 August 2025	MFN + 25 % ›reciprocal‹ tariff + 25 % additional ›reciprocal‹ tariff (EO 14329)	Additional 25% tariff imposed on account of India's purchase of Russian oil and as India did not agree to the bilateral trade deal terms set by the US	27 August 2025 to 7 February 2026
	2 February 2026	MFN + 25 % ›reciprocal‹ tariff (18 % announced under trade deal but not implemented)	Announced reduction of tariff rate based on announcement of a bilateral trade deal and India's promise not to buy Russian oil	7 February to 24 February 2026
Bangladesh, India	20 February 2026	MFN + additional 10 % MFN rate (to be applied till 24 July 2026)	Supreme Court struck down the ›reciprocal‹ tariffs on 20 February, effective 24 February 2026 and President Trump imposed additional MFN tariff under Section 122 of the 1974 Trade Act, effective 24 February to 24 July 2026 (trade deals not yet implemented)	24 February to end of May 2026
Bangladesh, India	11 and 12 March 2026	–	Announcement of investigations under Section 301 of the US Trade Act based on excess capacity and forced labour	–

of closures or reduced production in smaller companies that were already struggling, leading to a significant drop in their workforce (KII with Babul Akhter, General Secretary of Bangladesh Garments and Industrial Workers Federation, 21 April 2026 and KII with Syed Sultan Uddin Ahmmed, Executive Director, Bangladesh Institute of Labour Studies, 25 April 2026).[14]

This came at a difficult time as Bangladesh is set to graduate[15] from its Least Developed Country (LDC) status in 2026 and faces significant challenges in retaining preferential access to major garments markets, including the EU, UK, Canada, Japan, and the US. In addition, although the country is trying to conclude a significant number of bilateral trade agreements, the sector must also comply with stricter rules of origin and labour and environment standards in order to retain its traditional markets which will trigger higher costs and technology requirements that may be prohibitive, especially for SMEs (Islam, 2026).[16] All these factors severely exacerbate the challenges to the sector and to Bangladesh's overall economy, with women workers likely to bear a disproportionate share of adjustment costs (→ section 5.2.2 on page 35).

In India, given the protracted period of extremely high tariffs, the impact was clearly visible. In October 2025 OTEXA reported a 29 per cent drop in textile and garments exports. A December 2025 survey by the Confederation of Indian Textile Industry (CITI, 2026) found that nearly one-quarter of respondents reported a turnover decline of over 50 per cent in October–December 2025 compared with the preceding quarter and a further 50 per cent decline was expected in January-March 2026. Around 60 per cent of respondents reported that export orders were shifted to other garment producers such as Bangladesh and Vietnam. 82.6 per cent of respondents experienced sharp increases in order reductions, 73.9 per cent noted discount demands, and 48 per cent reported cancellations or postponements, underscoring the severity of the demand shock. The burden fell disproportionately on MSMEs, which accounted for 59 per cent of survey respondents.

A survey of 145 workers across 46 factories in September 2025 by Asia Floor Wage Alliance (AFWA) (Najib, 2026) showed that the three main hubs in Karnataka, Delhi NCR, and Tamil Nadu (Tirupur) faced major disruptions. In the Delhi hub, which has the highest US exposure, more than 50 per cent of factories faced reduced shifts, fewer workers on the line, partial stoppages, and idle production lines. In Karnataka, a similar situation impacted 50 per cent of factories while one third of factories faced disruptions in Tamil Nadu. AFWA also found massive cancellations of orders by brands and demands for discounts (often up to 20 per cent), thus passing on costs to supplying companies, which in turn passed these on to their workers (Kumar, 2025; Chua, 2025).

5.3.3 Uncertain Future: Prospects for the Agreements on Reciprocal Tariffs (ART)

At the time of writing, the status and exact contents of the US-Bangladesh Agreement on Reciprocal Tariffs (BART), signed on 9 February (White House, 2026a), and the US-India ART, announced on 6 February 2026 (White House, 2026b), are not fully clear, as the US Supreme Court struck down the US reciprocal tariffs. As of February 2026 news, the agreements are supposed to bring down US tariffs to 19 and 18 per cent for Bangladesh and India respectively, with these rates to be imposed on top of the pre-April 2025 MFN US tariff rate for each product line.

Through these Agreements, Bangladesh and India are expected to make massive concessions to the US in several areas covering both tariff and non-tariff issues,[17] whereas the tariff gains are meagre, if any, given the current dynamics. Even at a reduced level, the US tariffs will still represent at least a doubling compared to MFN rates before April 2025. Rates may be subject to erratic changes at any point in the future, leading to an era of uncertainty regarding trading positions and competitiveness.

Moreover, the ARTs include challenging provisions for the garment sector in both countries by including zero-tariff access to US markets but only if US cotton is used as inputs (see White House, 2026a), even when it is more expensive compared to domestic or alternative sources. Though Bangladesh does not produce cotton, shifting from Indian to US cotton may take time, making it difficult for small enterprises to survive the tariffs in the meantime (KII 5). Being required to import US cotton creates additional challenges for India as it will reduce demand for domestic cotton. As recognised by workers' organisations (KIIs 4 and 7), this may intensify competition not only among countries but also among workers across countries and among sectors within the same country, including between garment workers, cotton farmers, and industrial cotton workers.

Since currently the Section 122 tariffs of 10 per cent are applied to all countries on an MFN basis and are temporary, Bangladesh and India receive no special advantage

14 Hereinafter KII 5 and KII 6 respectively.

15 The new government in Bangladesh has officially applied to the UN for a three-year extension of its graduation but the final decision is awaited at the UN General Assembly.

16 Reports forecast a decline of 14.3 per cent and a rise in overall tariffs of 8.9 per cent on Bangladesh's total exports (World Trade Organization, 2020) of which 84 per cent is garments, as well as a decline of 11.6 per cent in garment exports (Rahman *et al.,* 2022) as a result of graduation, which again will impact workers, especially women.

17 The BART text and the US-India Joint Statement indicate provisions such as zero-duty access for US exports on a range of products and services including in vulnerable sectors like agriculture and dairy; guaranteed quantities of exports from the US and investments in the US; concessions on a number of areas such as fisheries subsidies, intellectual property rights, e-commerce moratorium and domestic taxation of US digital corporations, as well as on standards and technical barriers; liberalisation of government procurement; and even restrictions on partner countries' trade agreements with third countries, with significant implications for their policy sovereignty.

from the US deals and may even face disadvantages if competing countries do not sign such agreements. In March the US initiated Section 301 investigations for sixteen countries based on »structural excess capacity and production in manufacturing sectors« (Press Office, 2026), and later for another sixty countries concerning »forced labour« (Office of the United States Trade Representative, 2026), a further pressure tactic to secure adherence to the highly unbalanced ARTs.

It remains to be seen whether Bangladesh and India will ultimately conclude and implement the US ARTs and on what terms. In either case, the future appears extremely uncertain, with the garment sector in both countries facing an escalation of existing crises, further aggravated by the Covid-19 pandemic and the Russia-Ukraine war. For Bangladesh, the risks are even greater due to graduation-related challenges, the political turmoil of 2025, and marked dependence on garment exports. The sector's future in both countries will depend not only on trade relations with the US and diversification of export markets, but also on how competing countries act. Additionally, the US–Israel–Iran war poses a serious threat to fuel supplies, affecting production, input costs, and incomes.

5.4 The Impact on Women Workers

The impacts of the US tariffs affected garment-sector workers in Bangladesh and India in multiple ways and thus had consequences for many women, given the significant proportion of women in the sector in both countries. In addition, there were several gender-specific impacts due to the way women engage with the sector or their gender-based vulnerability. As quality secondary data is scant, this study has used primary accounts from workers' unions, civil society organisation, and thinktanks (KIIs) for the analysis.

Bangladesh
First, closure or downsizing of small factories directly affected women's jobs (KII 5). Secondly, if regular monthly employment continued, cuts in overtime significantly affected incomes; workers are very dependent on this supplementary income even to meet basic household expenses (KIIs 1 and 5). In particular, this had cascading impacts on women workers' ability to pay for food and their children's education. Thirdly, one very interesting feature in Bangladesh was suppliers' use of uncertainty and volatility to create fear and anxiety in order to exert greater psychological control over workers, curtailing their bargaining capacity. In some cases (KIIs 5 and 6), workers were told not to take leave, to do unpaid overtime work, and forego benefits. There were instances of companies requesting the government to allow exemptions to labour law provisions, such as contract-based job guarantees and payment of wages (KII 6).

Garment supplier companies' political influence made it easier for them to pass on the brands' and suppliers' tariff-related costs to workers, with jobs targeted primarily in lower-skilled segments. In addition, as female unionization rates are relatively low (Islam, n.d.), it comes as no surprise that women workers disproportionately faced the brunt of cutbacks. Workers, especially women workers, already threatened by the introduction of automation as a replacement tool (Rahman *et al.,* 2025), find that continued crises in the sector have taken away the bargaining power they need to ensure their jobs and incomes or secure a voice in policy decisions related to the sector.

India
In India, women workers were likewise disproportionately impacted, as they constitute 60–80 per cent of the workforce in the sector. The silent and often invisible retrenchment of workers in India (KII 3) was manifested through various strategies.

First, closures of some factories led directly to job losses. Secondly, migrant workers were laid off by being told not to report back after going home on leave (KIIs 2, 3, 4, and 7). Their housing and benefits were curtailed. Migrant workers are almost entirely women, are less organised, and have more limited bargaining power than local workers (Mohan, 2017). Thirdly, the most recent hires and disabled workers were dismissed first and their social security benefits were cut. Fourthly, employer-provided transport services were withdrawn, forcing local workers in remote locations to take involuntary leave (KIIs 2, 3, and 4). Fifth, sectors where women make up much of the workforce, such as production and sewing work, were targeted first for job cuts; there was also a 50 per cent reduction in overtime, especially by women (Najib, 2026).

Sixth, piece-rate work, which involves around 10 per cent of workers and is undertaken almost completely by women, was stopped. In addition, subcontracting and outsourcing activities like stitching and washing were also halted (KIIs 2, 4, and 7). These are already some of the most informal employment segments, within which workers, again mostly women, operate without wage guarantees, social security benefits, labour inspections, or legal protection.

As in Bangladesh, the atmosphere of fear and misgivings generated by tariff uncertainty was transmitted to workers through increased productivity targets and production pressures. Workers were required to work longer hours for the same wage, denied leave or asked to undertake compensatory work, while new recruitment and overtime benefits were restricted (KIIs 2 and 4).

Beyond the direct effects, additional impacts were specifically gendered in both India and Bangladesh. This was more visible in India due to the prolonged high tariffs. Existing adverse workplace conditions, (gender-based harassment, abuse, sexual harassment, and violence) worsened considerably (KIIs 2, 4, and 7). Roles such as junior tailors and assistants, where women proliferate, were targeted first, while relatively skilled positions generally held by men, such as supervisors and master tailors, were retained.

High accommodation and transport costs along with loss of paid overtime forced more women to leave employment as they could not afford to live near factories or travel to their jobs, while in addition childcare facilities remained inadequate (KII 4 and 7). This increased women's care burdens. Interviews also revealed growing household debt and reduced expenditure on health and children's education, often dependent on women's earnings (KII 4). Women also faced lower mobility in searching for alternative work opportunities (Najib, 2026). Most importantly, women who had gained recognition and standing within households through paid work lost that foothold, which was a major erosion of their socio-economic identity within and outside the household (KIIs 4 and 5).

5.5 Responses to the Tariff Changes

5.5.1 Government Responses

Government responses in both countries, as mentioned above, focused primarily on trade diversification and attempting to secure a trade deal with the US. In India, diversification included securing additional FTAs, most notably with the EU, drawing up a comprehensive forty-country market diversification strategy, as well as engaging in efforts to propel domestic consumption (Press Information Bureau, 2025a). Additionally, the government provided a range of incentives to the industry to encourage investment and enhance the ease of doing business. The government extended the Export Obligation (EO) period in the textile sector from six to eighteen months, revised the Product Linked Incentive (PLI) scheme by reducing entry barriers and financial thresholds for setting up new businesses, introduced an import duty exemption for cotton, rationalised the Goods and Services Taxes (GST) rate across the textile value chain, and approved the Credit Guarantee Scheme for Exporters (CGSE), which provides 100 per cent credit guarantee coverage to lending institutions that extend additional credit facilities to eligible exporters (Press Information Bureau, 2025a).[18] There seems to have been no effort to offer direct relief to workers impacted by the tariffs or to directly address the concerns raised by workers' collectives and unions.

In Bangladesh too, the government focused on securing a trade deal with the US. Additionally, in response to requests by the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) the government provided some relief to the sector for the cumulative crises by expediting release of pending cash incentives to improve factory cash flow and providing soft loans or low-interest loans equivalent to six months of wages to ensure timely payment of salaries and bonuses to workers (TBS Report, 2026a). Before the Eid break in 2026, it provided soft loans to garment-manufacturing companies (KII 5 and KII 6; also see Mowla, 2026); however, we have no data on whether it reached the workers.

5.5.2 Responses by Brands / Buyer Companies

Very soon after the Trump administration's imposition of the tariff regime, US brands reported declining sales as a consequence of the tariff hikes. 70 per cent of US fashion brands surveyed in a study by Delaware University had delayed or cancelled some sourcing orders (Lu, 2025). Other studies too found that buyers rapidly reassessed sourcing strategies and production costs, pushing for orders to be paused or cancelled and requesting price reductions (or ›discounts‹), or to a significant extent passing on the increased tariffs to suppliers in Bangladesh and India (Business and Human Rights, 2026; Uddin, 2025; Hussain, 2025). Transfer of risks and costs to suppliers and subsequently workers was noted in our interviews in both Bangladesh and India. We found no evidence of the brands offering to cover any of the losses borne by suppliers or workers.

5.5.3 Responses by Supplier Companies

In response to the tariffs, companies and company representatives, such as the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) in Bangladesh and the Apparel Export Promotion Council (AEPC) in India, sought relief from the government for moratoriums on repayment of existing loans or provision of soft loans, also calling for removal of import barriers (Khetarpal and Shah, 2025; TBS Report, 2026a). As we have seen above, companies in both countries shifted a significant proportion of the risks and costs due to sourcing pressures from brands onto their workers. We have not come across any reports of companies providing direct relief to workers.

5.5.4 Responses by Workers' Collectives and Unions

Workers' collectives and groups responded to the tariffs by rallying workers, reaching out to brands and suppliers to resist shifting risks and costs to workers and seeking instead to ensure their rights were protected. In some instances, they were successful in ensuring workers did not lose their jobs (KIIs 4 and 7). However, workers' collectives and union leaders also highlighted the limited scope for negotiations or protests, pointing to systemic thwarting of their right to FOA in both countries. There were some isolated examples of strategic collaboration between women workers and supplier companies in Bangladesh, which actively encouraged women workers to send letters to the US government and political groups articulating the threats to their livelihoods (KII 1), along with some instances of workers' unions and collectives writing to their national governments. However, overall, union and collective repre-

18 Export obligation rules under the Advance Authorisation scheme require companies manufacturing products, including textiles, to meet export obligations within 180 days of import clearance. This requirement was eased for the textile and garment sector.

sentatives highlighted the limited nature of organizing efforts in both countries. Our interviewees underlined that cross-country collaborations between workers' unions and collectives were few and far between, with most union activity targeted at local levels. Many interviewees did however underline efforts by groups such as AFWA to collaborate with member organisations across garment-producing countries to articulate a regional position against the tariff regime (AFWA, 2025) and recognised the need for such collaborations (KIIs 2, 3, 4, 5, 6, 7). They also noted the challenges of creating a nuanced understanding of shared concerns given the rhetoric of inter-country competition (KII 3).

5.6 Recommendations

Aggressive, weaponised use of tariffs and bilateral trade agreements by the US has caused shocks to the garment sector in Bangladesh and India. Against the backdrop of a feminized workforce already facing precarious working conditions shaped by gender norms, high production targets and export goals, the tariffs imposed by the Trump regime form part of a continuum of crises for the garment sector. In injecting further volatility and uncertainty, the tariffs disproportionately impact women workers, exacerbating their precarity. In both countries, women workers faced a mix of fear and uncertainty, along with psychological pressure, reductions in paid overtime and social security benefits, closure of smaller factories with vulnerable workers laid off, cuts in transport and hostel facilities, and curtailed bargaining power.

In the face of these gendered impacts of tariffs and unfair trade regimes in global supply chains, the following section draws on the authors' analysis and suggestions from workers' organisations and policy experts to provide some (partially overlapping) recommendations for governments, companies, global institutions, and trade unions to advance towards a gender-transformative future for women workers.

5.6.1 Actions by Governments

Trade Policy for Cooperation and Diversification Instead of Competition and Concentration
National trade policymaking must be based on cooperation rather than competition, especially among developing countries and LDCs, encouraging coalition-building among them. It should ensure deliberate, well-planned diversification of export and import markets rather than dependence on a few developed countries with differing goals. Trade policy tools, including preferential tariffs, must be used proportionately to avoid intensifying competition and division among countries and their workers (AFWA, 2025).

Process and Substance of Trade Agreements
Trade agreements signed by national governments must first ensure fair, transparent, and inclusive negotiation processes that enable participation of diverse constituencies in both design and implementation, while rejecting coercive measures (such as tariffs or the US Section 301 investigations). Secondly, the substance must deliver on and in particular not detract from national sustainable development objectives. For example, tariffs should serve as tools for development rather than as weapons and must be proportionate and fair (KIIs 3, 5, and 7). Social and environmental provisions should not become trade barriers for developing countries and LDCs (Anuradha and Dutta, 2019) that can backfire on workers and are difficult to enforce. Facilitating export market access and technology transfer for sustainable production while ensuring national policy space to promote domestic production, decent jobs, public healthcare, and education services for workers should be necessary components of trade agreements which can serve the objectives of advancing women's rights, labour rights, and sustainability.

National Labour Laws and Implementation
National governments have a responsibility to enact progressive labour laws ensuring protections such as FOA, living wages, and social protection measures including subsidised public childcare (Rahman *et al.*, 2025). Effective implementation of these laws is equally important, for otherwise they become meaningless, as seen in Bangladesh (KII 1); simply including labour related provisions in trade agreements cannot adequately protect women workers' rights.

5.6.2 Actions by the Private Sector

Role of Brands/Buyer Companies
Brand MNCs must be regulated and made accountable for their impact on suppliers and workers (AFWA, 2025) through national policies, regional cooperation, and global initiatives. Specific measures include quadripartite negotiation mechanisms bringing in buyer brands under an ILO framework (Nathan, 2023), responsible and fair purchasing practices with sufficient lead times, sustainable costing and review mechanisms, effective gender-responsive human rights due diligence, continuous assessment of working conditions and social protection measures for women workers, and setting up disaster funds for workers during crisis situations (KIIs 2, 3, 4, 5, and 7). The Business and Human Rights Treaty (BHR Treaty) process is also an important space for a human rights-centric regulatory approach to MNC activities.

Role of Manufacturers or Supplier Companies
Supplier companies must ensure effective implementation of labour codes and standards under national labour laws, promote collective bargaining and FOA, protect labour costs in negotiations with buyers and brands, and work collaboratively to prevent wage competition and the downward slide of wages.

5.6.3 Role of Global Institutions and Fora

A fair, balanced, and development-oriented global framework on trade and work is critical to advance trade interests while protecting workers' rights. As the World Trade Organization (WTO) is primarily driven by commercial interests, the

International Labour Organization (ILO), UN human rights mechanisms (including the BHR Treaty), and the Committee on the Elimination of All Forms of Discrimination against Women (CEDAW) can serve as effective spaces. Democratization of global supply chains, inclusion of unions in decision-making, and tax justice policies whereby corporate taxes support workers' welfare (KII 4) must be key priorities in these initiatives.

5.6.4 Workers' Alliance for Human Rights

Trade unions must organise beyond national borders, strengthen regional and global alliances, and provide worker-led solutions with global trade unions, think tanks, and civil society organisations (KIIs 5, 6, and 7). Forming regional alliances of women workers, expanding women's participation in unions and representative structures, and increasing awareness of their rights (Rahman *et al.*, 2023) will be important to secure the rights of women workers across borders.

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List of Interviews

1 Nazma Akter, Executive Director, Awaj Foundation | Bangladesh | 11 April 2026.

2 Deepika Rao, Executive Director, CIVIDEP | India | 14 April 2026.

3 Wiranta Ginting, Deputy International Coordinator; Abhiramy S, Regional Coordinator South Asia; and Haris Najib, National Program Coordinator, India, Asia Floor Wage Alliance | Asia-wide | 14 April 2026.

4 A., Executive Director, Social Organisation for Garment Workers (details kept anonymous on request) | India | 17 April 2026.

5 Babul Akter, General Secretary, Bangladesh Garments and Industrial Workers Federation and Founder of Bangladesh Centre for Workers' Solidarity | Bangladesh | 21 April 2026.

6 Syed Sultan Uddin Ahmmed, Executive Director, Bangladesh Institute of Labour Studies | Bangladesh | 25 April 2026.

7 Raju B Chikkanarasaiya, General Secretary, Karnataka State Garment and Textile Workers' Union | India | 27 April 2026.

6.
An Analysis of the New Geoeconomic Order for Vietnam's Women

Jennifer P. Poole[1], Amelia U. Santos-Paulino and Prachi Sharma[2]

Abstract

Using household survey and UNCTAD trade and investment data, we analyse historical trends to examine how the new geoeconomic order affects Vietnamese women in foreign-invested, export-oriented production. High tariff uncertainty for Vietnam's export industries — some female-dominated — reduces women's employment. Meanwhile, high-tech foreign investment, in part diverted from China, expands skilled formal work opportunities, with scope to raise women's job quality. We recommend a gender-responsive policy, combining trade and investment while expanding women's access to skills development and mitigating trade policy uncertainty, to realize the full promise of Vietnam's integration into global markets for a gender-just labour market.

6.1 Introduction

Despite relatively high levels of educational attainment and labour force participation, women in Vietnam remain disproportionately represented in low-income, precarious employment, with economic vulnerability often concentrated among ethnic minorities (ILO, 2025). Economic policy must address the differential impact of trade, foreign investment, and technological change on women relative to men. Neglecting to recognize the gendered impacts of global policy engagements exacerbates the distortions faced by women — both on the demand-side (e.g. discrimination in hiring and wages) and on the supply-side (e.g. unpaid care burdens or skills training).

Vietnam provides a particularly relevant case study given its export-oriented growth model, deep integration into global value chains, and high concentration of women in tradable and foreign-invested sectors. Moreover, its development pathway differs from other Southeast Asian countries. Vietnam entered the export-manufacturing era with high female labour force participation already in place, building on higher education levels than its regional peers (Banerji *et al.* 2018). In moving up the value chain to more sophisticated exports, women in Vietnam have enjoyed relatively positive employment outcomes.

In this study, we explore household survey data from Vietnam,[3] combined with information from UNCTAD on industrial exposure to international trade and foreign investment over the 2000s, in order to draw evidence-based inferences about employment opportunities (measured in quantity and quality) for women[4] in the current challenging geoeconomic environment. The gendered outcomes of Vietnam's integration into the global economy in the 2000s provide a foundation with which to examine the new geoeconomic order. Our analysis begins with the sharp increase in US tariffs toward China in 2018 and extends to the more recent »Liberation Day« tariffs imposed on all trading partners by the Trump administration in April 2025.

To be clear, there is no single impact of the US tariff shock on Vietnamese women. We argue that the uncertainty generated by shifting US trade policy feeds into the Vietnamese economy through several mechanisms. First, the higher US tariffs faced by Vietnamese exporters decreases output and employment in export-oriented sectors. Because many of these sectors are dominated by women in lower-skilled informal jobs, it seems reasonable to expect that women will face employment declines in response to the tariff uncertainty. Meanwhile, increased US tariffs toward China since 2018 have diverted foreign investment flows to Vietnam, particularly in high-tech sectors that require skilled workers (Avendano *et al.* 2026). Given the high percentage of women in foreign-invested sectors in Vietnam, our work argues that the diverted investment flows have the potential to increase employment opportunities, primarily for more skilled women, and thus, potentially, to improve average work quality for women in the country.[5]

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2 We would like to thank the Asian Development Bank for support in accessing the Vietnam Household Living Standards Surveys (VHLSS). The opinions expressed in this publication are those of the authors and do not necessarily represent the views of the United Nations or its Member States.

3 We chose the VHLSS because it is designed to provide a broad view of the living conditions of Vietnam's population over time for all members of the household.

4 Though we acknowledge the many other economic roles women play, our work focuses on the labour market implications of the current uncertain trade environment. We recognize that women are not a homogeneous group. Our complementary academic work considers the impacts on women in different ethnic groups, of various education levels and migrant status, as well as on those performing different tasks. Please see, for example, Poole and Santos-Paulino (2017) and Pham, Poole and Santos-Paulino (2020).

5 That is to say, the same tariff shock may push some women out of jobs, meanwhile offering new opportunities to other women. Any study with a single industry focus, neglecting third-country effects, offers only a narrow, partial equilibrium view of the effects of trade policy. We stress the importance of a more holistic picture of the plurality of ways that women's employment is impacted by trade policy changes.

Our findings imply that strategic concessions to maintain export market access to the US, together with investment inflows, can advance gender equality when accompanied by policies that strengthen women's opportunities and agency in both the market and non-market economy (UNCTAD, 2021). Although export-oriented foreign investment in Vietnam has expanded employment opportunities for women, gender wage gaps persist (Pham, Poole and Santos-Paulino, 2020). Moreover, while technology-intensive foreign-invested sectors offer opportunities for women in skilled roles, barriers to gender justice remain, in part because women have relatively weaker access than men to STEM training and managerial tracks.[6] Linking trade and investment policy with gender-responsive measures, including targeted technical training, leadership development, and mentorship programmes, can help women capture these benefits, increasing average job quality for women in the country and supporting more inclusive structural transformation.

6.2 Women's Employment Trends in Vietnam

Vietnam is often cited as a regional outlier in women's economic participation. Since the 1990s, female labour force participation has remained among the highest in Asia (Banerji *et al.* 2018). This strong performance is underpinned by relatively high levels of educational attainment compared to regional peers, including STEM participation (UNESCO, 2021). The high rate of labour force participation among women in Vietnam is illustrated in Figure 1. According to our calculations based on the VHLSS, women's employment rates remained high and stable between 2004 and 2022,[7] fluctuating between roughly 72 and 77 per cent of working-age women employed, either in formal wage employment or in informal household businesses. Over the same time period, just over 80 per cent of working-age men were employed. We note, however, a growing gender gap in employment rates, reaching 9 percentage points by 2022, consistent with findings in Huynh and Ku (2026).

Among employed women, employment shares progressed into more formalised labour, as depicted in Figure 2. Although informal employment in household businesses (both industrial production and agricultural farming) continues to account for the majority of women's employment, its importance has steadily declined — from around 86 per cent of all employed women in 2004 to only 70 per cent in 2020.[8] The majority of men are also employed in household businesses in Vietnam, though the decrease in informal employment rates among men is smaller than the decrease among women.[9]

Figure 2 also shows that foreign investment has been an important source of job creation in the country (McCaig, Pavcnik and Wong, 2025), including for women, bringing women into the formal labour force. Our calculations based on the VHLSS report a steady expansion of women's employment in foreign-owned firms — from only 1.5 per cent of women workers in 2004 to 7.7 per cent in 2020. By 2020, only around 4 per cent of men were employed in foreign firms — highlighting that women are over-represented in multinational enterprises. Our econometric analysis confirms these trends: foreign direct investment (FDI) is an important feature in strengthening women's employment in Vietnam.[10]

The VHLSS offers three additional indicators of job quality for more recent years of the surveys: 1) whether the employed individual does wage-paying work; 2) whether the employed individual has a formal labour contract; and 3) whether the employed individual is enrolled in a social insurance programme. Along all three metrics, the data show that, on average, job quality for women has improved over the 2010s: Fewer women were self-employed or unpaid family workers than in wage employment during this period, fewer women were employed without a formal contract, and fewer women remained without social insurance options related to their employment (see Figure 3).

These aggregate statistics, however, mask considerable heterogeneity across employment type. Notably, as reported in Table 1, job quality for women in Vietnam is unambiguously higher in foreign firms than in household businesses. According to the VHLSS, 100 per cent of women workers in foreign firms receive a salary; by contrast, only around one quarter of women workers in household businesses do. Similarly, very few women work in foreign firms without a contract, while over 90 per cent of household business employment is informal (without a contract). Access to social insurance programmes has been steadily increasing in foreign firms, yet remains close to non-existent in household business employment.

Another metric of job quality pertains to the type of work performed. In Table 2, we report the shares of male and female employment across occupational categories, from higher skilled to lower skilled for the five major skill-groups

6 While outside the scope of this study, Investing in Women (n.d.) also points to the continuing burden of unpaid care work and occupational segregation as other barriers to women's advancement into higher-paying and higher-skilled jobs. UNCTAD (2021) similarly highlights how weak implementation of flexible working and childcare policies, together with cultural norms, can constrain women's labour force participation and access to employment.

7 The General Statistics Office of Vietnam has not released the microdata for the 2024 VHLSS wave. The latest data available to us at the time of the writing are from 2022.

8 This trend is consistent with recent evidence from the International Labour Organization documenting a gradual but persistent shift of women out of informal household businesses and into more formal wage employment (ILO, 2023, 2024).

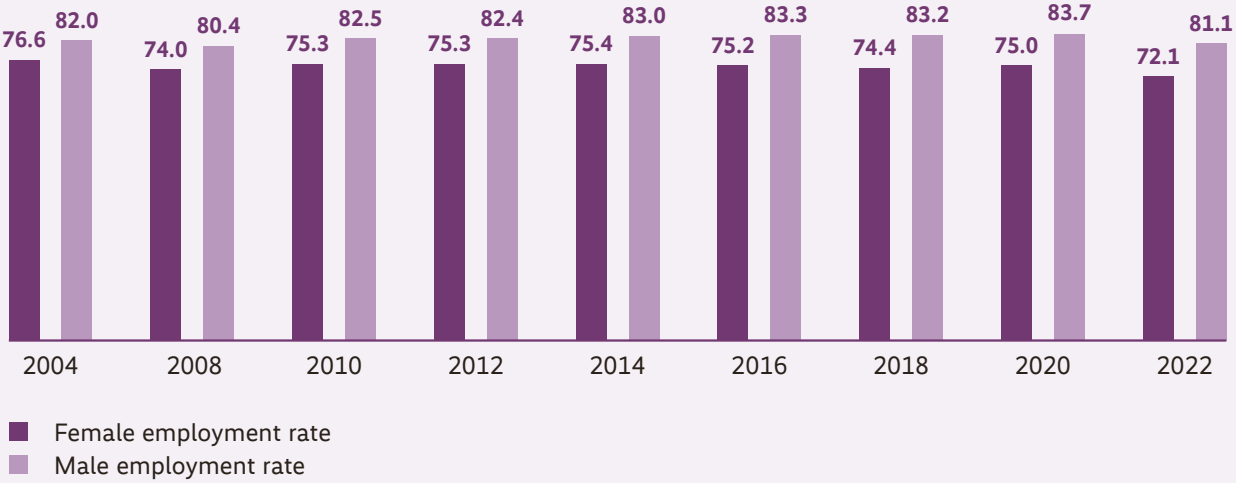
9 McCaig and Pavcnik (2018) demonstrate the impact of the US-Vietnam Bilateral Trade Agreement (BTA) in 2001 in supporting increased formal employment opportunities in the country, bringing workers out of informal household businesses.

10 Pham, Poole and Santos-Paulino (2020) estimate a large, positive, and statistically significant effect of greenfield FDI on women's employment.

Fig. 1

Employment Rates in Vietnam, 2004–2022

(per cent)

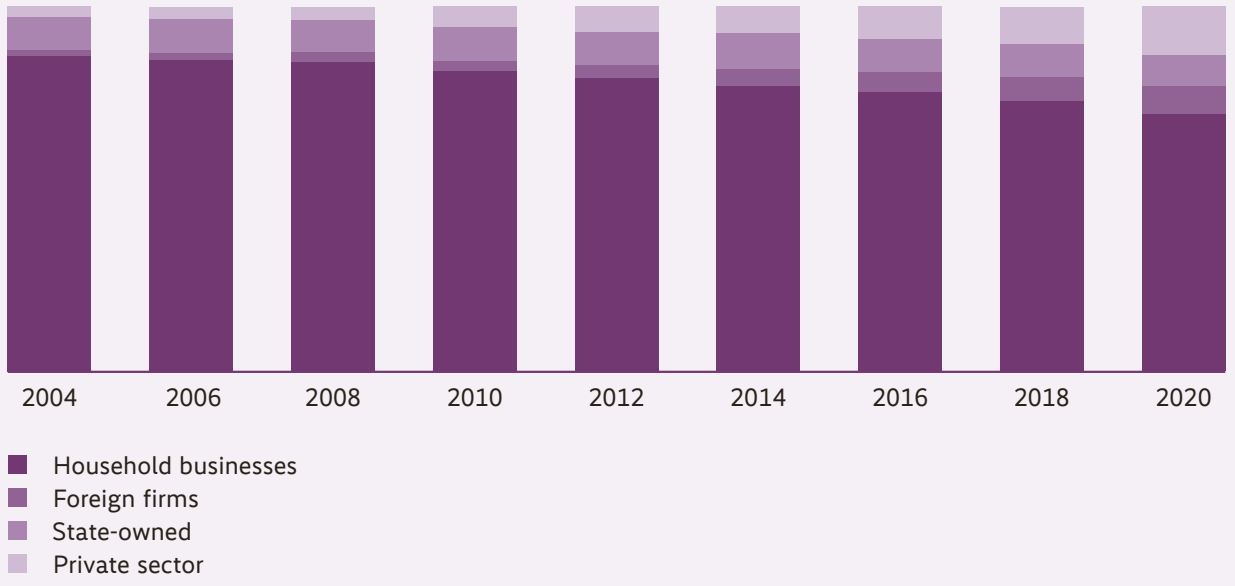


Source: Authors' calculations based on Vietnam Household Living Standards Surveys, 2004–2022.

Fig. 2

Type of Women's Employment, 2004–2020

(per cent of employed women)

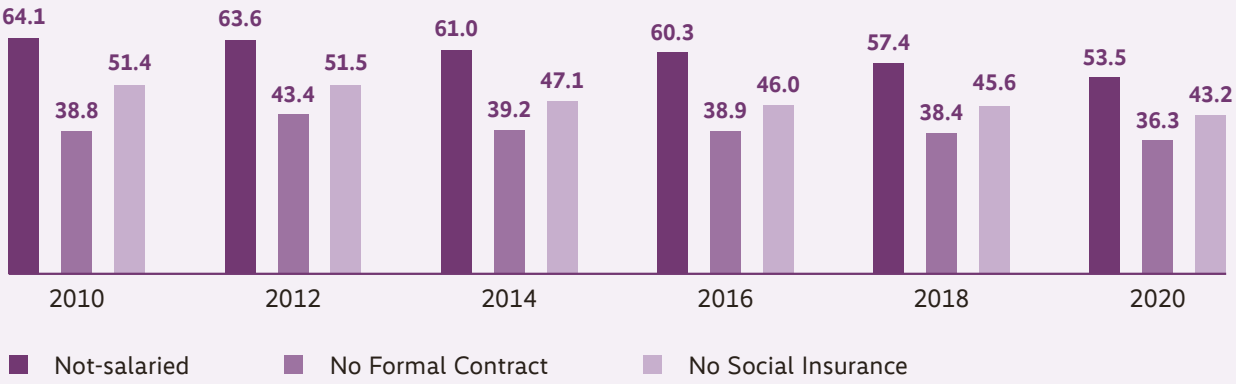


Source: Authors' calculations based on Vietnam Household Living Standards Surveys, 2004–2020.

Fig. 3

Job Quality Indicators for Women's Employment, 2010–2020

(per cent of employed women)



Source: Authors' calculations based on Vietnam Household Living Standards Surveys, 2010–2020.

Tab. 1

Job Quality Indicators for Women's Employment by Type of Employment, 2010–2020

(per cent of employed women)

	Foreign Firms			Household Businesses			
Year	Not-salaried	No Formal Contract	No Social Insurance	Year	Not-salaried	No Formal Contract	No Social Insurance
2010	0.0	5.7	15.7	**2010**	77.9	92.4	99.9
2012	0.0	4.7	13.8	**2012**	79.0	98.0	100.0
2014	0.0	3.7	14.1	**2014**	78.0	98.0	99.9
2016	0.0	2.5	8.0	**2016**	78.6	97.1	99.8
2018	0.0	2.3	7.5	**2018**	77.3	97.6	99.8
2020	0.0	2.3	6.8	**2020**	76.2	96.3	99.8

Source: Authors' calculations based on Vietnam Household Living Standards Surveys, 2010–2020.

defined by the ILO. Our analysis suggests that women and men are similarly distributed in skilled and unskilled occupations. Slightly more women are employed in clerical and sales professions, while relatively more men perform skilled agricultural and trade work. The stark contrast between foreign firms and household businesses is further evident in Table 2. Over half of all women employed in foreign firms work in relatively skilled roles (managerial, sales, and skilled blue collar jobs),[11] compared to only around a third of women in household businesses.[12]

6.3 Trends in Vietnamese Trade and Investment

The United States is a major export destination for Vietnam. This is largely due to the long-standing open trade relationship between the two nations (US-Vietnam BTA), as well as Vietnam's liberalisation efforts since the 1990s, including its accession to the World Trade Organization in 2006. Figure 4 reports the evolution of Vietnam's exports to the United States alongside its total exports to the

11 Fernandes and Kee (2020) report that in Bangladesh foreign firms employ more women, particularly in administrative roles, with spillovers to connected domestic firms, suggesting that gendered hiring practices may be transmitted through value chain linkages.

12 A complete breakdown of more detailed occupations by gender and firm type is reported in the appended Table A.

Tab. 2

Occupational Shares by Gender and Firm Type, 2022

(per cent of employed)

	All Firms		Foreign Firms		Household Businesses	
Occupations	**Women**	**Men**	**Women**	**Men**	**Women**	**Men**
Managers, professionals, and technicians	6.3	6.0	23.6	16.0	0.2	0.4
Clerical, service, and sales workers	21.3	13.1	9.8	10.6	21.2	10.8
Skilled agricultural and trades workers	11.9	17.2	22.8	25.5	12.1	18.0
Plant and machine operators, and assemblers	1.1	7.3	30.1	36.2	0.3	5.3
Elementary occupations	59.4	55.7	13.8	11.7	66.3	65.6

Source: Authors' calculations based on Vietnam Household Living Standards Surveys, 2022.
Note: Lighter shades reflect more skilled occupations and darker shades reflect lower-skilled occupations.

world. It is clear that the United States has been an important driver of Vietnam's export growth over this period. Vietnam's export dependence on the US began to increase steadily in 2018, in the aftermath of the first Trump administration's tariff policy changes toward China. This increase reflects not only some trade rerouting through Vietnam, but also substantial investment and production relocation by multinational firms seeking alternatives to China. As a result, recent geopolitical tensions have largely enhanced Vietnam's position in global supply chains.

Vietnam's export dependence on the US is particularly pronounced in several sectors in which over half of all Vietnamese exports are destined for the United States. In 2023, before the recent US policy upheaval, the top five industries in terms of export shares to the United States were: cork and articles made of cork (77 per cent of Vietnamese exports are shipped to the US), furniture, bedding, and lighting products (73 per cent), stone, cement, and mineral-based products (59 per cent), soaps, cleaning agents, and wax products (55 per cent), and apparel and clothing accessories (53 per cent).

Notably, the industries most reliant on the US market are also markedly female-intensive in terms of employment — in three of the top five industries, women account for over 50 per cent of those employed (based on our calculations using the VHLSS). The apparel industry is famously dominated by women and this is confirmed by our calculations. The other industries with major exports to the US also employ non-trivial shares of women: The wood and cork product sector employs around 51 per cent women and the non-metallic mineral products industry employs 58 per cent women. Taking a deeper dive into the women-intensive apparel industry as a representative example of export-oriented sectors, the VHLSS data reveal that approximately 40 per cent of women employed are non-salaried and over 60 per cent work in household businesses.

Vietnam's increasing integration into global value chains, supported by rising foreign investment, has been instrumental in expanding the country's export-oriented production base. Figure 5 illustrates the evolution of greenfield FDI in Vietnam from 2003 to 2025, with a particular focus on investment originating from the United States. We note a large increase in the share of FDI from the United States in 2025. There has been a noticeable shift toward investment in high-technology manufacturing, particularly semiconductors and electronic components (see Blanchard *et al.* (2021) and Avendano *et al.* (2026)). This shift points to Vietnam's growing integration into higher-value segments of global supply chains, especially in electronics and advanced manufacturing.

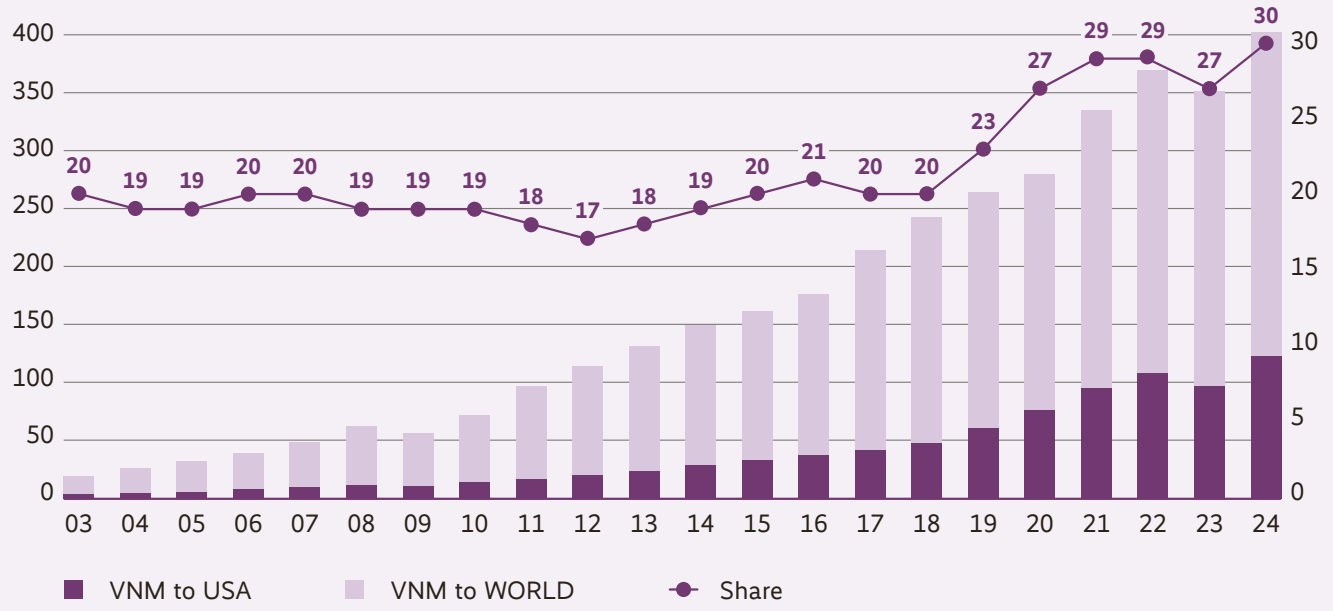
These shifts in FDI could have positive gendered labour market outcomes.[13] Historically, the electrical machinery, equipment, and parts industry has not employed many women — VHLSS reports only around 20 per cent of employment in the industry is female. However, jobs in the industry are high-quality — only 10 per cent of women workers report working on a non-salaried basis and only around 30 per cent work without formal contracts.

13 The academic literature on the topic offers mixed evidence. Juhn, Ujhelyi and Villegas-Sanchez (2014) provide empirical support for the idea that the technological upgrading associated with foreign investment lowers demand for physical tasks, relatively improving wage and employment outcomes for women in Mexico. Meanwhile, Kumari, Goel and Jena (2026) note that in India firms in the export sector employ more women and offer lower gender wage gaps, but the employment benefits for women decrease with the capital intensity of the firm. Our own work on Vietnam estimates large increases in employment and wages for women and men following investment liberalisation, particularly in high-tech provinces (Pham, Poole and Santos-Paulino, 2020).

Fig. 4

Evolution of Vietnamese Exports, 2003–2024

Total exports from Vietnam to the world and the United States (billions of US dollars) and share of exports to the United States (per cent)

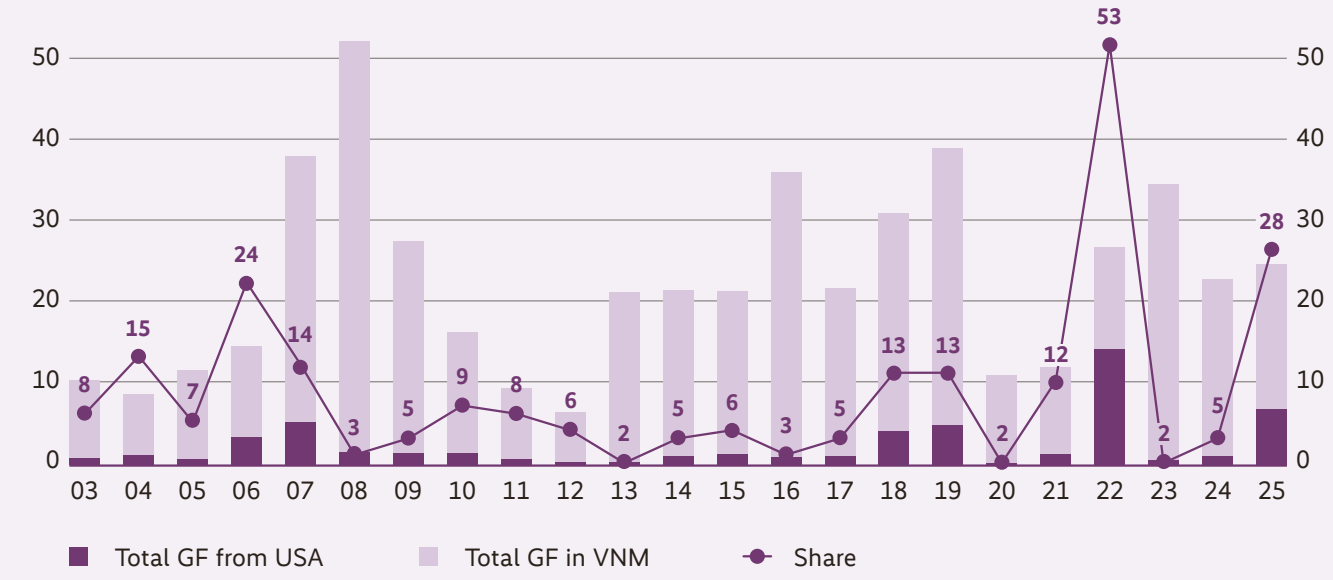


Source: UNCTADStat.

Fig. 5

Evolution of Greenfield Investment in Vietnam, 2003–2025

Total greenfield projects in Vietnam, greenfield projects in Vietnam from the United States (billions of US dollars), and share of greenfield projects from the United States to Vietnam (per cent)

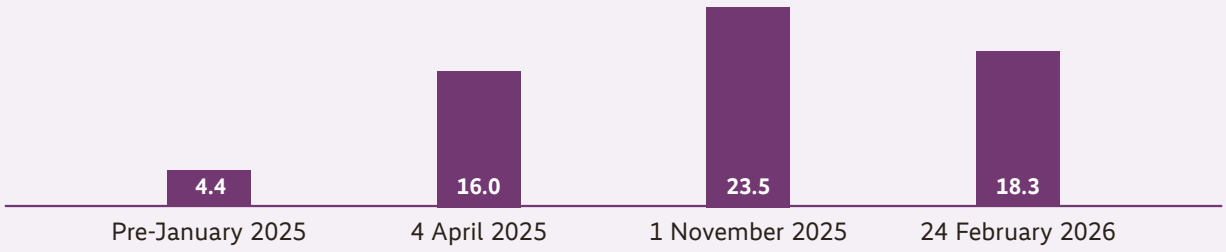


Source: Based on information from The Financial Times Ltd, fDi Markets (www.fDimarkets.com).

Fig. 6

Evolution of Tariffs Imposed by the United States on Vietnam, 2025–2026

(trade-weighted tariffs, per cent)



Source: UNCTAD based on US International Trade Commission and US presidential actions, including the Executive Orders published by the White House.
Note: Trade weights are for 2024. Tariffs are calculated at the Harmonized System 8-digit level.

6.4 The US Tariff Shock

Starting in February 2025, the United States introduced a broad package of country-specific sectoral tariffs, framed as ›reciprocal tariffs‹.[14] A central feature of the recent policy shift was the introduction of »Liberation Day« tariffs in April 2025, whereby the US administration imposed a baseline tariff of 10 per cent on imports from nearly all countries, alongside higher country-specific rates for selected trading partners. These measures were implemented rapidly and applied broadly, significantly expanding the scope of US trade restrictions beyond traditional sectoral tariffs. The tariffs remained in place through most of 2025, although they were subject to partial rollbacks, legal challenges, and ongoing negotiation.[15]

For Vietnam, the US policy shifts are particularly relevant given its strong specialisation in labour-intensive manufacturing and deep integration in global value chains. The escalation of US tariffs prompted a rapid and pragmatic response aimed at preserving access to the country's most important export market. The government engaged in intensive negotiations with the US administration, including multiple rounds of talks, trade delegations, and pledges to increase imports of US goods,[16] which culminated in an agreement whereby the US reduced the initially proposed 46 per cent tariff to 20 per cent, with a higher 40 per cent rate applied to goods that the US deemed trans-shipped. Vietnam also signaled a willingness to strengthen enforcement against trans-shipment and address US concerns related to rules of origin and trade imbalances. These commitments were formalized in the October 2025 Framework for an Agreement on Reciprocal, Fair, and Balanced Trade (USTR, 2025).[17] There is no indication that the Vietnamese government took into account the potential gendered impacts of the October 2025 Framework Agreement.

Figure 6 presents the evolution of US tariffs imposed on imports from Vietnam, measured as trade-weighted averages, illustrating the tremendous uncertainty and volatility of the US tariff regime faced by Vietnamese exporters in the last year.[18] Before January 2025, the average tariff rate was relatively low at 4.4 per cent, reflecting a period of stable and comparatively open trade relations between the countries. Despite the Framework Agreement, average trade-weighted tariffs rose further to 23.5 per cent by November 2025, indicating a substantial tightening of US trade policy toward Vietnam. By 24 February 2026, the average tariff declined marginally to 18.3 per cent, although it remains well above pre-2025 levels.

In Figure 7, we disaggregate these average tariffs by industry to highlight tariff increases faced by Vietnam's most exposed industries (as indicated in the previous section) between January 2025 and February 2026. These industries dominated by women and deeply dependent on the US

14 While much of the policy discussion has focused on these newer measures, they sit on top of an already complex tariff structure shaped by earlier trade rules, exemptions, and sector-specific actions.

15 A key turning point occurred in February 2026, when the legal basis for the tariffs was overturned by the US Supreme Court. In the immediate aftermath, the administration began to adjust and unwind parts of the new tariffs and began accepting applications for tariff rebates in April 2026.

16 For example, over twenty memoranda of understanding have been signed between Vietnamese and US companies (e.g. Vietnam Airlines) to purchase US exports.

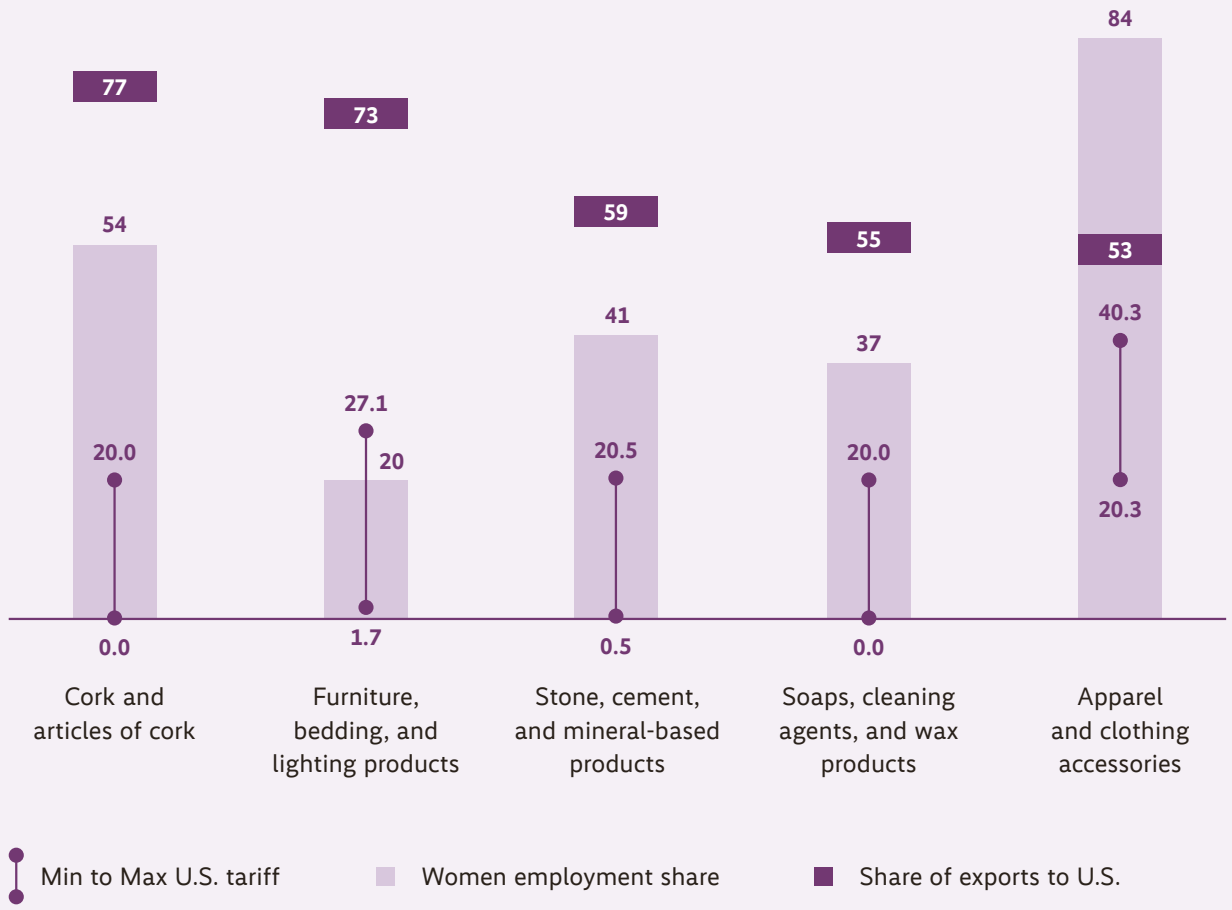
17 While this is a signed agreement, it is not clear that the Agreement has entered into force. Moreover, in June 2026, trade policy shifted again when the US launched new Section 301 measures, proposing additional tariffs of at least 10 per cent on imports from approximately 60 economies, including Vietnam, linked to findings on forced labour-related import restrictions (USTR, 2026).

18 The latest data available in the UNCTAD database of tariff actions at the time of writing date from 24 February 2026.

Fig. 7

Industry Exposure to Tariff Changes by Share of Exports to the US, 2025–2026

(per cent)



Source: Authors' calculations based on UNCTAD and Vietnam Household Living Standards Surveys.
Note: Top five industries identified based on share of total Vietnamese exports shipped to the United States in 2023.
The minimum and maximum tariff rates are for the period between January 2025 and February 2026.

market for exports experienced huge increases in tariffs between January 2025 and April 2026. Most notable is the increase in average tariffs of over 25 percentage points faced by furniture exporters. The other top five export-share industries saw average tariffs rise by around 20 percentage points, the median increase across all industries. An important takeaway is that the effective tariffs faced by Vietnamese exporters often differed substantially from headline rates, making the tariff environment complex and heightening economic uncertainty for firms.

6.5 The Gendered Effects of the New Geoeconomic Order

In the previous sections, we relied on historical data from Vietnamese household surveys, alongside UNCTAD trade and investment data, to illustrate recent trends in both quantity and quality of employment for Vietnamese women across export-oriented and (high-tech) foreign-invested sectors. We presented the following key points: 1) Vietnamese women are strong participants in the labour market, increasingly moving away from informal household businesses and toward private-sector foreign firms; 2) many traditional export-oriented sectors in Vietnam (e.g. apparel) are reliant on women, often in low-skilled and more precarious positions (without formal contracts or social insurance); and 3) women are strongly represented in foreign-owned firms, which offer higher job quality on average, especially as foreign investment in high-tech, high-skilled manufacturing increases.

What are the gendered effects of the new geoeconomic order in Vietnam? We consider these key points to draw evidence-based inferences in response to this question. First, key export sectors have been confronted with substantial uncertainty. Several of these sectors employ a predominantly female workforce, suggesting that tariff-

induced disruptions in exports may disproportionately shrink women's employment options.[19] It follows that the strategic concessions made through the Framework Agreement with the US to maintain export market access can support employment for women.

Blanchard *et al.* (2021) and Avendano *et al.* (2026) show that the geopolitical and trade tensions between the US and China led to large reductions in global value chain foreign investment to China, with some evidence of investment diversion toward Southeast Asia. Vietnam is frequently cited as a recipient of diverted foreign investment, notably in industries such as electronics and machinery. Therefore, as FDI increases in response to geoeconomic shifts, women could potentially benefit disproportionately from growth in the foreign-invested sector, given the strong representation of women in foreign-owned firms. This is true in both the quantity and quality of jobs, as employment for women in foreign-owned firms tends to be in higher-skilled professions with higher-quality job attributes (formal contracts with wage employment and social insurance).

In other words, the US tariff shock may have distinct impacts for women depending on the sector in which they are employed, their skill levels, and occupations. On the one hand, decreased exports (in response to rising US tariff uncertainty) may reduce employment for women in predominantly low-skilled, informal jobs. On the other hand, if Vietnam continues to benefit from US-China tensions with increased foreign investment in high-tech sectors, we predict an increase in the share of high-quality jobs available to women in foreign-invested sectors.

6.6 Implications for Gender-Responsive Policy

Recent shifts in trade policy have important gendered implications. Changes in trade flows and investment patterns reshape both the quality and quantity of employment in export-oriented sectors in which a high number of women work, while increased emphasis on higher-value manufacturing may widen existing gaps in access to skills and opportunities if not addressed through targeted policies. Vietnam's experience underscores that trade policy is not gender-neutral. As our analysis shows, women are disproportionately represented in export-oriented manufacturing and in household enterprises that are sensitive to changes in prices, employment, and demand. At the same time, women face structural barriers in accessing higher-skilled and better-paying jobs, especially in emerging sectors such as electronics and advanced manufacturing.

Vietnam's case highlights that strategic trade concessions and rising investment inflows can create new opportunities for growth and structural transformation. However, realising the full benefits calls for a deliberate policy effort to ensure that women are not only participants but also beneficiaries of these changes. Embedding gender considerations into trade, education, and labour policies is therefore essential for achieving gender-just outcomes (ILO, 2024). For now, Vietnam's policy efforts, in response to the changing geoeconomic order, have largely focused on maintaining export competitiveness, attracting foreign investment, and adapting to changing global value chains. These include continued trade negotiations, efforts to diversify export markets, and policies aimed at positioning Vietnam as a key destination for high-technology manufacturing. While these strategies are economically important, they do not automatically translate into gender-just outcomes.

A gender-responsive policy approach requires linking trade and investment strategies with targeted measures that expand women's capabilities and access to opportunities. Education and training policies are central in this regard. Expanding access to STEM education, digital skills training, and vocational programmes can help women transition into higher-value roles within global value chains, where jobs are increasingly skill-intensive (OECD, 2019; World Bank, 2023). Measures that address demand-side constraints within firms and industries are equally important. While export expansion has created substantial employment opportunities for women in Vietnam, women remain concentrated in lower-skilled manufacturing activities and continue to face barriers to advancement into technical and managerial positions. Policies that encourage firms to adopt transparent promotion systems, equal-pay practices, leadership development programmes, and gender-sensitive workplace standards can help address these constraints and support women's upgrading into higher value activities within global supply chains.

Policies that address constraints outside the labour market, such as access to affordable childcare, safe transportation, and flexible working arrangements, are also integral for gender-just outcomes. These factors play a critical role in enabling women to participate in the workforce, particularly in sectors characterised by long hours or shift-based production.

Additionally, promoting gender equality through foreign investment requires coordinated action across international, home-country, and host-country levels. In host countries, the benefits of foreign investment depend on domestic absorptive capacity, including education systems, labour market institutions, and linkage programs that integrate local firms, particularly women-led enterprises, into global value chains (UNCTAD, 2021). In parallel, labour market policies that strengthen worker protections, ensure fair wages, and promote career advancement are essential for translating employment growth into meaningful improvements in welfare.

19 Our forthcoming and complementary econometric evidence reveals that increased exports lower the rate of household businesses, increasing formal employment options for women (Paz, Poole and Santos-Paulino, 2026).

Finally, reducing policy uncertainty is critical. The recent volatility in global trade policy illustrates how rapidly changing tariffs and market conditions can create risks for firms and workers alike. Women may be particularly exposed to such shocks, as they are often concentrated in more vulnerable forms of employment. Governments can mitigate these effects through transparent policy communication, social protection mechanisms, and active labour market programmes that support workers during periods of adjustment.

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Appendix

Tab. A

Occupational Shares by Gender and Firm Type, 2022

(per cent of employed)

	All Firms		Foreign Firms		Household Businesses	
Occupations	**Women**	**Men**	**Women**	**Men**	**Women**	**Men**
Armed forces	0.1	0.7	–	–	–	–
Legislators and senior officials	0.0	0.1	–	–	–	–
Corporate managers	–	0.0	–	–	–	–
General managers	–	0.0	–	–	–	–
Physical, mathematical, engineering science professionals	0.2	0.9	2.4	5.3	–	0.0
Life science and health professionals	0.0	0.1	0.8	–	0.0	0.0
Teaching professionals	3.0	1.6	0.8	1.1	0.1	0.1
Other professionals	2.0	2.0	17.9	6.4	0.0	0.0
Physical and engineering science associate professionals	0.1	0.1	–	–	–	0.0
Life science and health associate professionals	0.1	0.1	–	–	0.1	0.1
Teaching associate professionals	–	–	–	–	–	–
Other associate professionals	1.0	1.3	1.6	3.2	0.1	0.2
Office clerks	1.3	1.6	4.9	1.1	0.1	0.1
Customer services clerks	0.2	0.2	–	–	0.0	0.0
Personal and protective services workers	2.7	3.3	0.8	3.2	2.6	1.9
Models, salespersons, and demonstrators	17.0	8.0	4.1	6.4	18.5	8.8
Market-oriented skilled agricultural and fishery workers	7.8	10.5	0.8	2.1	8.8	12.4
Subsistence agricultural and fishery workers	–	–	–	–	–	–
Extraction and building trades workers	0.1	0.6	–	–	0.1	0.5
Metal, machinery, and related trades workers	0.3	2.6	9.8	10.6	0.0	2.0
Precision, handicraft, printing, and related trades workers	0.5	0.3	2.4	2.1	0.5	0.3
Other craft and related trades workers	3.2	3.2	9.8	10.6	2.7	2.9
Stationary-plant and related operators	–	–	–	–	–	–
Machine operators and assemblers	1.0	1.9	30.1	27.7	0.1	0.5
Drivers and mobile-plant operators	0.2	5.4	–	8.5	0.1	4.7
Sales and services elementary occupations	5.7	2.8	4.9	1.1	5.5	2.9
Agricultural, fishery, and related labourers	51.4	49.0	1.6	1.1	59.1	59.8
Labourers in mining, construction, manufacturing, transport	2.2	3.9	7.3	9.6	1.7	3.0

Source: Authors' calculations based on Vietnam Household Living Standards Surveys, 2022.
Note: Lighter shades reflect more skilled occupations and darker shades reflect lower-skilled occupations.

7.
Indirect Impacts of the Tariffs on Women in the Informal Sector in Zimbabwe

Arimbi Wahono

Abstract

Zimbabwe's informal sector, one of the largest globally, is dominated by women. This case study shows that even countries with minimal US trade exposure experience US tariff impacts, albeit indirectly. Zimbabwe faces second-order effects through trade with South Africa, where tariff impacts and rising prices cascade, given the sizeable formal and informal trade between the two countries. Focusing on informal vendors and cross-border traders, this study examines how women in the informal sector – already lacking social protection – are especially vulnerable to macroeconomic shocks. It also contextualises these developments within Zimbabwe's history of externally imposed trade liberalisation and its current policy of seeking re-engagement with the US after decades of sanctions.

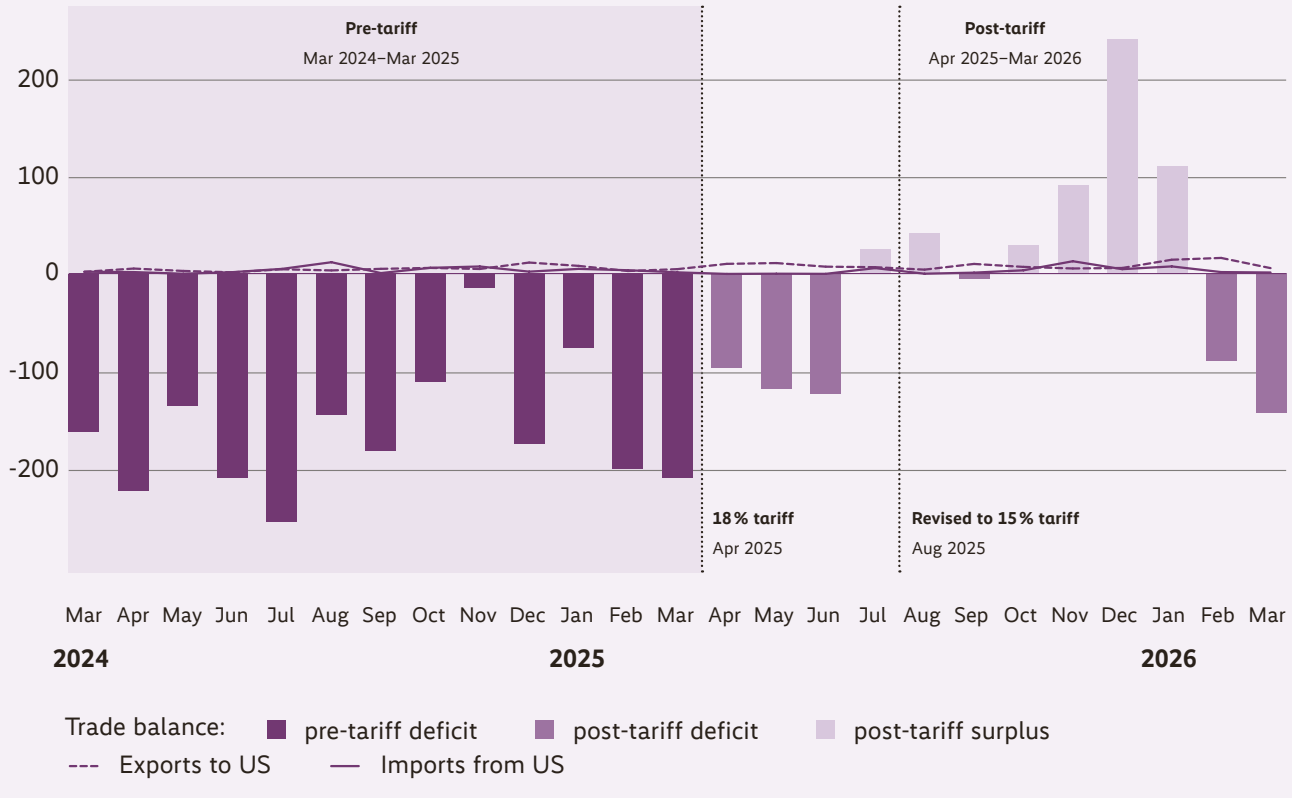
7.1 Introduction

Zimbabwe is an unusual suspect through which to analyse the impacts of US tariffs. Its trade with the US is limited: Exports to the US consistently account for less than one per cent of total exports (ZIMSTAT, 2026), due to over

Fig. 1

Zimbabwe: overall trade balance vs US trade flows (M US dollars), 2024–2026

Monthly values, Mar 2024–Mar 2026. Bars = overall trade balance, lines = Zimbabwe-US bilateral trade only. US tariff on Zimbabwe: 18 % (Apr 2025), revised to 15 % (Aug 2025). US lines near-invisible at this scale — illustrating structural non-dependence.



Zimbabwe overall trade balance vs. US trade flows: 2024–2026. Source: Zimbabwe National Statistics Agency (ZIMSTAT) External Trade Database 2026. Data in 2026 is only available till March 2026.

Box 1

Key Facts and Figures about Zimbabwe's Economy

Limited exports to the US
0.84 %
of all exports are sent to the US (Aug 2025)

World's second largest informal sector
60.4 %
of informal output as a percentage of GDP (2020)

Women-dominated informal sector
64 %
of those in rural informal sector are women

Women-owned MSMEs rarely export
2 %
of women-owned MSMEs export (UN Women, 2025)

20 years of US sanctions and Zimbabwe's exclusion from the African Growth and Opportunity Act (AGOA). These dynamics are illustrated in Figure 1, which shows that trade flows with the US are minimal and did not shift significantly following the initial 18 per cent tariff imposed by the US in April 2025 (later revised to 15 per cent in August 2025) (ZIMSTAT, 2026).

Zimbabwe's economic activity is driven primarily by its informal sector – among the largest in the world – rather than formal, export-oriented sectors. The women-dominated informal sector contributed 60.4 per cent of GDP in 2020 and employed 79.8 per cent of all workers in 2019 (World Bank, n.d.-a). Only around two per cent of women-owned micro, small, and medium-sized enterprises (MSMEs) (most of which are informal) export goods (UN Women, 2025).

This case study shows that even countries with minimal US trade exposure can indirectly experience tariff impacts – primarily through trade with more directly affected states such as South Africa, which is one of Zimbabwe's largest trading partners.[1] It is particularly important to examine such indirect effects in Zimbabwe's case, given that women in the informal sector lack social protection and are acutely exposed to macroeconomic and trade shocks. The causes and consequences of these shocks are often difficult to distinguish. As such, this case study applies a structural lens that reviews how trade shocks combine with other events (e.g. reduced health financing) to amplify negative gendered impacts amongst informal sector workers.

7.2 Trade Liberalisation and Zimbabwe's Women-dominated Informal Sector

At independence in 1980, Zimbabwe had a relatively diversified economy, with manufacturing the largest contributor to GDP at around 25 per cent – »exceptional by sub-Saharan African standards« (Kanyenze, 2006: 275). However, as economic performance stalled in 1991, Zimbabwe adopted IMF and World Bank-backed reforms under the Economic Structural Adjustment Programme (ESAP). Trade liberalisation replaced the country's earlier import-substitution strategy to increase exports (Kanyenze, 2011).

One of the most significant consequences was the rapid contraction of formal employment – particularly in manufacturing, where output declined by over 20 per cent – and the expansion of a feminised informal economy. Liberalisation was especially detrimental to women-dominated sectors including textiles, clothing, and footwear, hit by influxes of cheaper Asian goods (Kanyenze, 2011). Women increasingly turned to informal activities like cross-border trading and street vending to compensate for lost income (Tekere, 2001). Cross-border trade with South Africa became a core livelihood strategy. Survey evidence shows that among Zimbabwean women who had travelled to South Africa, 65 per cent did so to trade goods, compared to one-third of men (Chikanda, 2024).

This structural shift has disproportionately exposed women to precarious working conditions with limited social protection, making them particularly vulnerable to macroeconomic shocks (Tekere, 2001; Muchichwa, 2019). Women constitute the majority of informal-sector workers; in rural areas, women make up 64 per cent of all informal-sector participants (Muchabveyo *et al.*, 2025). As a result, 76.6 per cent of women – compared to 59.9 per cent of men – are engaged in vulnerable employment lacking formal work arrangements, social protection, and adequate safety nets (World Bank, n.d.-b).[2]

1 South African imports are especially significant to Zimbabwe's economy. In February 2026, goods from South Africa constituted 35.19 per cent (the largest figure for all countries) of formal imports. However, formal exports have been more volatile, ranging from 21.73 per cent in December 2025 to 9.75% in February 2026. All statistics come from ZIMSTAT.

2 The World Bank defines vulnerable employment as own-account workers (self-employed workers who work alone or with partners and do not regularly employ others) and contributing family workers (own-account workers in a market-oriented establishment operated by a relative in the same household) (World Bank Group, n.d.-c; World Bank Group, n.d.-d).

7.3 Gendered Impacts of US Tariffs in Zimbabwe

Box 2

A note on causality and data

The evidence here does not establish a simple causal chain from US tariffs to gendered impacts in Zimbabwe, but presents a plausible indirect mechanism through trade with South Africa. Where claims are based on interviews, they are framed as reported observations rather than verified economy-wide trends. Reliable macroeconomic data on the informal sector is limited, making it difficult to corroborate perceptions with empirical evidence. Some interviewees argue the tariffs are unlikely to have had any impact given limited US trade, while others could not disentangle potential tariff impacts from other economic shocks. Seven interviews were conducted for this case study, but some are not cited as they were used as framing, rather than as data.

7.4 Regional Transmission Channels of (Gendered) Tariff Impacts

Zimbabwe's diverse informal sector includes activities such as vending, cross-border trade, small-scale food processing, poultry rearing, tailoring, and much more. This case study relates to informal-sector workers engaged in vending, cross-border trade, and sex work; many of the informal-sector representatives interviewed primarily work with street vendors in urban areas.

US tariffs have reportedly contributed to an environment in which informal trading and vending have become less lucrative due to rising input costs for vendors importing goods from South Africa (which has more substantial trade with the US than Zimbabwe) (KII1; KII2). One interviewee notes that »South Africa is at loggerheads with the US, and they are our warehouse (…) Selling prices [of inputs and goods sold by informal sector vendors] go up because we import from South Africa.«(KII1) As a result, women are reportedly earning less from informal economic activities, especially cross-border traders who rely on sales in or goods from South Africa (KII2).

Faced with declining incomes, some vendors work longer hours – while still carrying the same unpaid care responsibilities at home – or turn to microfinance lenders with exorbitant borrowing costs (KII1). One interviewee notes that when women cross-border traders have to leave for longer to work, it negatively impacts family dynamics as women are expected to be present in the household (KII3). On economic shocks more broadly, an interviewee describes how income losses have a more pronounced effect on informal-sector women in rural areas compared to their counterparts in urban or peri-urban areas, as they lack information, networks, and financial resources (KII3).

7.5 The Growing Illicit Nature of Informal-Sector Work and Links to Health Concerns

One interviewee identified the increasing tendency for women to be forced into illicit informal work as being linked to tariffs (and other economic pressures). For instance, young women are reportedly pushed into sex work amid the persistent scarcity of formal employment and shrinking incomes in the informal sector (tariffs are likely one factor, although the distinct drivers are difficult to disentangle). These women are reportedly less able to cope with economic downturns than older women, who have children and grandchildren to support their informal businesses. Authorities have framed the women as being to blame for the risks of illicit work, undermining scope for informal-sector associations to negotiate with police and local government for safer working conditions and formal recognition for all their members, putting many women in the informal sector at greater risk of economic precarity (KII1).

Women and girls, who are increasingly entering sex work due to tariff-linked pressures, face heightened precarity as a result of what interviewees have described as a structurally underfunded health system in severe decline, a situation made worse by US aid cuts (KII1; KII2). The US was once the largest funder of HIV/AIDS programmes in Zimbabwe until it dismantled USAID and the President's Emergency Plan for AIDS Relief, resulting in the closure of community health services, shortages of HIV drugs, and rollbacks of HIV prevention services for sex workers (Mujuru, 2026; Médecins Sans Frontières, 2025; UNAIDS, 2025). One interviewee points out that HIV incidence is rising sharply amongst the growing number of women and girls in sex work in and around mining areas. This observation aligns with an article from state-owned paper *The Herald,* which notes that new HIV infections are being driven by mining districts, where sex workers have been especially vulnerable (*The Herald,* 2025). Sex workers in mining areas also face heightened risks of gender-based violence – including rape, which increases exposure to HIV and other STIs – as widespread drug and alcohol abuse among miners fuels violent behaviour (Mafongoya *et al.,* 2021).

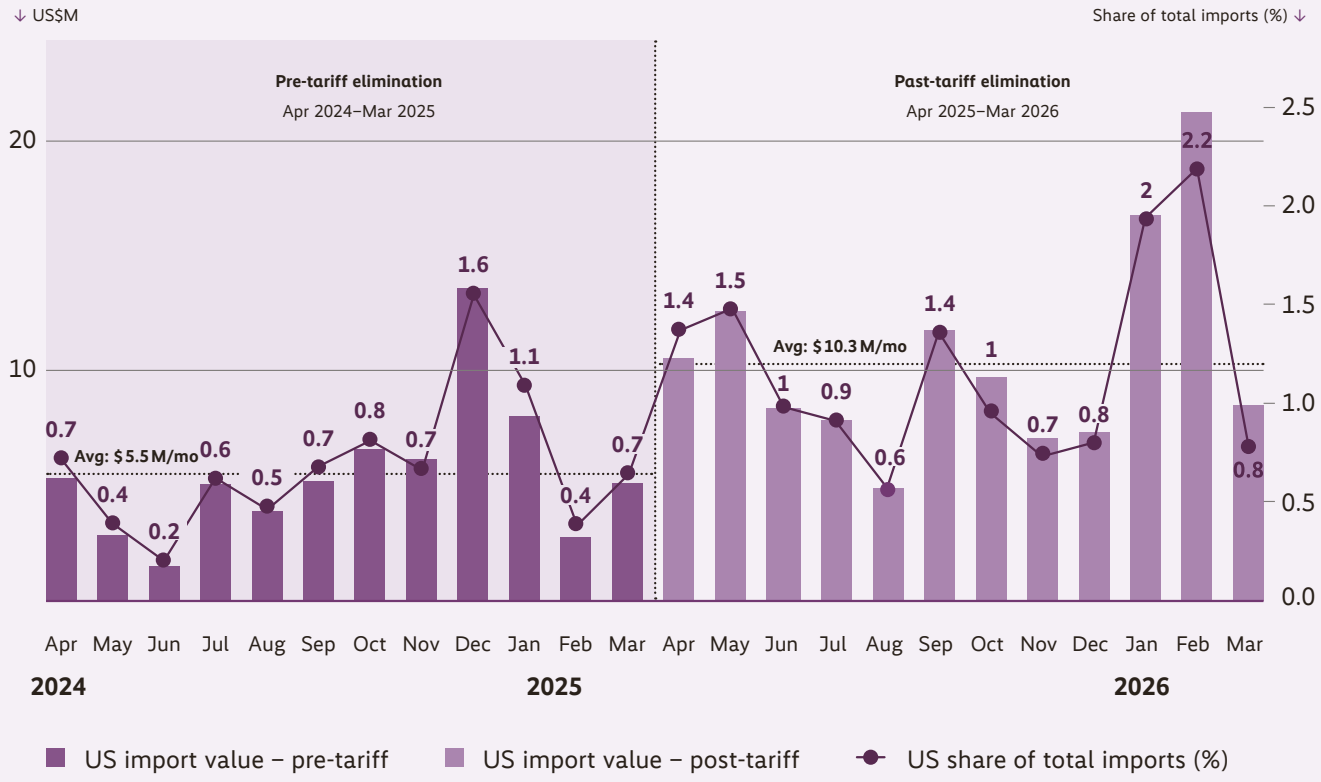
7.6 Trade Policy Response: Capitulation to the US and Scant Attention to Gendered Impacts and the Informal Economy

Though it has near-negligible trade with the US, Zimbabwe had a rather significant response to the US tariffs. Days after Trump announced an 18 per cent tariff on Zimbabwe in April 2025, President Mnangagwa removed all tariffs on US imports (previously taxed at 35 per cent) to strengthen relations with Washington and boost bilateral trade (Lawal, 2025; National Competitiveness Commission, 2025). One economist told *Al Jazeera* that cancelling tariffs on US goods could negatively impact production, increase unemployment, and reduce tax revenues by flooding Zimbabwe's market with cheaper US goods (Lawal, 2025).

Fig. 2

Zimbabwe: US imports – value & share of total, 2024–2026

Monthly values, Apr 2024–Mar 2026. Bars = US Import value (US$M); dashed purple line – US share of total imports (%). Dotted lines show period monthly averages. Zimbabwe eliminated tariffs on US goods in Apr 2025.



Zimbabwe imports from the US: 2024–2026. Source: Zimbabwe National Statistics Agency (ZIMSTAT) External Trade Database 2026. Data in 2026 is only available till March 2026.

US imports increased after the measure, nearly doubling from an average of 5.5 million US dollars in the year before the tariff was scrapped to 10.3 million US dollars in the year after (ZIMSTAT, 2026). It is as yet unclear how these imports might affect the economy – if at all. One possibility might be that cheaper US imports could compete with Zimbabwe's formal sectors. If this results in formal sector contraction it could lead to jobs being displaced to the informal sector, increasing competition in the informal sector and shifting the social dynamics within it.[3]

Zimbabwe's policy response reflects a country seeking to re-engage with the US after decades of sanctions. Its removal of tariffs on US goods coincided with the beginning of compensation payments to white farmers displaced during President Mugabe's land reforms in the 2000s – a scheme analysts suggest is aimed at cultivating goodwill in Washington (Lawal, 2025). The public-private national trade body ZimTrade (2025) has identified deteriorating US-South Africa relations as an opportunity for Zimbabwe to strengthen its own trade partnership with the US. However, the compensation payments come out of the public budget – funds that could be used to fill social protection gaps in the informal sector – and the elimination of tariffs on US goods may lead to declines in government revenue (National Competitiveness Commission, 2025), further curtailing the potential to fund social protection.

Interviewees did not have information on whether women, women's groups, or informal workers' groups participated in formulating these policy responses. Available sources also reveal no indication that the government engaged women's groups or weighed gendered impacts. One interviewee noted that »when [the government] implements these policies, it doesn't take into account women [or the] informal sector. It accounts for a small elite.« (KII2) Another claims that in policymaking, the government may engage in dialogue with informal sector representatives, but they

3 On the impacts of shifting social dynamics: KII1 claimed that in the past year, broader economic stress has pushed more men from the formal sector into the informal sector, which has eroded the relational character of the informal sector and its mutual aid networks. For instance, women would watch over each other's wares or share childcare responsibilities while trading; with more men displacing women from the sector, leaving wares unwatched now leads to them being stolen.

are »just discussing« and not making »practical changes« (KII3).

7.7 Gender-transformative Trade and Economic Policy

Drawing on insights from labour economists, informal sector representatives, and trade union actors, the following recommendations address structural drivers of gendered vulnerability to trade shocks:

1. **Industrial policy & market diversification:** Rebuild domestic productive capacity through industrial policy focused on value addition – particularly in mineral sectors – alongside investment in core production enablers (electricity, transport, water systems), to diversify beyond primary commodities and reduce import dependence.

2. **Formalisation, social protection, and support for the informal economy:** Ensure an adequately resourced and phased implementation of Zimbabwe's National Formalisation Strategy, which was developed through consultation with women in the informal sector (KII4).[4] This requires sustained, bottom-up engagement with informal workers and their representative associations, particularly women-led organisations. Priorities should include basic infrastructure (safe trading spaces, sanitation, storage), social protection and care infrastructure (childcare, healthcare, transportation), and enforcement of legal safeguards against harassment, extortion, and arbitrary enforcement, including for vendors and cross-border traders. Expand access to and awareness of legal support networks and knowledge to ensure women vendors and cross-border traders are aware of their rights and means of protection against theft of stock, extortion, and harassment.

3. **Collective bargaining & voice:** Strengthen the institutional role and bargaining power of informal worker organisations (especially if women-led) in economic governance, including in policy design, budgeting, and implementation processes with reference to trade and other macroeconomic issues.

4. **Gender-disaggregated data:** Collect gender-disaggregated data (e.g. on income, employment, trade, and access to social protection) across formal and informal sectors. This would support future research on the gendered impacts of macroeconomic shocks, particularly as growing trade with the US may restructure trade dynamics in ways that affect women and men differently. Such data will be especially important where trade impacts are experienced as second-order effects – transmitted regionally or spilling from formal into informal industries – and so risk going unnoticed, leaving women in the informal sector neglected in macroeconomic policy responses.

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4 KII4 was conducted with a labour economist who worked with Zimbabwe's government to develop the National Formalisation Strategy.

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8.
Gendered Impacts and Policy Responses

Shared Findings, Broader Issues, and the Structural Case for Reform

Caroline Dommen

The country case studies converge on two central findings: The impacts of the 2025 US tariff changes fell heaviest on women and governments' responses were unequivocally gender blind. Table 1 presents the channels of impact. In Bangladesh and India, women, who constitute the bulk of garment workers, faced sharp jobs cuts, impediments to work or reduced overtime revenue. In Madagascar, ›gender-neutral‹ layoff procedures (last-in, first-out) translated into disproportionate job losses for women, who outnumber men in factory roles and are often employed on shorter contracts. In South Africa, even though the full effects of the tariffs are yet to be felt, women seasonal citrus workers are structurally positioned as the first to be laid off, with race, geography, and migration status intersecting with gender to increase vulnerabilities. In Vietnam, the industries most reliant on the US market for exports also employ a substantial proportion of women workers, usually in less-skilled roles and in self-employed or contract arrangements to a greater degree than men. Even in Zimbabwe, whose exports to the US are near negligible, the tariff shock had indirect but clearly disproportionate impacts on women, who make up the majority of informal workers.

The case studies found no evidence that any of the governments considered women or gendered impacts when negotiating with the US to reduce the 2025 tariff increases. None of the countries implemented gender-specific measures for affected sectors, worker-directed relief, or gender impact assessments: The governments' framing was sectoral and macroeconomic (jobs, export volumes, competitiveness) rather than distributional.

The next two sub-sections discuss these shared findings in more detail. The third sub-section sets out some of the broader questions that the country studies raise.

8.1 Shared Findings on the Gendered Effects of the Tariff Changes

The Vulnerability of Women Workers

This publication's country study findings echo previous research which finds that women workers are often clustered in lower-skilled occupations (Borrowman and Klasen, 2020) and more vulnerable and informal sectors that are highly sensitive to economic shocks, leaving them likely to be the first to lose their jobs when a trade shock occurs (Atangana Ondoa and Ngachili Njikam, 2026; Tejani and Fukuda-Parr, 2021). As chapter 2 and all the country case studies note, the reasons for women's relative vulnerability are remarkably consistent across continents and over time.

The simple fact that the sectors studied employ so many women perforce results in large numbers of women's jobs being affected by reduced orders for export to the US. Beyond absolute numbers, the case studies show that women are disproportionately affected. This is not new: The Madagascar study, for instance, noted that women workers bore the brunt of the 2002 and 2009 economic crises in Madagascar's *zones et entreprises franches* (ZEFs), with women losing twice as many jobs as men did in 2002 and the majority of the 26,000 jobs lost after the 2009 AGOA suspension. Likewise, trade disruptions related to the COVID-19 pandemic fell hardest on women at the lower ends of global value chains.

The Madagascar and South Africa studies provide illustrations of women's more precarious employment – through short-term contracts or piece-work for example – and how it makes it easier for employers to lay them off when demand slows. The Vietnam study authors note that self-employed or contract work arrangements are designed to offer businesses flexibility in uncertain times. Research in Bangladesh and India revealed a range of strategies – beyond factory closures or non-renewal of contracts – that resulted in job losses or reduced income for women garment workers. Some employers curtailed transport or housing benefits and reduced possibilities for overtime work – essential for covering the cost of child care – prompting many women to relinquish their jobs. This reveals how different mechanisms that enable easy lay-offs are strongly rooted in the system.

The studies also show that the impacts of the tariff uncertainties were transmitted to women through a range of channels in addition to loss of employment, notably through lack of social protection and the increased care burden that came with reduced income.

Less Access to Social Protection

The gendered profile of social protection worldwide is borne out in all the country studies. ILO data show that women are less likely to benefit from social protection such as unemployment benefits. Globally, coverage of women lags behind men by around 11 per cent: Some 73.5 per cent of women in wage employment have no access to social protection (UN Women, 2024). The South African study describes the structural exclusion of female commercial

Tariff uncertainties and gender equality outcomes: channels of impact

Tab. 1

Mechanism	Channel of impact	Gendered aspect
Trade policy shock	› Increased tariff and tariff uncertainty › Immediate loss of price competitiveness	› Lack of new hires, short-term contracts, lay-offs › Price and production pressures
Sectoral responses	› Order cancellations, price pressures, factory closures	› Labour demand contracts rapidly, women on more precarious contracts are the first to lose work
Labour market effect	› Layoffs and working-hours reductions in export sectors	› Women are disproportionately affected due to precarious contractual arrangements
Government responses (domestic)	› Support to industries	› Support is gender-blind, misses opportunity to redress inequalities
Government responses (to the US)	› Concessions, e.g. agreement to increase agricultural and industrial imports from the US	› May affect sectors on which women are particularly dependent and/or in which they are invisible (e.g. subsistence agriculture)
Secondary effects	› Workers spending less, e.g. on transport and meals near production sites	› Women are disproportionately represented in informal services
Household transmission	› Income loss	› Reduced consumption, schooling, healthcare
Social outcomes	› Coping strategies	› Women take on increased unpaid care activities, informal work, migration
Longer-term impacts	› Lower human capabilities › Fewer or less skilled women workers	› Girls are often removed from school before boys › Women who work outside the home are role models, important in changing gendered norms towards acceptance of women's empowerment

Author's elaboration, drawing on Agarwal & Zarrilli (2026)

agricultural workers from unemployment insurance: Their daily, seasonal, or piece-rate contracts are typically not subject to unemployment insurance contributions. The India study indicates that women undertaking piece-rate work, stitching or washing are often informally employed, excluding them from social security protection.

Intensified Care Burdens

The country studies all note to varying degrees how loss of income for women workers triggers intensification of unpaid domestic and care work, confirming findings from earlier research in these and other countries (UNCTAD, 2022; Sibeko *et al.,* 2021). In the absence of hard data, the South African study used the Moser Triple Role Framework to show that income loss in the productive sphere intensifies women's reproductive and community management burdens such as by substituting purchased food with domestic production, while the Bangladesh study reported women leaving their employment when they could no longer afford child care.

Other research has shown that, compared to men, women prioritize spending on household expenses such as food, health, or education (Eissler and Bryan, 2025). The country studies do not explicitly research this aspect but do all point to potential long-term social reproduction and human capabilities effects of women's reduced income, drawing on interviews and secondary data to point to risks of food insecurity, withdrawal of children from school, and reduced expenditure on health. In so doing, they signal how changes in the external trade environment are partially absorbed, through women, by the unpaid reproductive economy, while also generating far-reaching social, distributional, and developmental consequences that extend far beyond temporary income loss (Belrhiti *et al.,* 2026).

Limited Bargaining Power

Women's more limited bargaining power is documented across virtually all economies, even if the degree, character, and causes vary enormously (Oppong and Bannor, 2022). The studies illustrate different facets of women's relatively weak workplace bargaining power, which is a structural factor limiting effective resistance to the impacts of tariffs on their employment and income.

In South Africa, there is no sector-specific bargaining council for seasonal agricultural workers. Around the world, trade unions are often male dominated and patriarchal. Active trade unions in Madagascar's ZEFs took to the streets and courts to protest against tariff-induced layoffs but their fragmentation, combined with employer pressures, constrains their ability to advance women's interests. The Bangladesh

and India studies describe active and sometimes successful interventions by unions and worker collectives. They also note restrictions on the right to freedom of association and the political influence of garment supplier companies, which has suppressed worker bargaining in Bangladesh – a trend also visible in other parts of the world. In India migrant workers, for the most part women, are less organised and so possess weaker bargaining power than local workers, illustrating intersecting vulnerabilities. The uncertainty and volatility surrounding the tariffs created an atmosphere of fear and anxiety in factories in Bangladesh, enabling employers to exert greater control over workers. The chapters on Bangladesh, India, and South Africa note that women workers lack labour mobility. These factors, combined with women's already more precarious contractual arrangements, further depress their bargaining power.

Power Relations and Competition

There is already a broad-based awareness that the global trade landscape is dominated by big players (UNCTAD, 2019). The country studies highlight the structural power dynamics in global supply chains, outlining different ways that increased costs are passed down the chain onto the most vulnerable workers, who are often women, in what the South African study calls a structural hierarchy of inequality. The studies illustrate typical transmission mechanisms that previous research has documented: Faced with higher import tariffs, brands and buyers cancel or reduce orders, demand discounts, or threaten to shift sourcing,[1] pushing costs onto suppliers, who in turn pass them on to workers, with women being particularly affected by increased production targets, denial of benefits, reduced overtime, wage cuts, and layoffs.

Taken together, the various chapters show how the tariffs per se are an egregious exertion of power, particularly in the way the US administration has used them to extract far-ranging concessions from the countries studied, but also in the more routine manner that brands are instrumentalising them to extract concessions from suppliers, thereby increasing their profits.[2] Vietnam and Madagascar's strong and asymmetrical dependence on US market access leaves them with little leverage to demand better terms. The Bangladesh, India, and Zimbabwe studies note that the 2025 tariff-reduction agreements with the US impose costly conditions (such as use of US cotton) that harm the economic prospects of the countries in question. Many of the concessions, such as Zimbabwe's commitment to compensate white farmers, raise gender justice warning signals, even if it was beyond the scope of this publication to study these. Moreover, the persistent tariff uncertainty affects women's and economies' ability to make strategic decisions, further increasing power imbalances in the economy. Interviewees for the Bangladesh and India studies – including many women without specialised trade policy knowledge – described themselves as victims of unfair and aggressive global trade policies, in this case the tariffs.

Research in Bangladesh and India uncovered attempts at cross-country collaboration between workers' unions and collectives as a way to confront the power of buyers and suppliers. A Malagasy trade official recognized the importance of negotiating jointly with other African countries. Several of the chapters indicate that the opposite is happening. The Vietnam study notes how, after the US imposed high tariffs on exports from China, production moved to other countries in South-east Asia, suggesting that this could benefit Vietnamese women by creating new jobs there as the sectors concerned employ high numbers of women. In Zimbabwe, deteriorating US-South Africa relations were identified as an opportunity for Zimbabwe to strengthen its own trade partnership with the US. The Bangladesh study notes that the future of the garment sector will depend on the actions of competing countries, amongst tariff-led exacerbation of the atmosphere of tension and competition already prevalent among garment and textile exporting countries in Asia. It also highlights the potential for the agreement with the US to spark tensions between sectors. These instances exemplify how the tariffs pit countries and sectors against each other, crippling possibilities for the joint response that would be necessary to push back against the power that importing companies and economies can exert.

Tariffs: Part of a Broader Shifting Trade Landscape

The previous chapters have all shown how the 2025 tariffs – unprecedented and disruptive as they were – are only part of an unstable international trade landscape. In South Africa and Madagascar the tariff changes compound uncertainties around the 2025 expiry and temporary renewal of AGOA (the African Growth and Opportunity Act, a trade preference programme that grants sub-Saharan African countries duty-free access to the US market for a range of goods). Bangladesh's current Least Developed Country (LDC) status gives it preferential access to many export markets, but may soon expire. Bangladesh and Madagascar's workers are particularly exposed to the risk of displacement by automation; in India and Vietnam, garment workers are also exposed but to a lesser degree. These factors further underline the need for an updated approach to trade and economic policy with resilience and gender justice at their centre.

1 The US company Walmart is reported to have demanded that its Chinese suppliers absorb 66 per cent of the tariff increase (Heintz and Milberg, 2025); this publication's chapters 3 and 5 document ways that suppliers have had to absorb export costs or offer discounts to brands in order to retain their business.

2 Walmart is one of the bigger companies procuring in Bangladesh. It is amongst the many brands that source in Bangladesh to have reported increased profits for 2025; its 2025 annual net income exceeded 20 billion US dollars, a 7.12 per cent increase as compared to 2024. Walmart's profitable trend continues: it reported a profit of more than 5 billion US dollars for the quarter ending 30 April, 2026, an 8.2 per cent increase year-over-year. Its share prices have been on a high and sharply upward course since 2025 (Human Rights Economics, 2026; Macrotrends, 2026).

Research Limitations

Timing
The research for the case studies provides valuable new data and insights on how trade disruptions following the 2025 tariff increases affect women and gender justice, even if there were effects that could not be documented in this research. The timing meant that the country studies differ in their ability to document actual versus projected impacts.[3] Some of the impacts are yet to be felt, as is most immediately visible in the chapter on South Africa, due to the seasonal nature of fruit harvests. As mentioned earlier in this chapter, it may take months or even years for the full economic and social impacts of the tariffs so far to be fully visible in all the countries studied.

Scope of the Studies
Some important topics – intersectionality, informality, and indirect gendered impacts of the tariffs – fell outside the scope of research for this publication, so were touched on only incidentally, if at all. All the studies remark on intersecting inequalities that compound gendered vulnerabilities, such as migration status, poverty, or race. The Madagascar, South Africa, and Zimbabwe chapters refer to how economic shocks can push women into informal work. The studies did not delve into secondary impacts of tariff-related job losses that other research has explored, such as loss of indirect employment in service sectors (transport, rental housing), or how reduced purchasing power in industrial zones may affect informal sectors like street vending that depend on demand from factory workers (Belrhiti *et al.,* 2026).

Data Gaps
The preceding chapters note the data limitations that the research confronted. The tariff shock is too recent for gender-disaggregated household or labour force survey data to be available. Some administrative data exist (export figures, firm-level reports) but are mostly aggregate rather than sector-based or gender-specific. Madagascar publishes monthly trade data with substantial delays and figures on job losses or unionization rates in the country are not disaggregated by gender. The Vietnam study relied on the Vietnam Household Living Standards Survey (VHLSS), most recently published for 2022, which disaggregates employment by sex and by sector, but not by contract type.

Several of the studies reflect the difficulty of finding data regarding informal work and social reproduction activities, with the one on India noting that homeworkers are »obscured by statistics«, invisibilized as they fall entirely outside of official employment surveys. This point is discussed further in → section 8.3. The studies identify the absence of reliable sex-disaggregated data as a structural obstacle to gender justice.

8.2 Consistently Gender-blind Responses

Research for this publication unequivocally finds that governmental responses to the 2025 tariff shock were gender-blind. None of the country teams found any evidence that government, industry, or worker responses took women or gender justice into account. The South African study observes that this is evidence of a structural institutional design failure.

Government Responses

In all the countries studied, government responses focused on trade diplomacy and support for firms and industries. The prime objective of all the countries examined was to secure a trade agreement with the US to reduce the tariff levels its exporters faced (and, in the cases of South Africa and Madagascar, to renew AGOA), whilst also seeking new export markets. Malagasy trade officials representatives did emphasise the importance of reflecting workers' rights in trade negotiations, yet their delegations included private industry representatives but no worker delegates.

The types of assistance that governments provided to industry included support for export diversification, working-capital support, and credit guarantees for eligible exporters. The country research was not able to identify any worker-specific – let alone women worker-specific – support in India, Madagascar, South Africa, or Vietnam. Bangladesh's government did provide soft loans to garment manufacturers, which the companies had requested to enable them to cover workers' salaries; however it is unclear whether the funds provided actually reached the workers. The chapter on South Africa notes the missed opportunity to condition capital support on minimum wage compliance for seasonal workers.

This echoes experience in other countries beyond those studied for this publication: Most governments' reactions centred on pandering to the US administration in an attempt to get tariffs down, seeking alternative export markets and promoting export competitiveness, with some countries also implementing labour market protections (Erasmus, 2025). In all parts of the world, responses to the tariffs on the whole prioritized private exporters' trade-access preservation, failed to consider longer-term strategic priorities, and only included a narrow range of expertise, mostly that of private business actors (Lowe and Stunt, 2025). This confirms the extent to which trade policy is treated as a technical arena in which only a handful of companies and trade experts participate, with little input sought by those who are affected because of their gender, let alone those affected indirectly. Overall, research for this publication corroborates how the framing of trade as a technical domain managed by – usually male – experts systematically excludes other ways of knowing from policy

3 As US tariffs continued to fluctuate while the research was being undertaken, it was hazardous to make projections based on actual tariff levels.

influence, thus entrenching market-based, elite, technocratic »trade orthodoxy« (Hannah *et al.*, 2022). Overall, research for this publication confirms that the trade community, with its narrow focus on maintaining export markets, tends to forget the actual human impacts of trade and trade policies. It also suggests the undemocratic way that the governmental responses were prepared, alluding to the fact that broader participation in trade policy design generally would boost the democratic nature of emergency trade policy decisions.

Industry and Worker Responses

The country chapters report different types of industry responses, often varying depending on the size and power of those industries, with evidence of attempts to push the costs of the tariff increases down the supply chain as noted earlier in this chapter. Industry in Madagascar negotiated with the government, seeking to cultivate goodwill with the US to regain preferential access. Brands producing in Bangladesh and India sought price reductions, cancelled orders, or asked suppliers to shoulder trade costs. Suppliers in those countries and South Africa sought soft loans, but there is no evidence of them having offered to cover losses borne by workers or by women workers specifically.

The Bangladesh, India, and Madagascar studies report active trade union responses, but these were not gendered and only met with limited success, as already mentioned. In Asia there were isolated examples of strategic collaboration between women workers and supplier companies, for instance, encouraging women workers to send letters to politicians in the US to draw attention to the tariffs' impacts on their livelihoods. Asian unions attempted, unsuccessfully, to articulate a regional position against the US tariff regime.

Tariff Agreements with the US

None of the agreements with the US analysed for this publication contained any gender provisions and there is no evidence of gendered impacts having been considered or of women's groups participating in their negotiation. The previous chapters illustrate how the US has used tariffs as a bargaining chip to achieve other objectives, reflecting how asymmetric trade dependency creates conditions for concessions in other areas. The Madagascar chapter points to US attempts to embed a critical minerals agreement within AGOA to secure access to African rare-earth reserves and others note the potentially deep-reaching impacts of the terms of their Agreements on Reciprocal Tariffs (ARTs) with the US, imposing conditions such as an obligation to use US cotton in garment production, zero-duty access for US agricultural imports, or reduced domestic taxation of US digital corporations, carrying potential high costs for the countries concerned. The South Africa chapter is distinctive in pointing out that the US 2025 Executive Order framing gender as ideology forecloses prospects for gender-related provisions in future trade agreements with the US.

8.3 Seeing the Unseen: Structural Questions for Gender-transformative Trade Policy

This section steps back from the case studies to draw out important broader structural questions that are implicit in their analysis and findings.

Different Crises, Similar Impacts

Previous crises – the 2008/9 global financial crises, COVID-19 and others – have played out in strikingly similar ways for women, particularly those in export sectors (Tejani and Fukuda-Parr, 2021; Trommer, 2022). The Zimbabwe chapter highlights the irony that women were particularly affected by the economic shock that liberalization constituted in the 1990s just as they are now impacted by the economic shock flowing from illiberal policies. Despite the analyses that previous global crises have generated and the recommendations made in their wake, no significant gendered policy shifts have followed and the repetition of well-established dynamics shows that the structural vulnerabilities remain unaddressed. Seen through this lens, efforts to diversify export markets or to increase domestic consumption are only a short-term/partial solution; there is a gap in policymakers' toolbox when it comes to urgent responses to unexpected shocks; many of the responses reflect a »short-termism« mindset and a lack of vision for long-term strategic needs (Sharma, 2025). This underscores the importance of developing and communicating gender-transformative responses now, for trade policy generally as well as to be ready for future trade shocks.

Who Profits?

The case studies show how brands have pushed much of the costs linked to the tariff uncertainties down the supply chain, but was this to maintain production and employment or a way to take advantage of a crisis to generate more surplus value? Leading clothing brands who produce in countries studied for this publication have increased their profits since the new tariffs were introduced in April 2025 (Human Rights Economics, 2026). This is a shocking illustration of the upward flows of profits and downward flows of costs documented by earlier research that shows how value flows upwards to the lead firms in global production networks (Gereffi, 2018; Heintz and Milberg, 2025; Hickel *et al.*, 2024; UNCTAD, 2019).

Multilateral Frameworks

None of the country studies document recourse to the multilateral frameworks designed to protect the less powerful from abuses of economic power. Indeed, even though the 2025 tariffs seem to clearly violate WTO rules, only four WTO members contested them through the organisation's dispute settlement system, which offers a rules-based, quasi-legal mechanism for ensuring that trade rules are respected. This confirms the point made above concerning the way in which the tariffs seem to have pushed countries into a

unilateral competitive posture rather than toward coordinated or joint responses.

The »Trade and Gender« Agenda
→ Chapter 2 noted the limited effectiveness of »trade and gender« initiatives taken in the trade context. In its defence, this work strand is relatively new and so may not yet be firmly enough established to have taken solid root in trade policy. Certainly, it has not appeared to be on the trade community's mind, as evidenced at the national level by the lack of gendered responses to the 2025 tariffs and at the international level by the dearth of references to the gendered impacts of tariffs in key trade and gender fora such as GTAGA (the Global Trade and Gender Arrangement) and the WTO's Informal Working Group on Trade and Gender.

Legal Frameworks for Women's Rights
The trade community often overlooks the strong body of international law that protects women's rights and sets out processes for developing women's rights-consistent trade policy. Some recent trade agreements do refer to the UN Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and various ILO Conventions that protect women at work. However, these instruments are generally ignored or grossly misunderstood in actual trade policy-making. The CEDAW Committee regularly raises trade-related questions with States Parties. In 2023 for example, it encouraged Germany to undertake impact assessments that explicitly take women's human rights into account before negotiating international trade and investment agreements, and to ensure that German private companies fulfil their human rights due diligence obligations throughout supply chains (CEDAW, 2023). More recently, noting Vietnam's strategic position in electronics supply chains, it recommended that the country improve compliance with due diligence obligations regarding businesses' responsibility to prevent and remedy discrimination against women in global supply chains (CEDAW, 2026).

None of the country studies noted any human rights or labour-rights-based responses or legal action against the tariffs from national governments or from human rights bodies.[4] Research for this publication failed to find any reference from official human rights supervisory bodies, such as the CEDAW Committee, regional human rights bodies or the UN Working Group on Business and Human Rights, to the question of whether the tariffs or governments' responses were consistent with human rights law.[5]

Whilst governments bear responsibility for ensuring that the tariffs, and responses to them, comply with human rights, the silence of the bodies entrusted with holding governments to account could be considered noteworthy. In fact, it is regrettably consistent with past practice: Although the risk that global competition leads countries to put downward pressure on labour standards to encourage investment and trade is well-known and acknowledged in many trade agreements,[6] human rights bodies have not engaged substantially with the question in trade policy fora.

Data and Invisibility

Women are insufficiently visible in trade policy because the data that policy relies on only recognises formal, market-based work. This means that two essential dimensions of women's economic roles are ignored. First, the unpaid reproductive and community labour that they undertake goes unmeasured and unpriced, even though it subsidises low wages by absorbing subsistence costs, as the study on South Africa explicitly notes. Second, informal work – which is a structural feature of the global economy and connected to the ›formal‹ economy in ways that have implications for gender relations – falls outside labour-force data that is used in policymaking and is overlooked in much trade research.

The studies in this publication offer new examples of how women act as buffers in trade shocks. The costs women absorb – including informal sector job losses, intensified care burdens, or food insecurity – do not show up in the figures that measure the extent of the shock or shape relief measures. More significantly, failing to account for them ignores the deleterious longer-term economic and social impacts that flow from trade shocks, as Table 1 shows.

As noted above, data that are available are often not disaggregated by gender: Aggregate figures mask relevant factors such as differentiated labour cost exposure to international trade shocks.

This raises the question of gendered data gaps: Why is women's informal or social reproduction work not important enough to show in the data and not important enough for the trade policy community to consider? Feminist approaches point out that data gaps reveal power dynamics and deprioritisation of groups that wield less economic power.

4 The Business and Human Rights Centre has been tracking the tariffs' effects on garment-sector workers in a news/advocacy capacity rather than formally raising the human rights issues involved as inconsistent with international law. See https://www.business-humanrights.org/en/big-issues/labour-rights/purchasing-practices

5 The ILO has reacted to the tariffs in quantifying employment impacts. In June 2025 Volker Türk, the UN High Commissioner for Human Rights, said that the shockwaves of a trade war will hit with the force of a tsunami, stating that countries with large export sectors, such as Bangladesh and Vietnam, are amongst those facing the greatest risk (Universal Human Rights Group, 2025); in October the Expert Mechanism on the Right to Development devoted a session to trade tariffs' impacts on the realisation of the right to development (Expert Mechanism on the Right to Development, 2025).

6 See for instance Article 25.3 of the Trade and Gender Equality chapter of the 2022 Free Trade Agreement Between New Zealand and the United Kingdom of Great Britain and Northern Ireland, https://www.gov.uk/government/collections/uk-new-zealand-free-trade-agreement.

Consumption Reduction and Structural Transformation

Export-oriented manufacturing, particularly in textiles and garments, has delivered employment for women in the Global South, but at a cost, confining workers and countries to low-skill, low-value segments of global value chains, segments that are disproportionately female, and disproportionately exposed to shocks. As a woman worker in southern India told one of this publication's authors, »we would rather be exploited than excluded«, exposing the extent to which choices are constrained in this context.

The focus in chapters 4 and 5 on the textiles and garments industry implicitly points to how environmental costs compound gender justice concerns. The fashion industry, which relies on women's labour, frequent consumption, and short-lived garment use, generates over 92 million tonnes of waste each year, alongside immense water and petrochemical use in production, the impacts of which fall disproportionately on women (Niinimäki *et al.,* 2020). Seeking to restore or expand existing trade patterns, as is the case in the responses that these case studies document, risks reinforcing rather than transforming the structural vulnerabilities that made women so exposed to the 2025 tariff shocks in the first place.

Trade economists are increasingly questioning whether export-led manufacturing remains a viable development strategy in the current context (Goldberg and Ruta, 2025; Rodrik and Ing, 2026). Some scholars go further, arguing that reducing consumption in the Global North would reduce appropriation from the Global South, freeing up labour and resources to serve domestic development needs rather than Northern overconsumption (Hickel, 2021; Nag *et al.,* 2026). Transitioning to a care-centred economy and shifting toward higher-value sectors based on gendered industrial policy analysis (International Labour Organization, 2024) offer more promising paths to employment that is both gender-just and resilient to external shocks (Braunstein, 2026). Achieving this requires a dynamic view of comparative advantage: not locking women and countries into the sectors where they have historically been exploited, but actively supporting their movement up the value chain.

Investing in Care as a Path to Gender Justice

As long as production remains concentrated in low-skill, labour-intensive segments of global value chains, access to new markets is likely to reproduce existing patterns. These may continue to provide jobs for women – whilst leaving them exposed to economic shocks, whether triggered by trade policy or other external factors.

Previous chapters have recalled how women's market employment can exacerbate their workload if it is not accompanied by support for care and social reproduction and underlined how women's social reproduction role can hinder their employment prospects. Unpaid care work is a structural economic policy issue and paid care work offers positive potential, for women and for economies more broadly. Scholarship has demonstrated that higher social spending and cooperative labour-management relations are not systematically linked to poor performance at the international level (Bernhardt and Milberg, 2011; Braunstein *et al.,* 2020). Another strand of research shows the strong multiplier effects of public spending on care jobs, which often surpass the impacts of investments in physical infrastructure across various country contexts: the unpaid and paid care economy is a constitutive driver of macroeconomic performance, not merely a constraint on it (Braunstein, 2026). Together, this work shows that it is possible for countries to use a mix of policies to ensure that »economic upgrading« leads to »social upgrading«, defined broadly as positive changes in employment and wages and respect for labour standards (Ilkkaracan *et al.,* 2021).

Gender Backlash

The South African chapter points to the reduced scope for reflecting gender equality in agreements with the US. This is part of a broader geopolitical environment in which masculinized, authoritarian, and anti-feminist approaches are becoming more common (FES, 2026). A rationale for the US tariffs exemplifies this with its narrative expressing nostalgia for the era of blue-collar »men's work« in manufacturing.

In this context it is useful to remember that a gender lens draws attention to areas of inequality and abuse of power and permits better understanding of the distributional impacts of trade policy across a range of different groups beyond just women and men; gender justice aims for better quality of life for all.

The gender justice agenda has shared concerns with other public interest regulatory concerns, such as tax justice, environmental standards, labour standards, or economic development more broadly, as gender and economic inequalities are so closely linked in the global division of labour that international trade and investment enables, also in the light of the pressure that global competition for investment puts on public-interest regulatory or fiscal policies. There will therefore be great value in explicitly drawing links between gender and other injustices and demonstrating the positive impacts of gender-transformative work on men and boys as well as on women and girls, while also connecting messaging about gender justice to economic resilience and economic stability (Brechenmacher, 2026).

Conclusion

This overview of the explicit and implicit shared findings from the country studies shows that the tariff uncertainty since 2025 can serve as a catalyst to ask deeper questions about the gendered impacts of international trade and what would be needed to bring about a trade model that genuinely promotes gender justice. Addressing these questions is necessary to develop gender-just responses to this and future trade shocks. It is all the more relevant in the

context of the broader reconfiguration of international trade that is currently underway. The following chapter compiles recommendations for governments and international bodies from the country studies and the discussion in this chapter.

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Recommendations

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The preceding chapters have indicated what types of policies and practices are needed for gender-transformative responses to future trade shocks; they demonstrate the importance of formulating gender-just policies and embedding them in trade policy processes outside of times of crisis, to help ensure that gender justice objectives are reflected in responses when unexpected crises materialize.

The country study chapters include recommendations for various actors, including governments, intergovernmental bodies, business actors, or trade unions. They point to a range of avenues for effecting change; many of the country recommendations overlap, with only minor divergences. The South Africa study, for instance, saw potential in African Continental Free Trade Area (AfCFTA) processes relating to women and youth, whilst the Zimbabwe study author averred that AfCFTA is too contested to rely on it as an avenue of change without proper discussion of the nuances of its impacts from a Pan-African feminist perspective.

This chapter brings together the main recommendations for governments and international bodies that the previous chapters have suggested. It organizes these recommendations broadly along the gender-responsive to gender-transformative continuum: from short-term measures to alleviate adverse gendered impacts of the tariff uncertainties to deeper structural changes for longer-term gender justice.

Make Emergency Support Gender-responsive

Government support to affected sectors should be conditional on those sectors improving working conditions, implementing gender-equality measures, and ensuring that all workers have social protection. Emergency wage support should be available for factories retaining female workers, to prevent mass layoffs of women. Cash transfers or school subsidies should be offered for at-risk families to reduce the risk of school dropout. The South Africa study urges the government to design publicly funded export promotion schemes in ways that make the funds accessible for Black women growers. That study also recommends making loans to companies conditional on the companies providing gender-disaggregated employment data.

Reinforce Respect for Human and Labour Rights

Governments and private actors should enact and actively implement human rights and labour rights protections. These should include progressive labour laws that encompass living wages and social protection measures, as well as subsidised public childcare. Specific protections should be developed and enforced – under the aegis of the International Labour Organization (ILO) or the UN Conference on Trade and Development (UNCTAD), for instance – to protect seasonal women workers in agricultural export value chains. Active labour market policies should be designed to address shocks beyond tariffs, such as climate-related disruptions, transport stoppages, or regulatory changes in import markets, rather than considering each shock in isolation. At the domestic level and internationally, states should take human rights and labour treaties as seriously as international trade agreements.

Limit Corporate Abuse of Women's Rights

The chapters that focus on the textile and garment sector centre the human rights responsibilities of private actors, particularly international brands. The Bangladesh and India chapter sets out the most detailed actions to this end, calling for mandatory human rights due diligence and regulation of brands and multinational corporations (MNCs) through national policy and global frameworks, along with the adoption of an international binding Business and Human Rights Treaty. Beyond ensuring companies' compliance with human rights obligations, states should work towards scrutiny of corporate practices and profits worldwide and favour global taxation agreements so that more of the gains accrue to the countries where production occurs and their workers; such measures would also help foster structural transformation of economies. Future trade agreements should include competition provisions limiting buyer influence, with attention to the gendered way monopsony power plays out in labour markets, in order to reduce the sway of a few dominant buyers over whether and under what conditions women work. Domestically, support, including export support, should only be provided to companies or sectors that comply with minimum wage and labour standards, verified through audits.

Support Collective Bargaining and Freedom of Association

All the studies recommend strengthening workers' rights to freedom of association and collective bargaining, even if their emphasis differs. The Bangladesh and India study focuses on the structural suppression of union rights both in law and by employer practice and calls for cross-country union solidarity, while the South Africa chapter recommends

that the government extend collective bargaining coverage to seasonal agricultural workers. The Madagascar study advises the creation of formal channels for worker representation in trade negotiations. The Zimbabwe chapter recommends strengthening the institutional role of informal worker organisations (especially women-led ones) in economic governance. A gender balance in worker representation in trade negotiations will be necessary.

Reinforce Social Protection Coverage for Women

Previous chapters have emphasized that social protection should be extended to cover a broader set of workers and situations. They recommend that informal workers – including undocumented migrant women workers – and those on short-term contracts be brought within the purview of social protection schemes. Some chapters recommend specific measures to ensure wide coverage, such as targeted Unemployment Insurance Fund (UIF) registration campaigns in South Africa before seasonal contracts begin. Social protection should be portable across employment forms; it should also shield workers from having to bear the cost of macroeconomic uncertainties. The Madagascar chapter recommends learning from some Export Processing Zone (EPZ) models, where export zone taxes could generate revenue for social protection and care infrastructure.

Recognize Informal Workers

All of the country studies call explicitly or implicitly for more recognition and protection of informal workers. As women are overrepresented in the informal workforce, this would benefit them in particular. Governments must gather more data about informal workers, disaggregated by gender, sector, and other relevant characteristics. Governments could require that companies submit disaggregated data about their workforce as a condition of government support. Such data must be collected regularly and governments must develop ways to reflect it in international trade policy formulation and in assessing the impacts of trade and trade policies.

Gather and Use Gender-disaggregated Data

The chapters point to different approaches to overcoming the data gaps they identify. The South African chapter takes the view that exporters receiving government support should be required to submit gender-disaggregated employment data by contract type as a condition of eligibility. The Zimbabwe study recommends collecting gender-disaggregated data (e.g. on income, employment, trade, and access to social protection) across formal and informal sectors. In addition to quantitative statistics, governments and other trade policy actors must recognize and legitimize a breadth of data sources and types, as these are important to identify second-order and non-market sphere impacts of trade, as well as impacts of trade policies on people who are not engaged in trade but are nevertheless affected by it.

Value Women's Skills and Knowledge Development

Some chapters note how facilitating women's access to skills, training, and career progression can reduce their vulnerability and strengthen their individual and collective bargaining position. The Vietnam chapter favours facilitating women's access to skills, training, and career progression. For Madagascar, this would require the redesign of national training schemes such as the Malagasy Professional Training Fund (FMFP). The Zimbabwe study notes the need to expand access to and awareness of legal support networks and knowledge so that women vendors and cross-border traders are aware of their rights and means of protection against theft and harassment.

Prioritise Investment in Human Capabilities

All the chapters identify the double burden of paid and unpaid work as a core mechanism that intensifies women's vulnerability to trade shocks, which in turn has long-term societal impacts. They thus concur that governments should invest in care infrastructure like childcare, elder-care, transport, and flexible working arrangements as a necessary complement to labour market and trade policy, and should implement the recommendations of the 5R Framework.[1] Public expenditure for care-related sectors should be considered investment rather than expenditure. Relatedly, governments must acknowledge that the unpaid and paid care economy is a constitutive driver of macroeconomic performance, not a constraint on it (Braunstein, 2026); the sectors offers strong growth-enhancing and job-creation potential – particularly for women (International Labour Organization, 2024). Supporting these sectors is of particular relevance in today's highly uncertain trade environment as they can offer more certainty than that which prevails in the international economy.

Integrate Care and the Care Economy into Trade Policy

Governments must treat care and care infrastructure as foundational to trade policy – rather than as a social afterthought as is currently the case. One way of ensuring it is integrated into economic models is to systematically integrate care into trade impact assessments; this can ensure that the ways that care investments can affect outcomes from planned trade agreements are made visible and factored into policy design, along with the social and gendered costs of trade-related economic changes. Governments must develop and implement these methodologies now so that they can be refined and be easily available when designing emergency responses to future trade crises, helping to

1 The International Labour Organization and UN Women strategy for decent care work, designed to recognize, reduce, and redistribute unpaid care work, while simultaneously rewarding and representing paid care work. (UN Women, 2022)

avoid gender-blind government responses to trade shocks. Aid for Trade financing should explicitly prioritise investment in physical and social care infrastructure alongside traditional trade facilitation measures. Indeed, as evidence from Zimbabwe most explicitly illustrates, care infrastructure shapes the conditions under which trade can generate broadly shared economic and social benefits.

Mainstream Gender into Trade Policy Design and Monitoring

Gender must be embedded systematically into trade policy design and monitoring, including through consistent use of gender-disaggregated data. Trade agreements should include provisions that are designed to address structural factors that limit women's ability to benefit from trade opportunities, to protect women and other vulnerable workers from economic shocks, and to address the ways that supposedly gender-neutral provisions disproportionately affect women. Governments must ensure fair and transparent trade negotiations and when designing trade policies and agreements should create formal channels to include a broader range of voices, including representatives from women's groups.

Reflecting the success or likely success of trade and trade policies by gender justice standards requires broadening trade success measures beyond export volumes and values or GDP figures. Measures must take account of the well-being of the workers, communities, and resources that enable production and trade. Governments and intergovernmental organisations must develop a set of gender-disaggregated indicators to assess gender-differentiated outcomes over time, ensuring that these include wellbeing indicators that are vital for ascertaining whether an economy is providing for its participants and can continue to do so over time. These indicators must consider the market and non-market impacts of trade.

Gender Impact Assessment

All five case studies call – explicitly or implicitly – for gender impact assessments to be conducted before and during trade policy design and trade negotiations, with the South African study framing the absence of such assessment as »itself evidence of structural institutional design failure«. The Madagascar study calls for ex-ante gender impact assessments to be institutionalised in negotiating channels. Governments must apply relevant impact assessment methodologies, blending approaches such as UNCTAD's trade and gender toolbox (UNCTAD, 2017) with human rights and other social impact assessment methodologies (Dommen and Browne, 2025). These must explicitly include anticipated and actual distributional effects of trade agreements along gender and other intersecting factors.

Market Diversification and Reduced Export Dependence

The case studies recommend deliberately diversifying export markets. The Madagascar and South Africa studies specifically identify AfCFTA and intra-African trade as alternative routes, with the latter also pointing to the potential that the Chinese market holds. The previous chapters identify how over-dependence on a narrow set of export markets is a dangerous structural vulnerability; several pinpoint the importance of not only finding new export markets but also upgrading within export sectors in order to avoid the vulnerabilities that flow from remaining concentrated in low-skill, labour-intensive segments of global value chains.

The Vietnam study calls for trade and investment strategies to be linked to targeted gender measures. Governments must plan export market diversification and upgrading strategically, centring consideration on the blend of policies that offers the best long-term resilience and robustness; a gender justice lens can help identify options that serve social and economic justice as well as resilience and robustness objectives. Bearing in mind the increasing number of expert voices describing how traditional export-oriented growth approaches are yielding fewer returns (Goldberg and Ruta, 2025; Rodrik and Stiglitz, 2026), the gender-transformative approach is particularly relevant in simultaneously pointing to options that favour the greatest economic resilience and robustness. For instance, care is among the sectors with the highest female employment multiplier after agriculture; expansion of care services is likely to generate highly skilled salaried positions, mainly in the public sector (International Labour Organization, 2024).

Industrial Policy

Industrial policies should condition support for specific sectors on their integration of gender-just measures. Countries must prioritise sectors with potential to generate decent jobs for women and, particularly for lower-income countries, scope to enable structural transformation of the economy towards higher value-added and less environmentally harmful sectors. To this end, they should follow ILO recommendations on how to embed gender equality objectives in sectoral policies (International Labour Organization, 2024). In order to foster gender justice alongside global economic justice, structural transformation policies must aim to improve the position of countries currently at the bottom of global supply chains in the international division of labour, improve working conditions in sectors where women are already predominant, and increase access of women workers to new and decent employment opportunities, particularly in higher-value added sectors (International Labour Organization, 2024).

Collective International Action

Several chapters recommend coalition-building among developing countries rather than competitive trade deal-making with the US and negotiating with other countries to increase the collective strength of Global South countries, especially Least Developed Countries (LDCs). Governments must collectively oppose unilateral trade measures and ensure that trade agreements support development objectives. Governments should develop a fair, balanced, and development-oriented global framework on trade, supported by international human rights and labour bodies. This should be carefully crafted so that more stringent gender equality, labour, or environmental standards do not disadvantage those who are least powerful in the global economy. On a broader and more fundamental level, the studies point to the importance of all countries refusing use of trade as an instrument of economic coercion and insisting on the need for a more just and equitable global trading system.

Recommendations to CEDAW and Other Human Rights Bodies

Women's rights and human rights bodies should speak up more forcefully when faced with international trade measures that run counter to the rights that they are entrusted with protecting; they should also ensure that official human rights bodies are present in the fora where trade policy is formulated. The Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), for instance, could ask States Parties whether they have included measures in favour of women's employment, upskilling. or pay equality in their services, trade, or investment liberalization agreements. CEDAW is encouraged to continue to ensure that states carry out impact assessments for trade agreements and that they explicitly consider women's rights in those impact assessments (CEDAW, 2023). CEDAW could also encourage States Parties to consider how the recent US tariff changes affected women in their country and which steps each State Party has taken to ensure that women's rights were reflected in proposed responses to the tariffs. CEDAW is also encouraged to continue to make recommendations to States Parties that are hosts of large brands or multinational corporations with global economic power to remind them of their obligation to ensure that the private companies fulfil their human rights due diligence obligations, including in the area of women's rights and gender equality, throughout supply and value chains (CEDAW, 2023).

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Gendered Impacts – Blind Responses

The 2025 tariff crisis intensified existing gender inequalities in the US and abroad. This study examines, through a gender-transformative lens, how the dramatic US tariff increases have affected women and gender justice across six Global South countries: Bangladesh, India, Madagascar, South Africa, Vietnam, and Zimbabwe.

The study shows how women were disproportionately affected: existing social and economic inequalities increased their vulnerability to tariff-related disruptions. The study also finds that governments responded in an entirely gender-blind manner.

In addition, the tariffs exposed structural inequalities in the global trading system. Export-dependent countries and workers remain particularly vulnerable to global economic shocks, while economic gains are often concentrated among companies and importing countries.

The authors, therefore, call for short-term gender-responsive crisis measures and longer-term gender-transformative changes. These range from conditioning emergency support to businesses on implementation of measures in favour of women workers, to ensuring that industrial policies prioritise sectors that generate decent jobs for women whilst also enabling structural transformation towards higher value-added and less environmentally harmful sectors.

Further information on this topic can be found here:
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