Pacific Trade Invest

PACIFIC ISLANDS EXPORT SURVEY 2026 HIGHLIGHTS

INSIGHTS INTO EXPORT DYNAMICS IN THE PACIFIC

WELCOME

A message from the General Manager, PTI Network

The Pacific Islands Export Survey has been a cornerstone of our evidence base for over a decade — tracking how the region's private sector is adapting, growing, and navigating the pressures of a complex global trading environment.

The 2026 edition is particularly significant. Participation has reached its highest level since tracking began, reflecting both the strength of the PTI Network's relationships across the region and a growing appetite for data that reflects business realities on the ground.

The findings are both encouraging and instructive. The region's exporters are digitally engaged, globally oriented, and confident about the future. At the same time, access to finance has reached its most constrained point on record — a systemic challenge that demands attention from policymakers and development partners alike.

We hope this report serves as a useful resource as you navigate the region's Aid for Trade priorities, and we look forward to continuing this dialogue.

Caleb Jarvis
General Manager - PTI Network

ABOUT THE SURVEY

The Pacific Islands Export Survey is a flagship initiative of the PTI Network, delivered on behalf of the Pacific Islands Forum Secretariat. Conducted biennially since 2014, it is the only longitudinal study of its kind in the region.

431+
Respondents across all FICs in 2026

12yrs
Of continuous tracking since 2014

16
Forum Island Countries covered

Highest participation on record

The survey tracks performance, sentiment, barriers, and emerging opportunities across sectors, geographies, and business stages — providing a consistent, comparable evidence base year on year.

FIVE KEY TAKEAWAYS
PACIFIC ISLANDS EXPORT SURVEY 2026

01

Export performance is stabilising.

This follows the post-COVID rebound, in an environment of sustained cost pressure and global uncertainty.

02

Pacific exporters are going global.

Digital is now the primary enabler, driving access to larger and more commercially attractive markets.

03

Finance is the binding constraint.

Access to finance has reached its most constrained point on record, the primary ceiling on growth.

04

The Free Trade Agreement (FTA) gap is a communications problem, not an agreement problem.

92% of exporters are eligible, but only 27% are benefiting*.

05

Inclusive employment is an under-utilised lever.

It is the strongest in the sectors driving exports. Implementation of Gender Equality, Disability, and Social Inclusion (GEDSI) policies and export capacity are closely aligned.

*See page 8 for full explanation

EXPORT PERFORMANCE

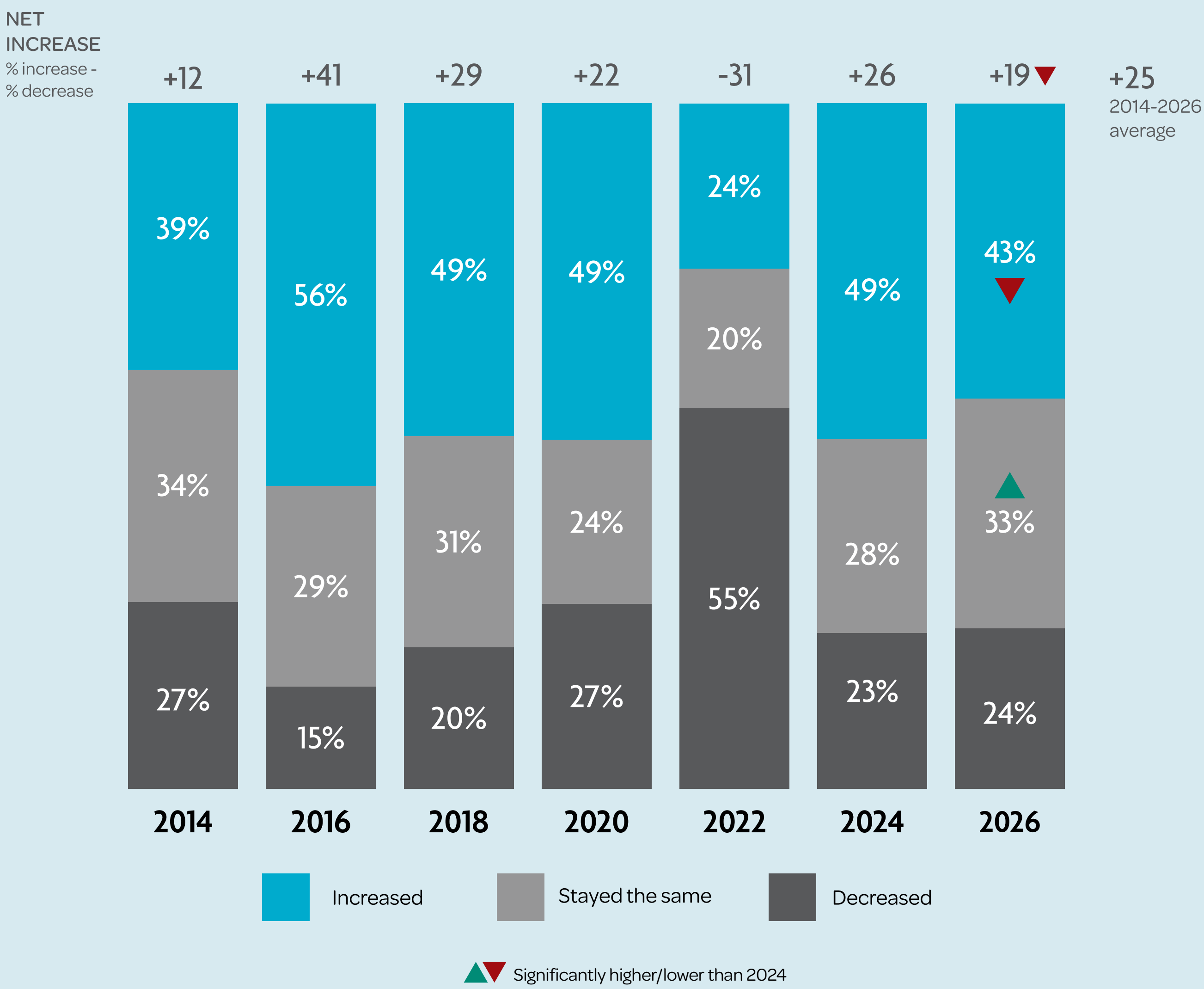
Takeaway 1 — Stabilisation following the post-COVID rebound

+19%

net revenue increase

Exporters reporting revenue growth in 2026 is at a net balance of +19 percentage points – below the long-term survey average of +25%, and down from +26% in 2024. The post-COVID rebound has run its course. Pacific exporters are now operating in a sustained environment of cost pressure and global uncertainty.

CHANGE IN REVENUE - LAST 12 MONTHS

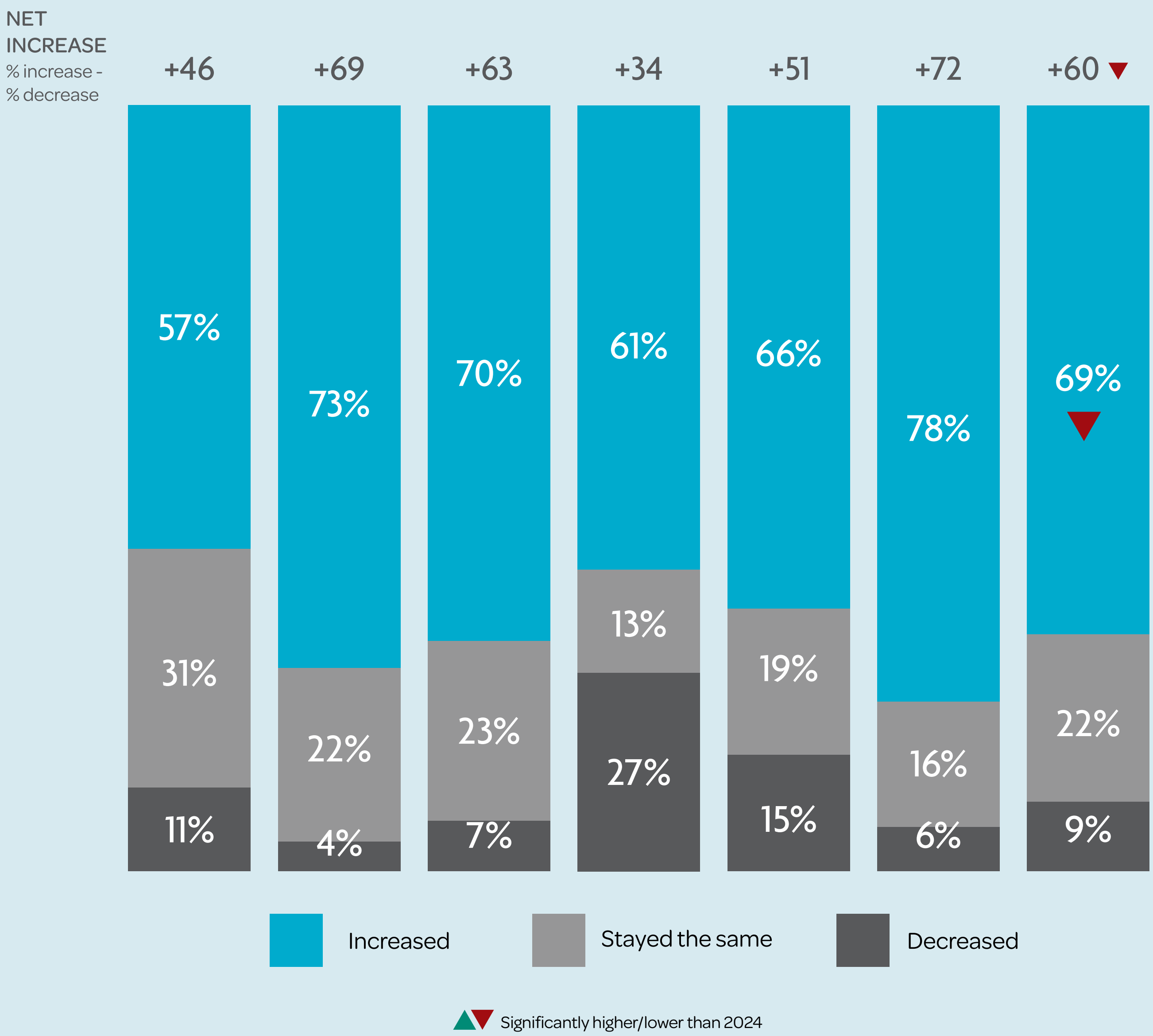


EXPORT PERFORMANCE

Takeaway 1 — Stabilisation following the post-COVID rebound

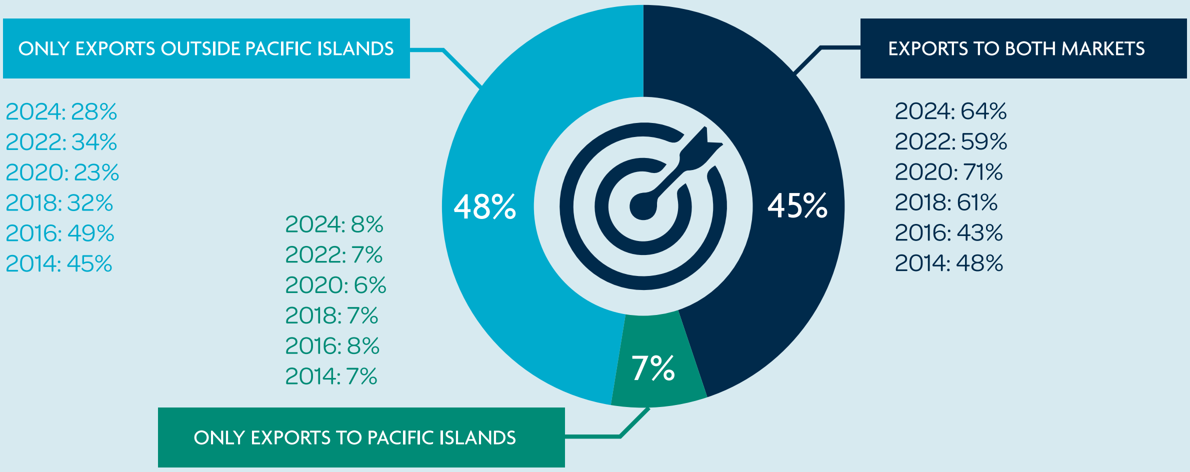
Despite softer recent performance, Pacific exporters project continued growth, with 69% of exporters expecting revenue to grow over the next 12 months and only 9% expecting a decline. Businesses have absorbed current conditions without retreating from their growth ambitions.

EXPECTED REVENUE CHANGE NEXT 12 MONTHS (NET INCREASE)



GOING GLOBAL

Takeaway 2 — Pacific exporters are reorienting towards larger external markets



WHERE ARE PACIFIC EXPORTERS SELLING?

	2026	2024	2022	2020	2018
Australia	57% ▼	65%	63%	65%	63%
New Zealand	50%	44%	52%	58%	49%
United States	33%	Previously grouped as 'North America'			
China	16%	12%	9%	18%	14%
United Kingdom	16%	Previously grouped as 'Europe'			
Other European Markets	15%	Previously grouped as 'Europe'			
Japan	15% ▲	9%	14%	17%	16%
Germany	13%	Previously grouped as 'Europe'			
France	13%	Previously grouped as 'Europe'			
Canada	11%	Previously grouped as 'North America'			
Other	29%	-	-	-	-
Don't export outside the Pacific	7%	8%	7%	6%	7%

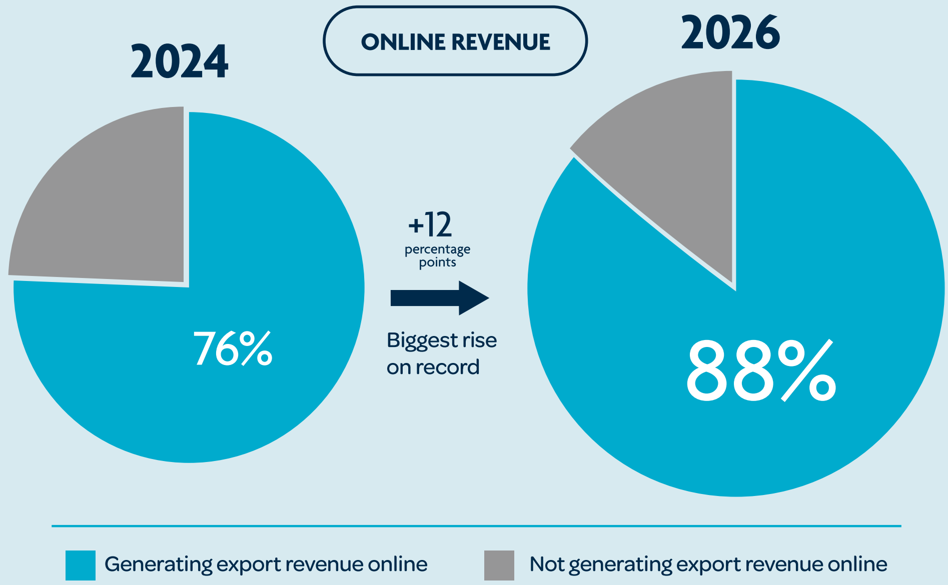
▲▼ Significantly higher/lower than 2024

Pacific exporters are actively reorienting toward larger, more commercially attractive external markets, with 48% of exporters now generating revenue exclusively outside the Pacific Islands – up dramatically from 28% in 2024. Australia and New Zealand remain the dominant destinations, with Japan showing the strongest recovery.

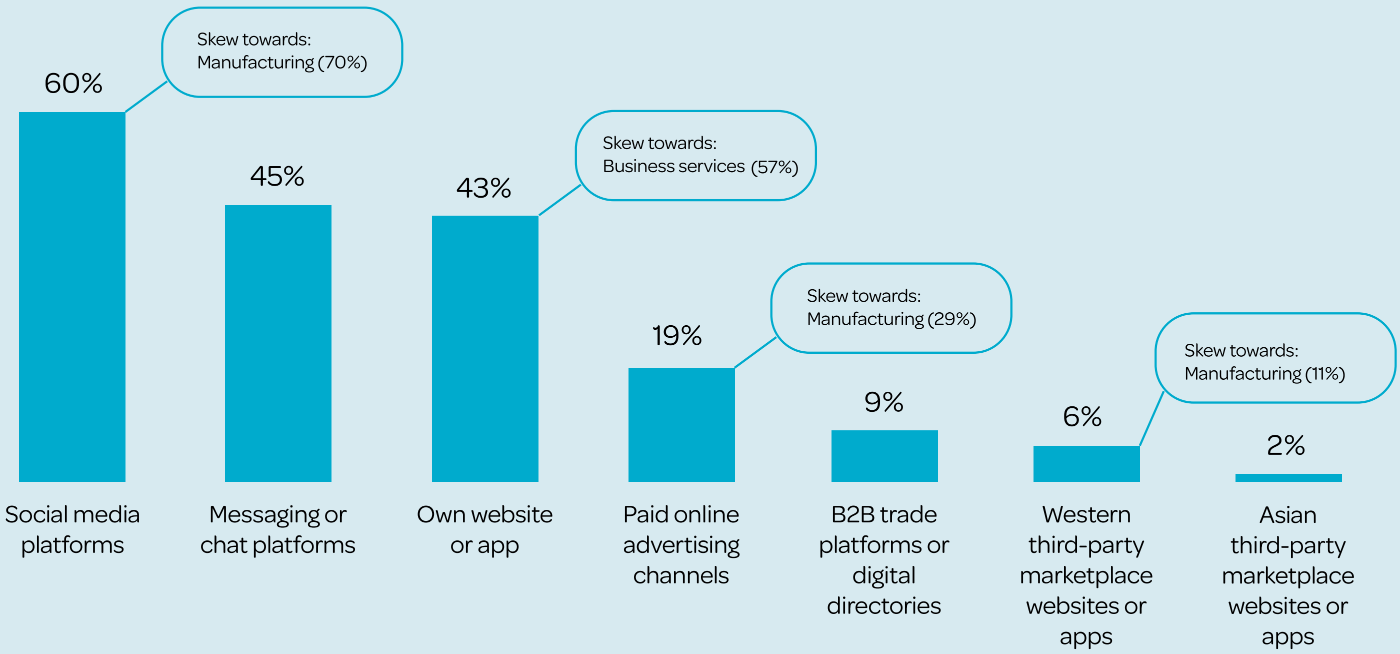
GOING GLOBAL

Takeaway 2 — Pacific exporters are reorienting toward larger external markets

Digital has become the primary export channel for businesses across the Pacific, with **88% of exporters now generating revenue through online channels** - up from 76% in 2024 and 73% in 2022, the biggest rise on record. While more businesses are selling online, digital's share of total export revenue has remained broadly stable at 48% (47% in 2024).



ONLINE CHANNELS USED WHEN GENERATING EXPORT REVENUE (Non-tourism exporters)



ACCESS TO FINANCE

Takeaway 3 — The primary ceiling on Pacific export growth

Cost pressures now dominate the export environment. High operating costs are cited by 48% of exporters - by far the most significant barrier. While logistics, marketing capability, and labour availability have improved since 2024, access to finance remains a persistent constraint, with seven in ten exporters reporting difficulty – the highest level recorded in the survey's history.

7 in 10

exporters find it difficult to obtain finance – the highest reading since tracking began. Up from 55% in 2020.

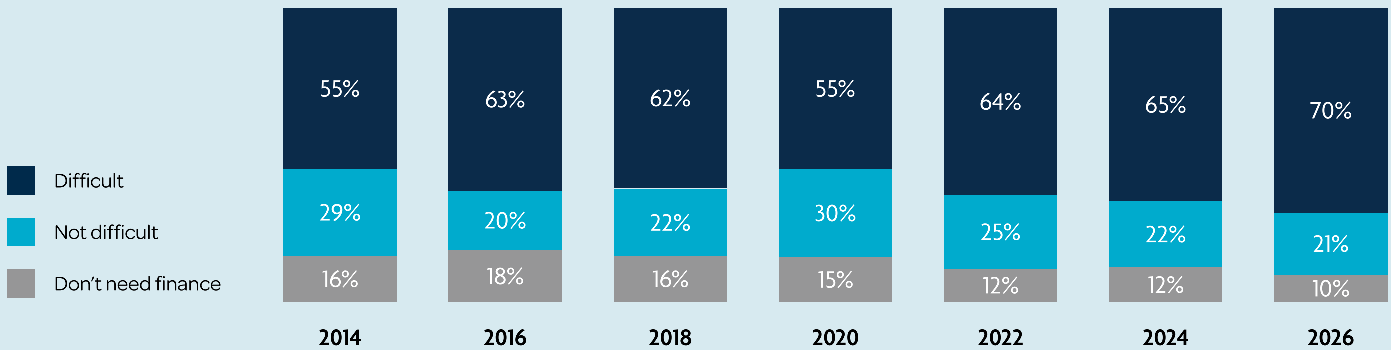
MAIN BARRIERS TO EXPORTING OR SELLING TO OVERSEAS CUSTOMERS

	2026	2024	2022	2020
High operating costs*	48%	46%	65%	47%
Access to finances or capital to support export activities	38%	37%	39%	35%
Challenges with supply chain or export logistics*	36% ▼	63%	62%	Statement added in 2022
International competition or pricing pressure*	32%	37%	39%	44%
Lack of marketing or online sales capability*	31% ▼	41%	37%	Statement added in 2022
Labour issues	22%	27%	26%	26%
Currency exchange rates	22%	22%	19%	20%
Domestic economic conditions	21%	24%	14%	20%
High import tariffs in target markets	20% ▲	12%	16%	18%
Concerns about getting paid	17%	14%	18%	10%
Effects from natural disasters and extreme weather events	16%	21%	26%	22%

▲▼ Significantly higher/lower than 2024

** Indicates code wording change for 2026*

DIFFICULTY OBTAINING FINANCE — HISTORICAL TREND (%)



When asked what would help most – support priorities mirrored existing barriers, with export grants (50%), logistics support (45%), and introductions to overseas buyers (44%) leading in importance. Reported barriers around freight/logistics and marketing appear to be easing – a positive signal that existing programs are gaining traction.

PREFERENTIAL TRADE ACCESS

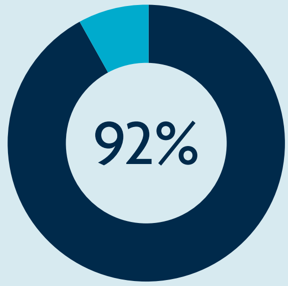
Takeaway 4 — A communications problem, not an agreement problem

There's a large gap between FTA eligibility and received benefits

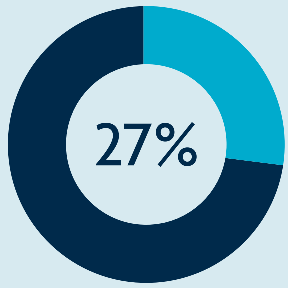
Despite 92% of Pacific exporters qualifying for preferential trade access under at least one Free Trade Agreement*, only 27% report receiving benefits as a result. This large gap highlights that awareness and understanding of how to fully leverage existing FTAs is limited, with awareness particularly low among newer exporters.

** Methodology note – FTA eligibility: The 92% eligibility figure is derived from survey data. Respondents' countries of operation were cross-referenced with their reported export markets over the past 12 months, and each resulting trade corridor was mapped against known Free Trade Agreements schedules to determine eligibility. Figures on FTA benefit reflect respondents who self-reported benefiting from at least one applicable agreement.*

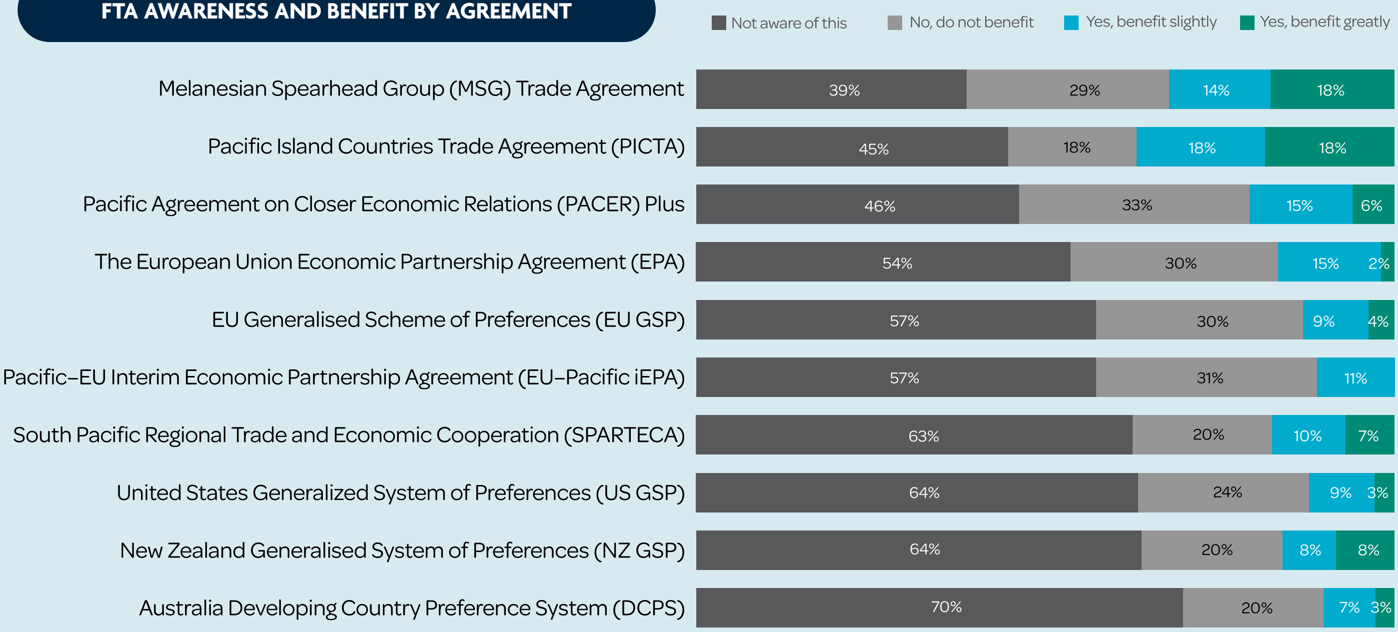
Proportion of Pacific Island export businesses **eligible** under at least 1 FTA



Proportion of Pacific Island export businesses **benefiting** under at least 1 FTA



FTA AWARENESS AND BENEFIT BY AGREEMENT



INCLUSIVE EMPLOYMENT & GEDSI

Takeaway 5 — An under-utilised lever in the sectors driving export growth

Workforce inclusion is occurring within the Pacific's most export-active sectors rather than sitting at the margins, with implementation of Gender Equality, Disability, and Social Inclusion (GEDSI) policies most evident in sectors with strong export activity like agriculture and manufacturing.

These sectors, where women's workforce participation is already strong, continue to actively adopt GEDSI measures. Throughout Pacific businesses, women account for 42% of CEOs, 47% of leadership roles, and 49% of the workforce.

47%

of leadership roles are held by women

Agriculture and Manufacturing lead on both inclusive hiring AND export growth

DISABILITY INCLUSIVE EMPLOYMENT BY SECTOR (%)

	OVERALL	INDUSTRY				LEADERSHIP		BUSINESS SIZE		
		Agriculture	Manufacturing	Tourism	Services (inc ICT)	Male-led	Female-led	1-4 employees	5-20 Employees	More than 20 employees
2026 base n	n=431	n=85	n=119	n=130	n=77	n=252	n=172	n=139	n=189	n=103
2026	23%	33%	27%	20%	16%	24%	23%	11%	22%	43%
2024	27%	35%	24%	35%	14%	27%	29%	14%	30%	38%

The fifth takeaway: inclusion and export growth are aligned, but not evenly realised. High levels of female participation are evident in export-active sectors, while broader GEDSI outcomes, particularly disability inclusion, remain less consistently adopted. This points to a clear opportunity to deepen inclusion within the Pacific's most commercially dynamic sectors.

REPORTS PUBLISHING IN JULY 2026

Full reports will be available in July 2026. Pacific Trade Invest is available to deliver targeted briefings to PIF member states on request.

1 PACIFIC ISLANDS EXPORT SURVEY 2026 (full report)

COUNTRY REPORTS

2 FIJI

3 PAPUA NEW GUINEA

4 TONGA

5 VANUATU

6 MICRONESIA (regional bloc)

THEMATIC REPORTS

7 TOURISM (sector)

8 AGRICULTURE (sector)

9 FMCG (sector)

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