PACIFIC ISLANDS EXPORT SURVEY

2026

Vanuatu Spotlight

Pacific Trade Invest

PACIFIC ISLANDS EXPORT SURVEY 2026

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COMPREHENSIVE

1. FULL REPORT
2. HIGHLIGHTS REPORT

These companion reports provide deeper insights by country and sector, allowing readers to explore the trends, challenges and opportunities most relevant to them.

SPOTLIGHTS

3. FIJI (country)
4. VANUATU (country)
5. TOURISM (sector)
6. AGRICULTURE (sector)
7. MANUFACTURING (sector)

Pacific Trade Invest

INTRODUCTION

Vanuatu is one of the Pacific's most internationally engaged export economies, with businesses spanning tourism, manufacturing, agriculture and business services. This report draws on the experiences of Vanuatu businesses participating in the Pacific Islands Export Survey 2026, providing insights into exporter performance, market opportunities and the challenges shaping future growth.

The findings reveal a business community with the strongest growth momentum in the Pacific, with 59% of exporters reporting revenue growth and 82% expecting further growth ahead. Vanuatu also has one of the Pacific's highest concentrations of export-reliant businesses, with 43% generating more than three-quarters of their revenue from exports. Yet exporters here face some of the region's most acute challenges, from supply chain and logistics constraints to extreme weather, which disrupted 77% of businesses over the past year.

Through its network across key international markets, Pacific Trade Invest (PTI) helps Pacific exporters connect with buyers, investors and business partners. Our aim is that this report provides valuable insights for businesses, policymakers and development partners working to strengthen Vanuatu's export competitiveness and resilience.

Tim Martin
Trade Commissioner
PTI Australia

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FOREWORD

On behalf of the Government and People of Vanuatu, I am proud to present this first Vanuatu report of the Pacific Islands Export Survey 2026, prepared in partnership with Pacific Trade Invest.

The findings gives this Ministry real cause for pride. Vanuatu recorded the strongest export performance to other countries in this survey, with more of our businesses growing their revenue, and more expecting further growth, than anywhere else in the Pacific. Half of our exporting businesses earnings are generated from exports, the highest of any economy surveyed. Trade is the engine of our economy and the pride of our people.

I acknowledge the exporters who gave their time to complete this survey, and the partners who made it possible. Good and factual information is the foundation of good policy development and decisions making, and this report gives us an honest and detailed picture of how our exporters are faring, the opportunities ahead of them, and the barriers we must clear together.

Two of the greatest of those barriers are connectivity and market compliance requirements. . Our exporters are competitive and market ready, however the cost and reliability of freight and logistics,including standard and quality requirements from the import market stands between the market and the customers . Extreme weather adds to this, and Vanuatu feels it more sharply than any country in the region. These are challenges this Ministry takes seriously, and ones we are far better placed to meet with evidence of this quality in hand.

There is much to be proud of and much to leverage. Our exporters are among the quickest in the Pacific to adopt new technology, with up to 50% already working with artificial intelligence. They are currently trading under existing regional trade agreements, reaching France, New Caledonia and the wider Francophone Pacific in numbers well above the regional average, and building their on-line presence and around the world.

Vanuatu's exporters have shown they can compete with the best. This Ministry will continue to stand with exporters, our partners, to facilitate pathways for further growth in exports.

Tankiu tumas.

Noah Patrick Kouback
Director General

Ministry of Trade & Commerce
GOVERNMENT OF VANUATU

BACKGROUND

SPECIFIC OBJECTIVES

The Pacific Islands Export Survey series is a biennial research survey conducted by Pacific Trade Invest with the key objective of understanding and tracking export dynamics in the Pacific Islands. The specific objectives of this study are to:

- Determine business confidence;
- Identify initiatives to increase exports;
- Understand the use of digital marketing in generating export revenue;
- Identify key export target markets;
- Understand barriers to exporting in the Pacific;
- Understand financial and investment needs;
- Understand the impact of extreme weather;
- Gather gender equality, disability and social inclusion insights for exporters.

Pacific
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FIVE KEY TAKEAWAYS

PACIFIC ISLANDS EXPORT SURVEY 2026

01

Vanuatu boasts the Pacific's strongest export performance

with 59% of exporters reporting revenue growth over the past 12 months, a net of +42 which is significantly above the Pacific average (net +19). Outlook is also strong, with 82% expecting further growth over the next year, a net +77 against the Pacific-wide +60.

02

Vanuatu's economy is highly internationally integrated

with exports accounting for an average of 51% of total business revenue. These exports are also heavily geared towards a wider international market, with 43% of businesses generating more than three-quarters of their income from international sales - the highest export dependency of any country in this survey.

03

Logistics is Vanuatu's binding constraint

as supply chain and export logistics are cited by 55% of non-tourism exporters as a primary barrier. This is significantly above the 36% Pacific average and ranks first ahead of operating costs, reversing the pattern seen in every other country in this survey.

04

Extreme weather is Vanuatu's most acute commercial risk

with 77% of businesses impacted over the past 12 months, representing the highest rate in the Pacific. Physical damage (65%) and increased costs (71%) as resulting outcomes were well above Pacific benchmarks and point to a structural climate exposure, not a one-off event.

05

France and the Francophone Pacific are a distinctive commercial axis

with France representing Vanuatu's third-largest export market at 30%, more than double the Pacific average (13%). While New Caledonia leads all intra-Pacific trading partners with a 41% French export market, Vanuatu's bilateral footprint is evident, pointing to its historical ties.

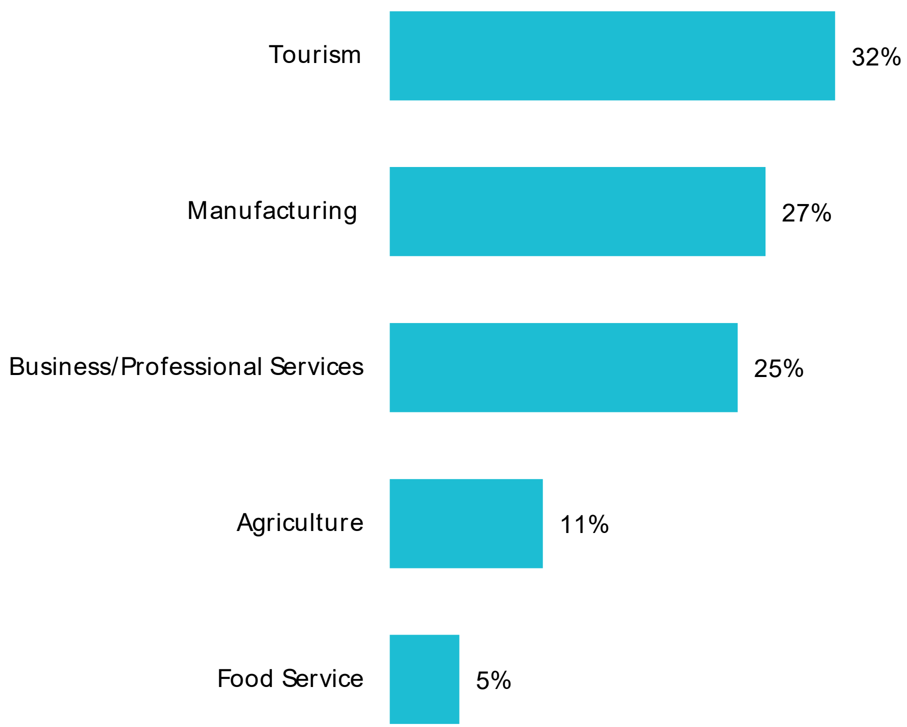
SAMPLE PROFILE

Business Activity

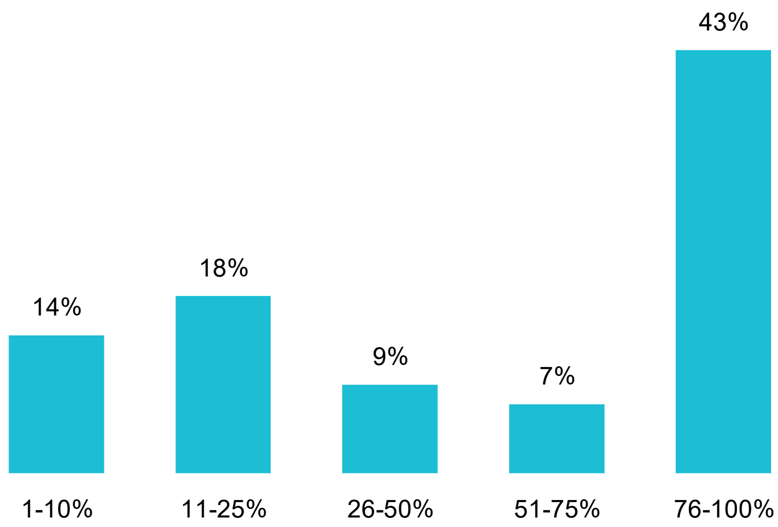
The range of businesses in Vanuatu is spread relatively evenly, with tourism leading the sample at 32%, followed by manufacturing (27%) and business services (25%). The remainder is made up of agriculture and food services.

Exports account for an average of 51% of total business revenue, with 43% of businesses generating more than three-quarters of their income from international sales - the highest export dependency recorded across all countries in this survey.

Main Activity



Proportion of Revenue From Exports

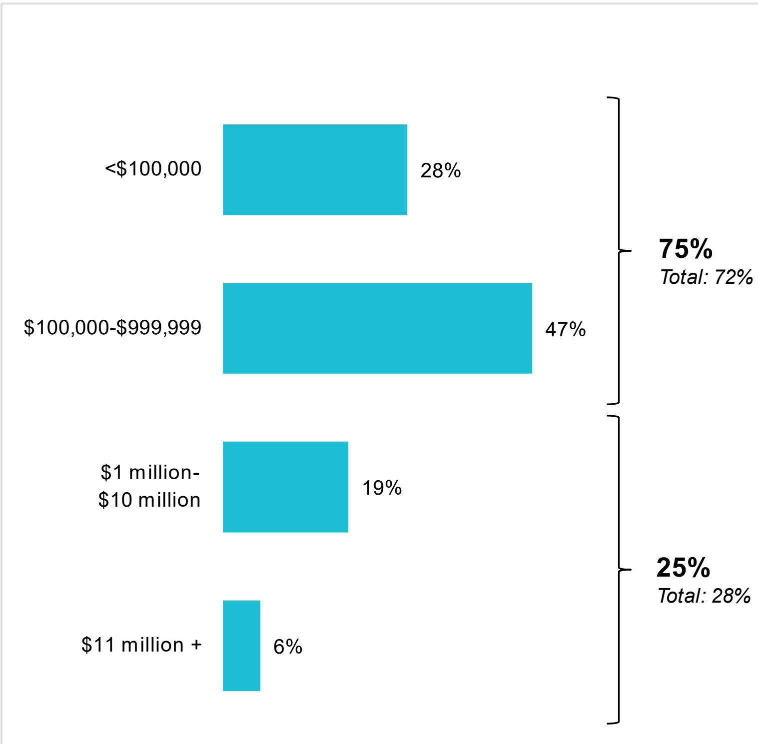


Average: **51%**

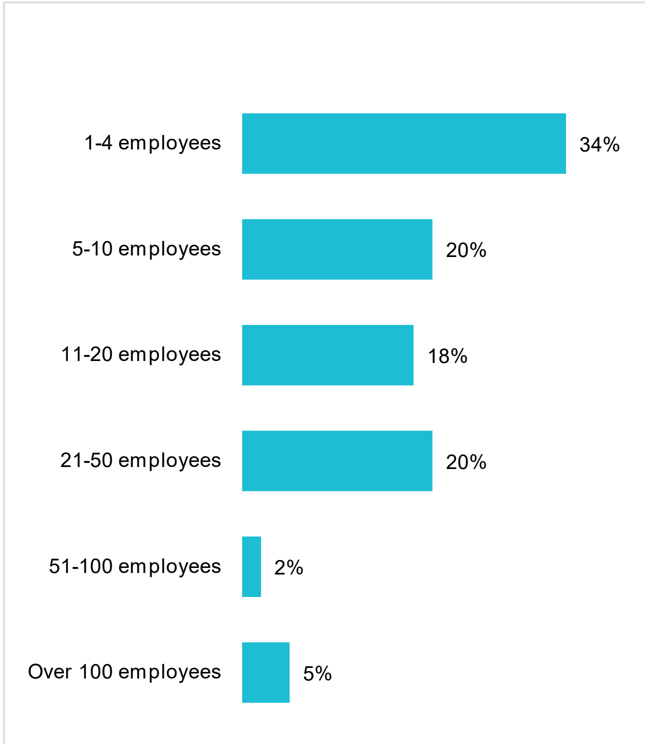
Firmographics

Vanuatu's business landscape is mature and streamlined, with 70% exporting for four years or more (against 63% across the Pacific), but three-quarters generating less than $1million in annual revenue, and 54% employing ten or fewer staff. Aside from boasting the most established exporter base of any country in this survey, diversity and inclusion also perform well, with women making up 54% of the employee workforce compared to the Pacific-wide 49%.

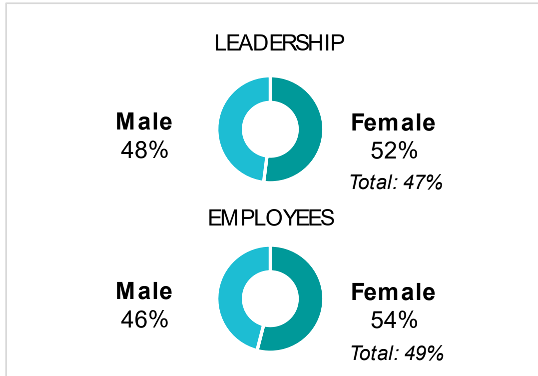
Annual Revenue



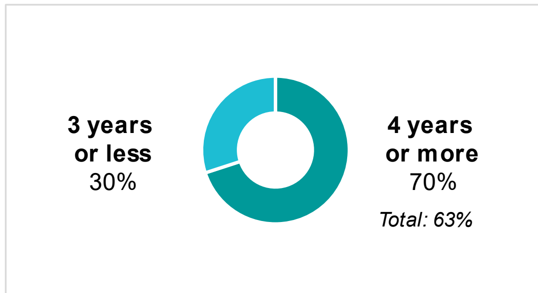
Number of Employees



Gender Divide



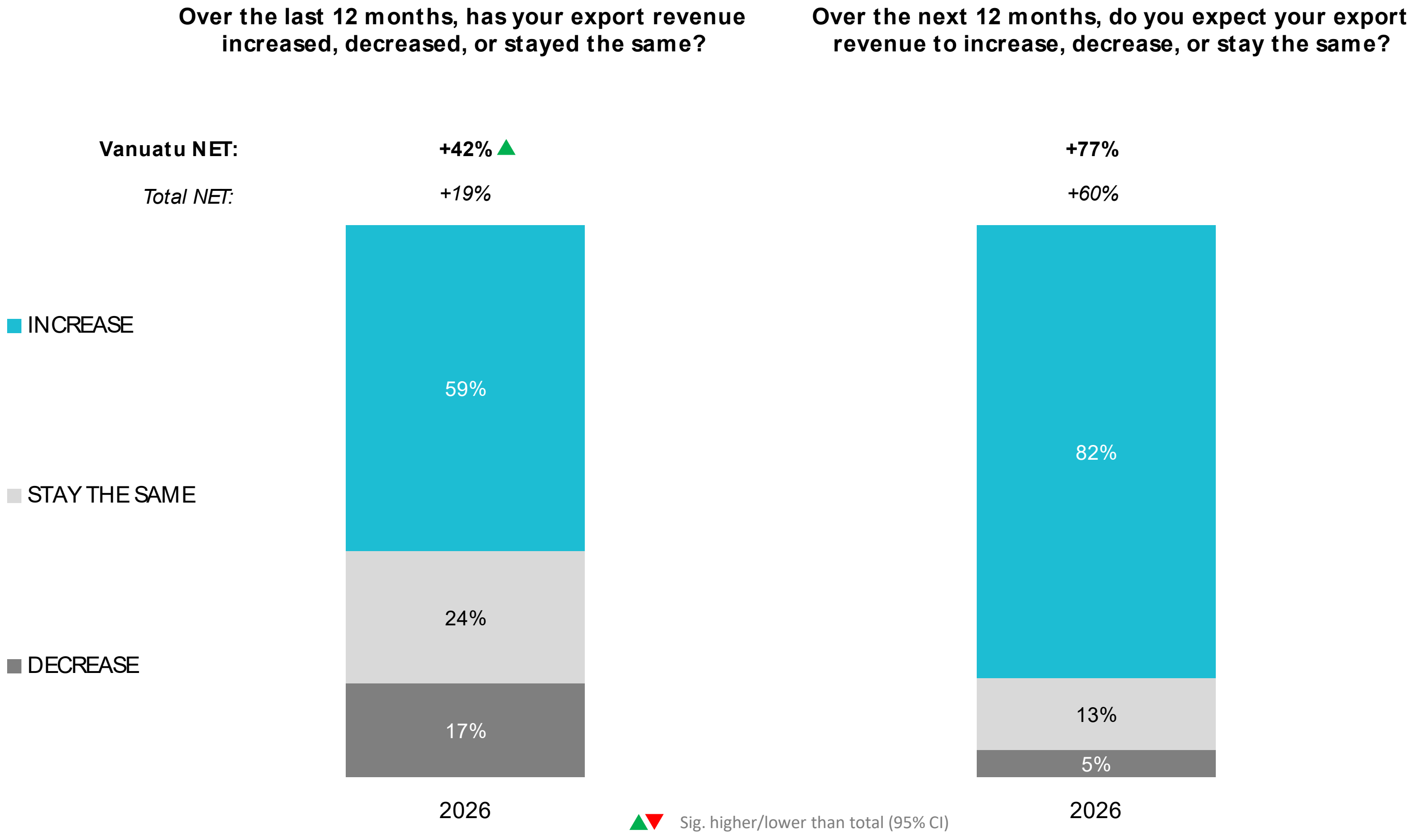
Export Maturity



EXPORT SENTIMENT & BEHAVIOUR

Export Sentiment

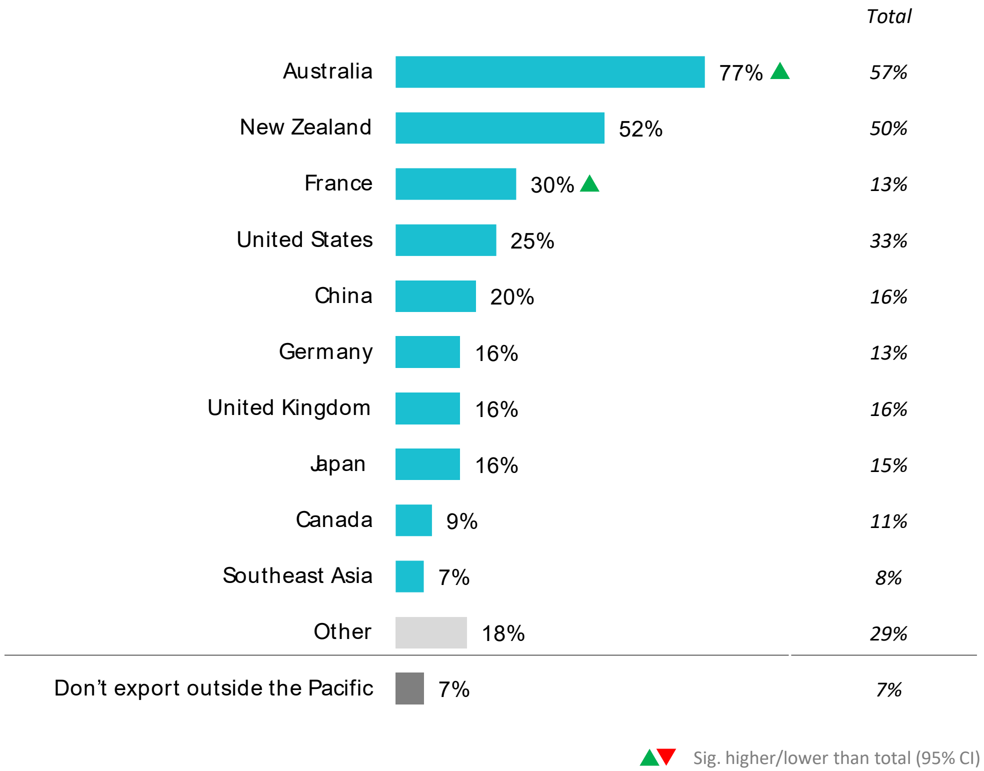
Growth throughout Vanuatu's export businesses is high with 59% reporting revenue growth over the past 12 months, a net +42 which is significantly above the Pacific average of net +19. Outlook for these businesses is also promising, with 82% expecting revenue to increase over the next 12 months, a net +77 against the Pacific-wide +60 – the highest confidence reading of any country in this survey.



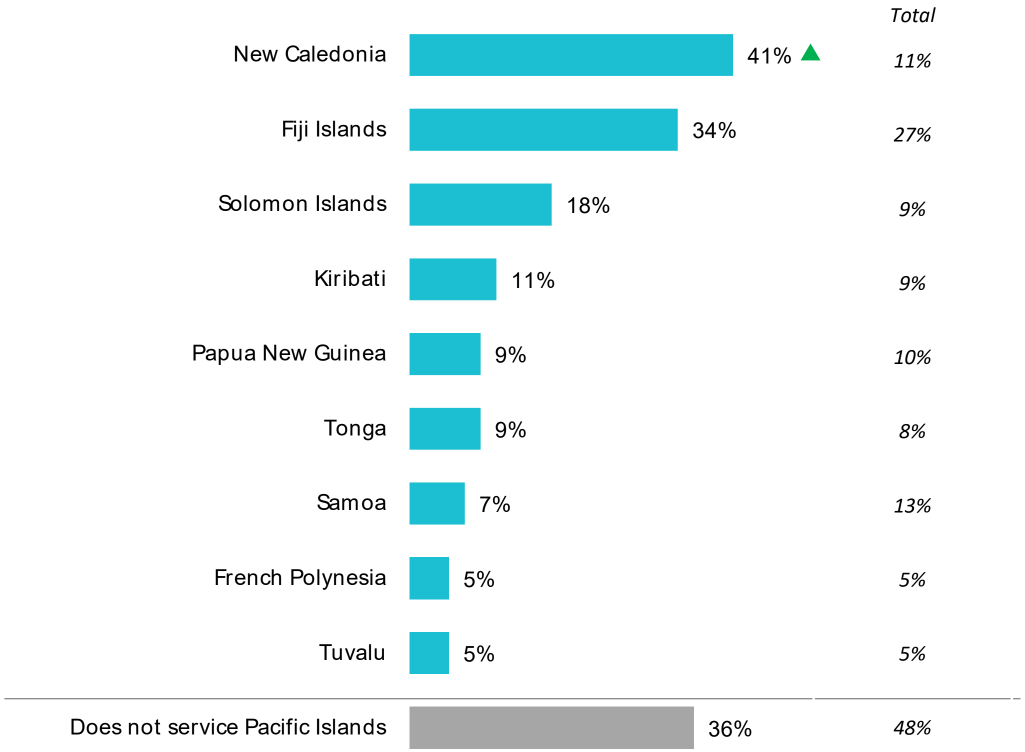
Geographic areas generated export revenue from over the past 12 months

Vanuatu's export footprint is concentrated on Australia, with 77% of exports being directed there, significantly above the Pacific average of 57%. New Zealand (52%) and France (30%) follow, with France's share more than double the Pacific average (13%), reflecting Vanuatu's historical ties.

Exporting outside of Pacific Islands



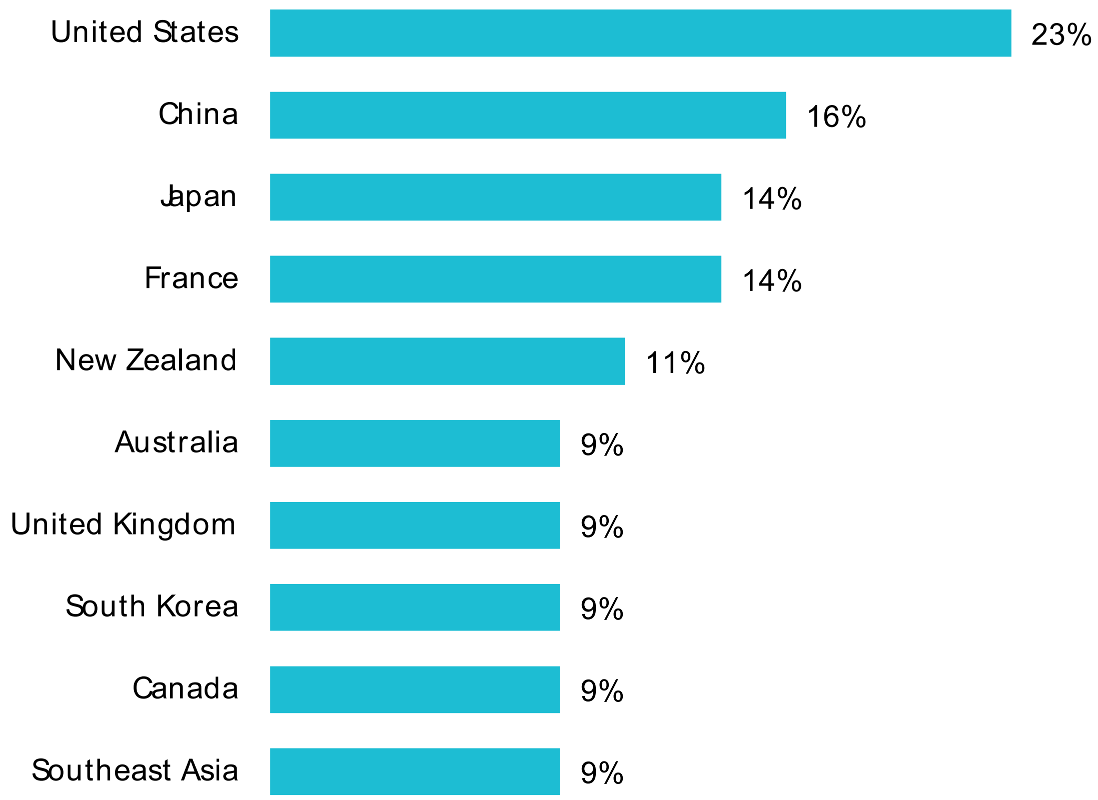
Exporting within Pacific Islands



Future export targets

Despite a well-established export market to Australia and New Zealand, Vanuatu businesses have their sights set on new opportunities. This broadening outlook sees US leading new market targeting over the next three years at 23%, ahead of China (16%), Japan and France (both 14%).

WHAT NEW MARKETS WILL YOU TARGET OVER THE NEXT 3 YEARS?

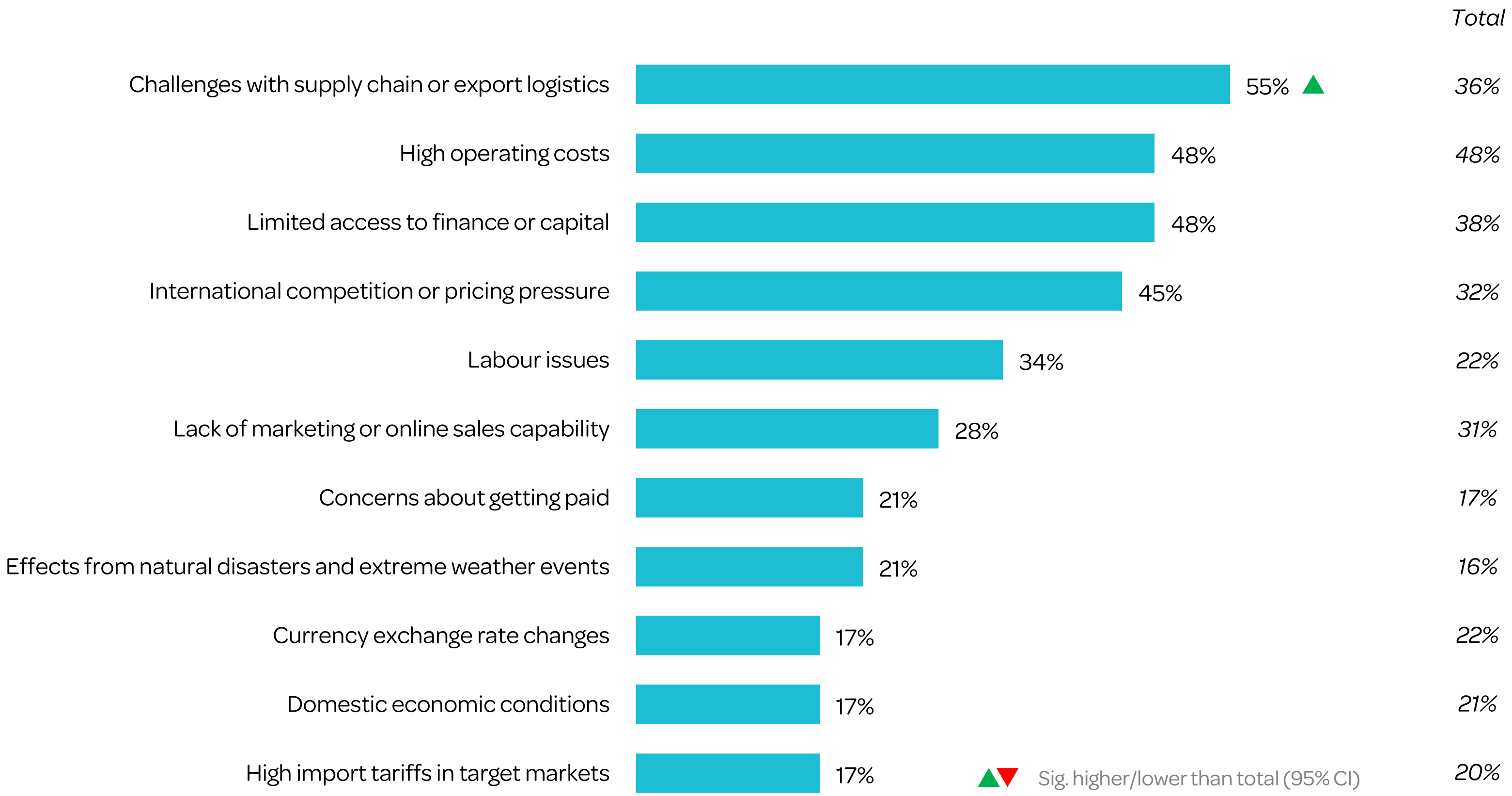


BARRIERS, ASSISTANCE & FINANCE

Export Challenges

For Vanuatu's non-tourism exporters, the primary challenge lies within supply chain and export logistics (55%), significantly above the Pacific average (36%) and ahead of high operating costs (48%) and access to finance (48%). This is a reversal of the regional pattern observed elsewhere in the Pacific. Competition (45% vs Pacific 32%) and labour issues (34% vs Pacific 22%) are also notably elevated, consistent with barriers being felt more broadly across Vanuatu's export base than other countries in the region.

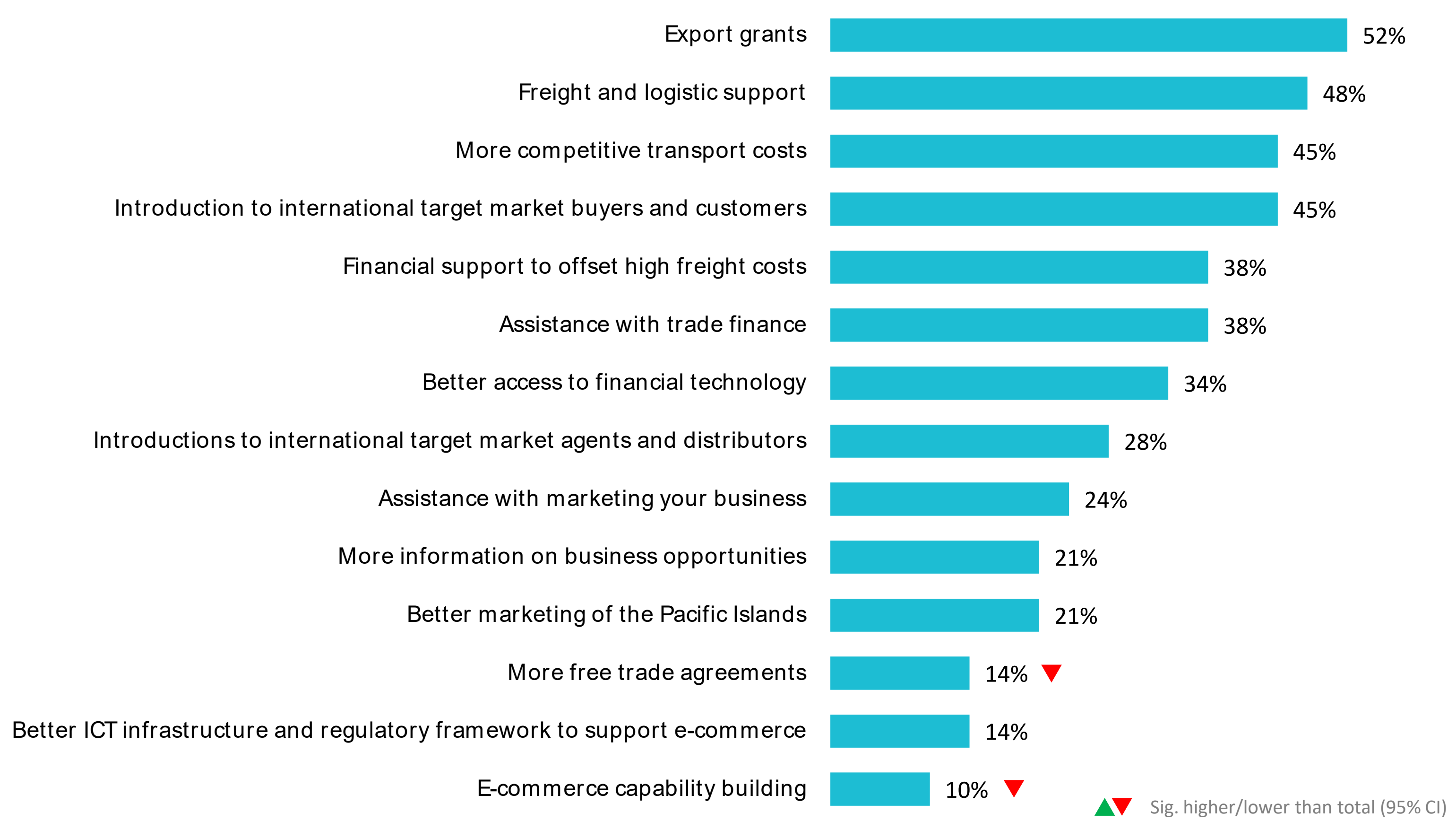
WHAT ARE THE MAIN BARRIERS TO EXPORTING OR SELLING YOUR PRODUCTS/SERVICES TO OVERSEAS CUSTOMERS OR VISITORS?



Export Assistance

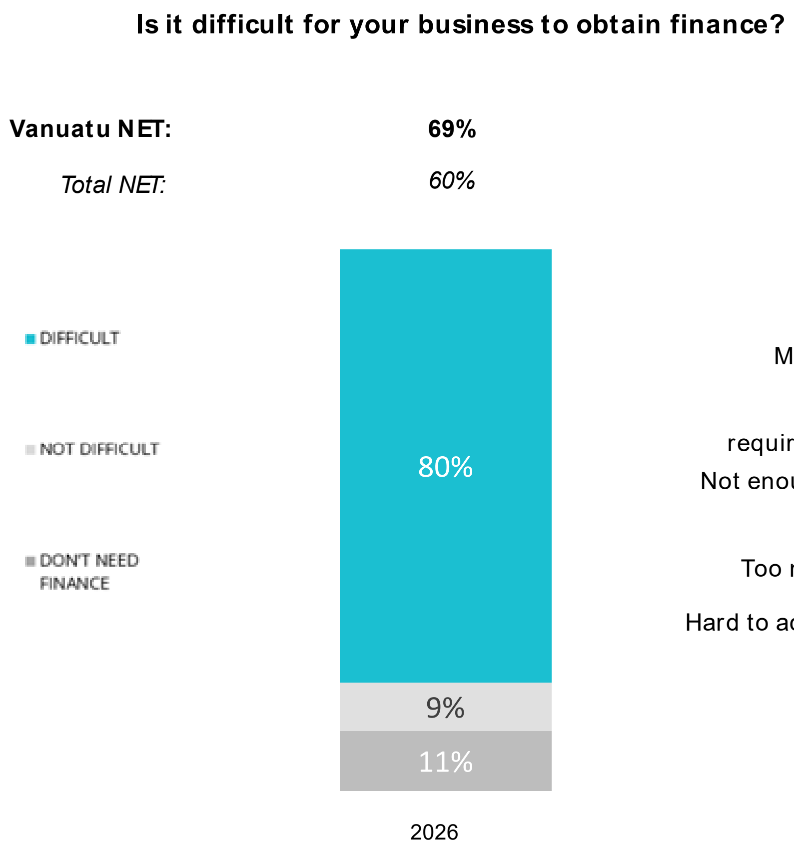
Consistent with Pacific-wide preferences, export grants, logistics and freight support, and introductions to international buyers lead the assistance priorities for Vanuatu exporters. These preferences directly correlate with logistics and cost barriers identified on the previous slide, pointing to a link between the challenges and possible solutions.

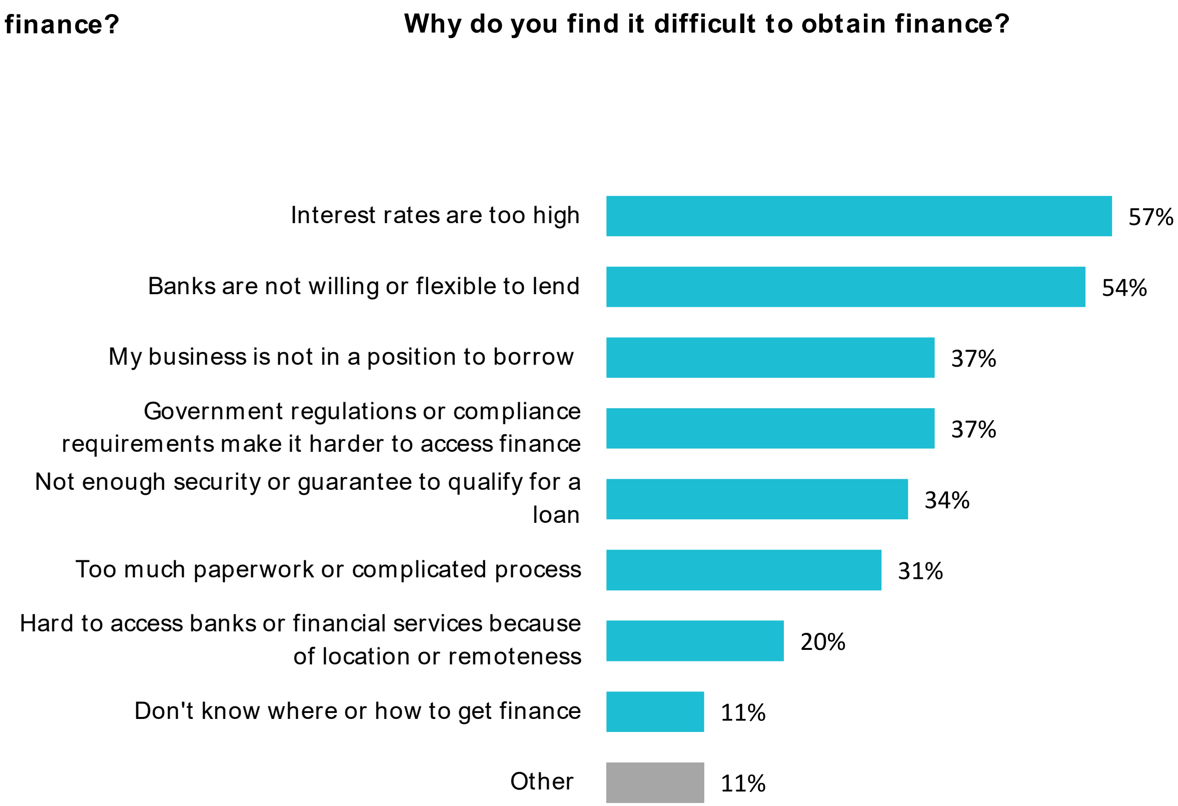
WHAT FORMS OF ASSISTANCE WOULD ENCOURAGE YOU TO INCREASE YOUR EXPORT ACTIVITY?



Access to finance

Eighty per cent of Vanuatu businesses report difficulty obtaining finance, among the highest readings of any country in this survey. High interest rates (57%) and banks' lack of willingness or flexibility to lend (54%) are the most cited reasons. Location and remoteness are also factors for 20%, an issue specific to Vanuatu's island geography.





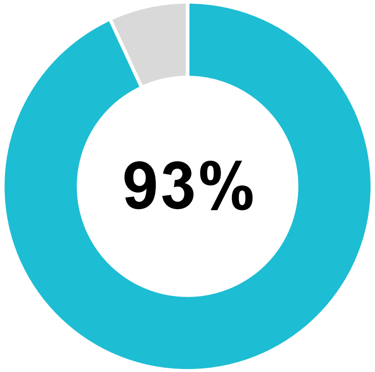
FTA ENGAGEMENT

FTA engagement

Consistent with a regional pattern, Vanuatu exporters observe a gap between Free Trade Agreement (FTA) eligibility and benefit, with 93% being eligible under at least one FTA, yet only 38% report benefiting. While FTA benefits in Vanuatu sit above the Pacific average of 27%, the existing gap still highlights where increased communications and awareness could be useful. The MSG Agreement and PACER Plus are the leading agreements generating reported benefit, each cited by 21% of exporters.

DO YOU BENEFIT FROM ANY OF THE FOLLOWING FREE TRADE AGREEMENTS?

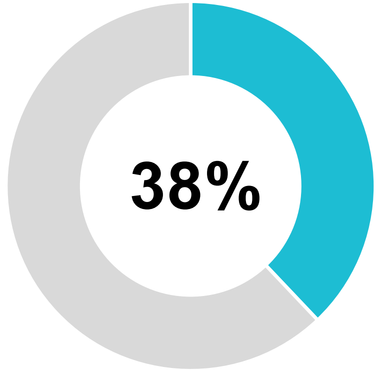
Proportion of Vanuatu export businesses eligible at least 1 FTA (i.e. correct location, correct export destination)



Total: 92%

Top 3 FTAs *(% of non-tourism businesses selecting benefit slightly / greatly)*	
Melanesia Spearhead Group (MSG) Agreement	21%
Pacific Agreement on Closer Economic Relations (PACER) Plus	21%
Pacific Island Countries Trade Agreement (PICTA)	7%

Proportion of Vanuatu export businesses benefiting slightly / greatly from at least 1 FTA



Total: 27%

ONLINE SALES & AI

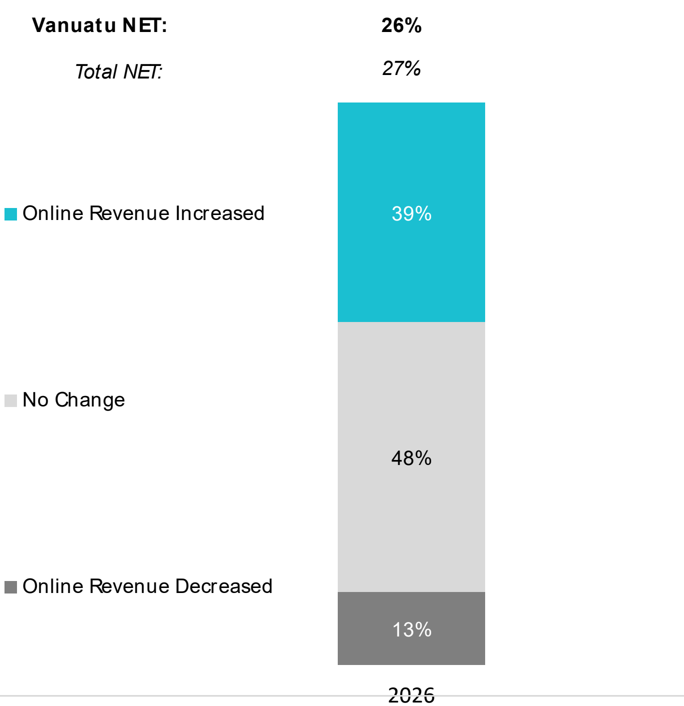
Online Distribution

Following the Pacific-wide trend of businesses increasingly taking things online, 84% of Vanuatu exporters currently generate revenue through online channels. While this is slightly below the Pacific average of 88%, uptick in online revenue is regionally in line, with 39% of exporters reporting an increase over the past 12 months. Social media is the dominant channel at 68%, with own websites and apps used by around half (48%).

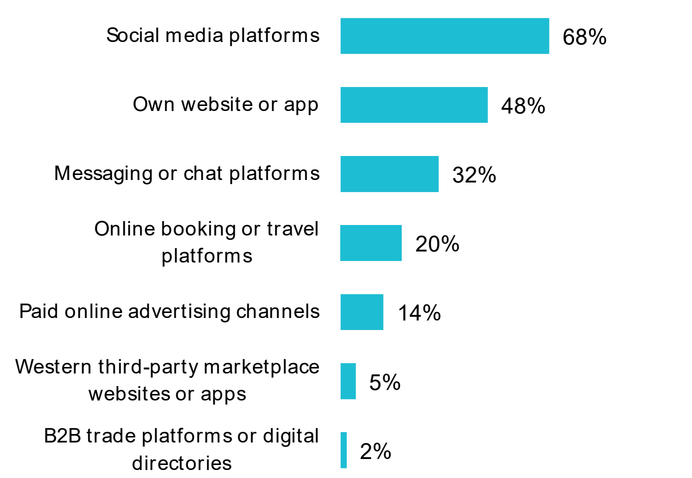
84% sell through online channels

Total: 88%

How has your export revenue generated through online channels changed over the past 12 months?



Which of the following online channels does your business use to generate export revenue?



Artificial Intelligence

Vanuatu exporters are ahead of the curve with AI integration, with 48% currently using AI tools throughout their business, higher than the Pacific average of 38%. Uptake is expected to increase, with a further 43% planning on adopting AI tools in the next year. Overall Vanuatu businesses have a positive outlook towards AI, with 74% agreeing it will improve their financial performance over the next three years, against 71% Pacific-wide. Marketing activities and identifying new business opportunities are the most common current applications.

IN WHICH AREAS ARE YOU USING (OR PLANNING TO USE) AI TO SUPPORT YOUR OPERATIONS?

AI Adoption

48% currently using AI

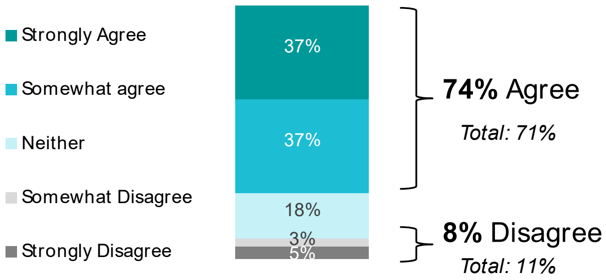
Total: 38%

43% planning to adopt AI

Total: 45%

Attitude to AI

"AI will positively impact the financial performance of our business over the next 3 years."

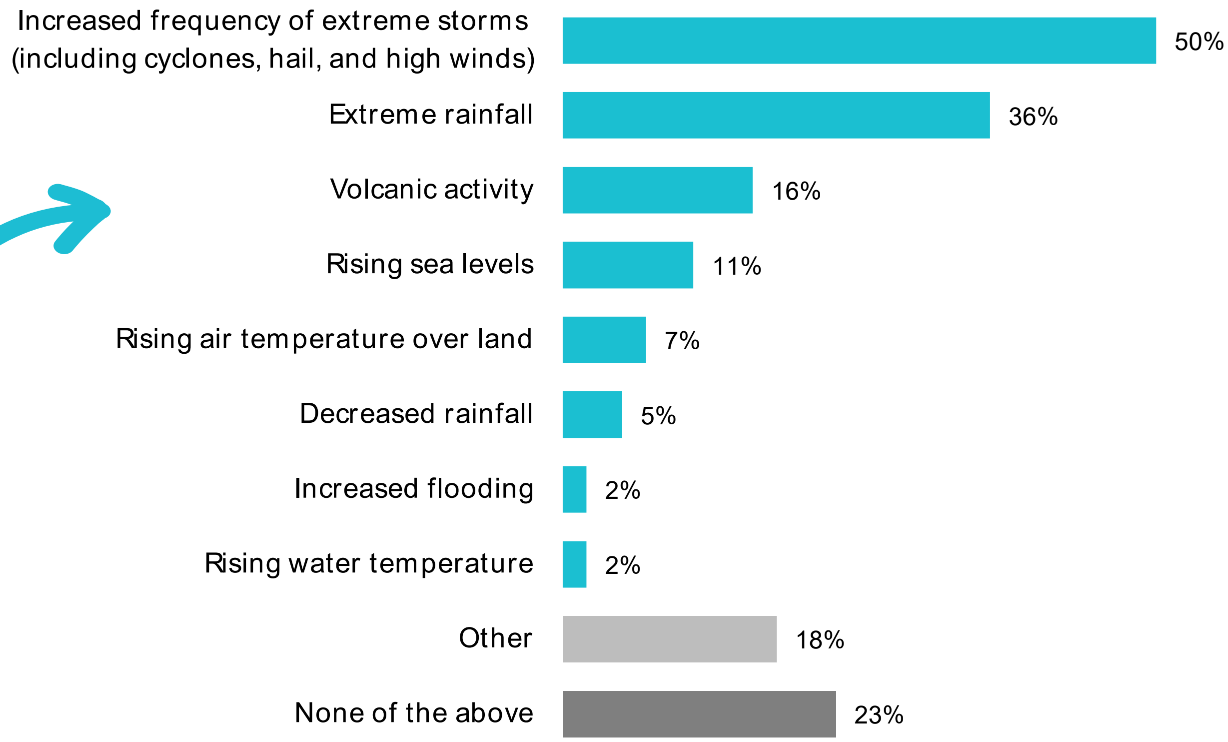


IMPACT OF EXTREME WEATHER PATTERNS

Impact of extreme weather patterns

While the impact of extreme weather is being felt by businesses across the entire Pacific, it's a particular challenge for Vanuatu exporters. The 2024 earthquake and Vanuatu's position in an active cyclone corridor has seen 77% of Vanuatu's exporters impacted in the past 12 months - the highest rate of any country in this survey and significantly above the Pacific average of 65%. Extreme storms and rainfall are the most reported events.

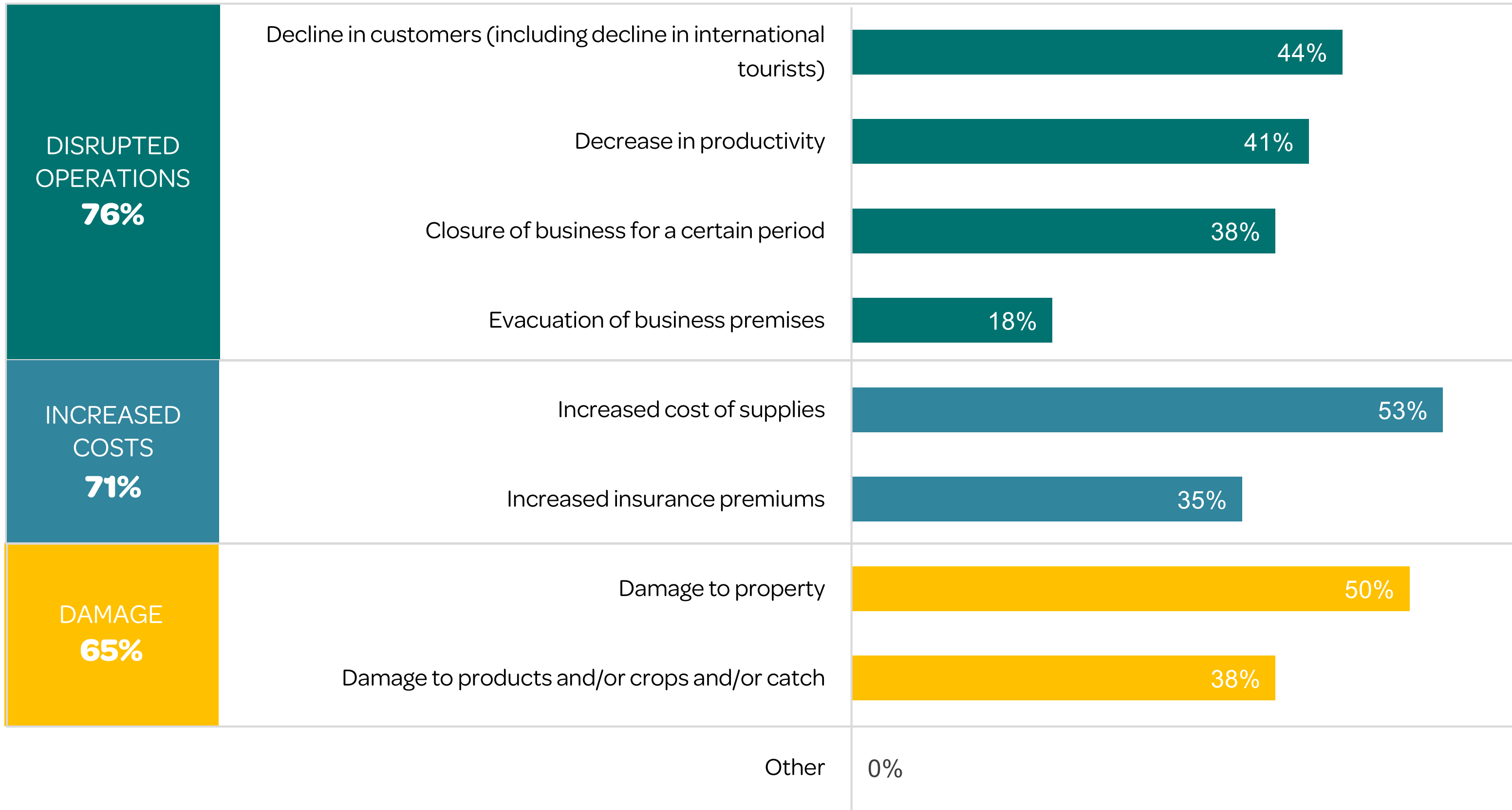
HAVE ANY OF THE FOLLOWING EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS OVER THE PAST 12 MONTHS?



Impact of extreme weather patterns

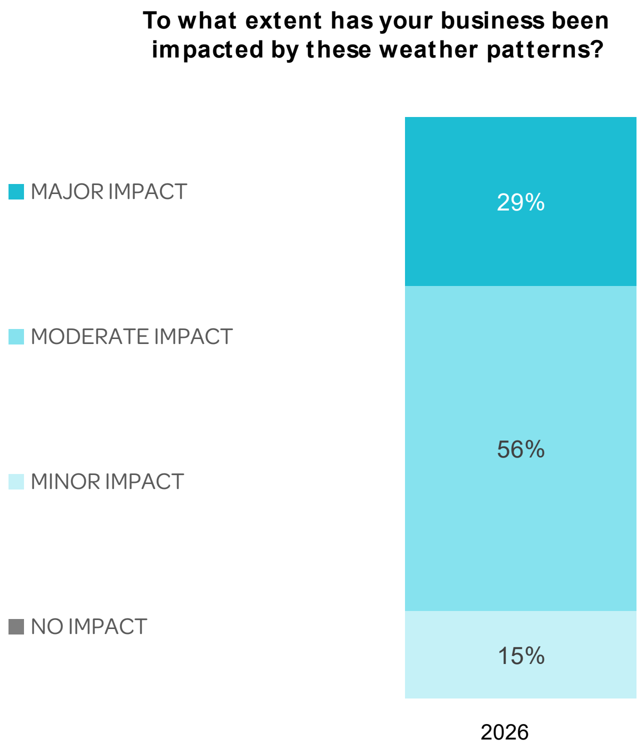
The timeline of extreme weather impacts experienced by Vanuatu's exporters reflects the acute, event-driven nature of the country's cyclone and storm exposure. Short-term impacts (44%) are more prevalent than the seasonal pattern common across the Pacific, partly attributable to the 2024 earthquake. The severity of these impacts is primarily moderate (56%), while 29% report major impacts, above the Pacific average of 23%.

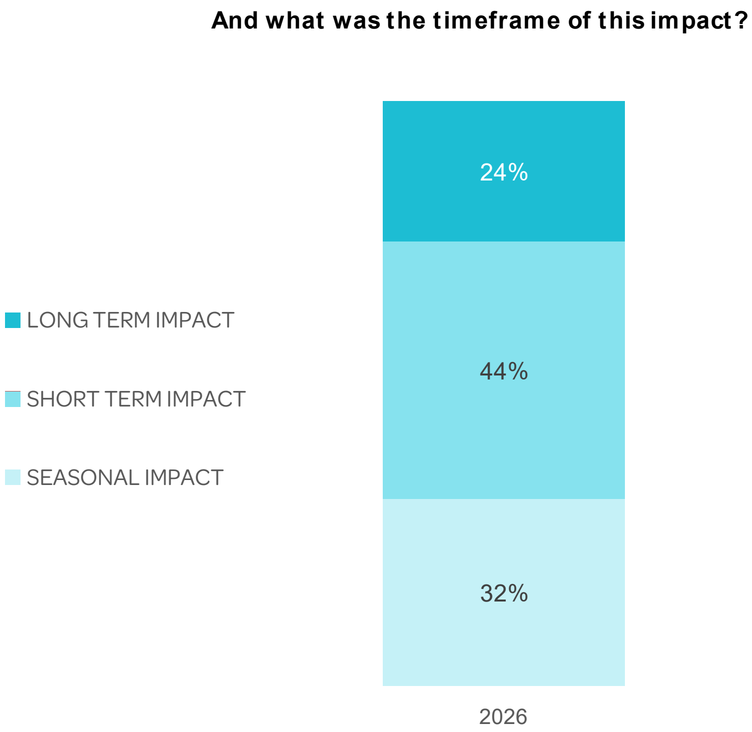
HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?



Impact of extreme weather patterns

Twenty-nine per cent of affected businesses report major weather impacts, above the Pacific average of 23%, and 24% report ongoing long-term effects. Moderate impacts are most common at 56%. Short-term impacts (44%) are more prevalent than the seasonal pattern more common across the Pacific - reflecting the acute, event-driven nature of Vanuatu's cyclone and storm exposure.



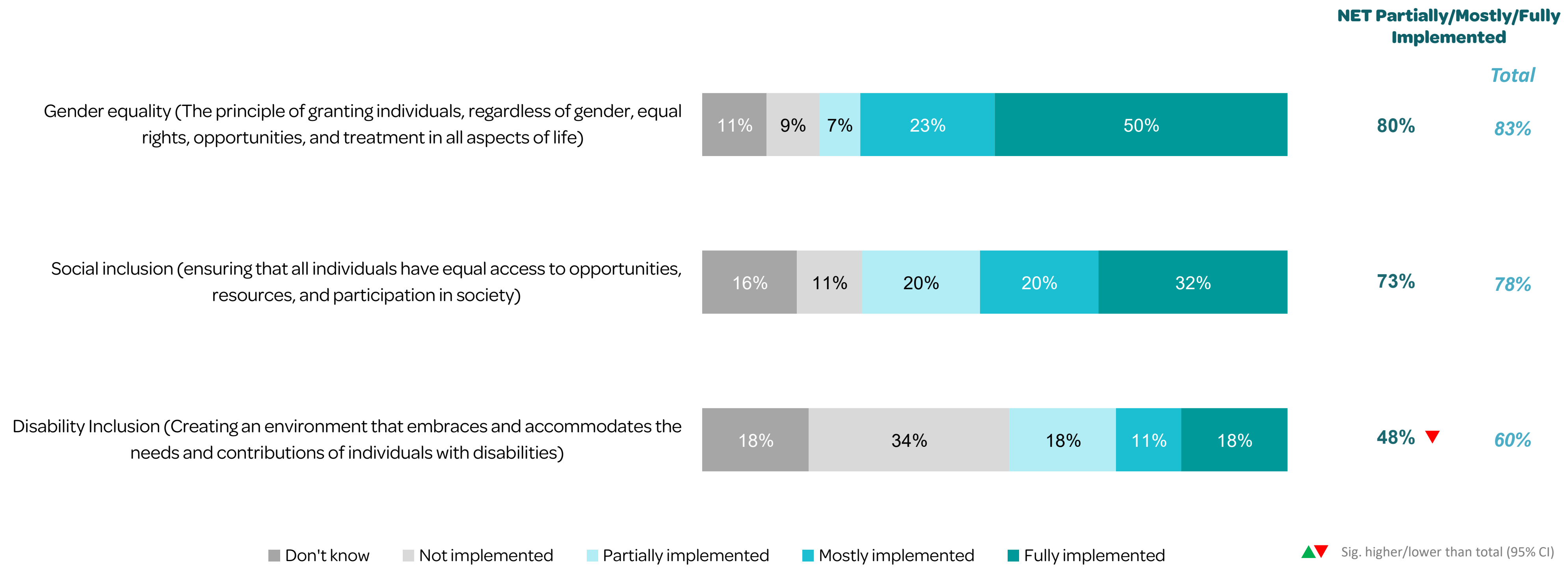


GENDER EQUALITY, DISABILITY & SOCIAL INCLUSION

Implementation of GEDSI Policies and Practices

While GEDSI implementation is rising throughout the Pacific, like other countries in the region, there is room for increased application throughout Vanuatu businesses. The country's current gaps in disability inclusion (48% partially or fully implemented against 60% across the Pacific), gender equality (80% vs Pacific 83%) and social inclusion (73% vs 78%) lay out a roadmap for greater GEDSI implementation that Vanuatu businesses can strive for.

TO WHAT EXTENT HAVE GENDER EQUALITY, DISABILITY AND SOCIAL INCLUSION (GEDSI) POLICIES AND PRACTICES BEEN IMPLEMENTED THAT ACTIVELY PROMOTE AND SUPPORT...?



RESEARCH METHODOLOGY

WHO RESPONDED

A total of 431 surveys were completed across all exporting sectors in the Pacific Islands Export Survey 2026. This report focuses on the 44 responses from business decision-makers and influencers in Vanuatu.

HOW

Respondents completed a 15-minute quantitative online survey.

WHEN

Online responses were collected between 2 March and 12 April 2026.

Survey invitations were distributed by Pacific Trade Invest Australia and partners.

PACIFIC TRADE INVEST

As the Pacific's leading trade and investment promotion agency, Pacific Trade Invest (PTI) works to improve the livelihoods of Pacific people by enabling decent work and economic growth in the Blue Pacific.

We develop and promote businesses from the Pacific region through trade, investment and tourism facilitation. PTI is an agency of the Pacific Islands Forum Secretariat, funded through the support of our host Governments, the Government of Australia, the Government of New Zealand, and the Government of the People's Republic of China.

Pacific Trade Invest

VANUATU FOREIGN INVESTMENT PROMOTION AGENCY

The Vanuatu Foreign Investment Promotion Agency (FIPA) is the statutory body responsible for promoting and facilitating foreign investment into Vanuatu. FIPA is the country's first point of contact for investors looking to establish or expand operations across Vanuatu and its outer islands.

FIPA provides free, confidential support across the investment lifecycle – from identifying opportunities in sectors such as tourism, agriculture, manufacturing and renewable energy, through to business registration, regulatory guidance and after-care services for existing investors. By connecting investors with government agencies, private sector partners and professional advisers, FIPA helps streamline market entry and strengthens Vanuatu's position as a competitive, low-tax investment destination in the Pacific.

INVEST VANUATU SINCE 1998

ACKNOWLEDGEMENTS & DISCLAIMER

Acknowledgements

PTI and survey partners would like to thank the Pacific export companies that took part in the survey and our on-the-ground partners who shared the survey through their networks

Disclaimer

The information presented in this report is based on information received by research company Fifth Quadrant from a survey administered from 2 March - 12 April 2026

Pacific Trade Invest

PACIFIC ISLANDS FORUM SECRETARIAT

INVEST VANUATU