PACIFIC ISLANDS EXPORT SURVEY

2026

Full report

Pacific Trade Invest

PACIFIC ISLANDS EXPORT SURVEY 2026

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COMPREHENSIVE

1. FULL REPORT
2. HIGHLIGHTS REPORT

SPOTLIGHTS

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

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

Pacific Trade Invest

FOREWORD

For more than a decade, the Pacific Islands Export Survey has provided one of the most comprehensive insights into the performance, outlook and challenges of the Pacific export sector. In 2026, participation reached its highest level since the survey began, providing the strongest evidence base yet on how Pacific exporters are responding to a rapidly evolving global trading environment.

As the Pacific's leading trade and investment promotion agency, Pacific Trade Invest (PTI) works across the region to support businesses to grow through trade, investment and tourism. A key part of that role is ensuring that policymakers, development partners and the export sector itself have access to reliable market intelligence. This survey remains one of the most important tools available to help us understand exporter sentiment, identify emerging opportunities and better target support where it can have the greatest impact.

This year's findings point to a sector that remains ambitious, adaptive and outward-looking. Pacific exporters continue to demonstrate strong confidence in future growth, with many actively pursuing new products, new markets and new ways of reaching customers. Digital channels are now firmly embedded in export business models, allowing Pacific firms to engage customers well beyond traditional markets and geographic constraints. At the same time, exporters are increasingly looking beyond the Pacific, with larger external markets such as Australia, New Zealand, the United States, China and Japan remaining central to future growth plans.

The survey also highlights a number of persistent constraints. Access to finance has become more difficult than at any point since tracking began, while operating costs remain a significant challenge across much of the export sector. Encouragingly, however, several longstanding barriers, including supply chain and logistics issues, appear to be easing as exporters adapt and regional connectivity improves.

Beyond the headline findings, the survey offers valuable insights into emerging themes shaping the future of Pacific exports, including the growing adoption of artificial intelligence, the increasing importance of digital trade, the impacts of extreme weather events, and the evolving role of trade agreements in supporting market access. Collectively, these findings provide a clearer picture of where the region's exporters are today and where they see future opportunities.

This full report is complemented by a range of country, sector and thematic reports that allow readers to explore findings in greater detail. Together, they provide a practical resource for businesses, governments, investors and development partners seeking to strengthen the competitiveness and resilience of the Pacific export sector.

We thank all businesses that participated in the survey and the many partners who helped promote it across the region. We hope these findings inform decision-making, stimulate discussion and contribute to a stronger, more successful Pacific export sector in the years ahead.

Caleb Jarvis
General Manager
PTI Network

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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.

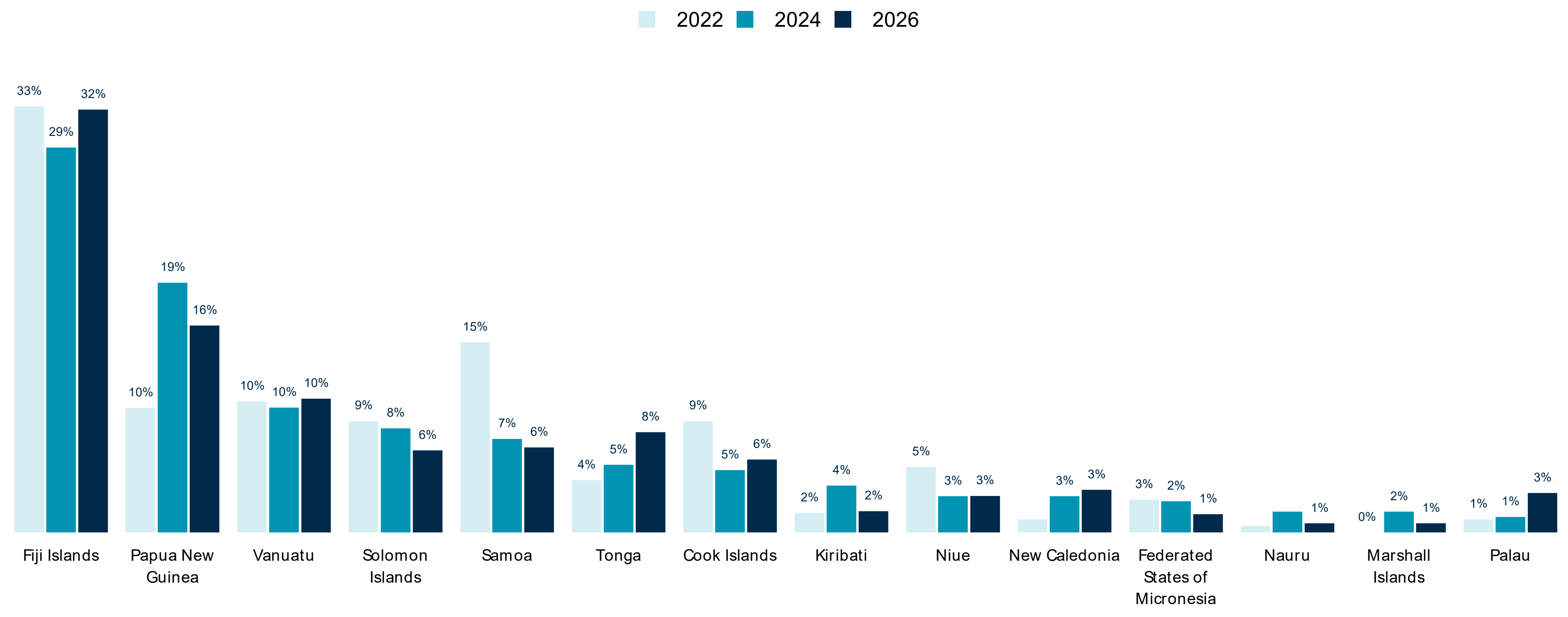
It is the strongest in the sectors driving exports. Implementation of Gender Equality, Disability, and Social Inclusion (GEDSI) policies and export capacity are closely aligned.

SAMPLE PROFILE

Location of Main Base of Operations

Closely aligned with the relative size of exporter bases across the Pacific, Fiji (32%) and Papua New Guinea (16%) account for the largest shares of the 2026 survey respondents. The remaining twelve Forum Island Countries are represented at correspondingly lower shares. This spread has remained relatively unchanged over the past three surveys, with notable growth in Papua New Guinea representation.

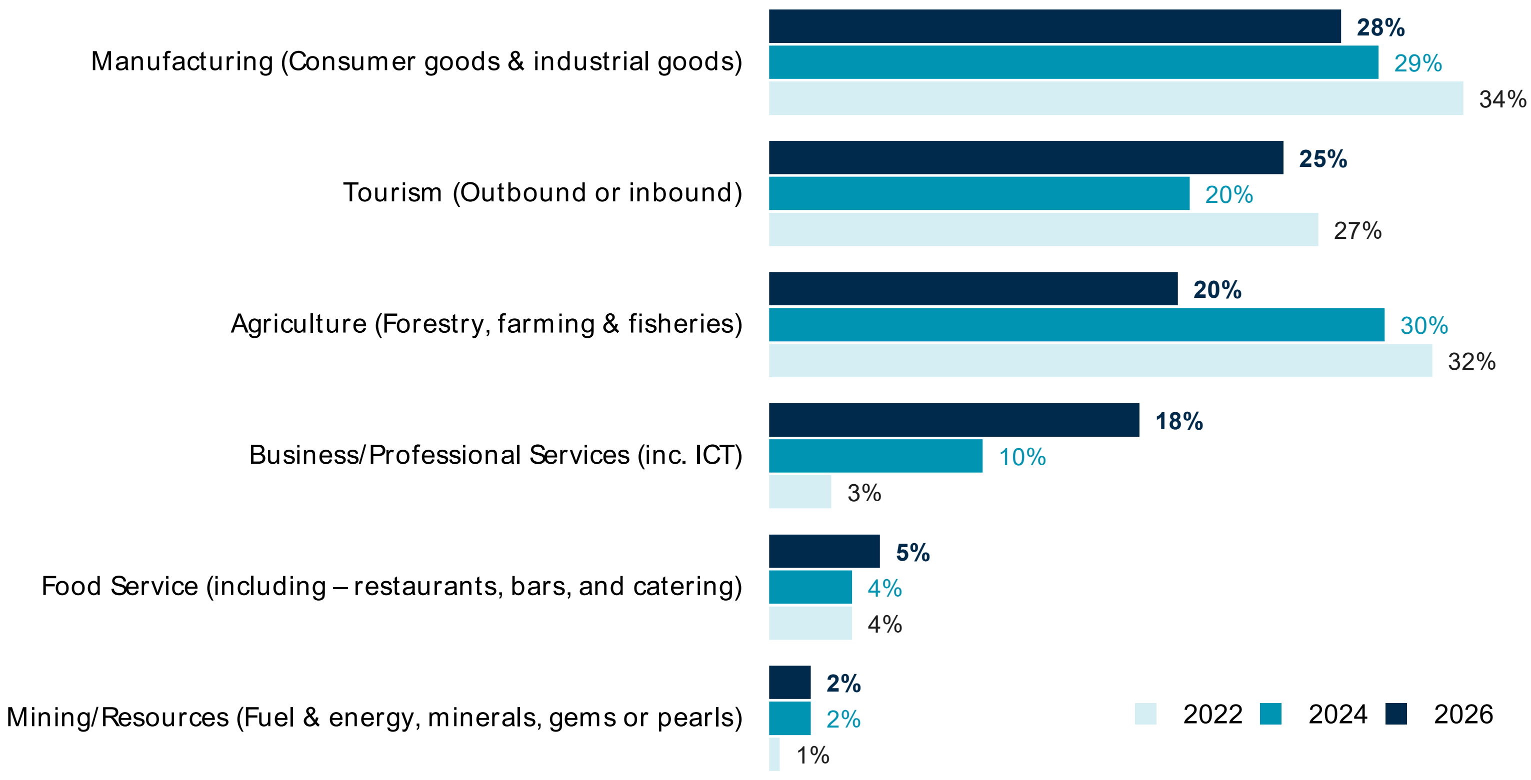
IN WHICH PACIFIC ISLAND COUNTRY IS YOUR MAIN BASE OF OPERATIONS?



Main Export Activity

Consistent with previous survey results, the sectors of manufacturing (28%), tourism (25%) and agriculture (20%) dominate the representation, making up almost three-quarters of the sample. Notably since 2022, those exporting business and professional services including Information and Communications Technology (ICT) have increased six-fold, indicative of the region's move towards a more digital landscape.

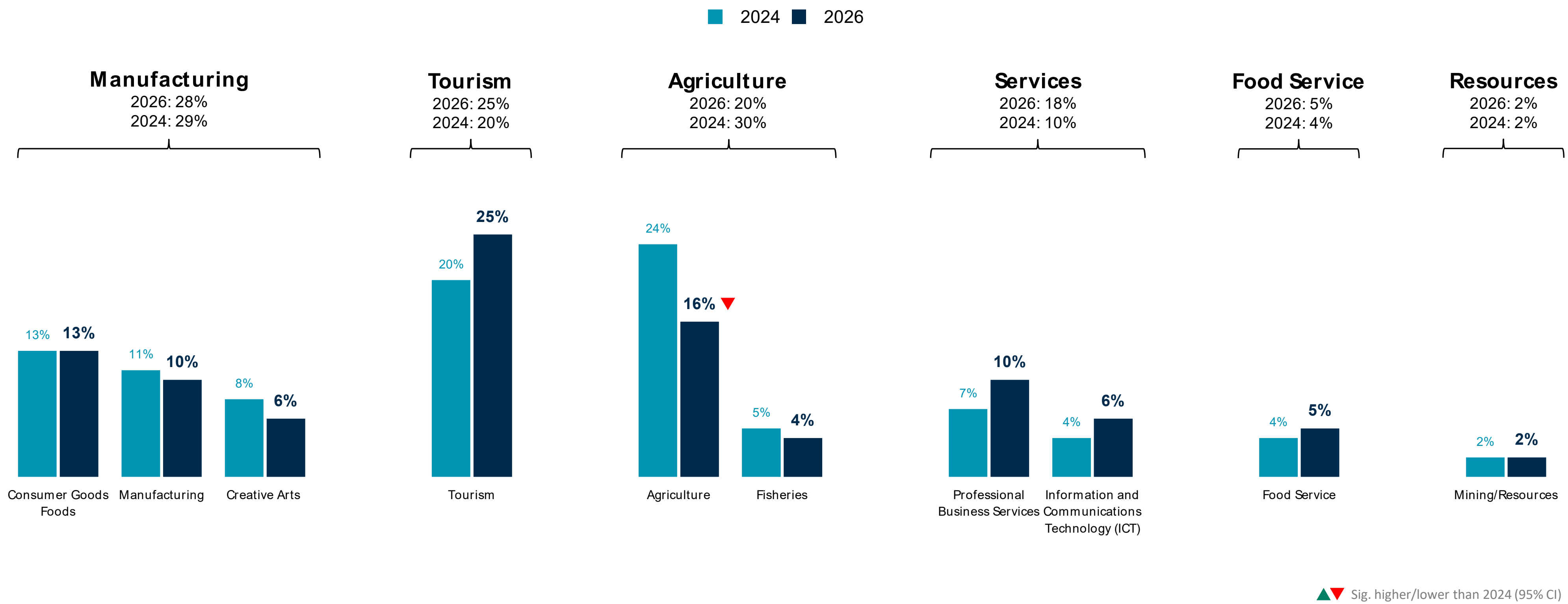
WHAT IS THE MAIN EXPORT ACTIVITY OF YOUR ORGANISATION?



Main Export Activity

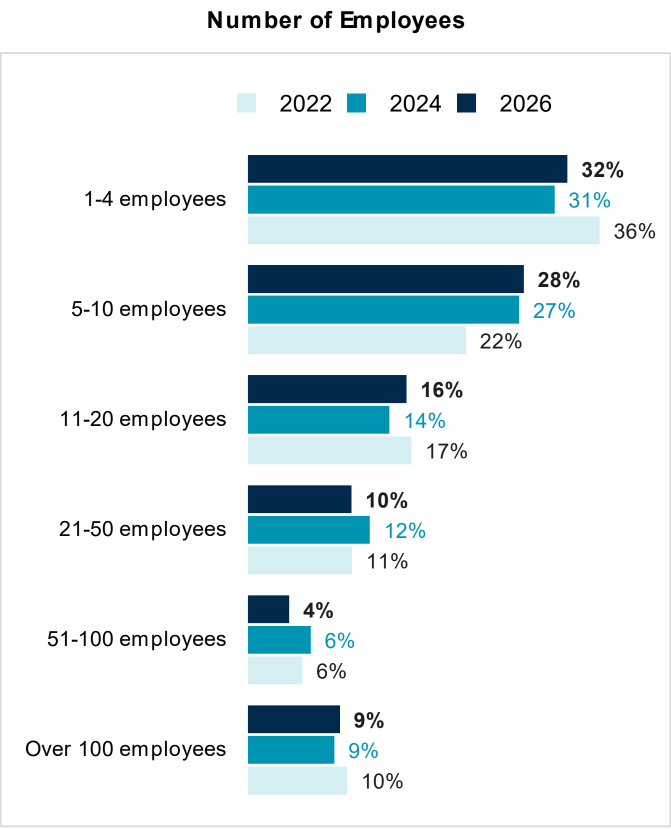
Agriculture's share of survey respondents has declined since 2024, while Services has recorded the strongest growth. Manufacturing and Tourism remain the largest export sectors represented in the survey.

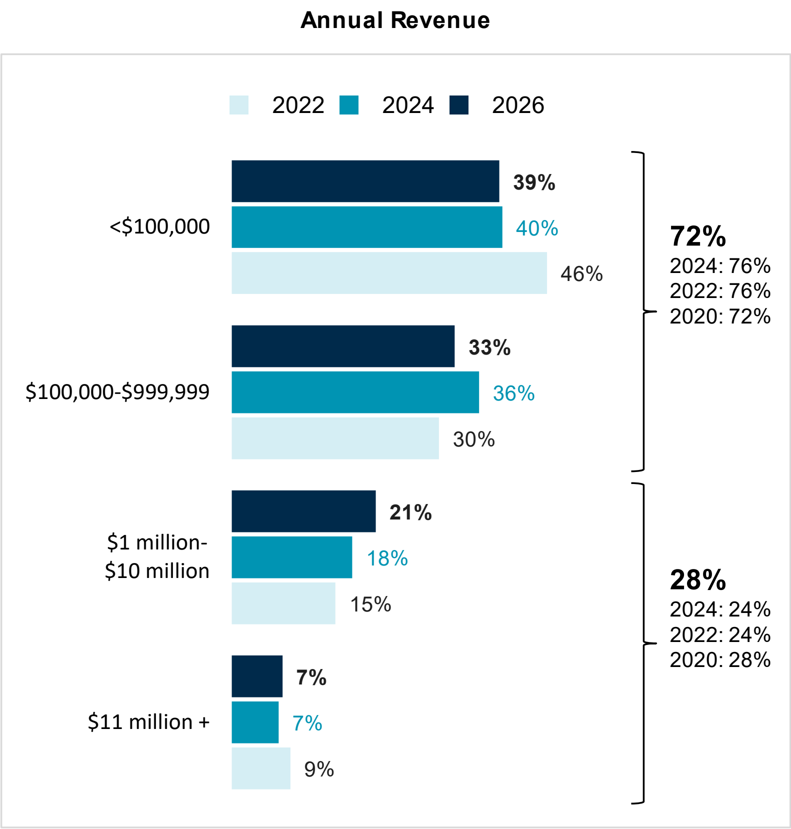
WHAT IS THE MAIN EXPORT ACTIVITY OF YOUR ORGANISATION?

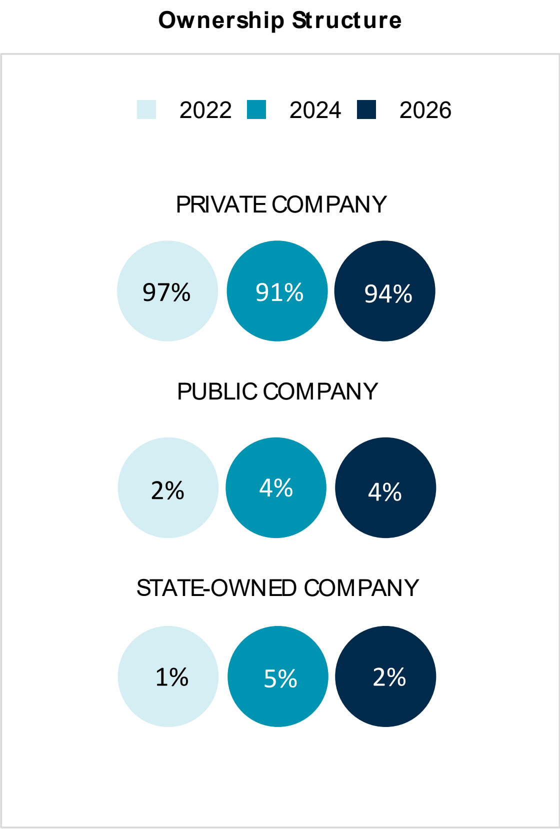


Business Profile

Largely, the Pacific business profile is private and lean, with 60% of businesses having 1–10 employees and 72% reporting annual revenue under A$1 million. These figures are both broadly stable against 2020–2024. Private companies remain the dominant ownership structure at 94%.



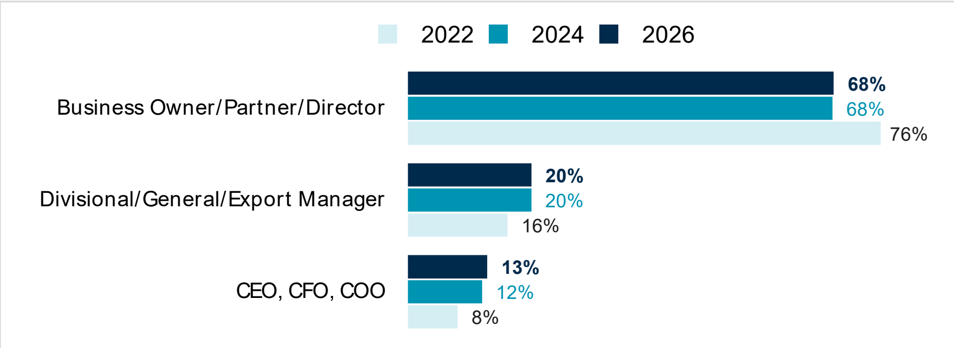




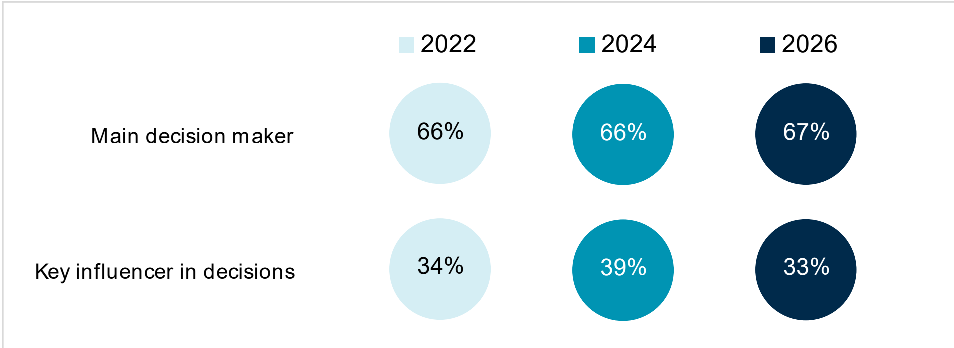
Respondent & Employee Profile

Survey seniority has gradually risen across the past three surveys, with female CEOs and proprietors making up 42% of respondents, up from 40% in 2024 and 39% in 2022.

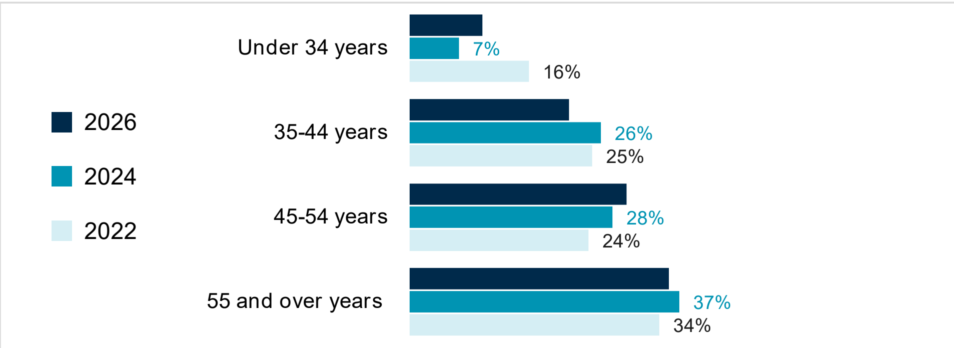
What is your job title?



Level of decision-making



Age of Proprietor/CEO/MD



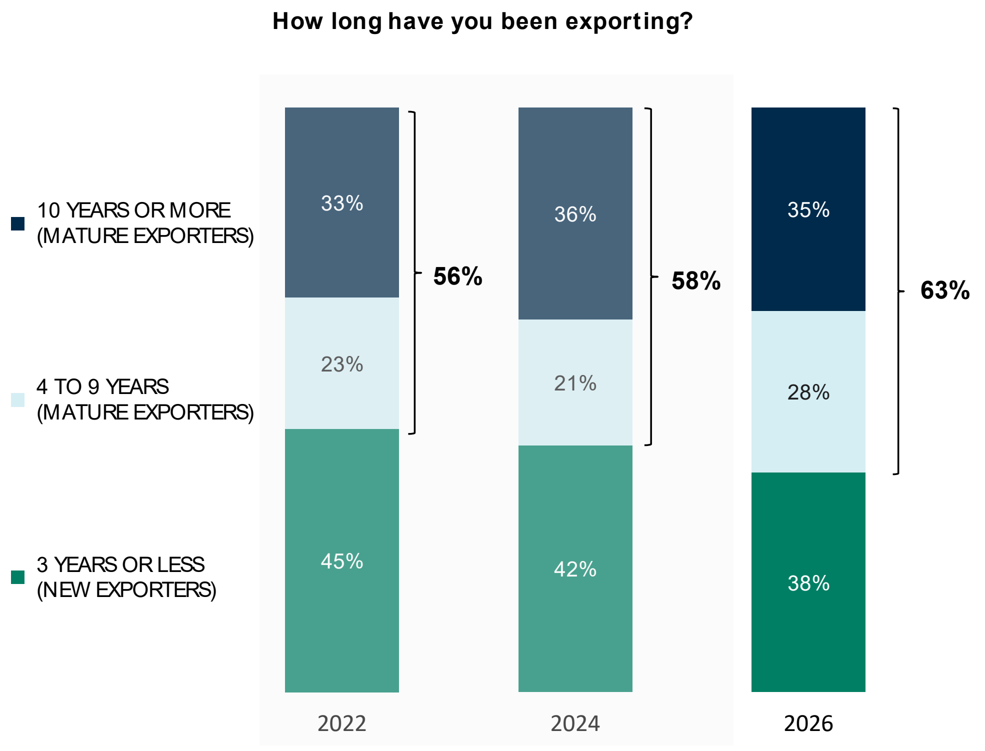
Gender of employees

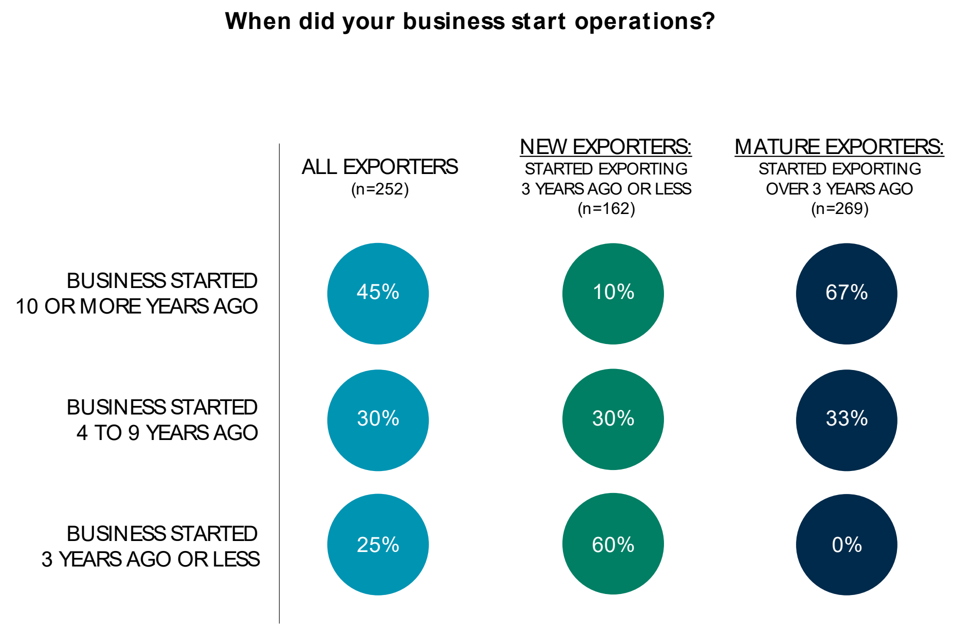
	Female	Male
CEO/Proprietor/MD	**42%** (2024: 40%) (2022: 39%)	**58%** (2024: 60%) (2022: 61%)
Leadership Team	**47%** (2024: 44%) (2022: 43%)	**53%** (2024: 56%) (2022: 57%)
Employees	**49%** (2024: 50%) (2022: 51%)	**51%** (2024: 50%) (2022: 49%)

EXPORT MATURITY

Number of Years Operating & Exporting

There has been an observable shift in the balance between new and long-established exporters. New exporters now make up 38% of the sample, down from 42% in 2024 and 45% in 2022, while businesses exporting for ten years or more have grown to 35% over the same period.





Number of Years Operating & Exporting

New exporters are smaller and more often female-led than mature exporters - averaging 15 staff and A$243,044 in annual revenue against 46 staff and A$2,529,832 for mature exporters - a gap worth holding in mind when interpreting the confidence, finance and barrier findings that follow.

HOW LONG HAVE YOU BEEN EXPORTING?

	NEW EXPORTERS: STARTED EXPORTING 3 YEARS AGO OR LESS (n=162)	MATURE EXPORTERS: STARTED EXPORTING OVER 3 YEARS AGO (n=269)
Mean Number of employees	15 ▼	46
Mean Annual Revenue	$243,044 ▼	$2,529,832
Main Export Activity	Services 24% ▲; Agriculture 23%; Manufacturing 25%	Tourism 35%; Manufacturing 29%; Agriculture 17%
Gender of Proprietor/CEO/MD	Male 56%; Female 44%	Male 60%; Female 40%
Mean Age of Proprietor/CEO/MD	43	48

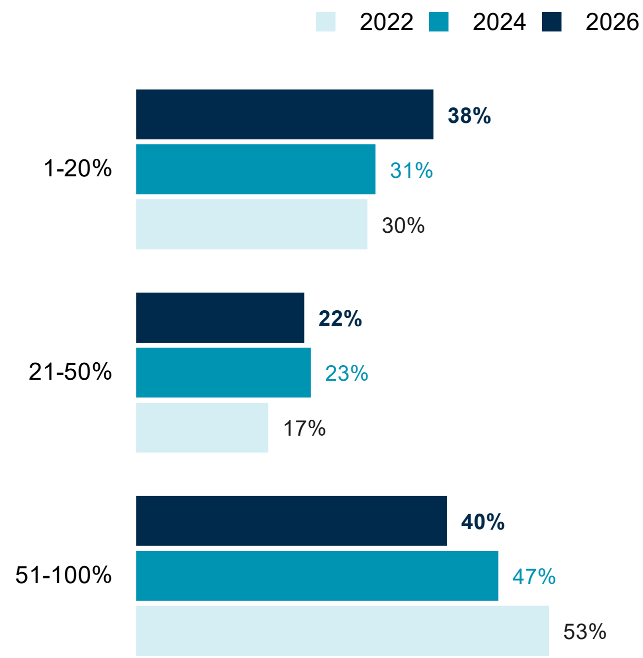
▲▼ New sig. higher/lower than Mature (95% CI)

Percentage of Revenue Generated from Exporting

Export revenue dependence has eased across the board with the average share of revenue from exporting falling from 52% in 2022 to 42% in 2026.

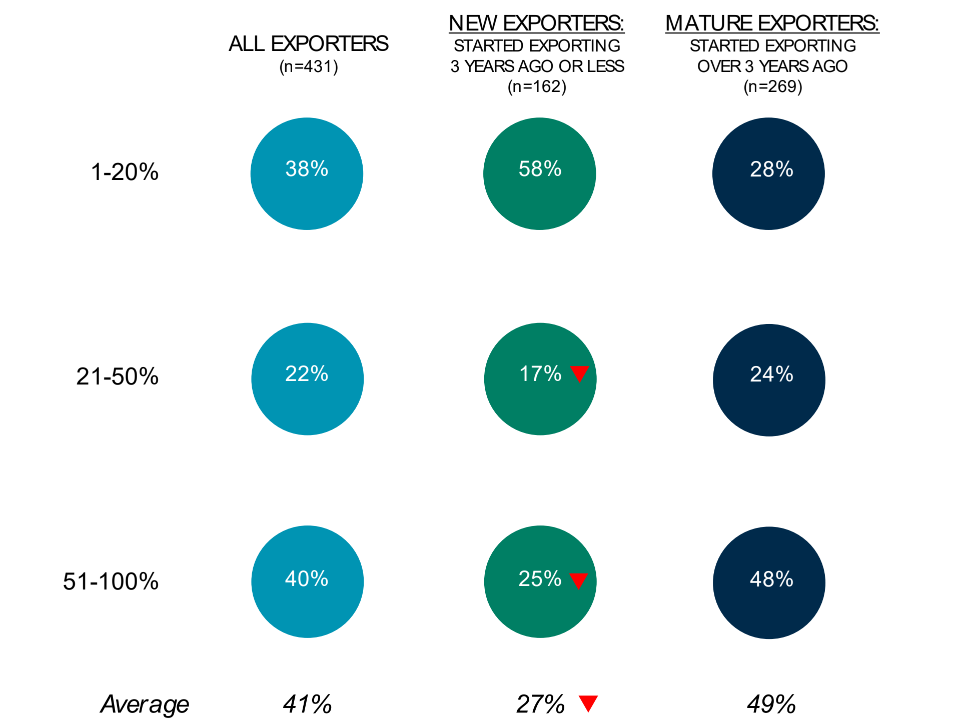
Mature exporters still well ahead of new entrants on this measure.

WHAT % OF YOUR REVENUE IS FROM EXPORT ORDERS OR SELLING YOUR PRODUCTS AND/OR SERVICES TO OVERSEAS CUSTOMERS?



	Avg.
2026	42%
2024	47%
2022	52%

No significant differences vs. 2024 (95% CI)

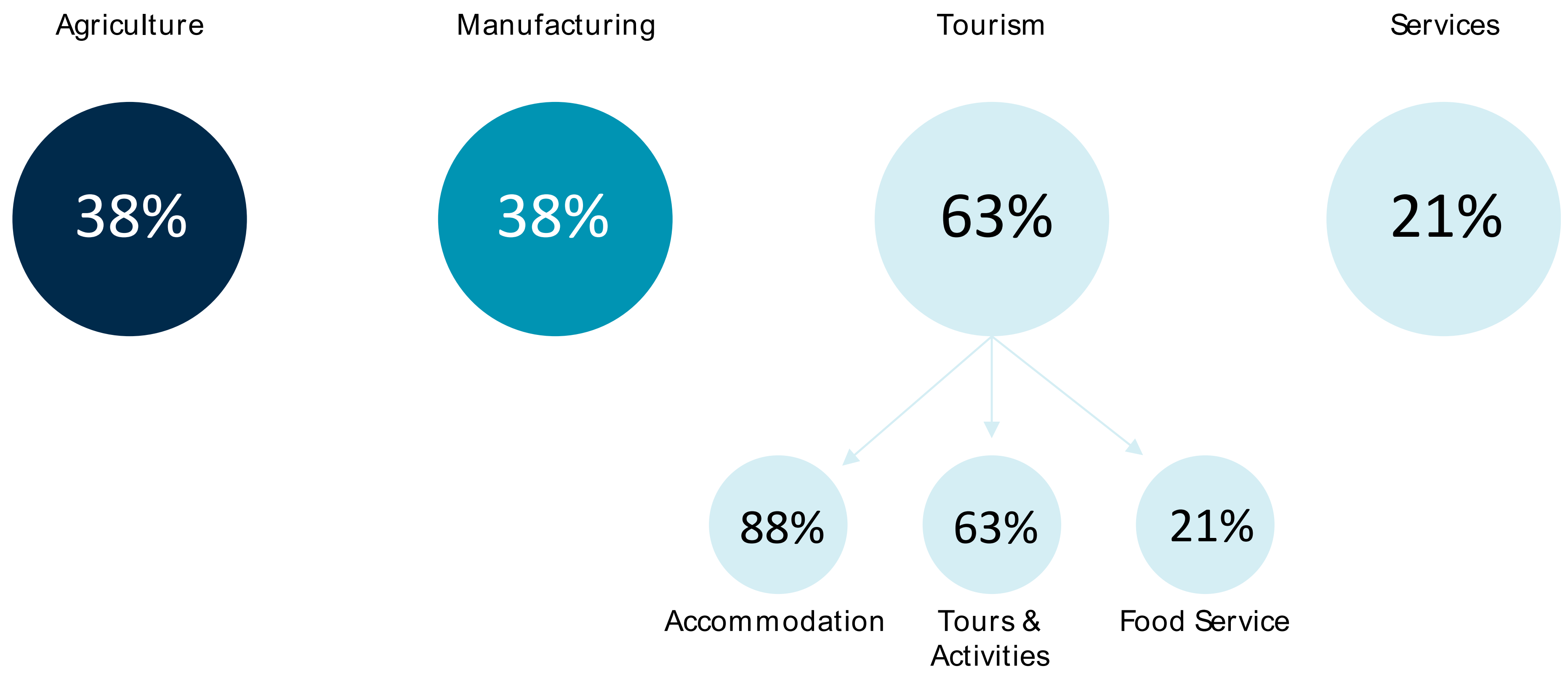


New sig. higher/lower than Mature (95% CI)

Percentage of Revenue Generated from Exporting

Throughout the industries represented, tourism is the most export dependent, with tourism providers generating 63% of revenue from exports. For accommodation providers specifically, this sits at 88%, which is more than four times higher than those in food service (21%). This is to be expected, with tourist accommodation largely dependent on international tourists for revenue.

WHAT % OF YOUR REVENUE IS FROM EXPORT ORDERS OR SELLING YOUR PRODUCTS AND/OR SERVICES TO OVERSEAS CUSTOMERS?

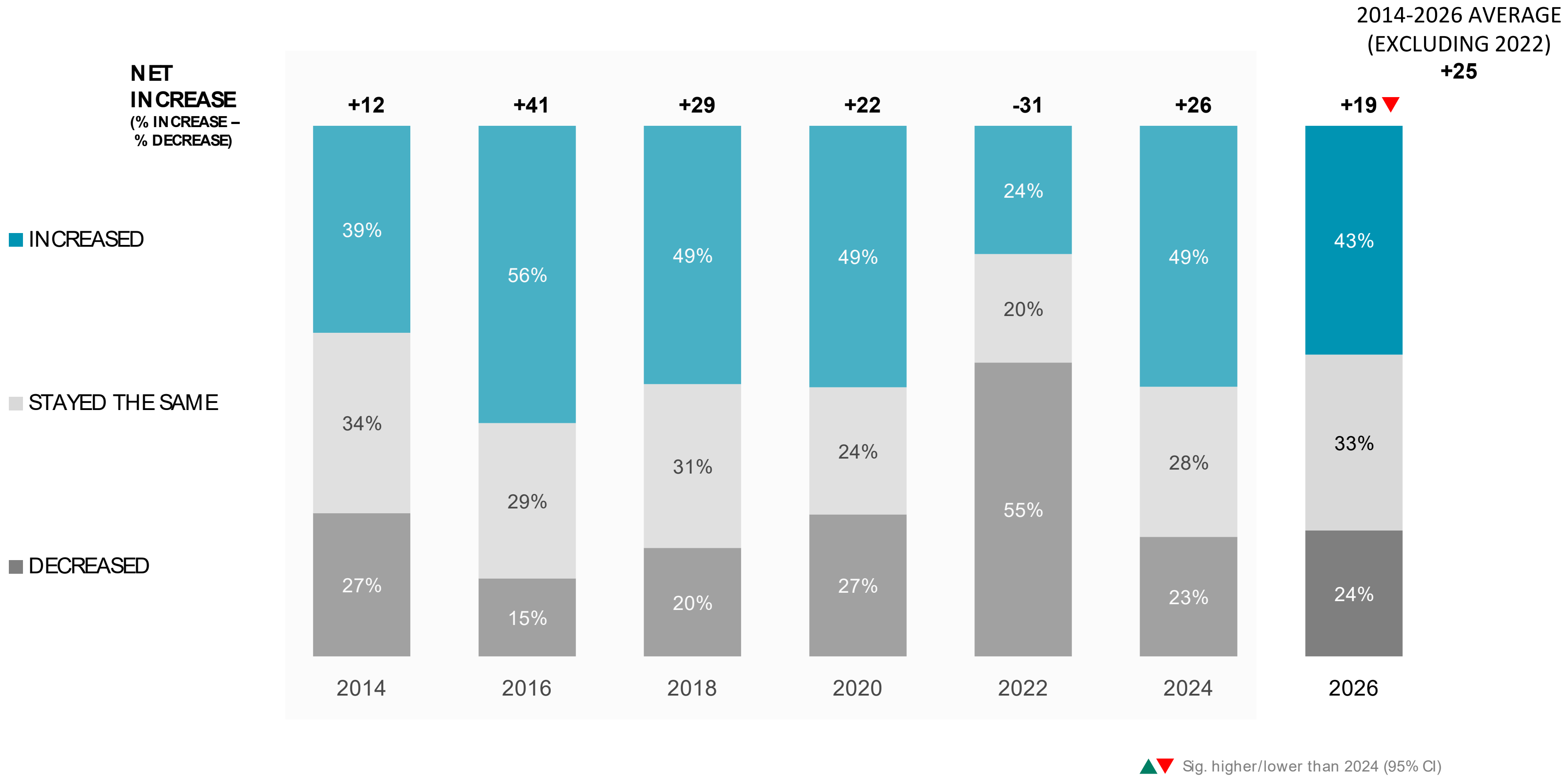


EXPORTER CONFIDENCE

Change in Export Orders Over the Last 12 Months

The post-pandemic rebound has been fully realised, with growth slowing to stable levels. Exporters reporting revenue growth sit at net +19, down from +26 in 2024 and below the long-term average of +25.

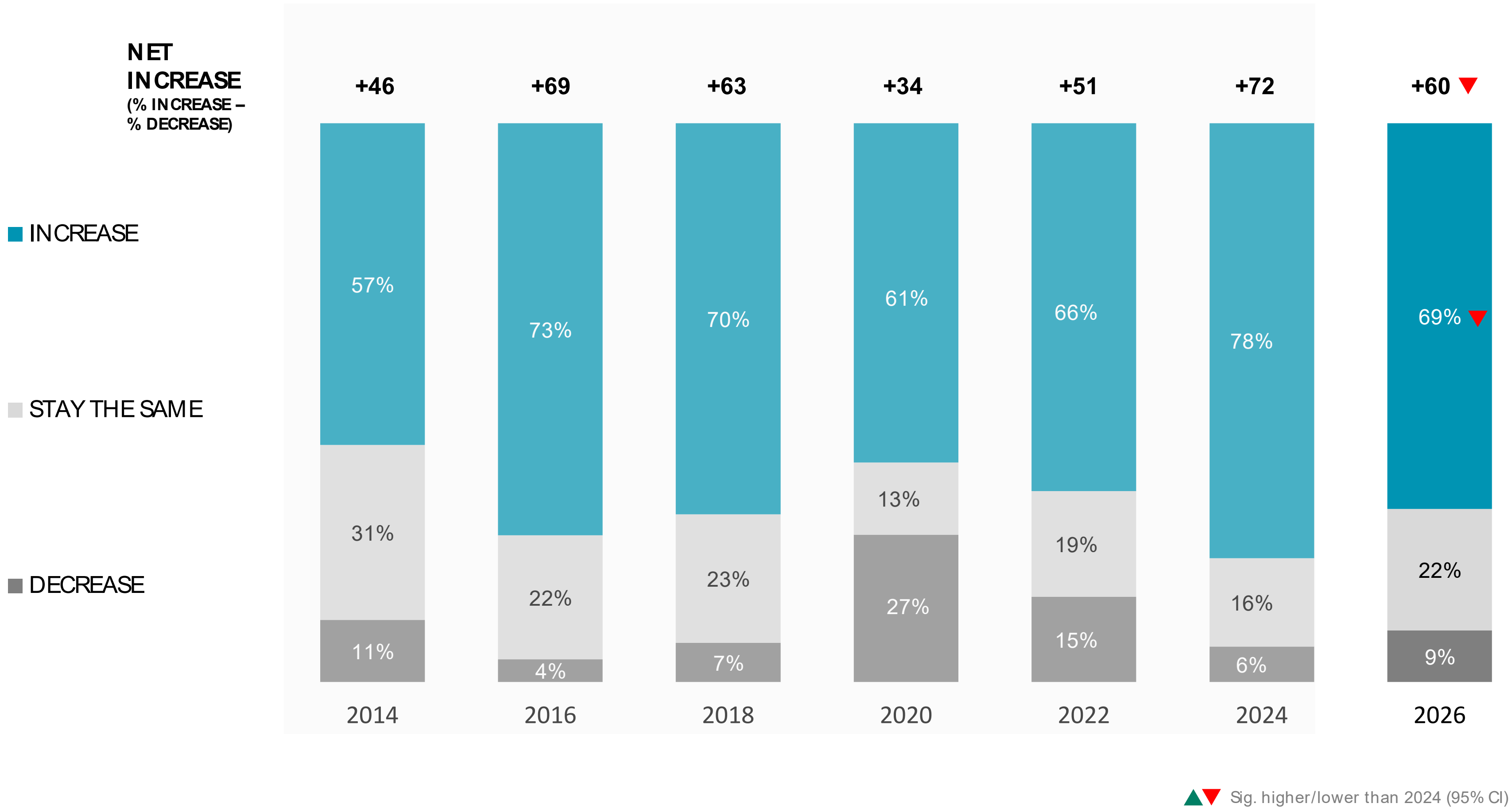
OVER THE LAST 12 MONTHS, HAS YOUR EXPORT REVENUE INCREASED, DECREASED, OR STAYED THE SAME?



Expected Change in Export Orders Over the Next 12 Months

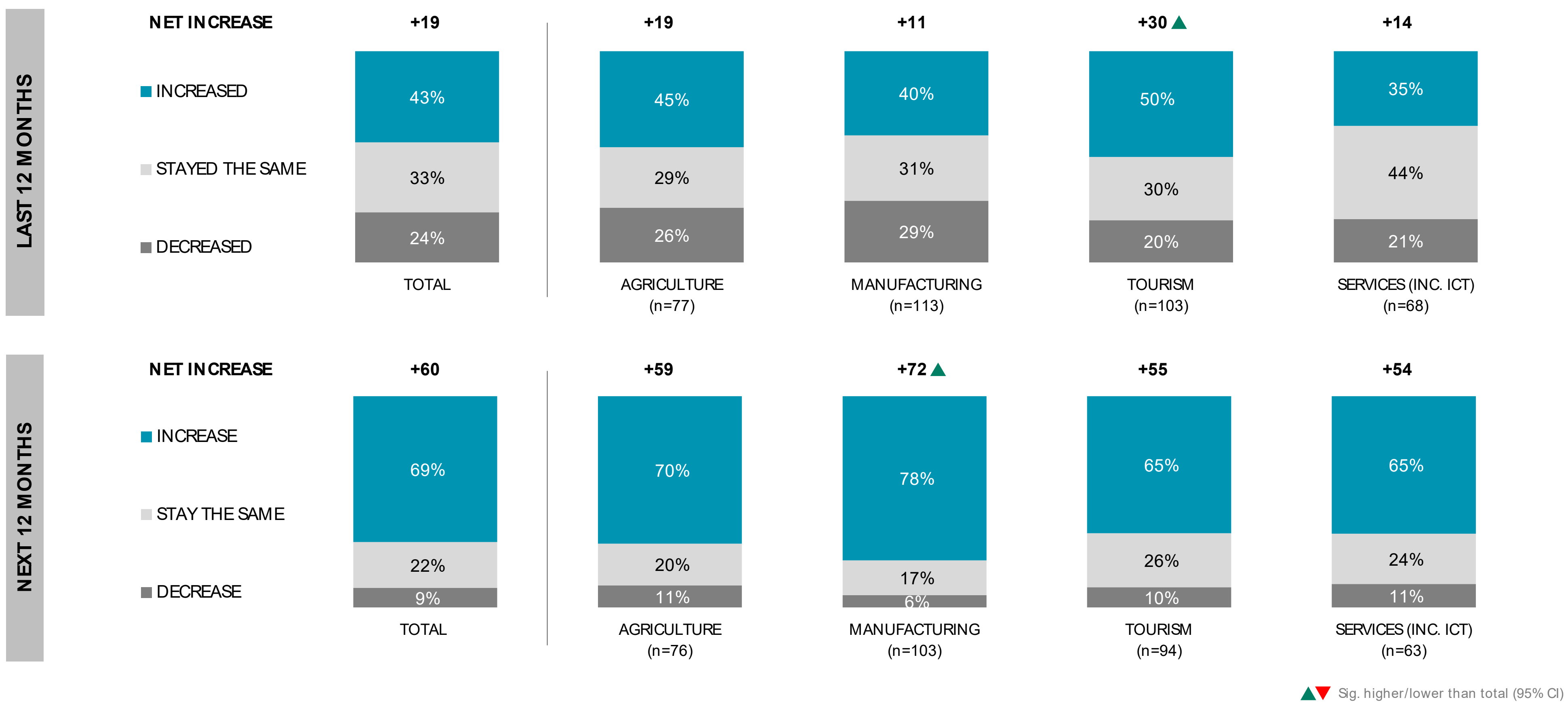
Confidence about the year ahead remains strong even as recent performance has cooled - 69% of exporters expect orders to rise over the next 12 months. This reflects net +60, which is just below the 2024 peak of +72 and the fourth-highest result on record.

OVER THE NEXT 12 MONTHS, DO YOU EXPECT EXPORT REVENUE TO INCREASE, DECREASE, OR STAY THE SAME?



Change in Export Orders by Industry

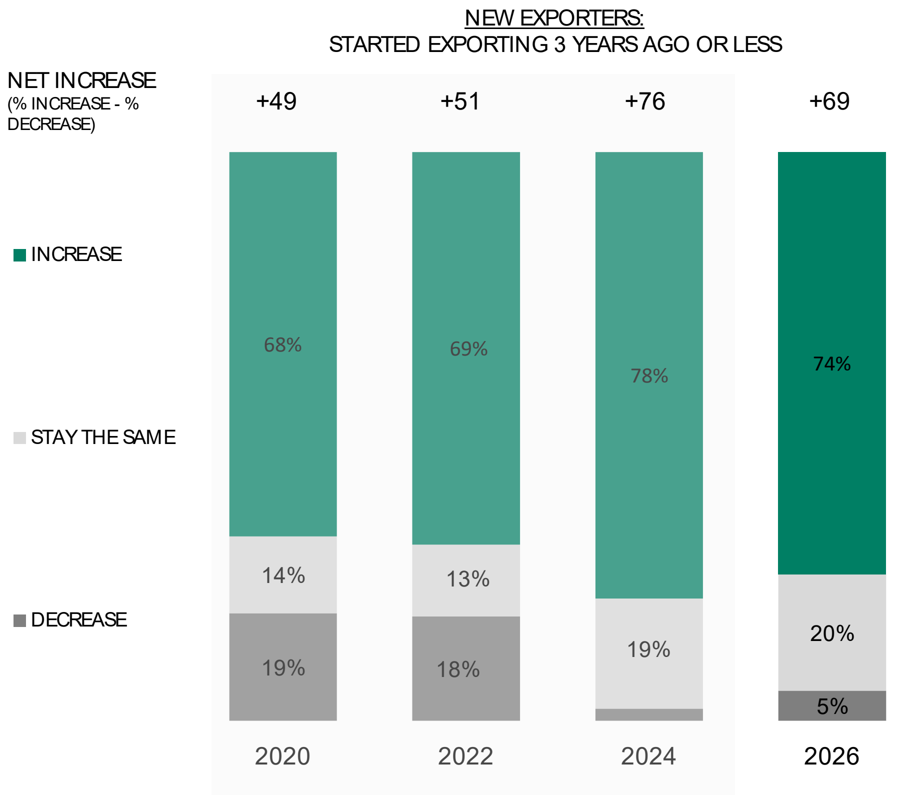
Tourism led the way on actual revenue growth over the past 12 months, but it's manufacturing and agriculture exporters who are now the most confident about the year ahead - a sign that momentum is shifting toward production-based sectors as the post-pandemic tourism rebound matures.

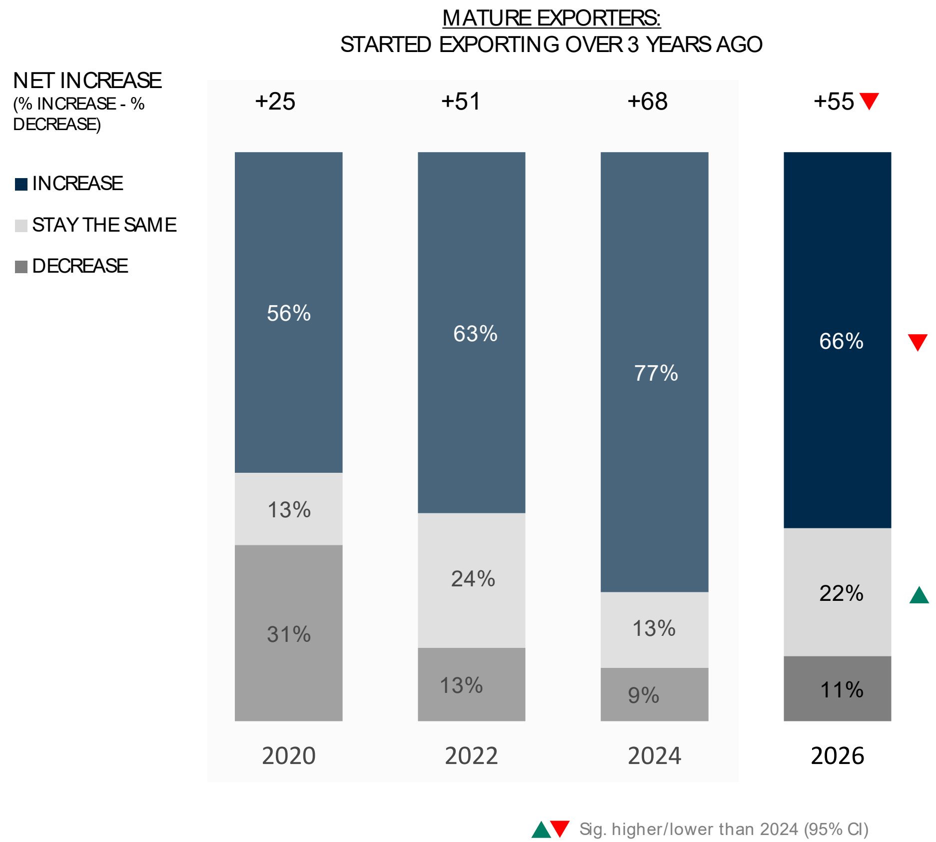


Expected Change in Export Orders Over the Next 12 Months

Both new and mature exporters remain upbeat, but confidence has waned slightly among mature businesses - falling from a net +68 in 2024 to +55 in 2026. This is likely reflective of their greater exposure to trade policy uncertainty and broad geopolitical pressures compared with newer entrants, who have held steadier with net +76 in 2024 and +69 in 2026 respectively.

OVER THE NEXT 12 MONTHS, DO YOU EXPECT EXPORT REVENUE TO INCREASE, DECREASE, OR STAY THE SAME?

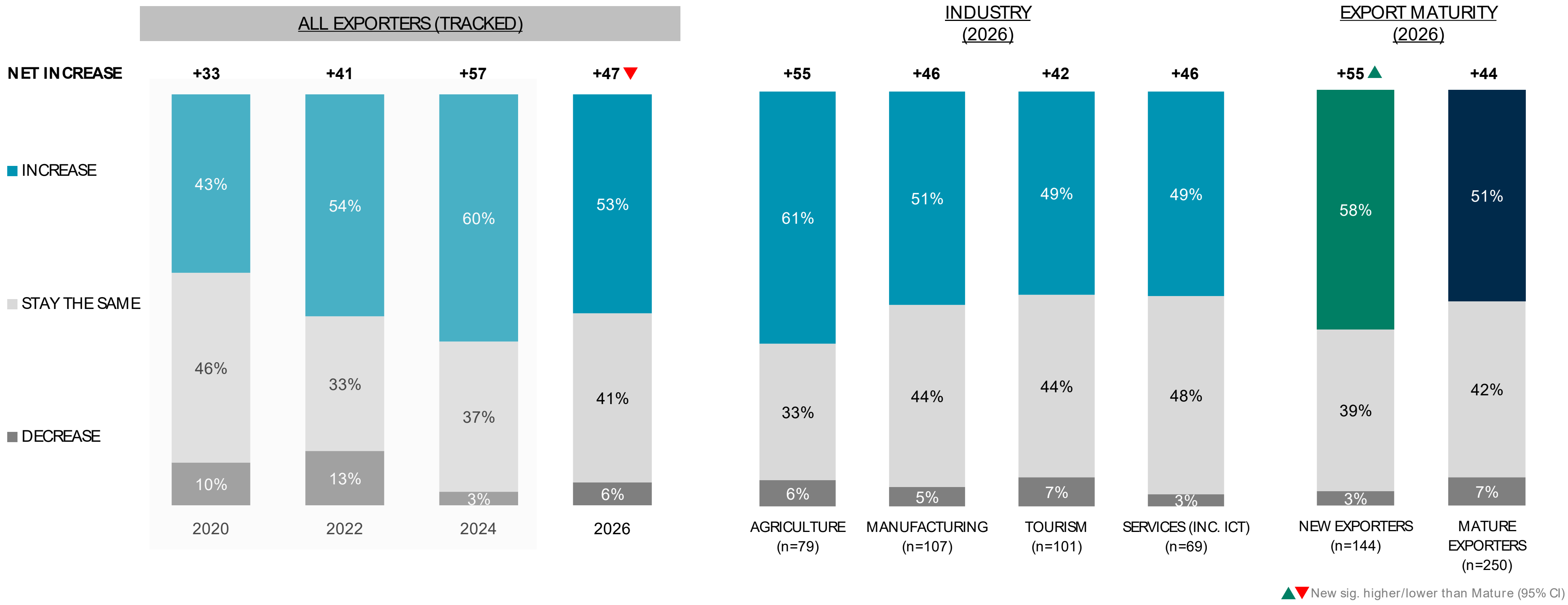




12-Month Employment Projections

Hiring intentions remain solidly positive but have eased back from their 2024 peak, with net intentions at +47% (down from +57%). New exporters and agriculture businesses are the most likely to be growing their teams, suggesting the sectors with the strongest export momentum are also the ones investing most in people.

DURING THE NEXT 12 MONTHS DO YOU THINK THE NUMBER OF EMPLOYEES WILL INCREASE, DECREASE OR REMAIN THE SAME?



INITIATIVES TO INCREASE EXPORTS

Initiatives Instigated to Increase Export Orders in Last 12 Months

New product development (43%) and process improvement (38%) remain the top levers non-tourism exporters are pulling to drive growth. Overall though, businesses are pulling fewer growth levers, with the average number of initiatives per business falling from 3.8 in 2024 to 3.1 in 2026, pointing to a more cautious, focused approach in a volatile environment.

WHAT INITIATIVES HAS YOUR ORGANISATION INSTIGATED TO INCREASE EXPORT ORDERS IN THE LAST 12 MONTHS?

		2024	2022	2020
Average no. initiatives	*3.1*	*3.8*	*3.5*	*3.7*
Developed new product/services specifically for export markets	43%	45%	51%	49%
Improved internal business processes to improve efficiency*	38% ▼	49%	53%	49%
Increased digital marketing or online promotion*	35%	39%	39%	35%
Entered new markets	28% ▼	38%	30%	36%
Hired new staff or upskilled existing staff*	28%	36%	24%	27%
Allocated more time and money to drive innovation	26%	29%	32%	41%
Agricultural production expansion (e.g. more growers, more land/plantings, improved farming practices)†	25%	(New for 2026)	(New for 2026)	(New for 2026)
Implemented new technology platforms	21% ▼	30%	30%	25%
Improved e-commerce capabilities	20%	27%	24%	29%
Improved speed of delivery	20%	24%	29%	30%
Sought support or advice from Pacific Trade Invest*	18% ▼	36%	32%	28%

▲▼ Sig. higher/lower than 2024 (95% CI)

*Indicates code wording change for 2026

Initiatives Instigated to Increase Export Orders in Last 12 Months

Mature exporters, who rely more heavily on export revenue, are running a broader spread of growth initiatives than newer businesses (3.3 on average versus 2.4). The sector focus differs too: agriculture is concentrating on expanding production (54%), while manufacturers are leaning into new product development - each playing to its own strengths.

WHAT INITIATIVES HAS YOUR ORGANISATION INSTIGATED TO INCREASE EXPORT ORDERS IN THE LAST 12 MONTHS?

INITIATIVE	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
Base n=	*n=310*	*n=85*	*n=119*	*n=77*	*n=131*	*n=179*
Average no. initiatives	*3.1*	*2.9*	*3.6*	*2.8*	*2.4*	*3.3*
Developed new product/services specifically for export markets	43%	35%	55% ▲	36%	34% ▼	49%
Improved internal business processes to improve efficiency	38%	32%	44%	38%	28% ▼	45%
Increased digital marketing or online promotion	35%	21% ▼	42%	40%	30%	39%
Entered new markets	28%	35%	29%	17%	25%	31%
Hired new staff or upskilled existing staff	28%	27%	29%	31%	18% ▼	36%
Allocated more time and money to drive innovation	26%	20%	32%	29%	21%	29%
Agricultural production expansion	25%	54% ▲	24%	4% ▼	22%	27%
Implemented new technology platforms	21%	14%	22%	32%	18%	23%
Improved e-commerce capabilities	20%	12%	28%	19%	18%	22%
Improved speed of delivery	20%	20%	24%	17%	14% ▼	25%
Sought support or advice from Pacific Trade Invest	18%	18%	26%	8%	19%	17%

▲▼ Sig. higher/lower than total (95% CI)   ▲▼ New sig. higher/lower than Mature (95% CI)

Initiatives Introduced to Increase Export Orders in Last 12 Months

Tourism businesses are running more growth initiatives than any other segment, averaging 3.8 simultaneously. Digital marketing and online promotion remains the single most-used lever at 60%, but the real story this wave is the shift toward people and product - improving the customer experience for international tourists (55%) and upskilling staff (53%) are now nearly as common, alongside increased investment in new or improved products and services (50%), suggesting tourism operators are focusing as much on what they offer as how they promote it.

WHAT INITIATIVES HAS YOUR ORGANISATION INTRODUCED TO INCREASE EXPORT ORDERS IN THE LAST 12 MONTHS?

		2024	2022	2020
Average no. initiatives	*3.8*	*3.8*	*3.5*	*3.7*
Increased digital marketing or online promotion*	60%	57%	42%	55%
Improved customer experience for international tourists	55%	(New for 2026)	(New for 2026)	(New for 2026)
Upskilled staff to better serve international tourists	53%	(New for 2026)	(New for 2026)	(New for 2026)
Increased investment in new or improved products and services	50%	(New for 2026)	(New for 2026)	(New for 2026)
Improved online sales capabilities*	41%	29%	29%	28%
Established or strengthened partnerships with international travel partners	36%	(New for 2026)	(New for 2026)	(New for 2026)
Improved internal business processes to increase efficiency*	35%	49%	40%	44%
Implemented new technology*	28%	33%	27%	29%
Sought support or advice from Pacific Trade Invest*	18%	25%	15%	23%

▲▼ Sig. higher/lower than 2024 (95% CI)

*Indicates code wording change for 2026

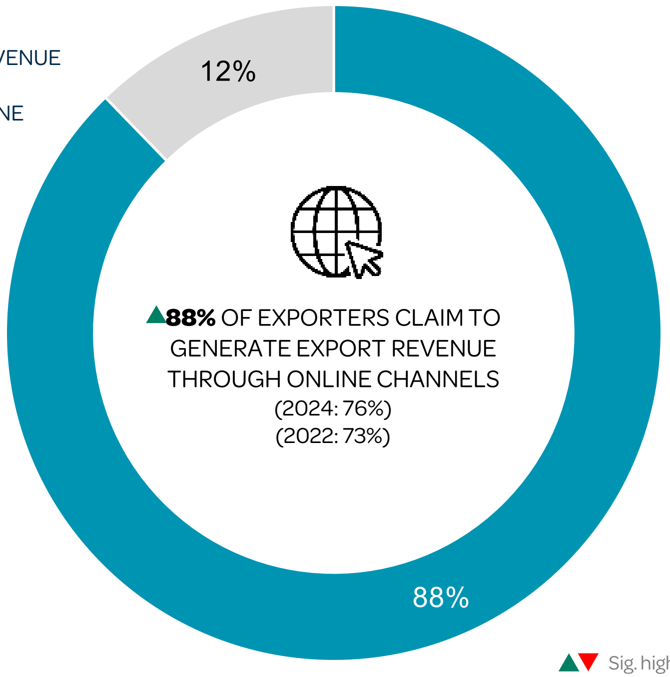
DIGITAL MARKETING

Export Revenue Generated Through Online Channels

Digital has firmly become the default export channel with 88% of exporters now generating revenue online. This is up from 76% in 2024 and 73% in 2022, representing the largest year-on-year rise on record. Tourism businesses lead the way, drawing 57% of their revenue through online channels.

APPROXIMATELY, WHAT PERCENTAGE OF YOUR EXPORT REVENUE IS GENERATED THROUGH ONLINE CHANNELS?

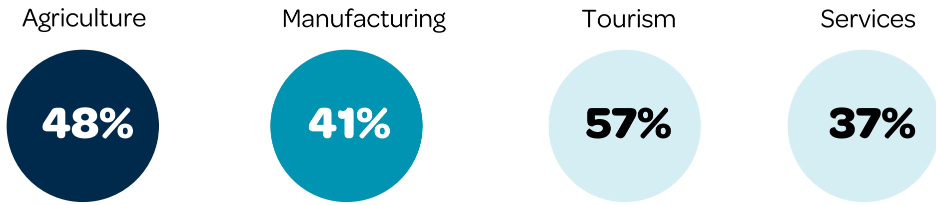
12% NO EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS
(2024: 24%)
(2022: 28%)



▲▼ Sig. higher/lower than 2024 (95% CI)

AMONG THESE BUSINESSES, ONLINE CHANNELS GENERATE:

Total

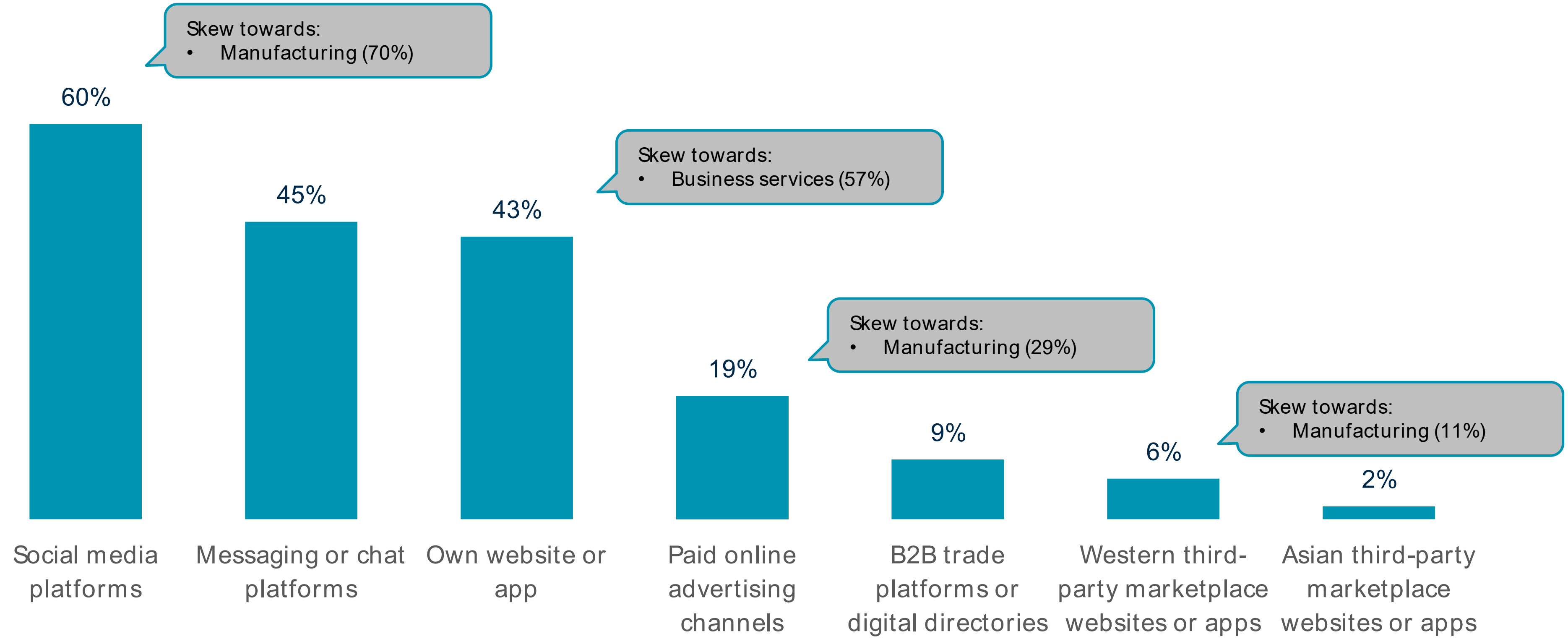


OF THEIR TOTAL EXPORT REVENUE, *ON AVERAGE*

Online Channel Usage

Social media remains the channel of choice for non-tourism exporters at 60% usage, well ahead of messaging platforms (45%) and own websites (43%). Third-party marketplaces, by contrast, are barely used - Western and Asian platforms sit at just 6% and 2% respectively - suggesting most exporters are still building direct relationships with customers rather than relying on intermediaries.

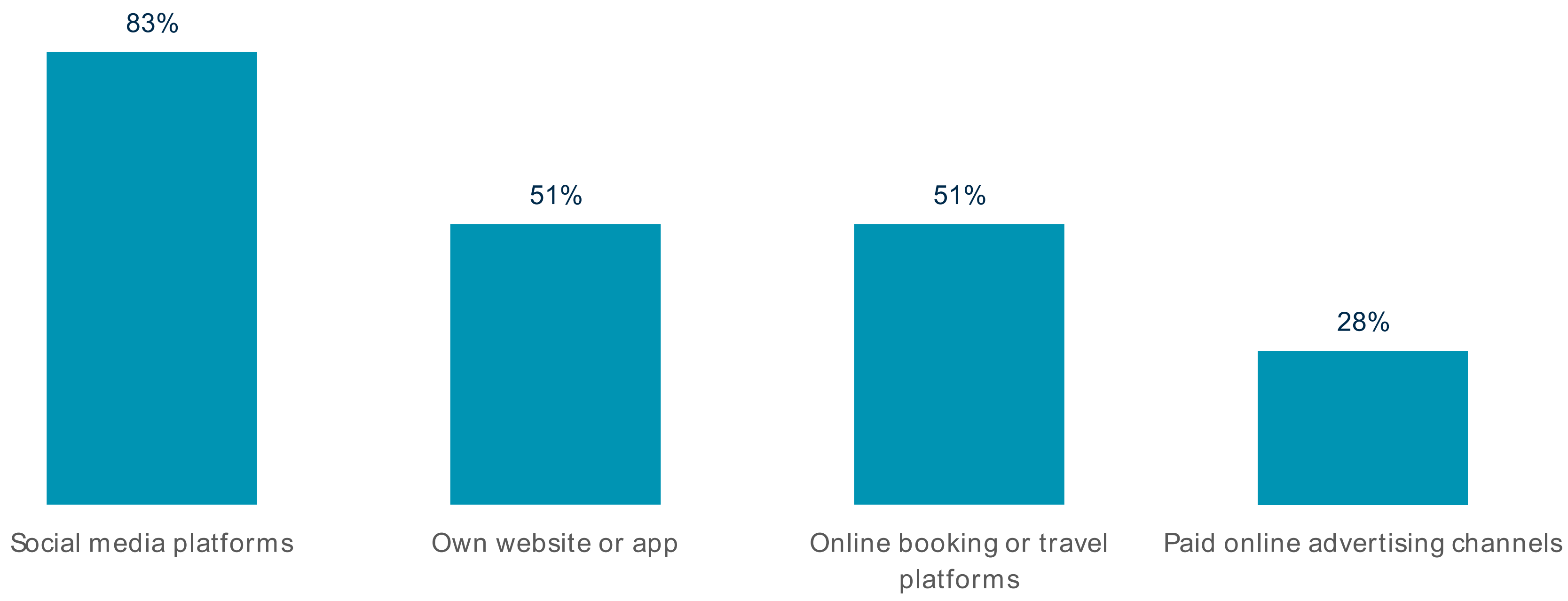
WHICH OF THE FOLLOWING ONLINE CHANNELS DOES YOUR BUSINESS USE TO GENERATE EXPORT REVENUE?



Online Channel Usage

Tourism operators lean more heavily on social media than other exporters, at 83% usage, this proliferation reflects how international travellers now research and book experiences. Own websites and third-party booking platforms are tied as the next most-used channel (both 51%).

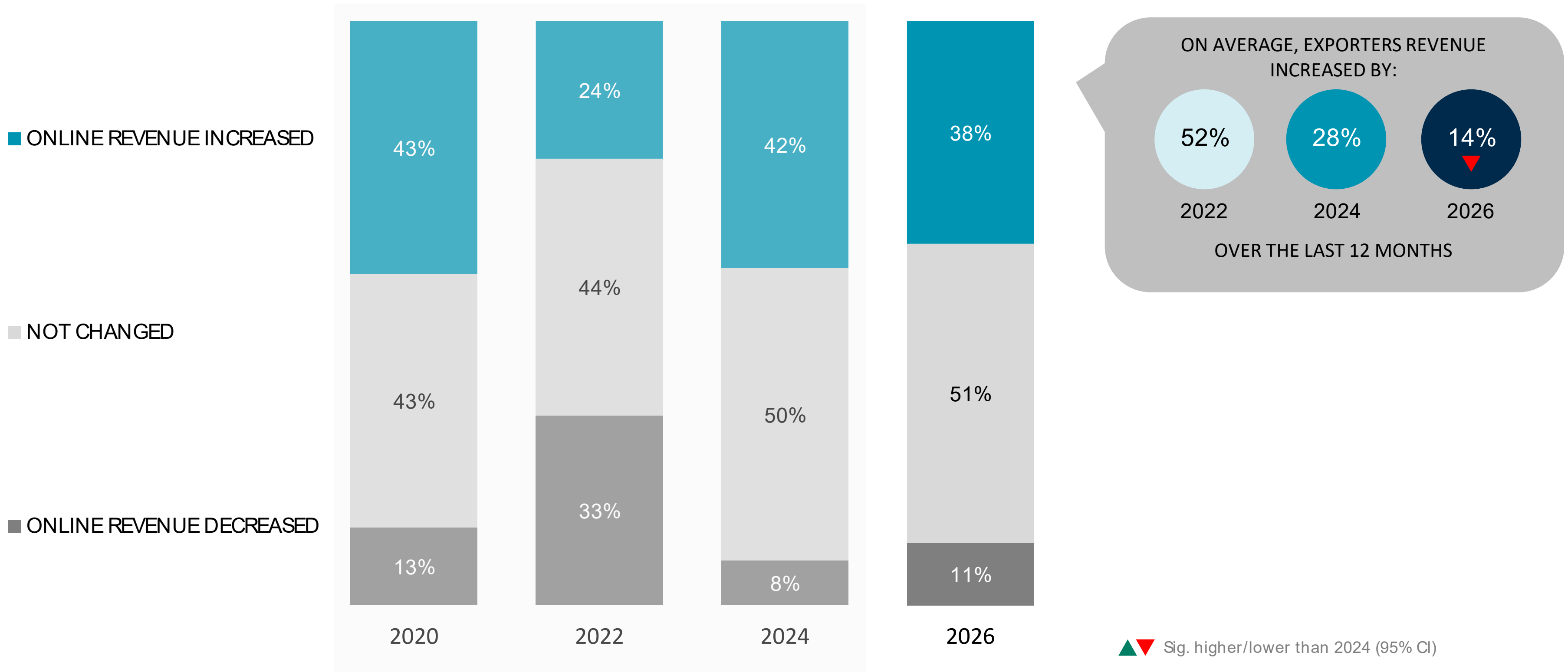
WHICH OF THE FOLLOWING ONLINE CHANNELS DOES YOUR BUSINESS USE TO GENERATE EXPORT REVENUE?



Export Revenue Generated Online – Change Over Past 12 Months

Online revenue growth has clearly normalised, with average growth among digitally active exporters down to 14%, a sharp fall from 52% in 2022 and 28% in 2024. This isn't a sign digital is losing relevance - more exporters than ever are selling online - but it does confirm the channel has matured from explosive early growth into a steadier, more established part of the export mix.

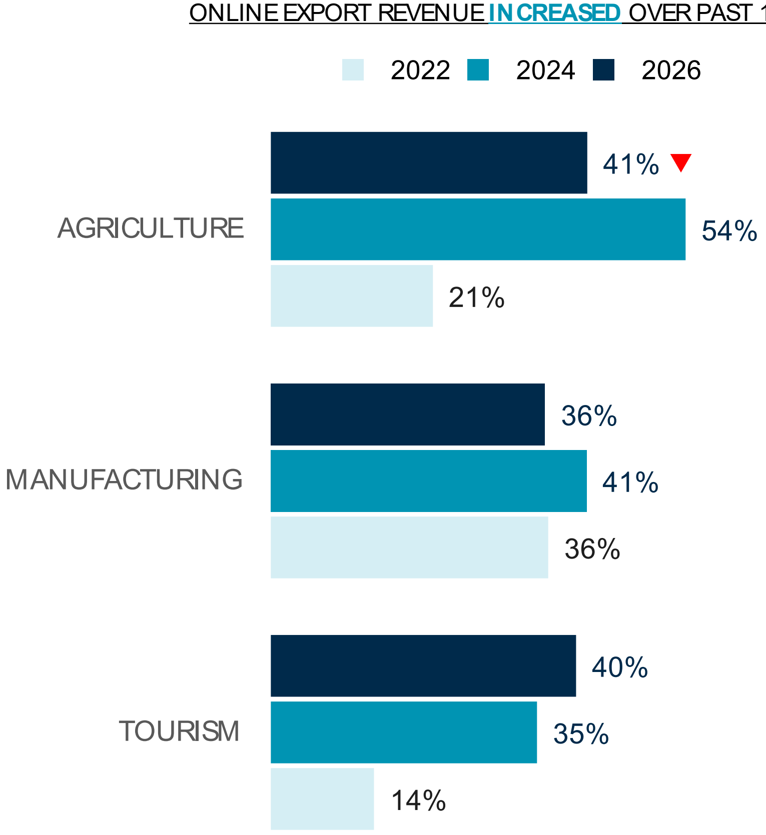
HOW HAS YOUR EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS CHANGED OVER THE PAST 12 MONTHS?

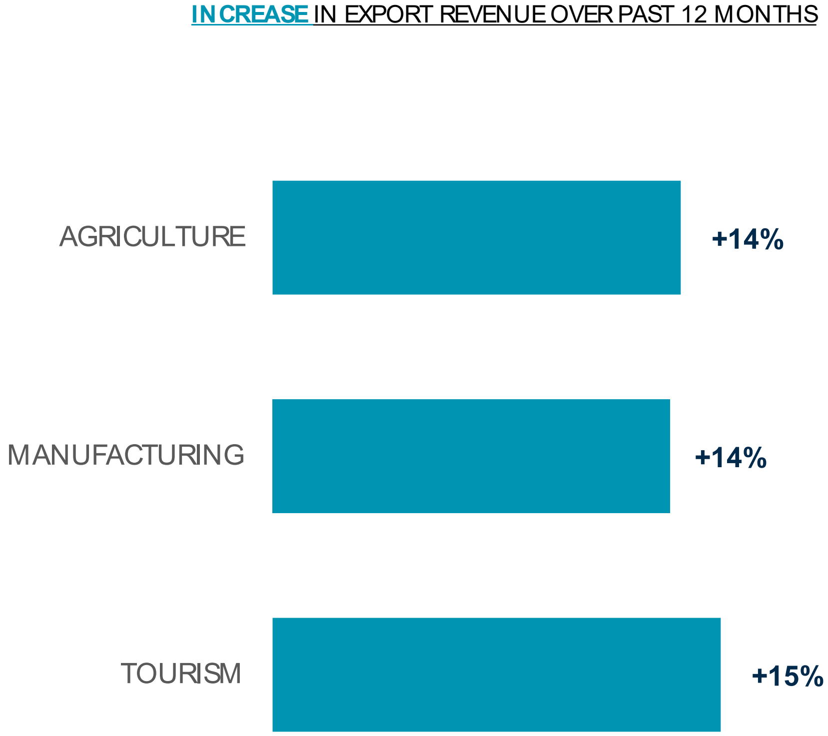


Export Revenue Generated Online – Change Over Past 12 Months

The online revenue slowdown identified on the previous page is broad-based but not even - agriculture saw the sharpest pullback, with only 41% reporting an increase in 2026, down from 54% in 2024, while manufacturing (36%) and tourism (40%) held closer to prior levels. Where growth did occur, its scale was strikingly consistent across sectors, averaging 14–15% regardless of industry.

HOW HAS YOUR EXPORT REVENUE GENERATED THROUGH ONLINE CHANNELS CHANGED OVER THE PAST 12 MONTHS?



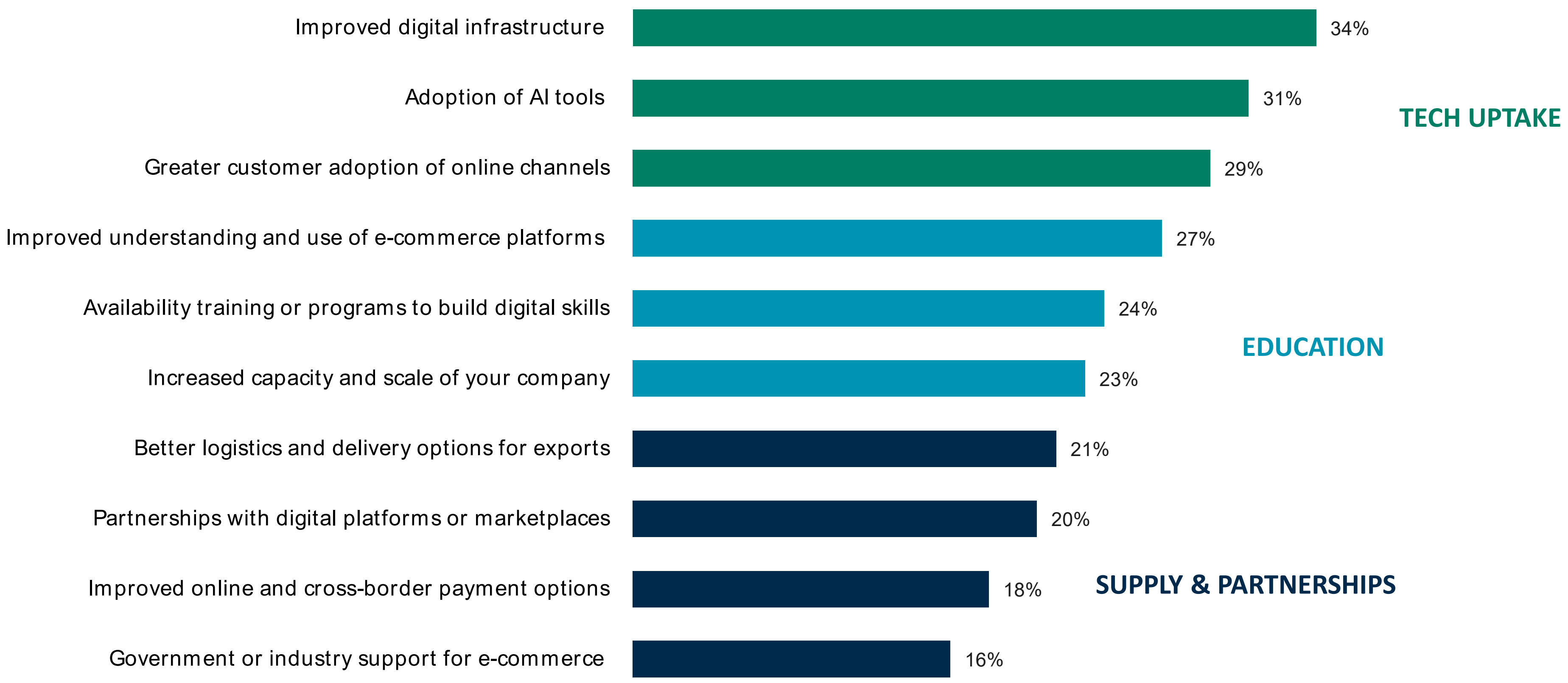


Sig. higher/lower than 2024 (95% CI)

Factors Positively Impacting Generation of Online Revenue

Technology uptake is the leading factor behind non-tourism online revenue growth, inclusive of improved infrastructure access, AI tools, and customers becoming more comfortable transacting online. Education-related support is close behind as a positive factor, underlining how much of this shift is being driven by capability-building rather than demand alone.

FACTORS THAT HAVE POSITIVELY IMPACTED ONLINE REVENUE GENERATION



Factors Positively Impacting Generation of Online Revenue

The drivers of online growth differ meaningfully by sector: agriculture businesses point to better logistics and delivery options far more than services do (38% versus 13%), while the reverse is true for AI adoption, cited by 40% of services businesses against just 21% of agriculture. This is a reminder that "digital enablement" means different things to different types of exporters.

FACTORS THAT HAVE POSITIVELY IMPACTED ONLINE REVENUE GENERATION

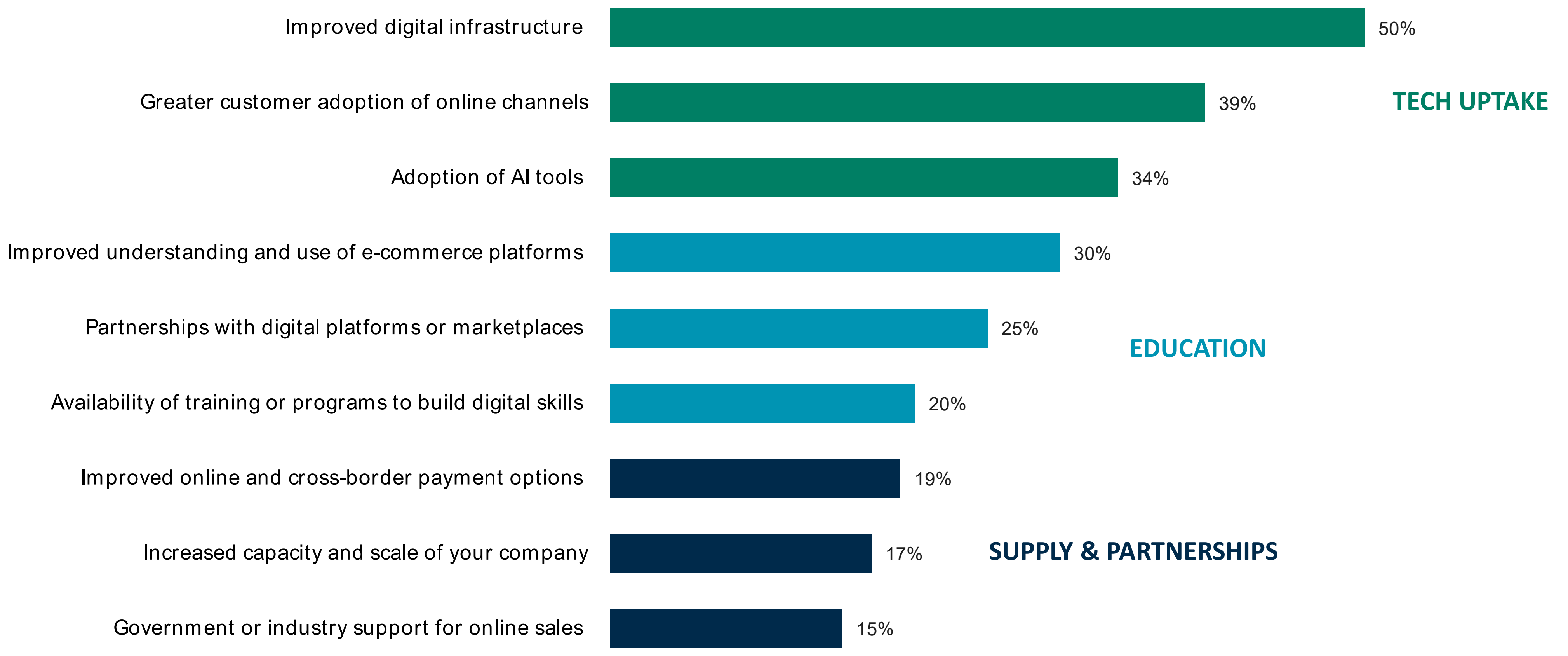
INITIATIVE	EXPORT AREA			EXPORT MATURITY	
	AGRICULTURE	MANUFACTURING	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
Base n=	*n=66*	*n=83*	*n=27**	*n=83*	*n=109*
Improved digital infrastructure	30%	37%	38%	32%	36%
Adoption of AI tools	21%	35%	40%	32%	31%
Greater customer adoption of online channels	30%	32%	25%	30%	28%
Improved understanding and use of e-commerce platforms	21%	30%	33%	24%	28%
Availability of training or programs to build digital skills	17%	26%	33%	27%	22%
Increased staff, time or resources to support online sales	15%	24%	27%	23%	23%
Better logistics and delivery options for exports	38%	19%	13%	21%	22%
Partnerships with digital platforms or marketplaces	13%	23%	25%	22%	19%
Improved online and cross-border payment options	9%	24%	24%	15%	20%

▲▼ Sig. higher/lower than Mature (95% CI)

Factors Positively Impacting Generation of Online Revenue

Technology uptake continues to play a key role in online revenue generation, with half of exporters citing improved digital infrastructure as a positive factor. Customer adoption of online channels and AI integration also rank highly, demonstrating the increasing value of digital capabilities in reaching and serving international markets.

FACTORS THAT HAVE POSITIVELY IMPACTED ONLINE REVENUE GENERATION



Reasons For Not Using Online Channels

Among the small minority of exporters still not selling online, the barrier has shifted. Technology itself is no longer the obstacle it once was, with concerns falling from 48% in 2024 to 31% in 2026.

Instead, operational issues have risen from 34% to 45% over the same period and are now the leading barrier for this group, suggesting the next push needs to focus on capability and capacity rather than access to tools.

WHY DOES YOUR ORGANISATION NOT USE ANY ONLINE/DIGITAL CHANNELS TO GENERATE EXPORT REVENUE?

			2024	2022	2020
RELEVANCE 42% (2024: 52%, 2022: 64%)	It is not relevant to the needs of the business	25%	11%	57%	42%
	Our customers don't need it or don't buy through digital channels	23% ▼	50%	31%	19%
TECHNOLOGY CONCERNS 31% (2024: 48%, 2022: 43%, 2020: 47%)	Costs of setting up or maintaining an online platform are too high	23%	*New code 2026*		
	Lack of technology to support e-commerce activities	17%	27%	25%	31%
	Poor or no internet connection	9%	11%	11%	19%
	Lack of access to online payment solutions	4% ▼	27%	25%	36%
OPERATIONAL ISSUES 45% (2024: 34%, 2022: 29%, 2020: 31%)	Lack of skills or expertise	36%	32%	29%	31%
	Legal and regulatory concerns	9%	14%	7%	6%

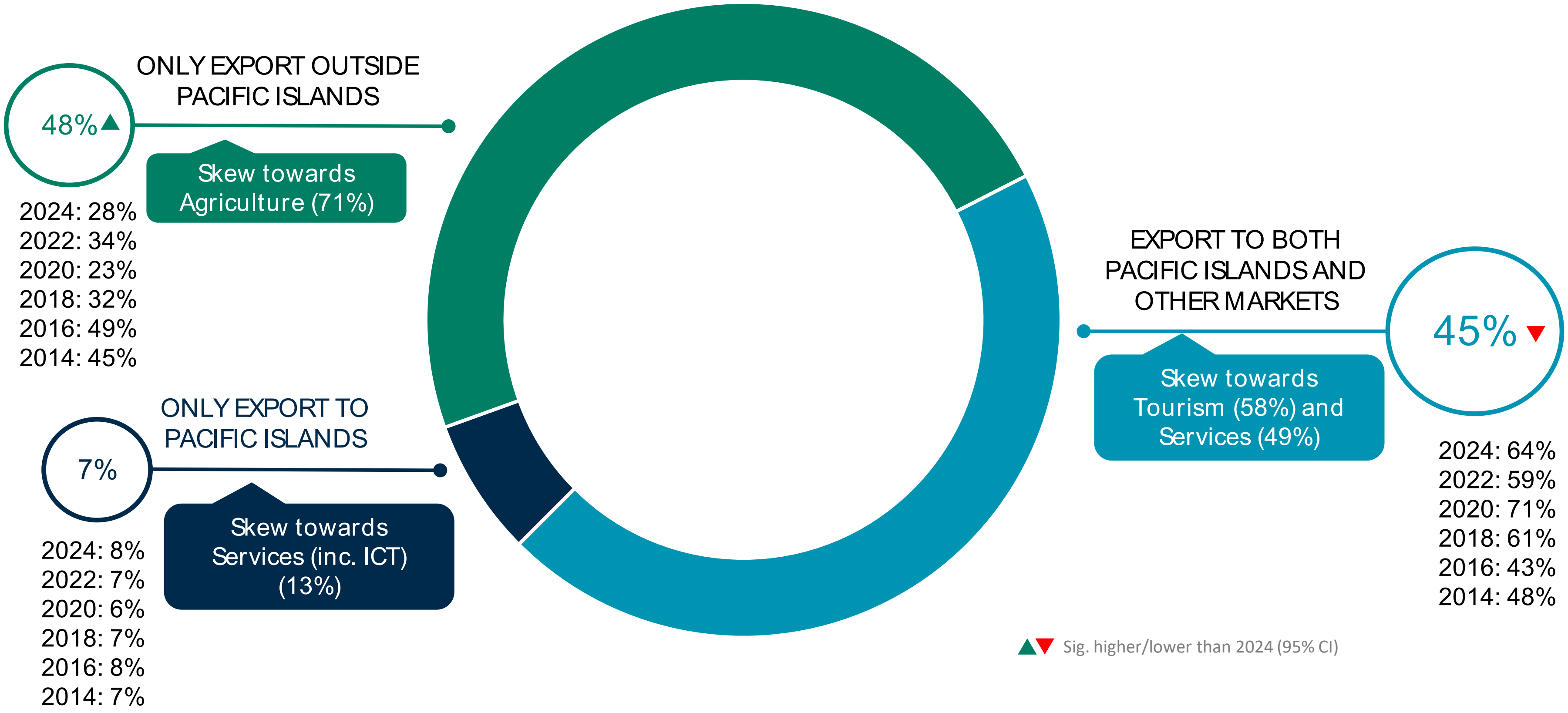
▲▼ Sig. higher/lower than 2024 (95% CI)

EXPORT DESTINATIONS

Markets Exported to Over the Past 12 Months

Pacific businesses are reorienting decisively toward markets beyond the region: 48% of exporters now generate revenue exclusively outside the Pacific Islands, up from 28% in 2024 - the largest single-wave shift recorded on this measure. The trend is most pronounced in agriculture, where 71% of businesses now export exclusively outside the Pacific, likely chasing the larger, more profitable markets that growing digital and infrastructure capability now make accessible.

WHICH GEOGRAPHIC AREAS DID YOUR COMPANY GENERATE EXPORT REVENUE OVER THE PAST 12 MONTHS?



Geographic Areas Generated Export Revenue from Over the Past 12 Months

Australia (57%) and New Zealand (50%) remain the two largest export destinations by some distance, but the standout story this wave is Japan, with 15% now exporting there, up from just 9% in 2024. This represents the strongest recovery of any market tracked, and points to renewed momentum in key Asian markets after several softer years.

Exporting outside of Pacific Islands

	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%

Exporting within Pacific Islands

		2024	2022	2020
Fiji Islands	27%	34%	25%	32%
Samoa	13%	12%	13%	16%
Vanuatu	12%	14%	11%	15%
New Caledonia	11%	10%	10%	11%
Papua New Guinea	10%	19%	12%	16%
Solomon Islands	9%	10%	10%	14%
Kiribati	9%	10%	9%	8%
Tonga	8%	10%	12%	18%
Cook Islands	8%	9%	11%	13%
Nauru	6%	6%	6%	6%
French Polynesia	5%	3%	5%	4%
Tuvalu	5%	4%	5%	7%
Niue	4%	2%	4%	6%
Micronesia (FSM)	4%	4%	4%	6%
Marshall Islands	3%	9%	5%	7%
Palau	1%	2%	2%	6%
Other Pacific Islands	13%	10%	7%	6%
Don't export to Pacific Islands	48% ▲	28%	34%	23%

▲▼ Sig. higher/lower than 2024 (95% CI)

Countries Exported to Outside The Pacific Islands

Tourism businesses service a much broader geographic spread than other exporters, reaching an average of 4.5 export regions. This figure is more than double the 2.0 average for services exporters, who remain concentrated on Australia (45%) and New Zealand (35%) thanks to proximity, established trade ties and simpler logistics.

FROM WHICH COUNTRIES DID YOUR COMPANY SERVICE INTERNATIONAL TOURISTS / GENERATE EXPORT REVENUE OVER THE PAST 12 MONTHS?

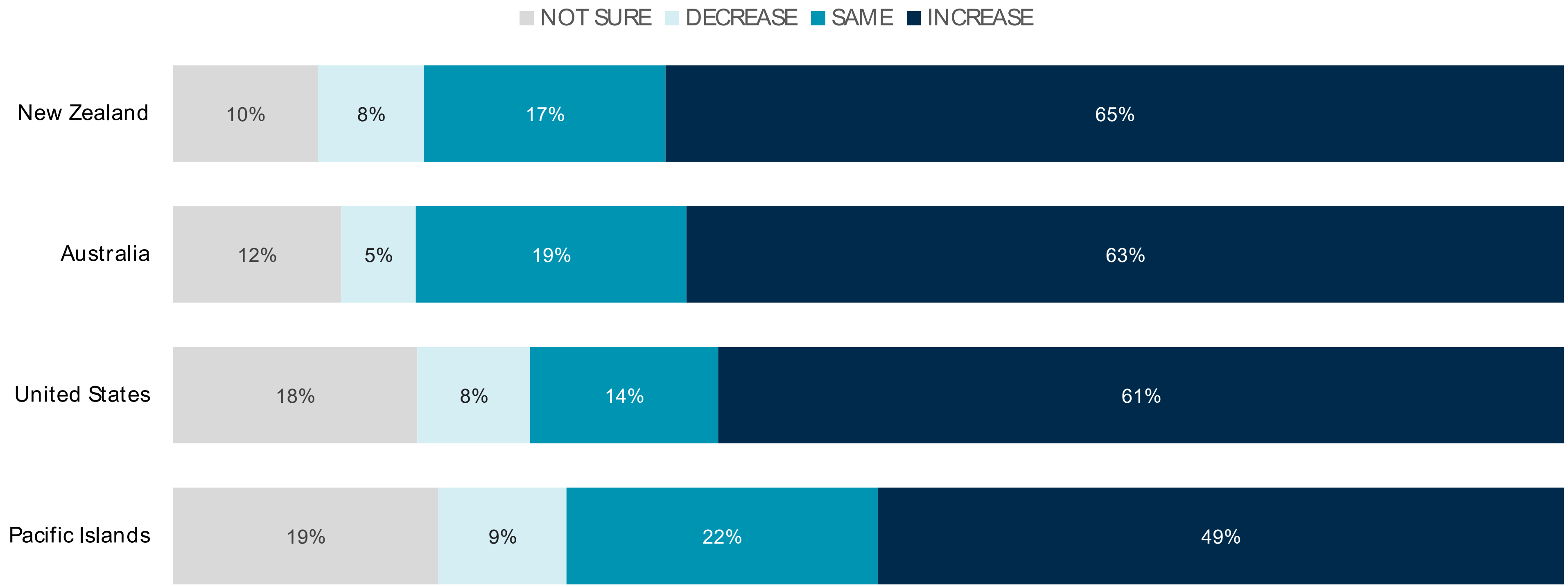
COUNTRIES SERVICED	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
Base n=	*n=431*	*n=85*	*n=119*	*n=130*	*n=77*	*n=162*	*n=269*
Australia	57%	38% ▼	58%	77% ▲	45%	43% ▼	65%
New Zealand	50%	49%	50%	57%	35% ▼	36% ▼	58%
United States	33%	27%	29%	55% ▲	16% ▼	20% ▼	41%
China	16%	7% ▼	7% ▼	31% ▲	17%	12%	18%
United Kingdom	16%	7% ▼	11%	32% ▲	8%	9% ▼	20%
Japan	15%	13%	8% ▼	27%	8%	9% ▼	17%
Germany	13%	5% ▼	4%	33% ▲	3% ▼	4% ▼	18%
France	12%	5% ▼	7% ▼	24% ▲	12%	9%	14%
Canada	10%	7%	8%	21% ▲	3% ▼	3% ▼	15%
Pacific Islands	52%	29% ▼	56%	60%	62%	44% ▼	57%
Avg. number of regions (2026)	*2.8*	*2.1*	*2.3*	*4.5*	*2.0*	*1.9*	*3.3*
Avg. number of regions (2024)	*2.9*	*2.6*	*3.1*	*3.6*	*2.6*	*2.4*	*3.3*

▲▼ Sig. higher/lower than total (95% CI)

Change in Non-Tourism Export Orders or Revenue from Overseas Markets Over Next 12 Months

Non-tourism exporters expect growth across every major market over the next 12 months, but confidence isn't evenly spread. New Zealand (65%) and Australia (63%) lead market growth expectations, while the Pacific Islands itself is the weakest of the four tracked at 49%. This reflects the broader shift toward larger external markets seen elsewhere in this report.

HOW WILL EXPORT REVENUE CHANGE OVER THE NEXT 12 MONTHS FOR THE FOLLOWING...?

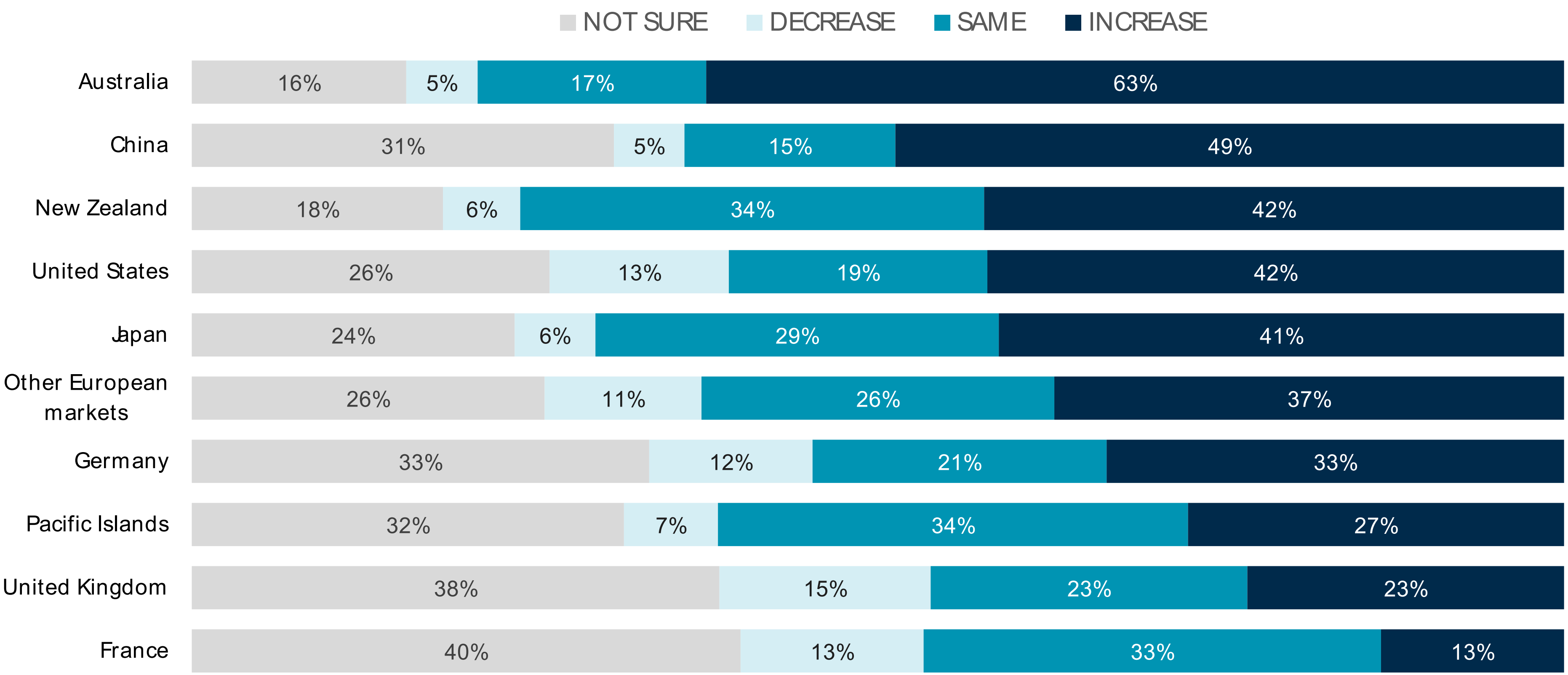


Change in Export Orders or Revenue from Overseas Markets Over Next 12 Months

Tourism operators expect Australia (63%) and China (49%) to lead growth over the next 12 months, well ahead of New Zealand and the US (both 42%).

European markets trail noticeably - France sits lowest at just 13% expecting growth - reflecting far less certainty about that region's recovery.

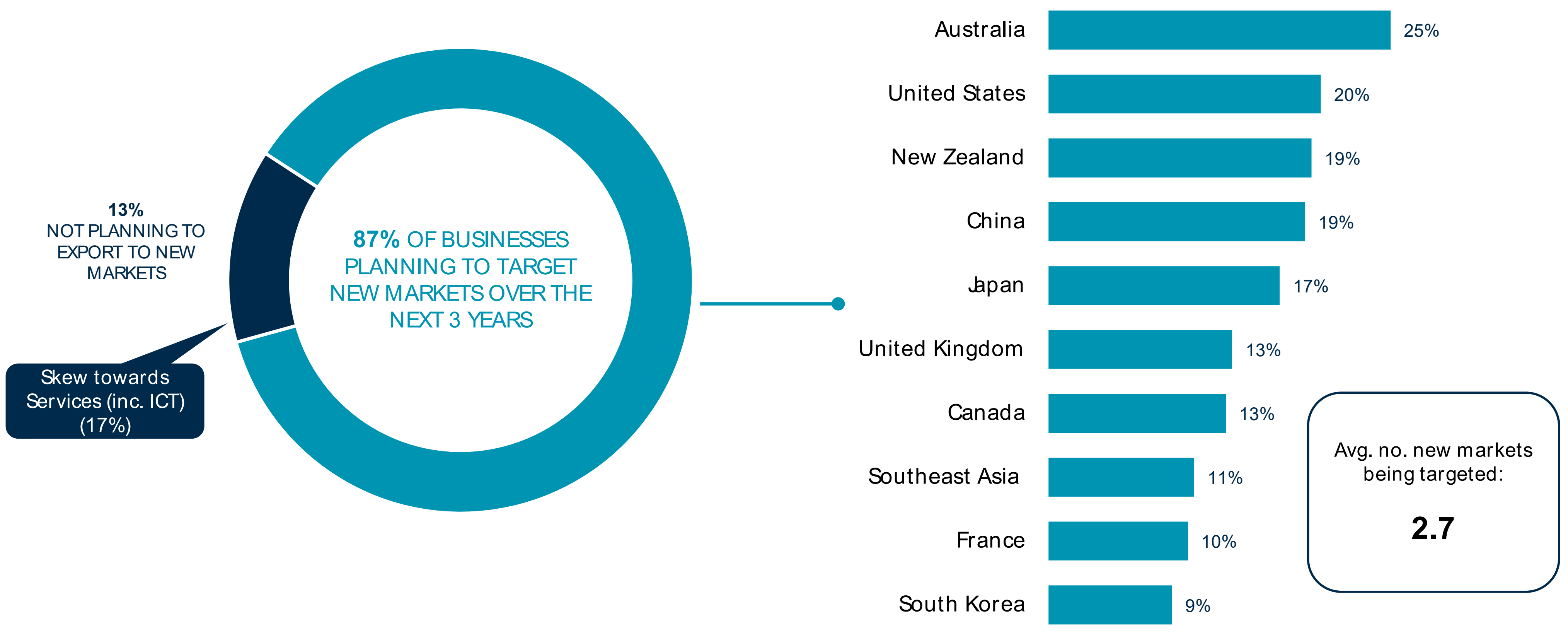
HOW WILL INTERNATIONAL TOURISM REVENUE CHANGE OVER THE NEXT 12 MONTHS FOR THE FOLLOWING...?



Entering New Markets Over the Next 3 Years

Expansion ambition remains high across the board with 87% of exporters targeting new markets over the next three years, reflecting an average of 2.7 new markets per business. Tellingly, the markets already dominant today - Australia, New Zealand, the US, China and Japan - are also the top expansion targets, suggesting growth is being pursued by deepening existing relationships rather than chasing entirely new territory.

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



BARRIERS TO EXPORTING

Barriers to Exporting

High operating costs remain the dominant barrier for non-tourism exporters, with access to finance close behind. The more encouraging signal is elsewhere: supply chain and logistics challenges have eased sharply, falling from 63% in 2024 to 36% in 2026, alongside improvements in online sales capability and labour availability. This is a sign that some of the operational fixes of recent years are starting to pay off even as cost and finance pressures persist.

WHAT DO YOU CONSIDER TO BE THE MAIN BARRIERS TO EXPORTING OR SELLING YOUR PRODUCTS TO OVERSEAS CUSTOMERS?

		2024	2022	2020
High operating costs*	48%	46%	65%	47%
Access to finances or capital to support…	38%	37%	39%	35%
Challenges with supply chain or export…	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…	16%	21%	26%	22%

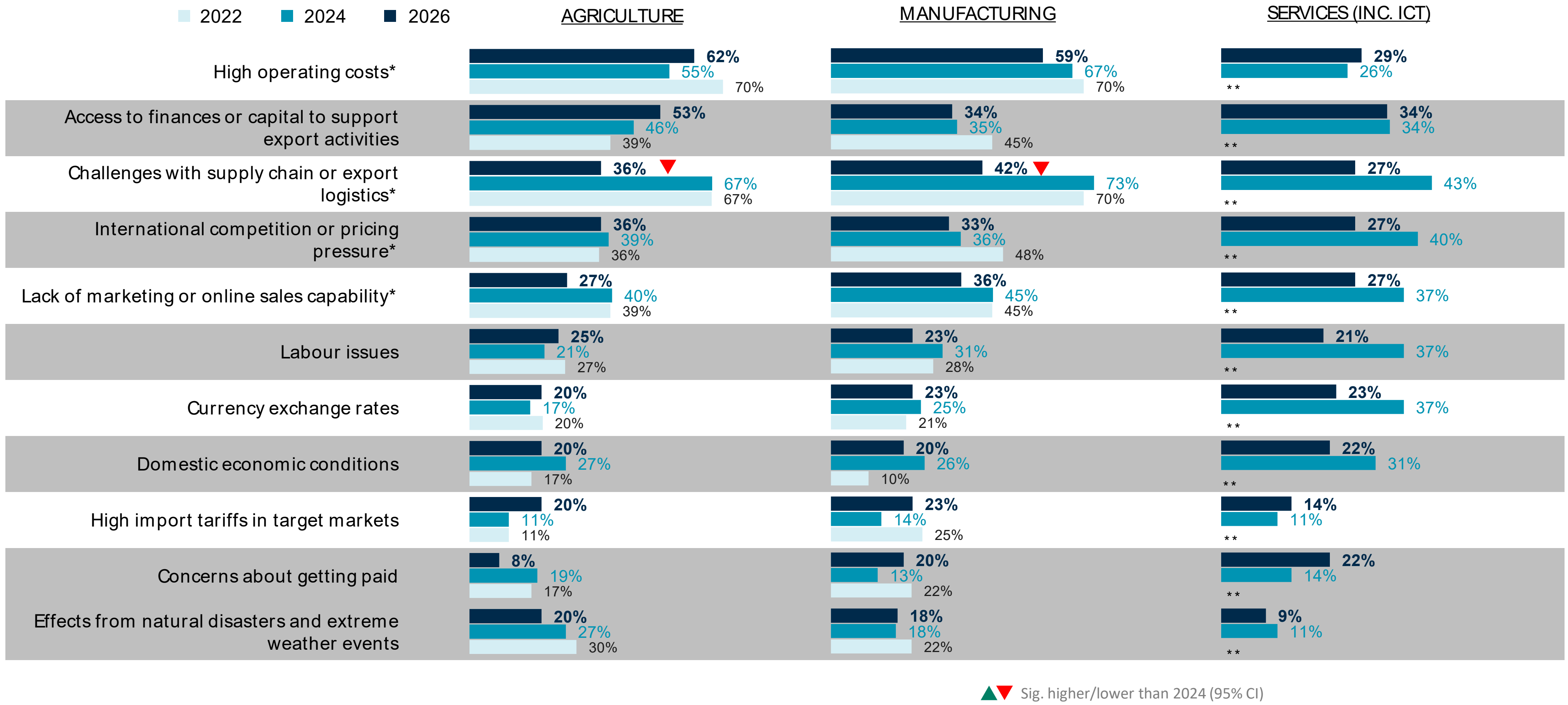
▲▼ Sig. higher/lower than 2024 (95% CI)

*Indicates code wording change for 2026

Barriers to Exporting

Operating costs and finance remain the top two barriers in agriculture and manufacturing, though both have eased sharply since 2024 - supply chain and logistics challenges fell from 67% to 36% in agriculture and 73% to 42% in manufacturing. Services exporters report a flatter, more even spread of barriers, with no single issue dominating above 34%.

WHAT DO YOU CONSIDER TO BE THE MAIN BARRIERS TO EXPORTING OR SELLING YOUR PRODUCTS TO OVERSEAS CUSTOMERS?



*Indicates code wording change for 2026

** Base too low to show

Assistance Needed to Encourage Increasing Export Activity

Exporters place the most value in the following three forms of assistance: export grants (50%), logistics support (45%) and introductions to overseas buyers (44%), with each directly addressing the barriers identified earlier in this report. This correlation is a useful signal for where targeted support is likely to have the most impact.

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

		2024	2022	2020
Export grants	50%	55%	61%	52%
Help improving export logistics	45%	40%	38%	43%
Introduction to international target market buyers and customers	44%	45%	45%	42%
Financial support to offset high freight costs	40% ▼	49%	55%	*Statement added in 2022*
More competitive transport costs	39% ▼	51%	55%	52%
Introductions to international target market agents and distributors	37%	42%	46%	35%
Assistance with marketing your business	35% ▼	46%	49%	39%
More information on business opportunities	32%	33%	37%	29%
More free trade agreements	31%	32%	36%	30%
Help with ecommerce capability building	29%	28%	30%	33%
Assistance with trade finance	29%	32%	38%	29%
Better marketing of the Pacific Islands	28% ▼	42%	41%	35%
Better access to financial technology	24%	31%	24%	24%
Better ICT infrastructure and regulatory framework	16%	22%	33%	18%

▲▼ Sig. higher/lower than 2024 (95% CI)

Assistance Needed to Encourage Increasing Export Activity

Sector needs are closely related to sector cost pressures, with 60% of manufacturing businesses pointing to export grants as the assistance that would most help, while 58% of agriculture businesses prioritise financial support for freight costs. These needs reflect the distinct cost structures each sector is grappling with.

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

INITIATIVE	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	SERVICES (INC. ICT)	NEW	MATURE
Base n=	*n=310*	*n=85*	*n=100*	*n=77*	*n=131*	*n=179*
Export grants	50%	59%	60%	29% ▼	51%	49%
Help improving export logistics	45%	56%	52%	23% ▼	44%	45%
Introduction to international target market buyers and customers	44%	39%	50%	39%	40%	47%
Financial support to offset high freight costs	40%	58% ▲	41%	25% ▼	40%	40%
More competitive transport costs	39%	39%	47%	23% ▼	30% ▼	45%
Introductions to international target market agents and distributors	37%	32%	47%	27%	36%	38%
Assistance with marketing your business	35%	34%	39%	32%	35%	35%
More information on business opportunities	32%	28%	36%	34%	31%	32%
More agreements	31%	33%	39%	19%	34%	29%
Help with ecommerce capability building	29%	21%	37%	25%	34%	26%
Assistance with trade finance	29%	40%	29%	21%	33%	26%
Better marketing of the Pacific Islands	28%	22%	37%	21%	26%	30%
Better access to financial technology	24%	19%	25%	30%	26%	22%
Better ICT infrastructure and regulatory framework	16%	11%	18%	25%	16%	17%

▲▼ Sig. higher/lower than total (95% CI)

Barriers to Exporting for Tourism Exporters

Limited air connectivity and high flight costs rank as the leading barrier for tourism exporters at 44%, ahead of high operating costs (40%) and access to finance (33%). This underlines how dependent the sector remains on aviation infrastructure outside its own control. Most other barriers have eased since 2024, with marketing capability falling sharply from 61% to 33%.

WHAT DO YOU CONSIDER TO BE THE MAIN BARRIERS TO SERVICING INTERNATIONAL TOURISTS?

		2024	2022	2020
High operating costs*	48%	46%	65%	47%
Access to finances or capital to support…	38%	37%	39%	35%
Challenges with supply chain or export…	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…	16%	21%	26%	22%

*Indicates code wording change for 2026

Assistance Needed to Encourage Increasing Export Activity - Tourism

Marketing support remains the highest priority for tourism businesses, with assistance to market their business (50%), better marketing of the Pacific Islands (44%), and help with e-commerce capability building (41%) ranking as the most sought-after forms of assistance.

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

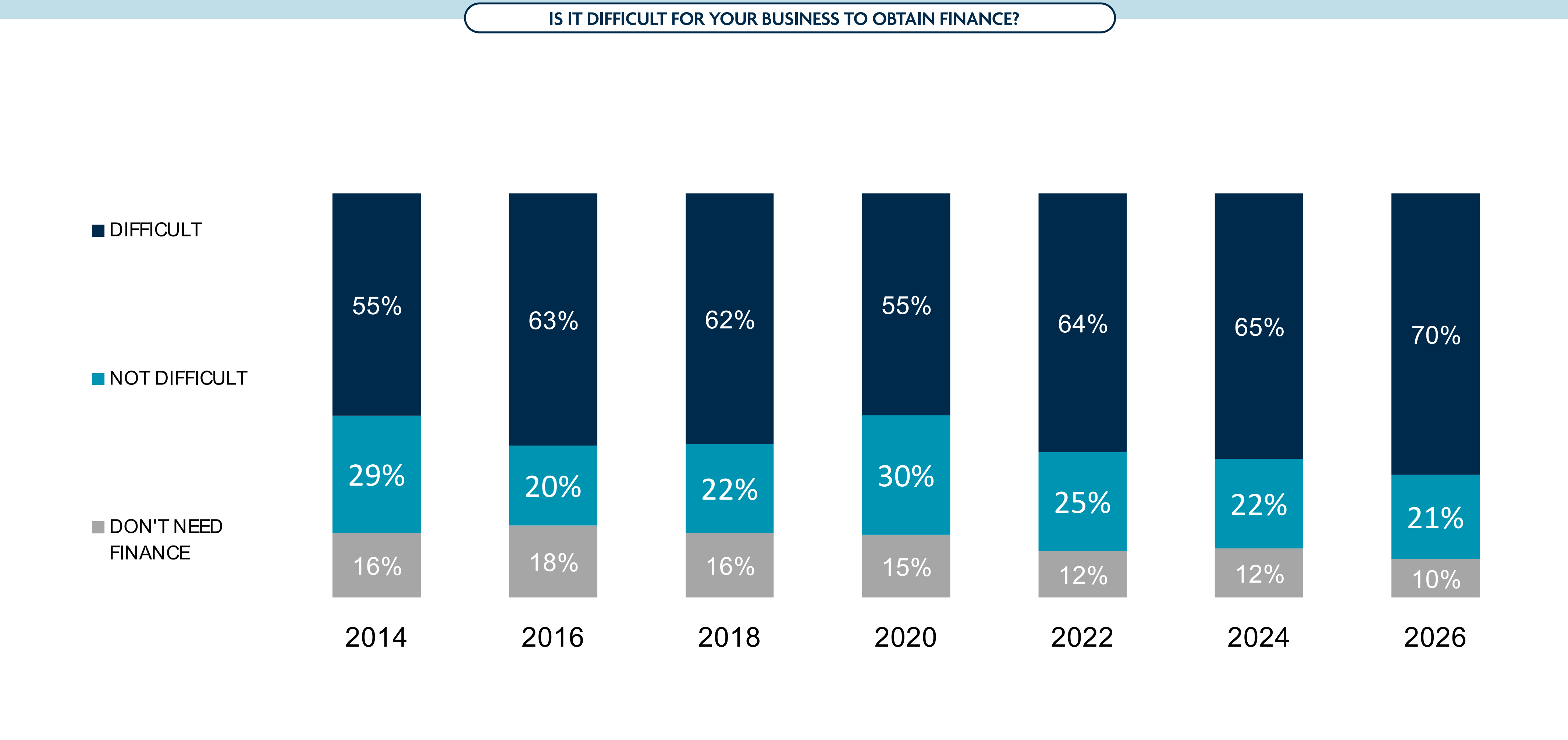
		2024	2022	2020
Assistance with marketing your business	50%	62%	49%	57%
Better marketing of the Pacific Islands	44%	42%	55%	53%
Help with ecommerce capability building	41% ▲	25%	28%	34%
Better access to financial technology	40%	35%	45%	38%
Better ICT infrastructure and regulatory framework	26%	26%	28%	25%
More information on business opportunities	26%	35%	34%	39%
Assistance with trade finance	24%	16%	30%	31%

▲▼ Sig. higher/lower than 2024 (95% CI)

FINANCE AND INVESTMENT

Difficulty Obtaining Finance

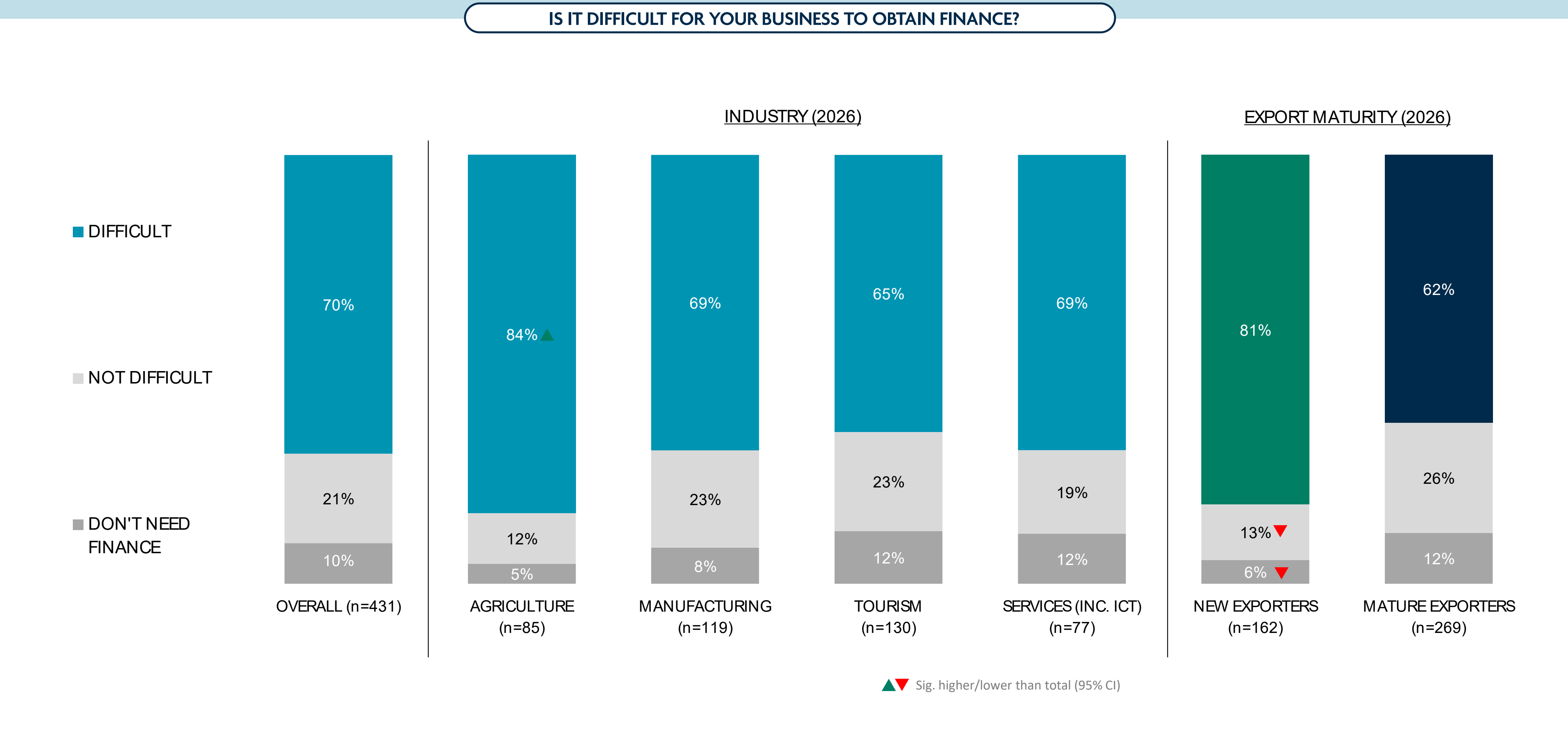
Access to finance has become harder than at any point since tracking began in 2014. Seven in ten exporters (70%) now find it difficult to obtain finance, up from 55% in 2020 - reinforcing finance as one of the biggest constraints on Pacific export growth identified in this report.



Difficulty Obtaining Finance

For new exporters or those in the agriculture industry, obtaining finance is a notable challenge, with 81% of new exporters and 84% of agricultural businesses reporting difficulty.

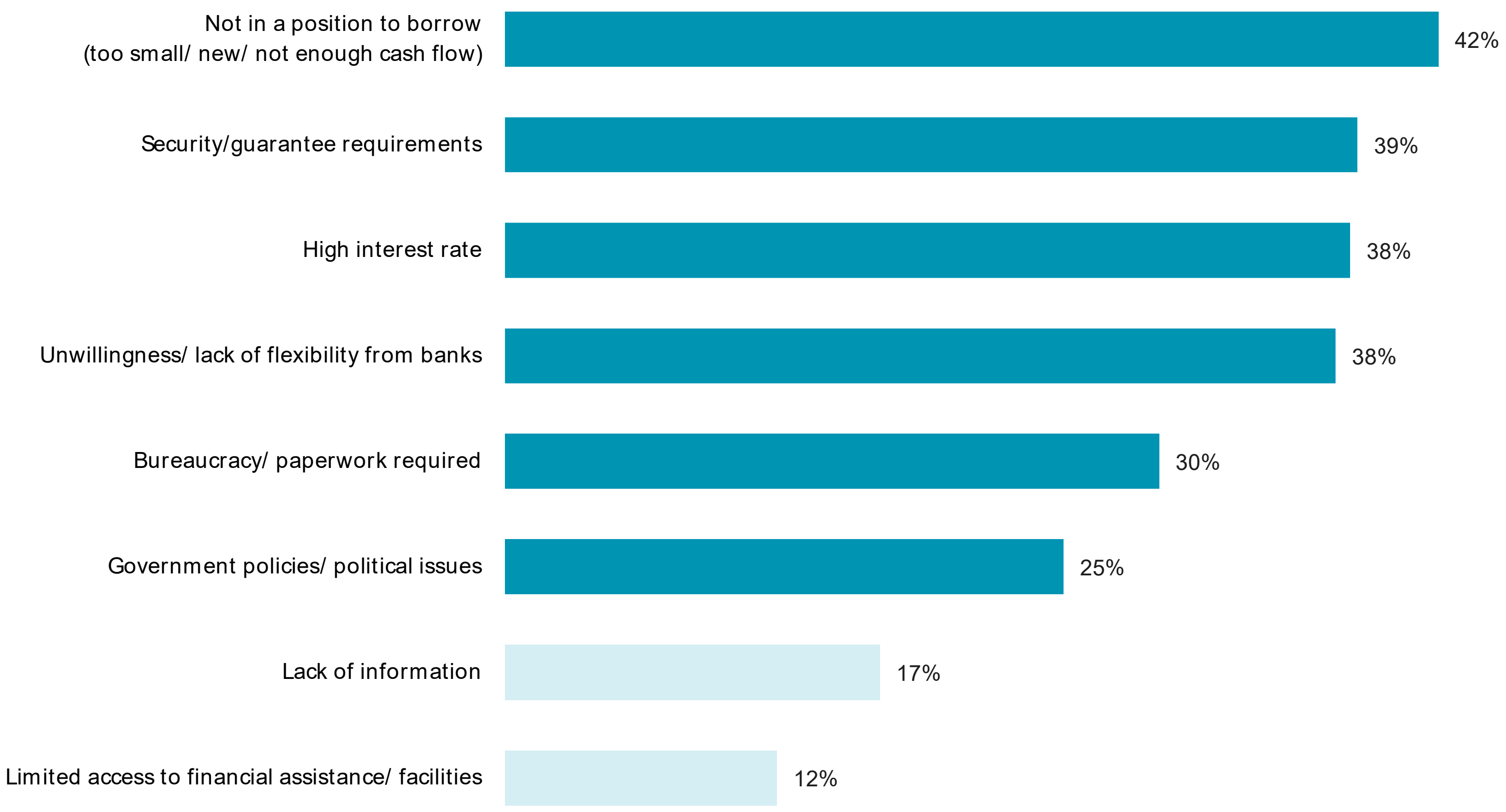
These figures are significantly above the overall figure of 70% and the highest readings of any segment measured in 2026.



Key Reasons for Difficulty Accessing Finance

Forty-two per cent of exporters who find finance difficult cite not being in a position to borrow as the primary reason, often as a result of being too small, too new, or lacking sufficient cash flow. This reason is ahead of security and guarantee requirements (39%) and high interest rates and bank inflexibility (both 38%), which represent a set of barriers that compound rather than operate independently for earlier-stage businesses.

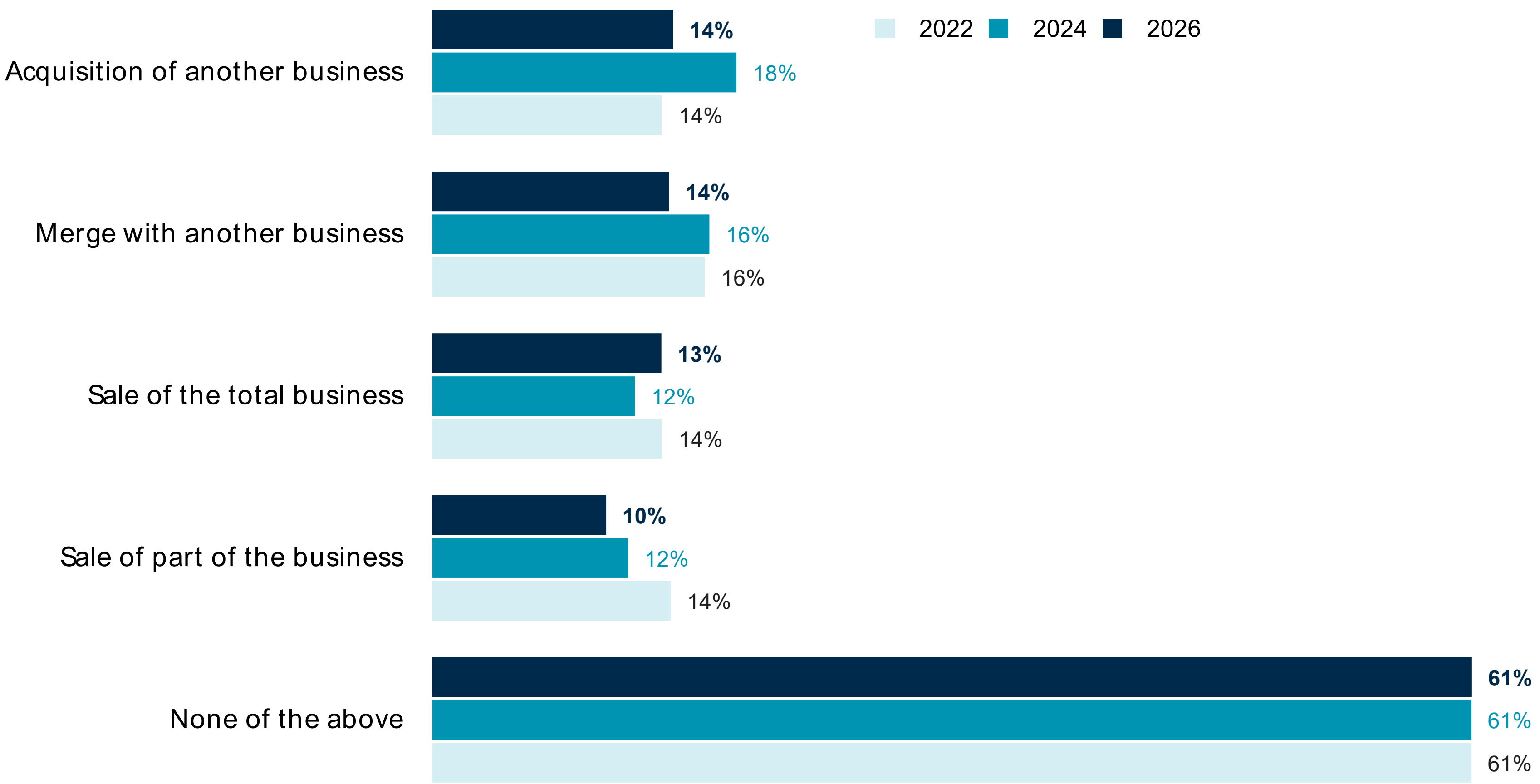
WHY DO YOU FIND IT DIFFICULT TO OBTAIN FINANCE?



Consideration of Selling Business or Seeking Investment

A sizeable minority of exporters are weighing major strategic change, with 39% considering acquisitions, mergers, or sales over the next two years. This figure has held remarkably steady across the 2022, 2024 and 2026 survey waves, suggesting these business decisions aren't a temporary response to current conditions but a consistent feature of the growth-capital landscape.

ARE YOU CONSIDERING ANY OF THE FOLLOWING ACTIVITIES OVER THE NEXT 2 YEARS?

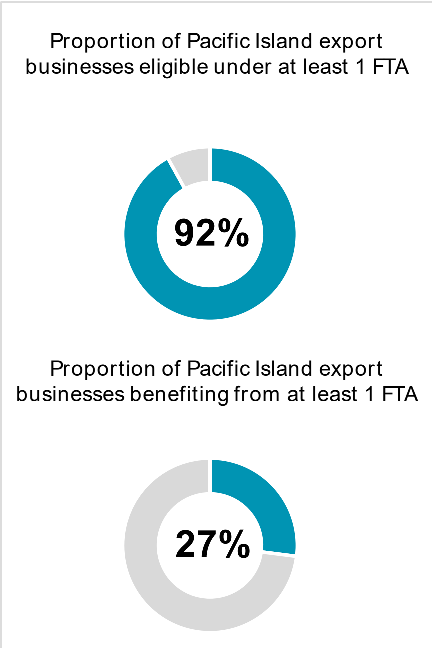


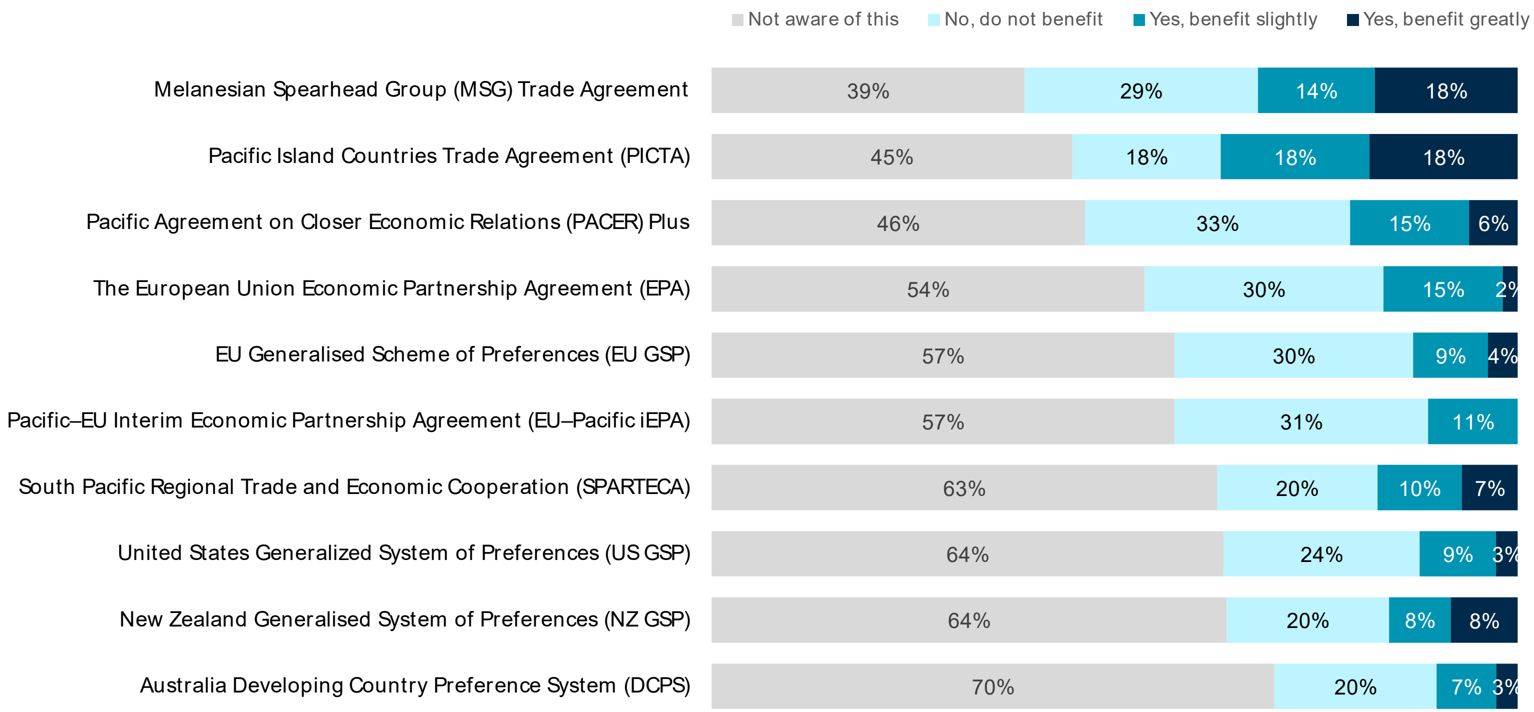
FTA & US TRADE POLICY IMPACTS

FTA Engagement

There is a significant gap between trade agreement eligibility and realised benefit, with 92% of exporters being eligible under at least one Free Trade Agreement, yet only 27% report actually benefiting. This 65-point gap, combined with the awareness levels on the next page, points clearly to a communications and education problem rather than a shortcoming in the agreements themselves.

PLEASE INDICATE IF YOU BENEFIT FROM ANY OF THE FOLLOWING TRADE AND ECONOMIC PARTNERSHIP AGREEMENTS?





FTA Awareness

Awareness is the clear bottleneck behind the FTA gap, and it isn't evenly distributed - manufacturing businesses report the lowest awareness of any sector, with non-awareness reaching 75% for the EU GSP and Pacific–EU iEPA specifically, well above the 39%–70% non-awareness range recorded across the ten agreements overall. Mature businesses tend to be somewhat better informed, but a significant gap persists even among this group.

% NOT AWARE OF FTA

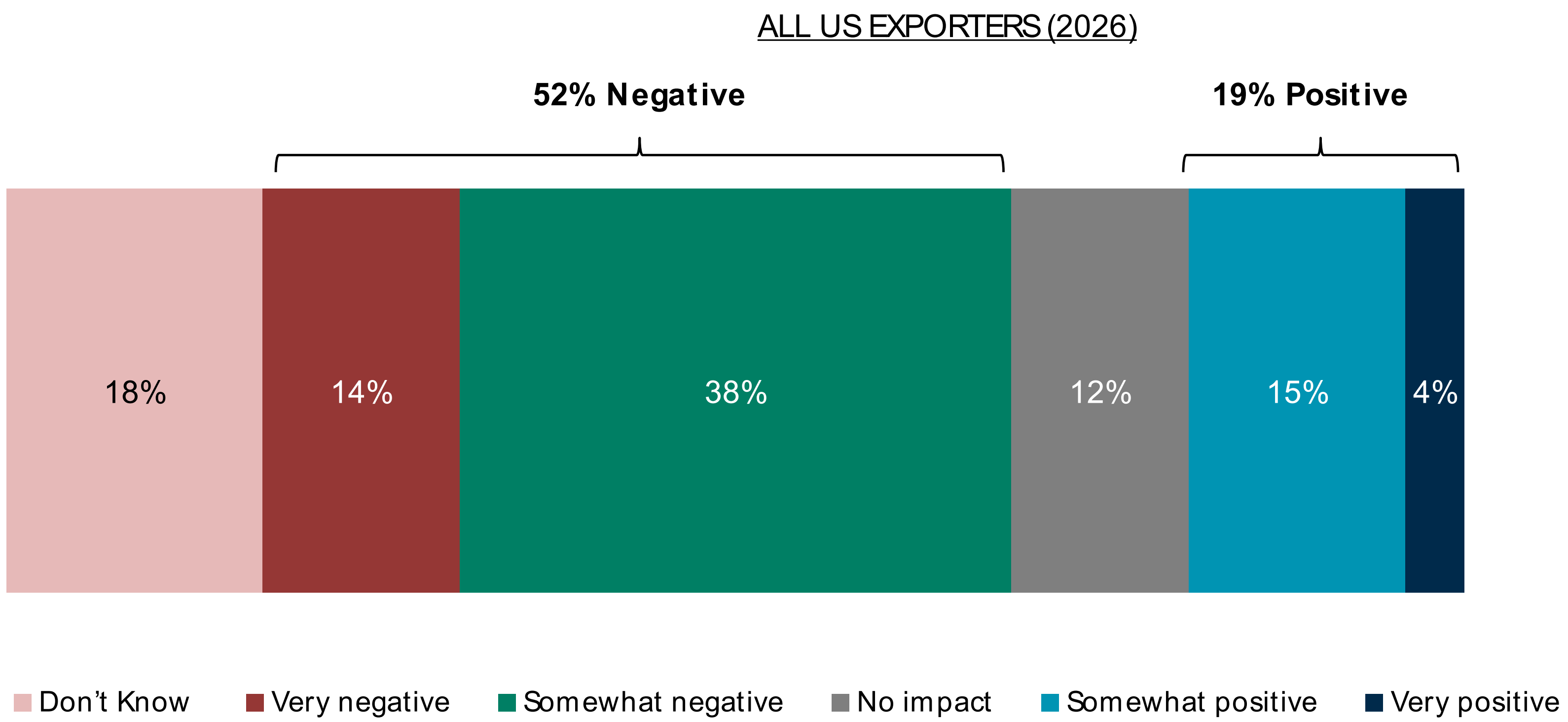
FTA	OVERALL	EXPORT AREA			EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	SERVICES (INC. ICT)	NEW	MATURE
Base n=	*n=310*	*n=85*	*n=100*	*n=77*	*n=131*	*n=179*
Melanesian Spearhead Group (MSG) Trade Agreement	39%	36%	43%	35%	53% ▲	31%
Pacific Island Countries Trade Agreement (PICTA)	45%	28% ▼	54%	40%	55% ▲	39%
Pacific Agreement on Closer Economic Relations (PACER) Plus	46%	47%	52%	37%	56% ▲	42%
The European Union Economic Partnership Agreement (EPA)	54%	50%	60%	53%	62% ▲	48%
EU Generalised Scheme of Preferences (EU GSP)	57%	50%	75% ▲	47%	62%	55%
Pacific–EU Interim Economic Partnership Agreement (EU–Pacific iEPA)	57%	56%	75% ▲	47%	62%	55%
South Pacific Regional Trade and Economic Cooperation (SPARTECA)	63%	65%	67%	53%	72% ▲	58%
United States Generalized System of Preferences (US GSP)	64%	48% ▼	76% ▲	58%	79% ▲	58%
New Zealand Generalised System of Preferences (NZ GSP)	64%	64%	75% ▲	37% ▼	63%	64%
Australia Developing Country Preference System (DCPS)	70%	75%	75%	57% ▼	73%	68%

▲▼ Sig. higher/lower than total (95% CI)

Impact of US Trade Policies

US trade policy is creating real uncertainty for exporters who sell into that market with 52% expecting a negative impact over the next year, against just 19% expecting a positive effect. This net negative reading of 33 points signals genuine concern rather than background noise among this exposed group.

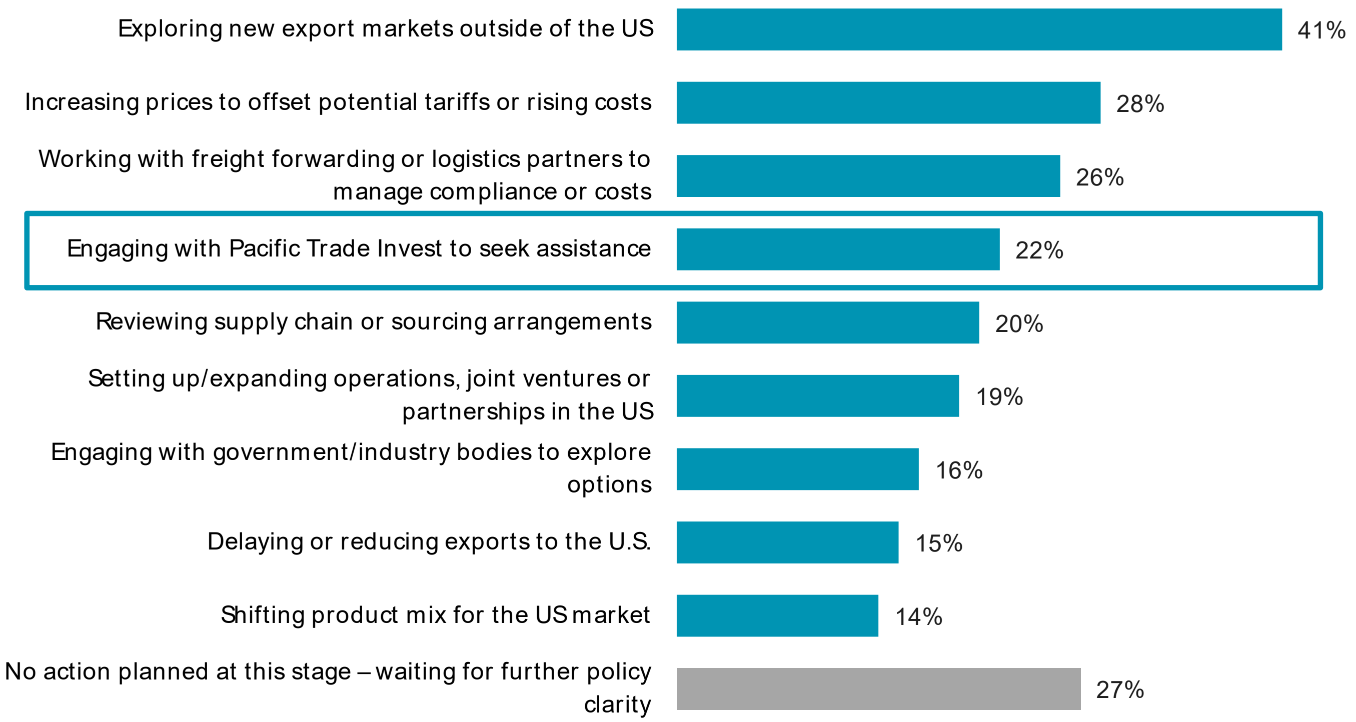
WHAT IMPACT DO YOU EXPECT USA'S TRADE POLICIES TO HAVE ON YOUR BUSINESS'S EXPORT ACTIVITY TO THE UNITED STATES OVER THE NEXT 12 MONTHS?



Changes Being Implemented in Response to US Trade Policy

Twenty-seven per cent of US-exposed exporters are waiting for further policy clarity before acting. Among those already responding, market diversification leads - 41% are exploring new export markets outside the US - ahead of price increases to offset tariffs (28%) and logistics adjustments (26%).

WHAT CHANGES, IF ANY, ARE YOU IMPLEMENTING OR CONSIDERING AS A RESULT OF SHIFTS IN US TRADE POLICY?

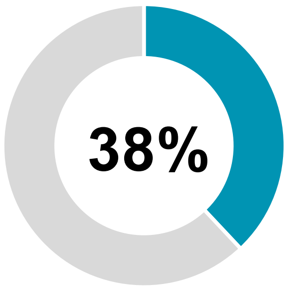


USE OF AI

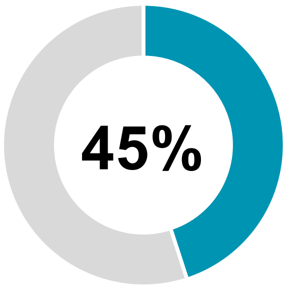
AI Uptake

Thirty-eight per cent of Pacific exporters are already using AI, with a further 45% planning adoption within the next 12 months. Uptake is highest in services (55%) and manufacturing (44%), while agriculture - at 16% current adoption - records the highest planning intent of any sector at 55%, suggesting the gap is narrowing.

AI Adoption



currently using AI



planning to adopt AI in the next 12 months

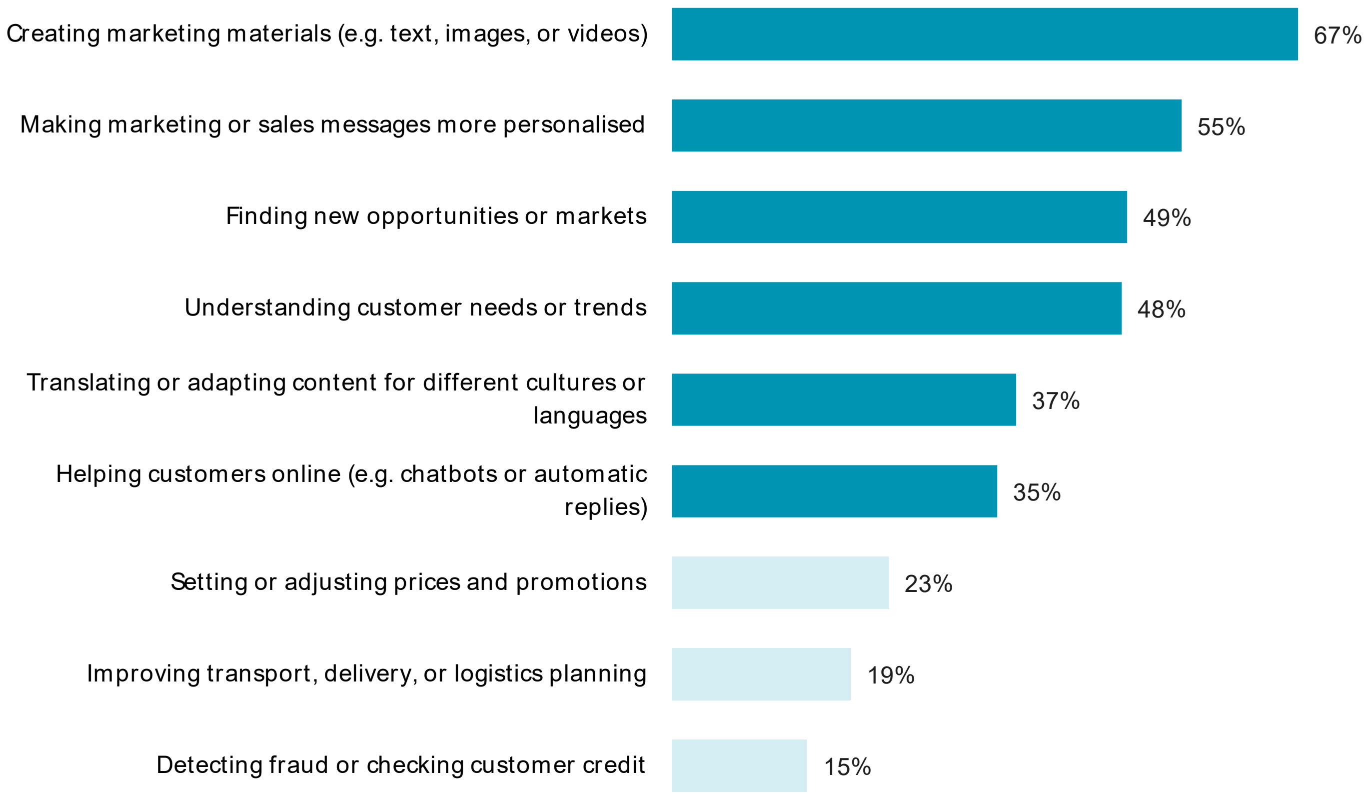
	EXPORT AREA				EXPORT MATURITY	
	AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
	n=85	*n=119*	*n=107*	*n=77*	*n=162*	*n=269*
AI Adoption	16% ▼	44%	32%	55% ▲	37%	36%
Planning to adopt AI	55% ▲	35%	52%	31% ▼	44%	43%

▲▼ Sig. higher/lower than total (95% CI)

Type of AI Use

AI use among Pacific exporters is concentrated in commercial and customer-facing functions, including marketing content creation, customer message personalisation, market opportunity identification and customer insight. This targeted use suggests the technology is being adopted as a growth tool ahead of more operational applications.

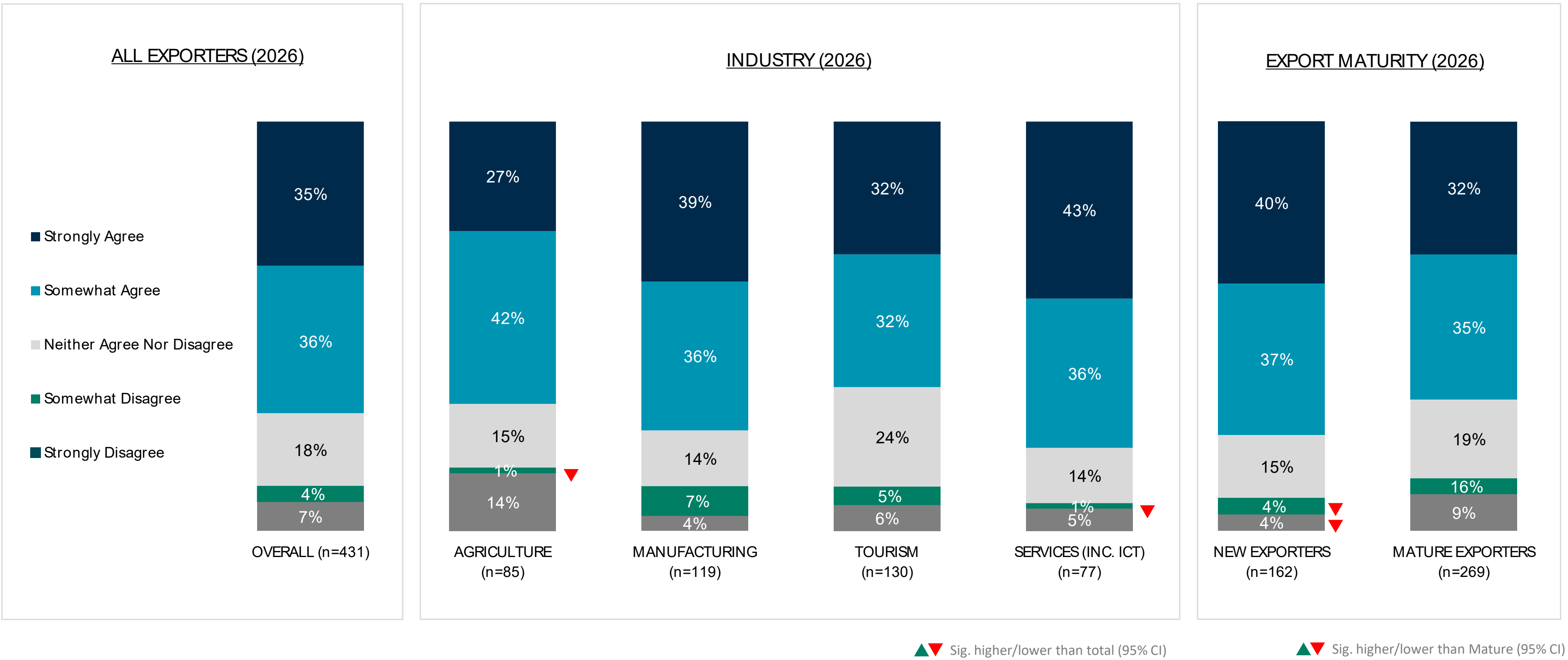
IN WHICH AREAS ARE YOU USING (OR PLANNING TO USE) AI TO SUPPORT YOUR OPERATIONS?



Attitude to AI

Sentiment toward AI is strongly positive across the board, with 71% of exporters believing it will improve their business's financial performance over the next three years. Services exporters are the most confident of any sector, reinforcing the sense that AI is increasingly seen as delivering real operational value rather than being treated as a passing trend.

"AI WILL POSITIVELY IMPACT THE FINANCIAL PERFORMANCE OF OUR BUSINESS OVER THE NEXT 3 YEARS."

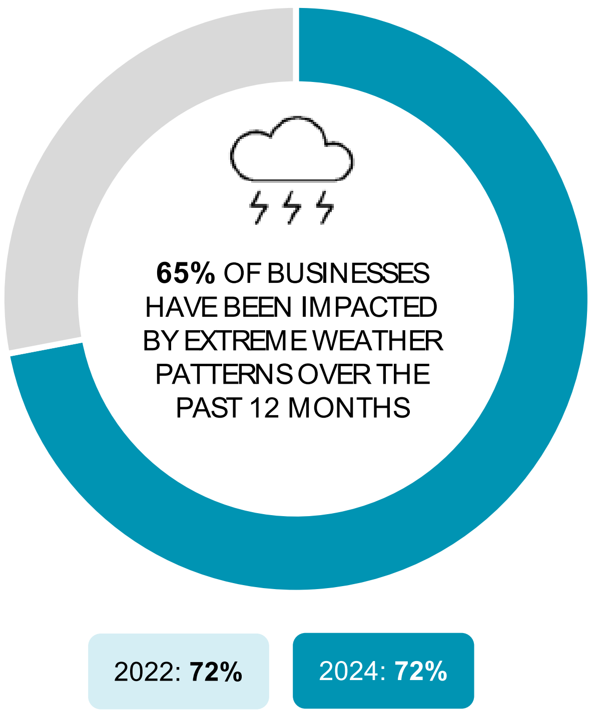


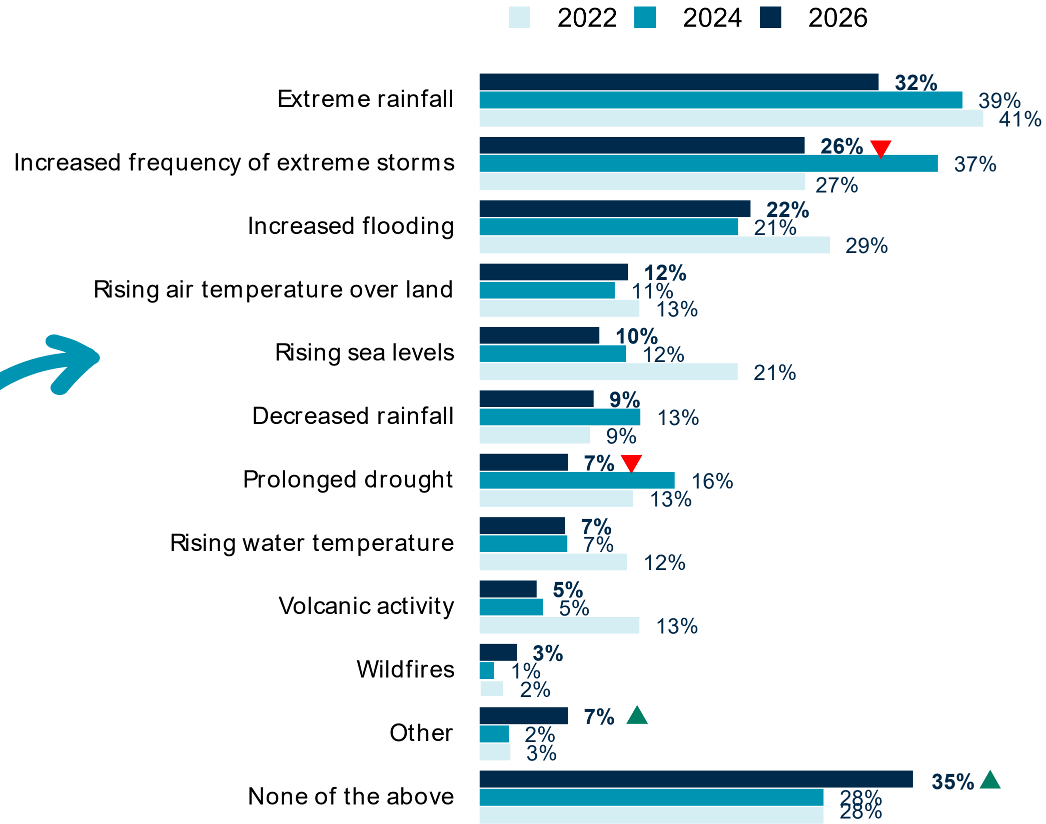
IMPACT OF EXTREME WEATHER PATTERNS

Impact of Extreme Weather Patterns

Exposure to extreme weather remains high but has eased, with 65% of exporters being impacted over the past year, down from 72% in both 2022 and 2024. This represents the lowest reading recorded in the past three waves, and is a modestly encouraging sign despite weather-related disruption remaining as a near-universal feature of doing business in the region.

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



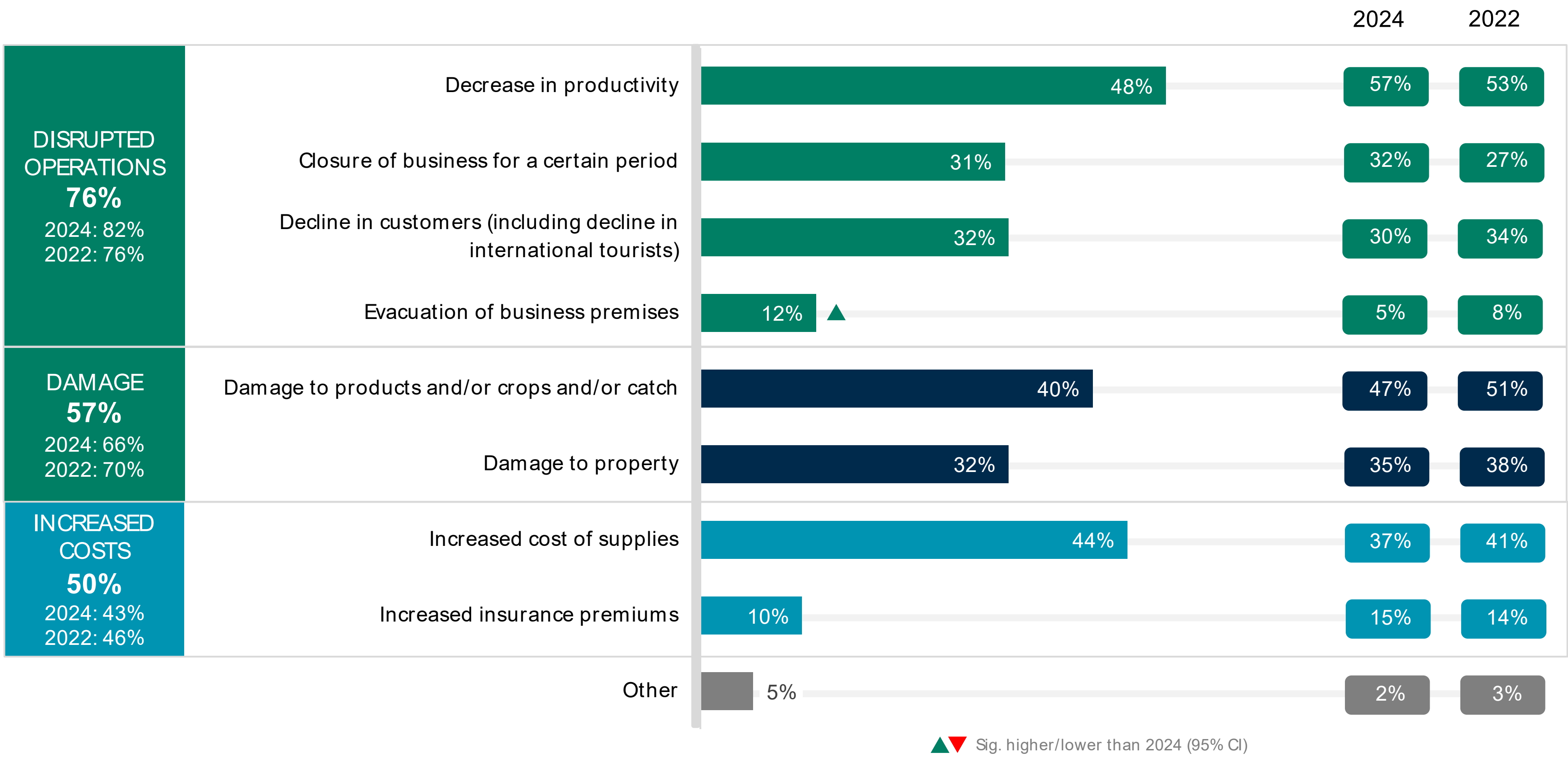


Sig. higher/lower than 2024 (95% CI)

Impact of Extreme Weather Patterns

Most of the operational impacts of extreme weather have eased or held steady, with disrupted operations remaining the most common consequence at 76%, down from 82% in 2024. That being said, cost pressures are the exception, rising to 50% from 43% over the same period, suggesting that even as physical disruption recedes, the financial sting of extreme weather is becoming more acute.

HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?



Impact of Extreme Weather Patterns

Extreme weather hits different sectors in different ways. Agriculture bears the brunt of physical damage impacts, with 65% reporting damage to products, crops or catch, more than double the rate for services (19%). Tourism is far more exposed to the knock-on effect of declining customer numbers (48% versus just 17% for agriculture).

HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?

IMPACT	OVERALL	EXPORT AREA				EXPORT MATURITY	
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	NEW (≤3 YEARS)	MATURE (> 3 YEARS)
Base n=	*n=279*	*n=65*	*n=77*	*n=86*	*n=42*	*n=100*	*n=179*
Decrease in productivity	48%	60%	55%	35% ▼	43%	45%	49%
Damage to products and/or crops and/or catch	40%	65% ▲	42%	30%	19% ▼	40%	40%
Increased cost of supplies	44%	43%	48%	47%	36%	42%	45%
Damage to property	32%	23%	30% ▼	43% ▲	26%	30%	32%
Closure of business for a certain period	31%	17% ▼	34%	34%	36%	23%	36%
Decline in customers	32%	17% ▼	27%	48% ▲	33%	31%	32%
Increased insurance premiums	10%	9%	9% ▼	12%	14%	7%	12%
Evacuation of business premises	12%	6%	9%	10%	26% ▲	7%	15%
NET DISRUPTED BUSINESS OPERATIONS	**76%**	**75%**	**73%**	**78%**	**76%**	**74%**	**77%**
NET DAMAGE	**57%**	**75% ▲**	**56%**	**55%**	**38% ▼**	**57%**	**57%**
NET INCREASED COSTS	**50%**	**49%**	**53%**	**52%**	**45%**	**46%**	**52%**

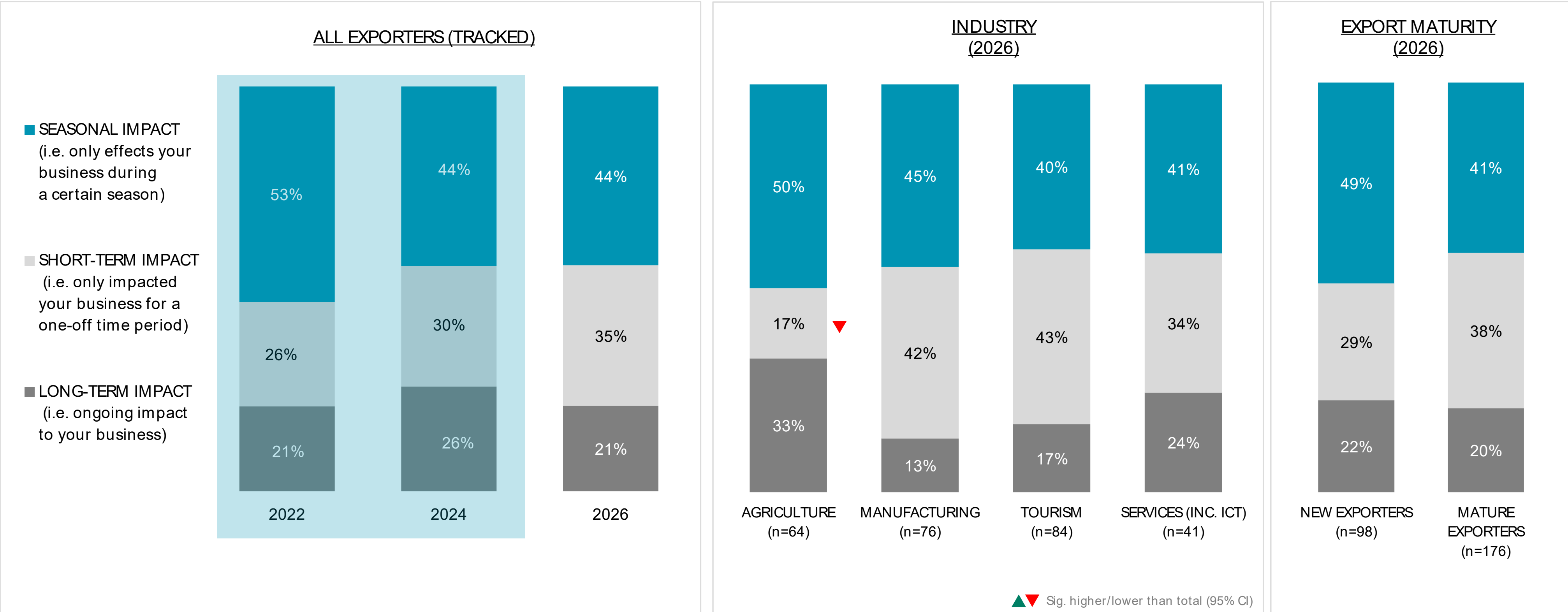
▲▼ Sig. higher/lower than total (95% CI)

▲▼ New sig. higher/lower than Mature (95% CI)

Impact of Extreme Weather Patterns

Seasonal impacts are the most common time frame of extreme weather impacts overall (44%), but agriculture diverges sharply with 33% of agriculture businesses reporting ongoing long-term impacts, against 13% for manufacturing and 17% for tourism. This points to the lasting effects of damage to crops, land and production capacity.

TIMEFRAME OF THIS IMPACT

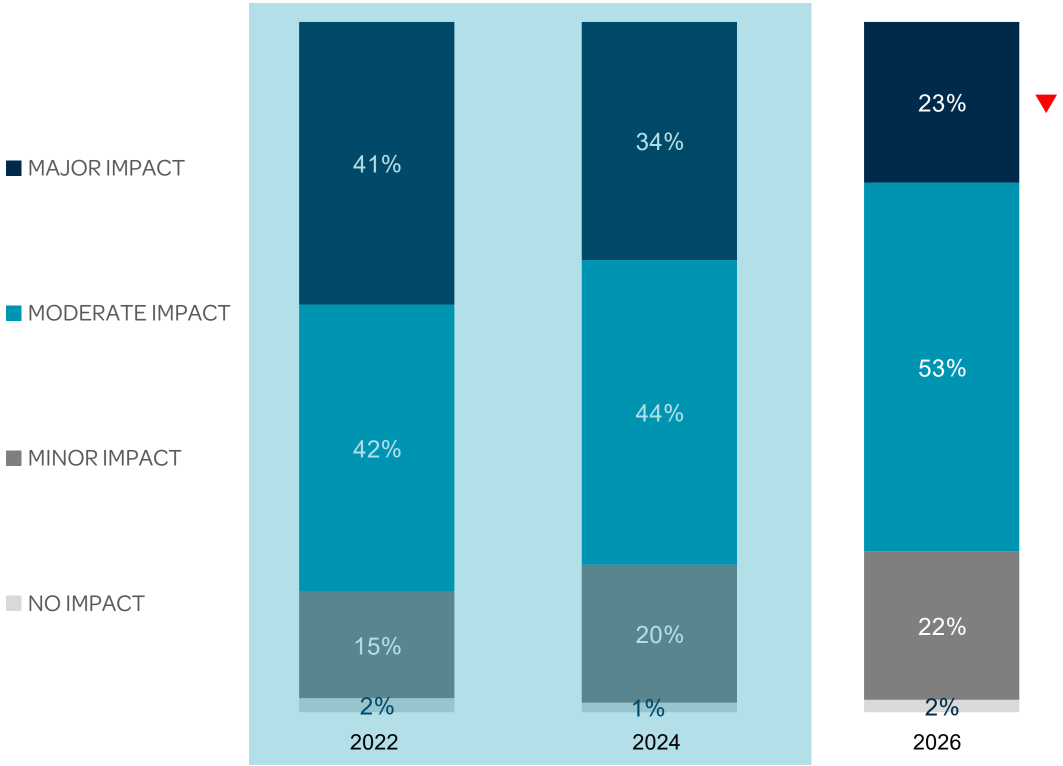


Impact of Extreme Weather Patterns

The effect severity of these extreme weather impacts has also shifted, with major effects falling from 41% in 2022 to 23% in 2026. Moderate impacts are now the most common experience at 53%, suggesting increased resilience among businesses who are adjusting for these seasonal recurrences.

TO WHAT EXTENT HAS YOUR BUSINESS BEEN IMPACTED BY THESE WEATHER PATTERNS?

(AMONG BUSINESSES THAT HAVE BEEN IMPACTED IN PAST 12 MONTHS)



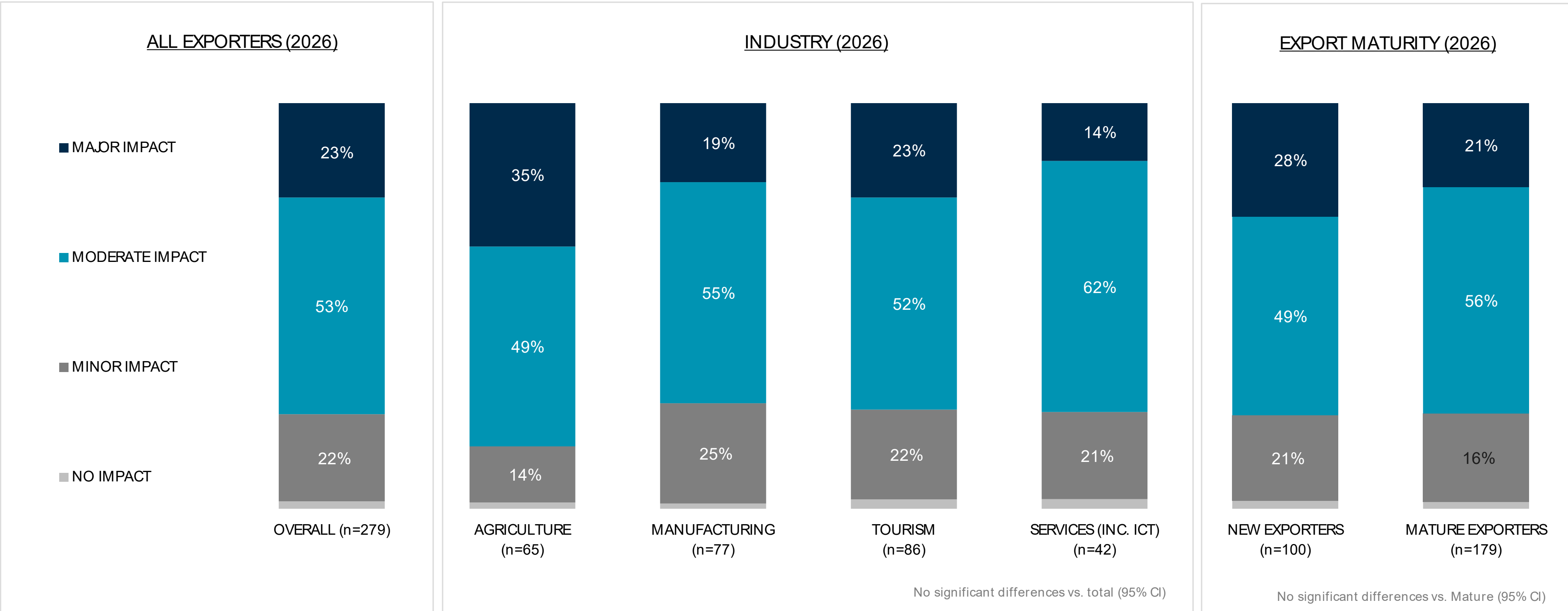
Note: scale changed in 2026.
Previous scale:
Major – Minor – Minimal Impact

Sig. higher/lower than 2024 (95% CI)

Impact of Extreme Weather Patterns

Agriculture records the highest incidence of major weather impacts at 35%, against 23% for tourism, 19% for manufacturing and 14% for services - consistent with its lead on long-term impact duration shown on the previous page.

TO WHAT EXTENT HAS YOUR BUSINESS BEEN IMPACTED BY THESE WEATHER PATTERNS?

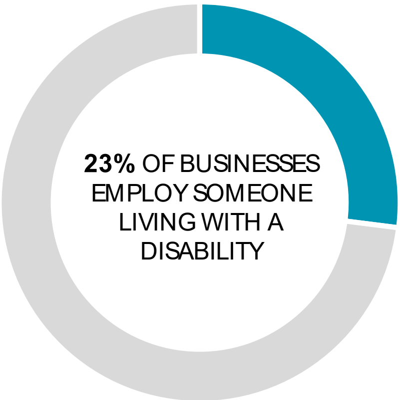


GENDER EQUALITY, DISABILITY & SOCIAL INCLUSION

Businesses Employing Individuals with a Disability

Disability employment has slipped slightly, with 23% of exporters now employing someone living with a disability, down from 27% in 2024. The pattern is sector-specific: more labour-intensive industries like agriculture (33%) and manufacturing (27%) lead the way in disability employment, while tourism (20%) and services (16%) lag behind - pointing to a clear opportunity to support these sectors in building more inclusive employment practices.

IS ANYONE CURRENTLY EMPLOYED BY YOUR BUSINESS LIVING WITH A DISABILITY?



2024: **27%**

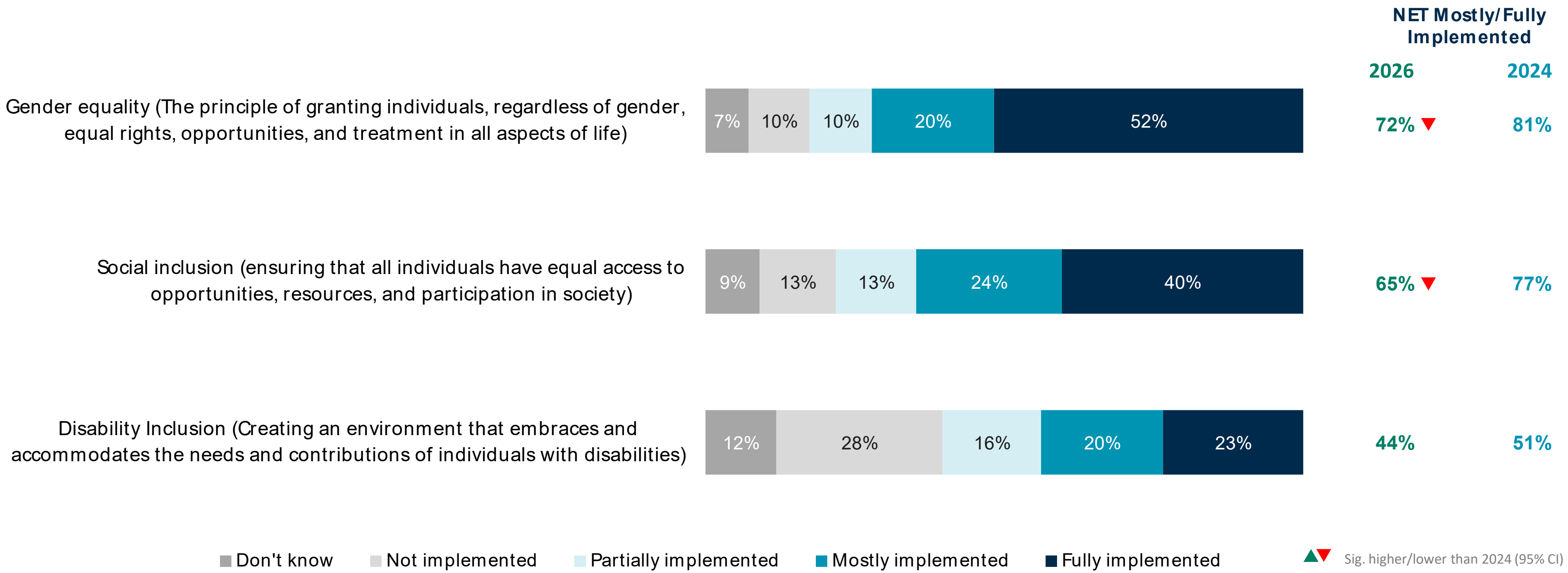
		INDUSTRY				LEADERSHIP		BUSINESS SIZE		
	OVERALL	AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)	MALE-LED	FEMALE-LED	1-4 EMPLOYEES	5-20 EMPLOYEES	MORE THAN 20 EMPLOYEES
2026 base n	*n=431*	*n=85*	*n=119*	*n=130*	*n=77*	*n=252*	*n=172*	*n=139*	*n=189*	*n=103*
2026	23%	33%	27%	20%	16%	24%	23%	11%	22%	43%
2024	*27%*	*35%*	*24%*	*35%*	*14%*	*27%*	*29%*	*14%*	*30%*	*38%*

▲▼ Sig. higher/lower than 2024 (95% CI)

Implementation of GEDSI Policies and Practices

Mostly or fully implemented Gender Equality, Disability, and Social Inclusion (GEDSI) policies have declined across all three measures since 2024. Policies with gender equality are down from 81% to 72%, those with social inclusion from 77% to 65%, and those with disability inclusion from 51% to 44%.

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



Implementation of GEDSI Policies and Practices

Lived experience appears to drive GEDSI policy adoption. Disability inclusion policies are mostly or fully implemented by 72% of businesses that already employ someone with a disability, compared with just 33% of those that don't. This 39-point gap is the widest of the three GEDSI measures tracked, and a strong signal that exposure and awareness go hand in hand with formal policy adoption.

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

(% Mostly/Fully Implemented)

INITIATIVE	OVERALL	BUSINESS SIZE			LEADERSHIP		EMPLOY SOMEONE WITH A DISABILITY?	
		1-4 EMPLOYEES	5-20 EMPLOYEES	MORE THAN 20 EMPLOYEES	MALE-LED	FEMALE-LED	YES	NO
Base n=	*n=431*	*n=139*	*n=189*	*n=103*	*n=252*	*n=172*	*n=101*	*n=304*
Gender equality	72%	58% ▼	74%	87% ▲	70%	75%	86% ▲	67%
Social inclusion	65%	57% ▼	62%	80% ▲	63%	67%	77% ▲	59%
Disability inclusion	44%	38%	41%	57% ▲	44%	44%	72% ▲	33%

▲▼ Sig. higher/lower than total (95% CI)

▲▼ Sig. higher/lower than male-led (95% CI)

▲▼ Sig. higher/lower than no individuals with a disability (95% CI)

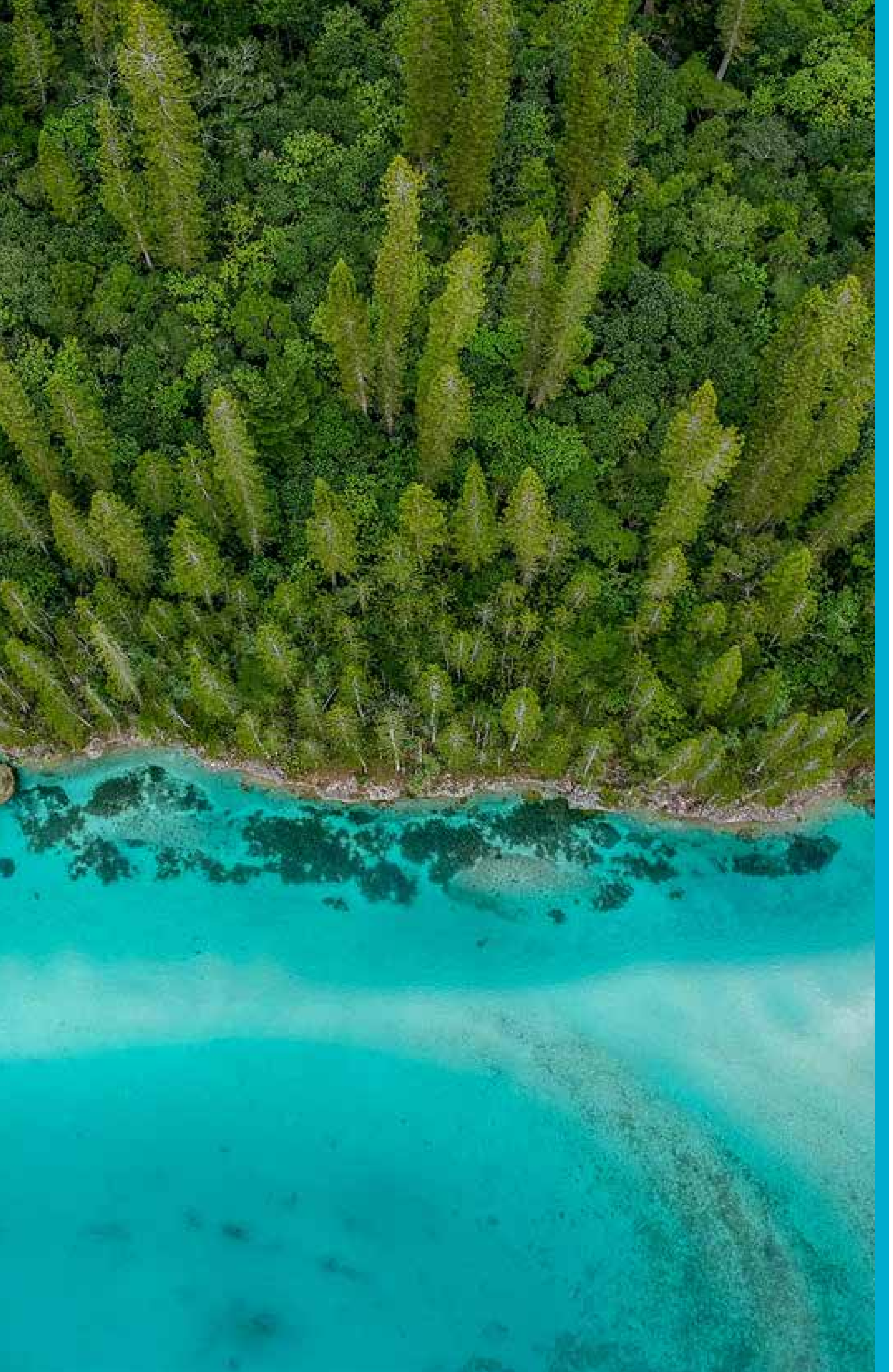
Implementation of GEDSI Policies and Practices

Consistent with its lead on disability employment, agriculture also records the strongest GEDSI implementation of any sector - 52% on disability inclusion specifically, against a low of 37% in manufacturing. This represents the widest sector gap on this measure and is a further sign that agriculture is leading the way on inclusive employment practices.

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

(% Mostly/Fully Implemented)

INITIATIVE	OVERALL	EXPORT AREA			
		AGRICULTURE	MANUFACTURING	TOURISM	SERVICES (INC. ICT)
Base n=	*n=431*	*n=85*	*n=119*	*n=130*	*n=77*
Gender equality	72%	76%	75%	72%	66%
Social inclusion	65%	68%	67%	65%	60%
Disability inclusion	44%	52%	37%	44%	45%



RESEARCH METHODOLOGY

WHO RESPONDED

A total of 431 surveys were completed. All respondents were key decision-makers and influencers working for exporting businesses, including tourism operators.

All businesses generate revenue through exports or international visitors.

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.

ABOUT 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 and is 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.

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

Australian Government
Department of Foreign Affairs and Trade