PACIFIC ISLANDS EXPORT SURVEY

2026

Agriculture Industry Spotlight

Pacific Trade Invest



Sabeto Valley Fiji

PACIFIC ISLANDS EXPORT SURVEY 2026

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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.

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INTRODUCTION

Agriculture is one of the Pacific's most important export sectors, supporting livelihoods, food security and economic growth across the region.

This report provides insights into international market access, exporter performance, growth opportunities and the challenges facing Pacific agriculture exporters.

Developed by Pacific Trade Invest (PTI), this Agriculture Industry Spotlight draws on the experiences of 85 agriculture exporters from across the Pacific, spanning farming, forestry and fisheries.

The findings highlight a sector that is optimistic about future growth, while continuing to face significant challenges in areas such as finance, freight and logistics, and the impacts of extreme weather.

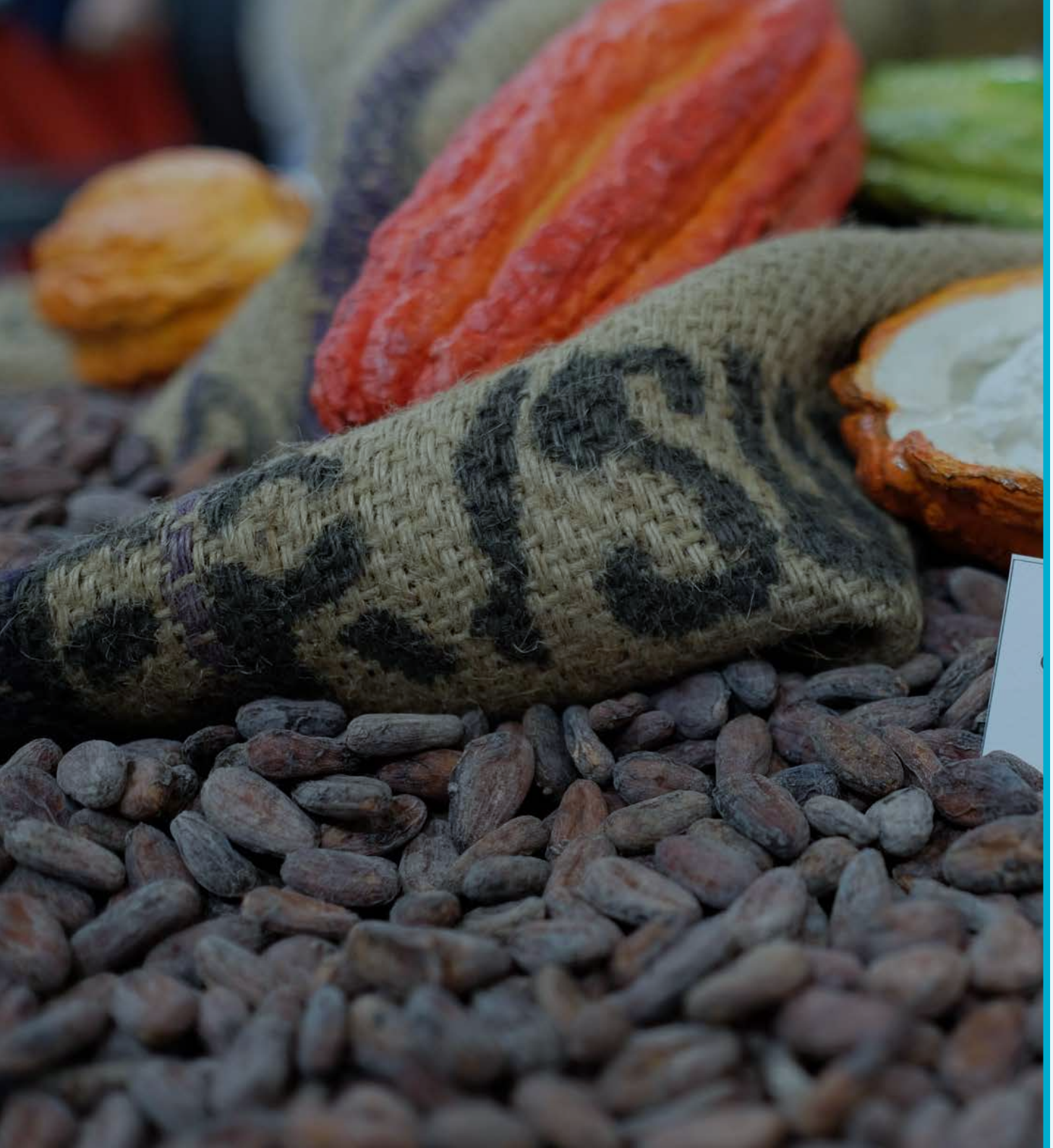
Through its network across key international markets, PTI helps Pacific exporters connect with buyers, investors and industry partners, creating opportunities for export growth, investment attraction and increased visibility for Pacific products.

We hope the findings in this report help inform decisions that strengthen the competitiveness, resilience and long-term sustainability of the sector.

Tim Martin
Trade Commissioner
PTI Australia

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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.

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FIVE KEY TAKEAWAYS

PACIFIC ISLANDS EXPORT SURVEY 2026

01

Agriculture leans on New Zealand, with scope to grow in Australia

New Zealand remains the sector's leading export destination (49%), while Australia represents the strongest growth opportunity, with nearly two-thirds of agricultural exporters planning to target the market over the next three years. Limited intra-Pacific trade points to untapped regional market potential.

02

Finance is agriculture's biggest growth constraint.

More than four out of every five agricultural businesses report difficulty obtaining finance (84%), which is the highest of any sector in the survey and significantly above the Pacific export average (60%). Banks being unwilling to lend, insufficient security, and high interest rates remain major barriers to growth.

03

Weather damage cuts deepest in agriculture.

The effects of extreme weather on the Pacific agricultural sector are major and the impacts are long-lasting, with 35% of impacted businesses reporting major weather effects and 33% reporting long-term impacts – both the highest of any sector.

04

Agriculture is on the cusp of an AI leap.

While current AI adoption sits at 16%, the lowest of any sector and significantly below the 38% Pacific export average, planning intent is the highest at 55%. This points to a near-term inflection rather than a structural lag when it comes to adoption of AI tools for business.

05

Logistic challenges span the whole supply chain.

For agricultural businesses needing freight and logistics support, 75% point to distribution and freight transport as a core challenge, with 52% noting this challenge spans both domestic and international legs. This is indicative that the constraints start well before the produce reaches an international port.



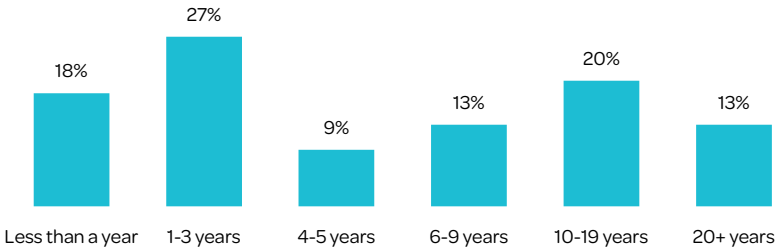
Tonga Livestock

SAMPLE PROFILE

Business Activity

Agriculture businesses are established exporters, averaging 7.5 years of export activity and 43% export-generated revenue. One quarter of the sector leans heavily on export, generating more than three-quarters of their income internationally. Leadership skews male at 59%, with men also representing 61% of employees in the sector.

Time Exporting

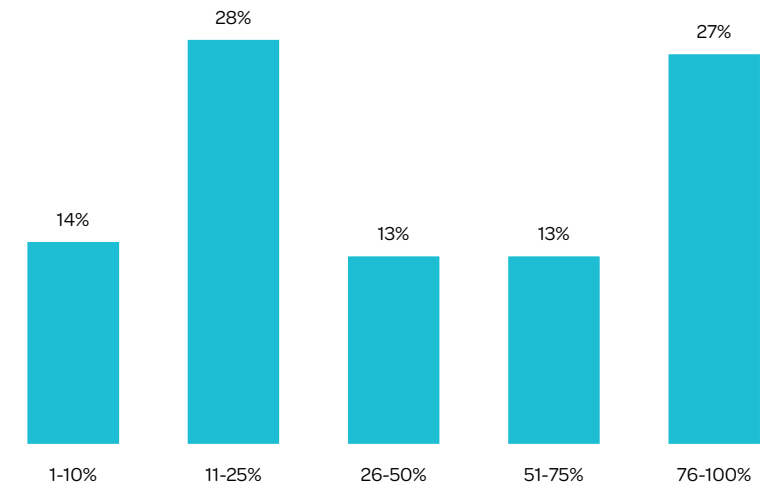


Average: **7.5 years**

Gender Divide



Proportion of Revenue From Exports

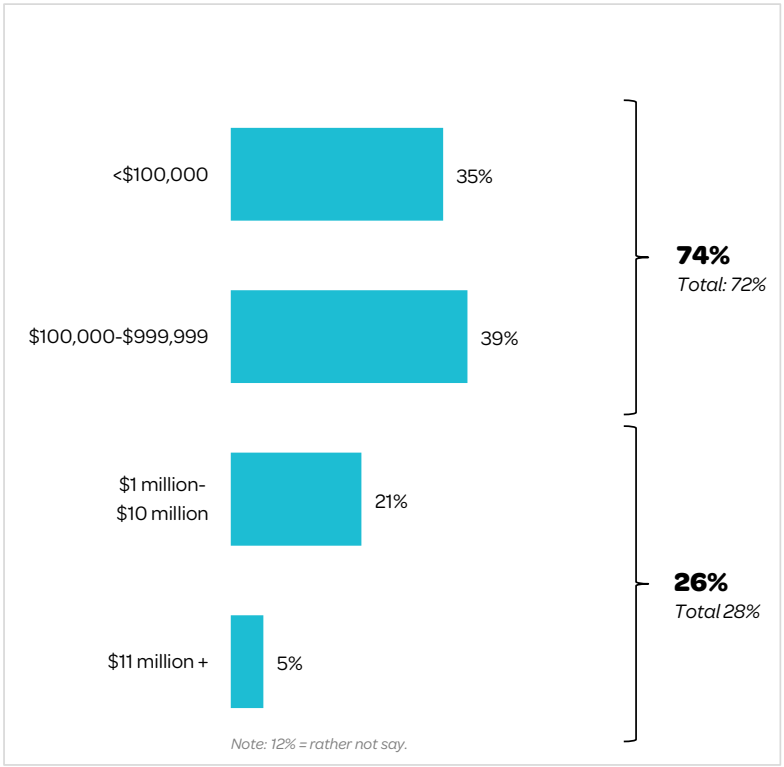


Average: **43%**

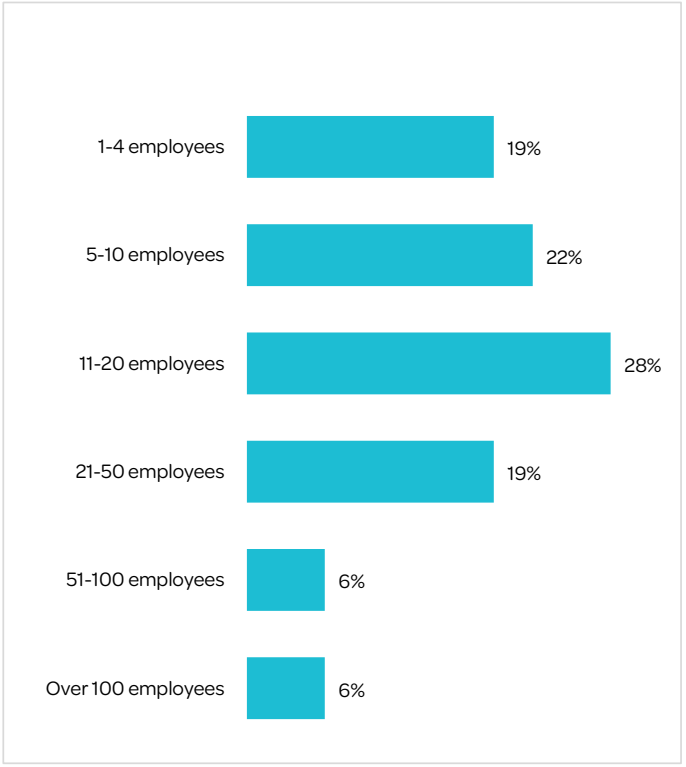
Firmographics

Agriculture businesses' revenue profile tracks the Pacific average, with 74% of businesses generating less than $1 million annually. The sector is dominated by forestry and farming operations (79%), with fisheries making up the remaining 21%, and most businesses employing between five and twenty staff.

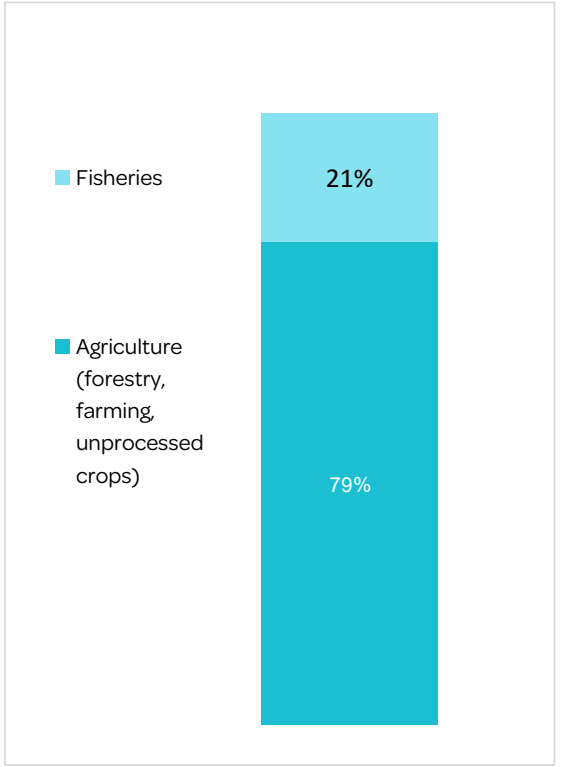
Annual Revenue



Number of Employees



Main Activity



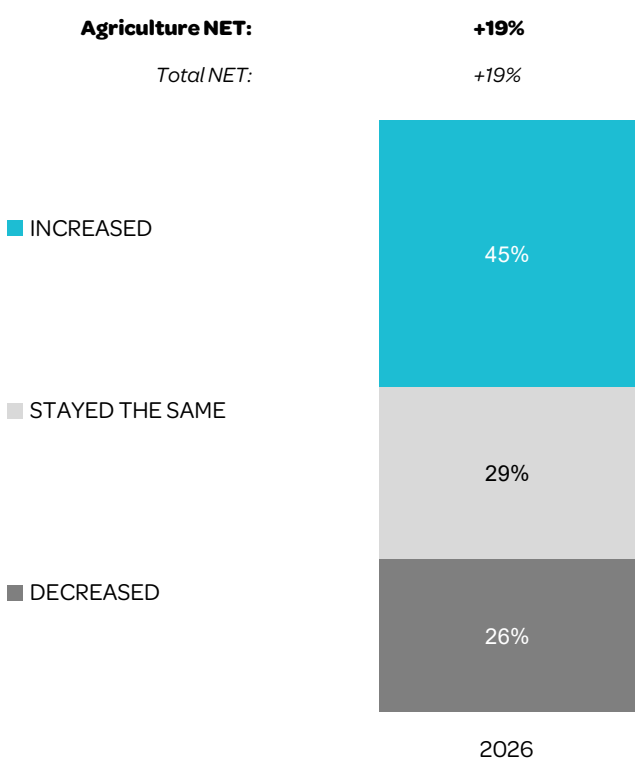


EXPORT SENTIMENT & BEHAVIOUR

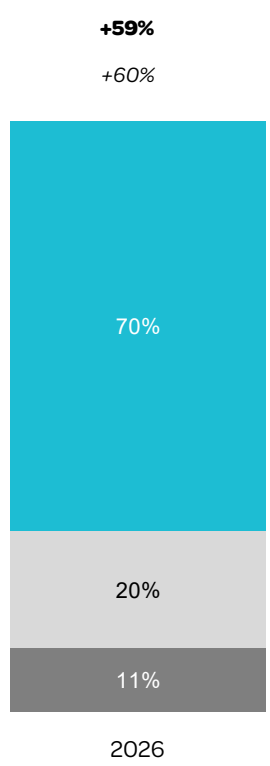
Export Sentiment

Agriculture businesses' performance mirrors broader regional trends with 45% reporting export growth over the last year, matching the Pacific export average of net +19. Outlook for these businesses is also aligned, with 70% expecting export orders to increase, a net figure of +59 against the Pacific export average of +60.

Over the last 12 months, have your export orders increased, decreased, or stayed the same?



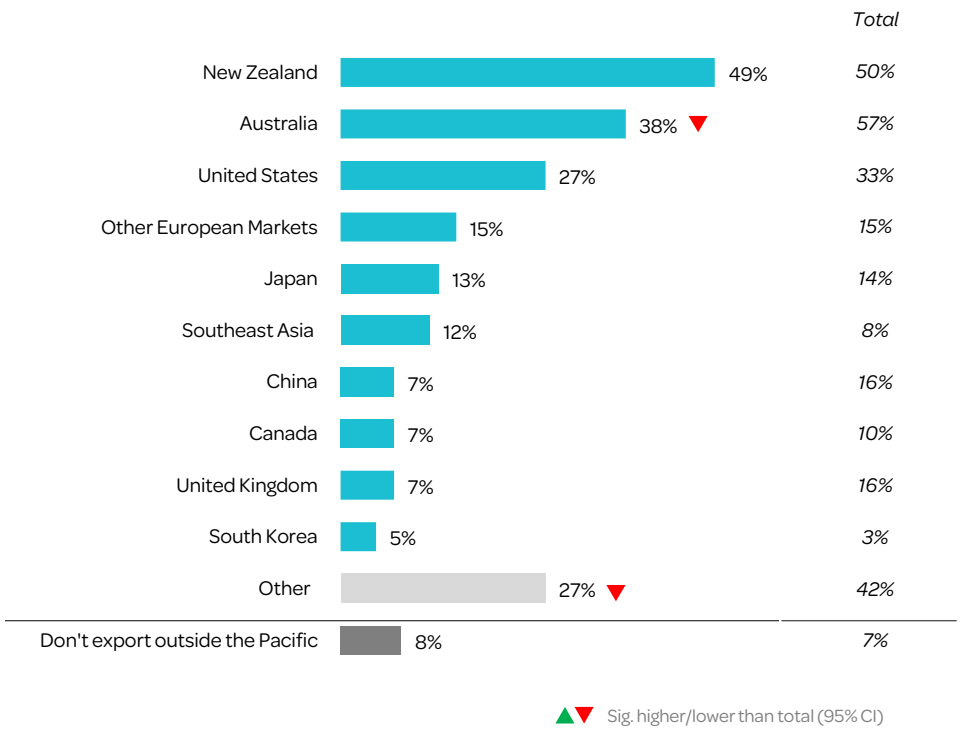
Over the next 12 months, do you expect your export orders to increase, decrease, or stay the same?



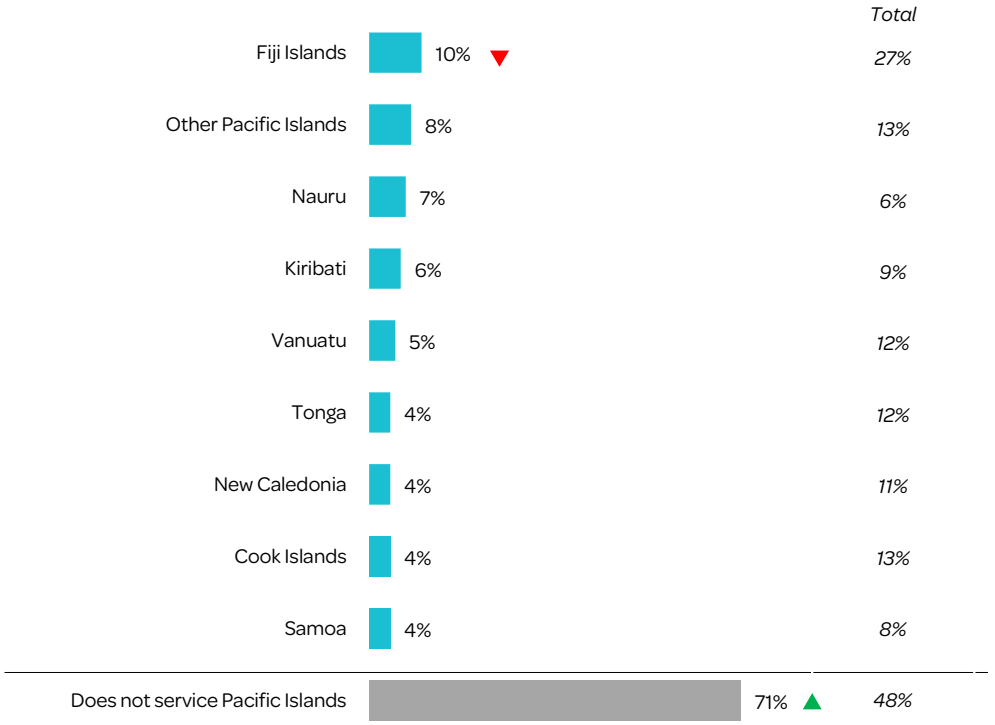
Geographic areas generated export revenue from over the past 12 months

New Zealand remains the sector's leading export destination at 49%, while Australia sits at 38%, which is below the Pacific export average (57%) and represents the strongest growth opportunity. Limited intra-Pacific trade points to untapped regional market potential, with 71% generating no revenue in the region yet.

Exporting outside of Pacific Islands



Exporting within Pacific Islands

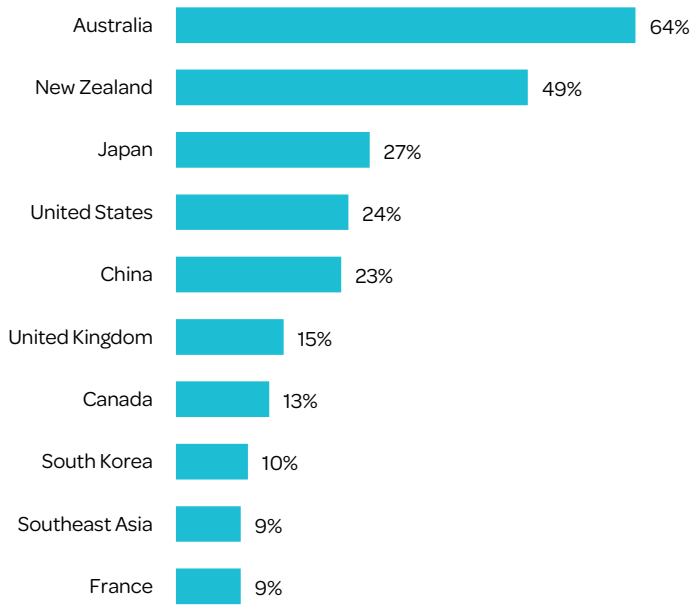


Future export targets

Australia leads new market targeting at 64%, followed by New Zealand (49%) and Japan (27%). Confidence in existing markets is strong with 72% of current agricultural exporters to Australia and 69% to New Zealand expecting revenue to increase over the next year.

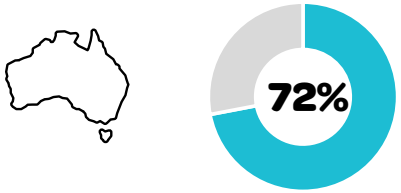
WHAT NEW MARKETS WILL YOU TARGET OVER THE NEXT 3 YEARS?

What new markets will you target over the next 3 years?

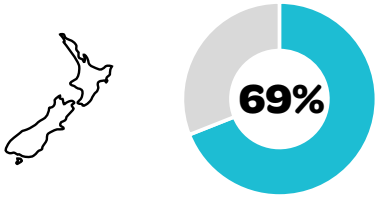


Do you expect your export revenue from markets you currently service, to increase, decrease or remain the same over the next 12 months?

***Increased* revenue from Australia**



***Increased* revenue from New Zealand**



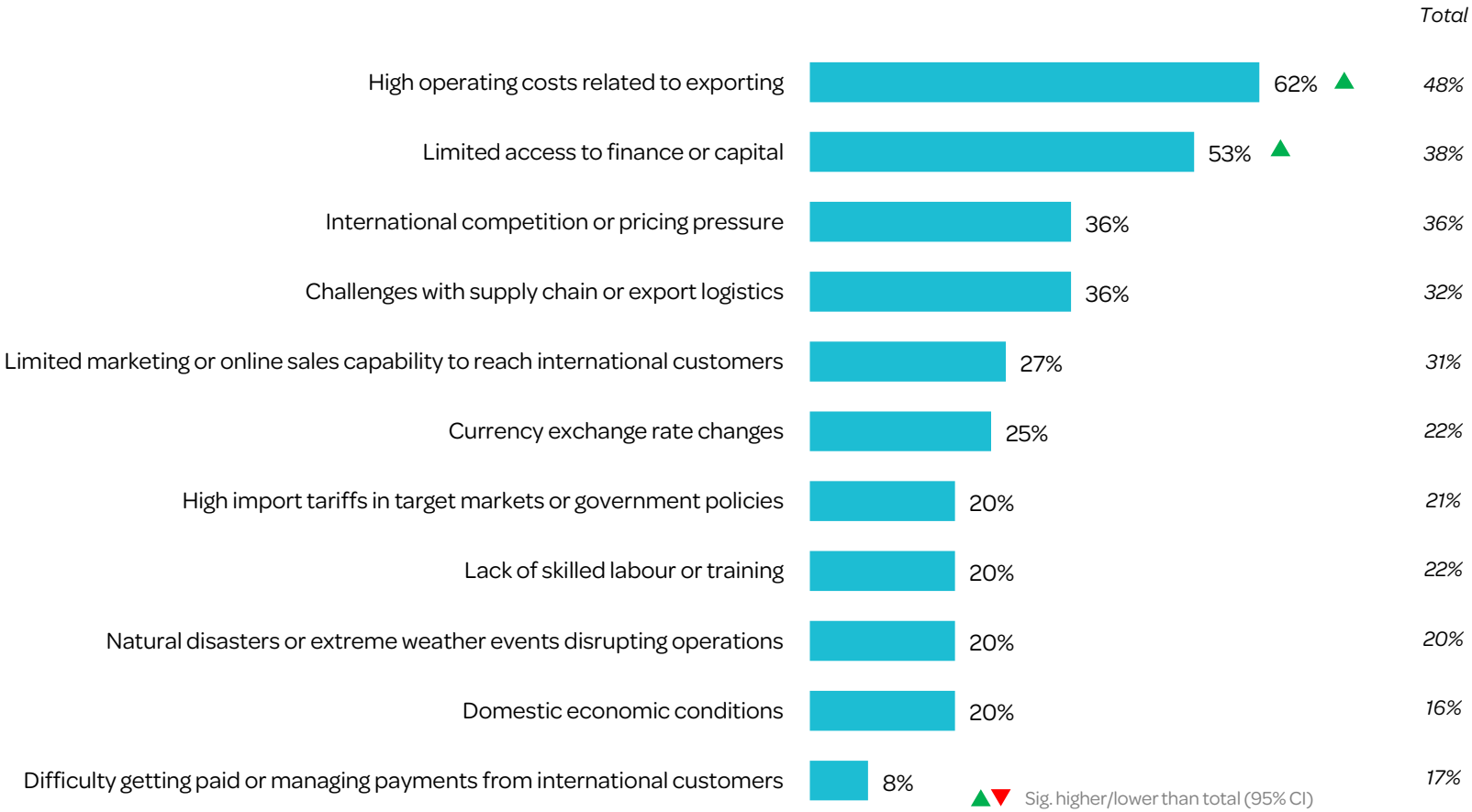


BARRIERS, ASSISTANCE & FINANCE

Export Challenges

The lead barrier for agricultural exports is high operating costs at 62%, followed by access to finance at 53%, both of these sit significantly above the Pacific export average of 48% and 38% respectively. Competition and supply chain logistics both sit at 36%, highlighting a sector where cost pressures and access to capital are significant constraints to export growth.

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



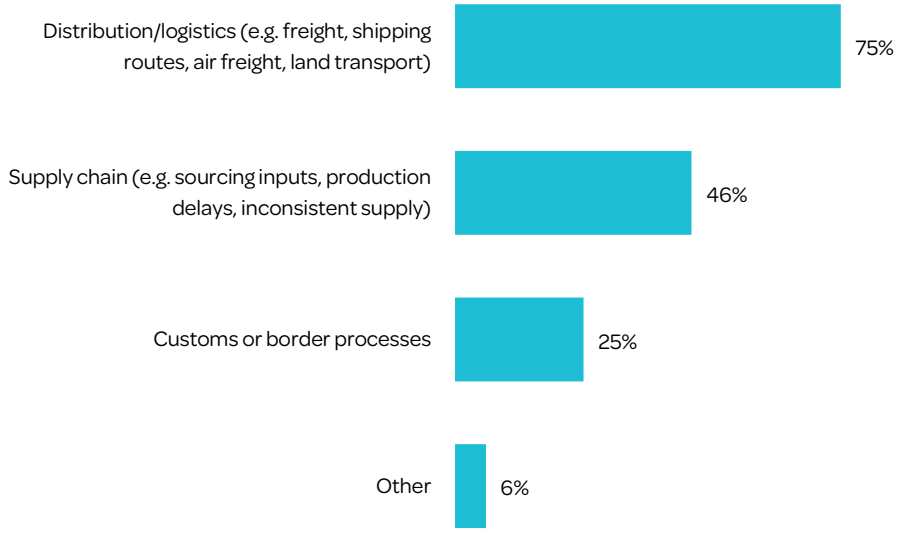
Logistics Support & Challenges

Among agriculture businesses needing freight and logistics support, distribution and freight transport is the core challenge at 75%, with supply chain issues second at 46%. These issues are end-to-end, with 52% observing them across both domestic and international legs. Twenty-nine per cent cite domestic-only challenges.

When thinking about the challenges you face, where do the freight and logistic issues mainly occur?



What type(s) of logistical challenge(s) is this related to?



Export Assistance

Leading the sector's assistance priorities are export grants at 59%, with freight and logistics support and offsetting freight costs closely behind at 58% and 56% respectively. This highlights the importance of freight, logistics and transport costs in supporting future export growth.

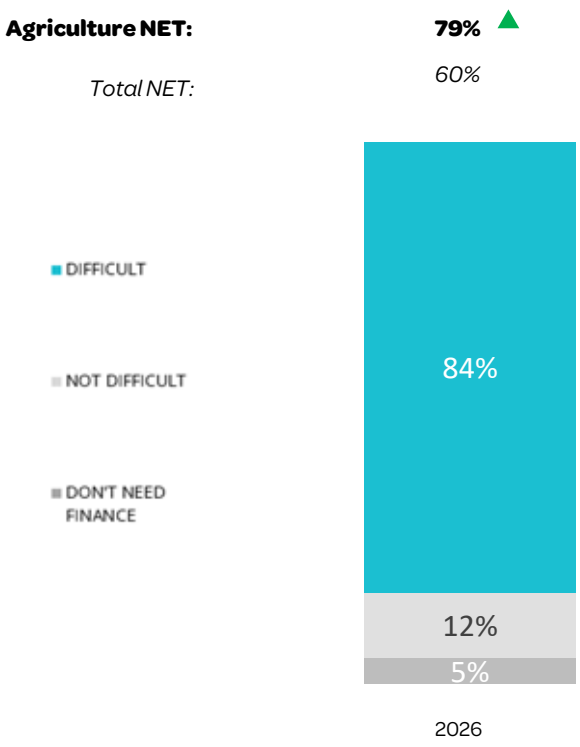
WHAT FORMS OF ASSISTANCE WOULD ENCOURAGE YOU TO INCREASE YOUR EXPORT ACTIVITY?



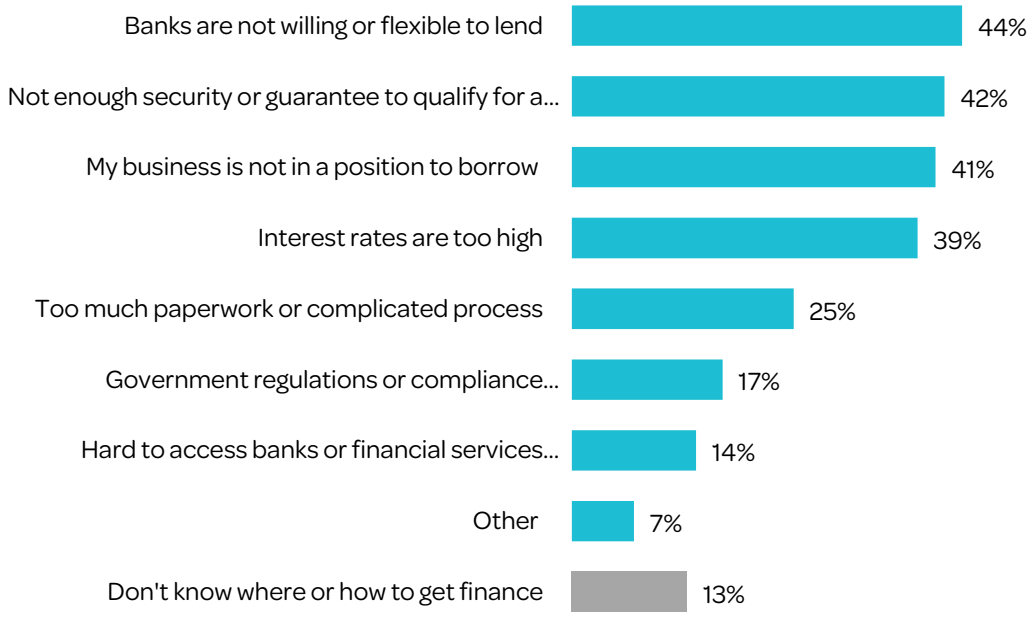
Access to finance

Access to finance represents a significant barrier for Pacific agricultural businesses, with 84% citing difficulty with access. This is significantly above the Pacific exporter average of 60%, highlighting the scale of finance constraints facing agricultural exporters. The reasons stack, with bank inflexibility (44%), insufficient security (42%), borrowing power (41%) and high interest rates (39%) all contributing.

Is it difficult for your business to obtain finance?



Why do you find it difficult to obtain finance?



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



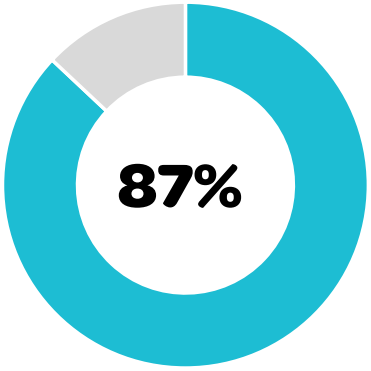
FTA ENGAGEMENT

FTA engagement

Consistent with the regional pattern, Pacific agricultural businesses have a gap between Free Trade Agreement (FTA) eligibility and benefit, with 87% being eligible under at least one FTA, yet only 33% report benefiting. PICTA (16%), SPARTECA (14%) and the New Zealand GSP (13%) are the leading agreements generating reported benefit, consistent with the sector's New Zealand-first orientation.

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

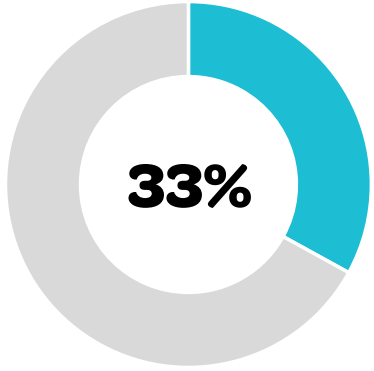
Proportion of Agriculture export businesses covered by at least 1 FTA (i.e. correct location, correct export destination)



Total: 92%

Top 3 FTAs *(% of total businesses selecting benefit slightly / greatly)*	
Pacific Island Countries Trade Agreement (PICTA)	16%
South Pacific Regional Trade and Economic Cooperation (SPARTECA)	14%
New Zealand Generalised System of Preferences	13%

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



Total: 27%



ONLINE SALES & AI

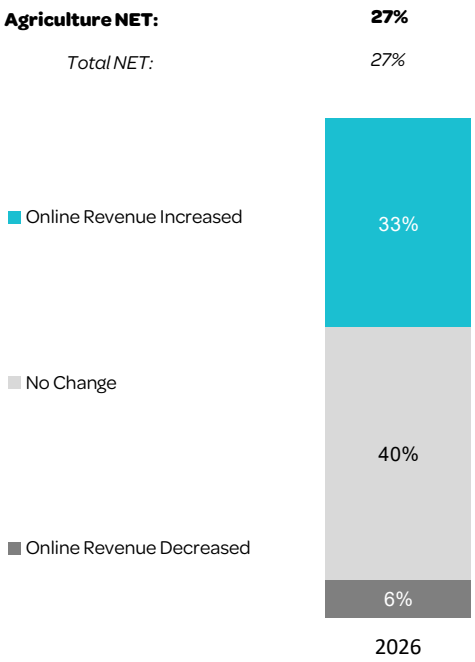
Online Distribution

Online sales play a more limited role in agriculture than in many other export sectors, with 74% of agricultural businesses generating revenue through online channels, compared with the Pacific export average of 88%. For those that do sell online, however, growth is keeping pace with the broader export community at a net +27%. Chat platforms (47%) and social media platforms (46%) are the most commonly used channels.

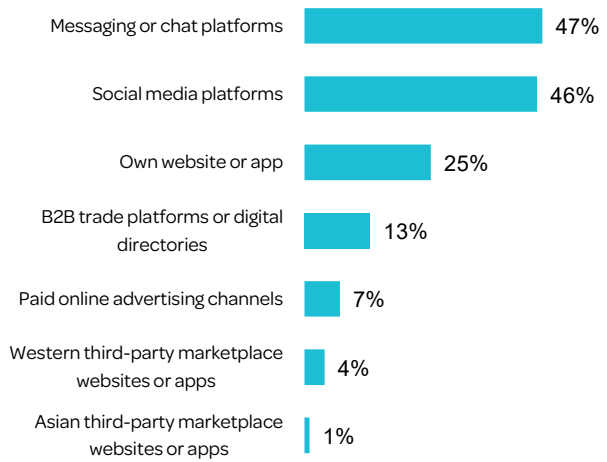
74% sell through online channels

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 revenue?



AI

AI integration is slow in rollout but a high planned priority throughout the agricultural sector compared to regional averages, with 16% using AI tools (vs. 38%), but 55% planning to adopt them in the future (vs. 45%). This points to a near term inflection rather than a structural lag. The highest applications, both current and anticipated, are finding new market opportunities (57%) and creating marketing materials (56%).

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

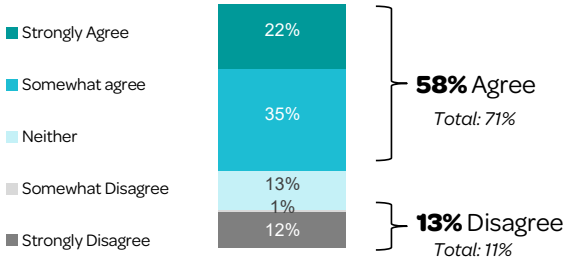
AI Adoption

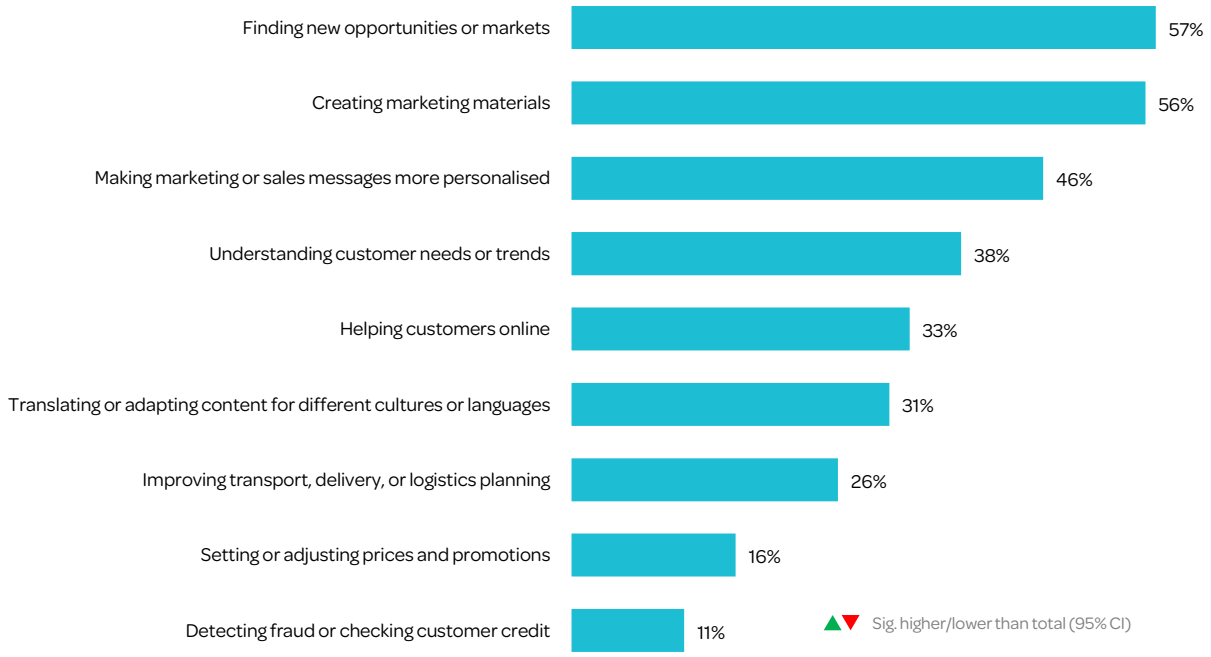
16% currently using AI
Total: 38%

55% planning to adopt AI
Total: 45%

Attitude to AI

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





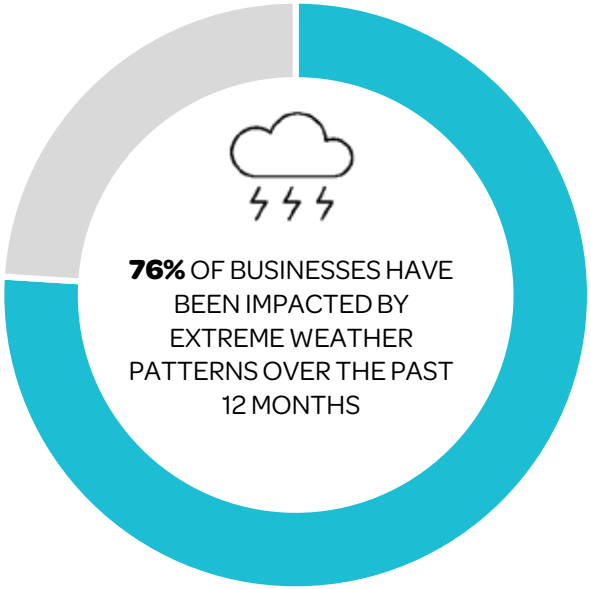


IMPACT OF EXTREME WEATHER PATTERNS

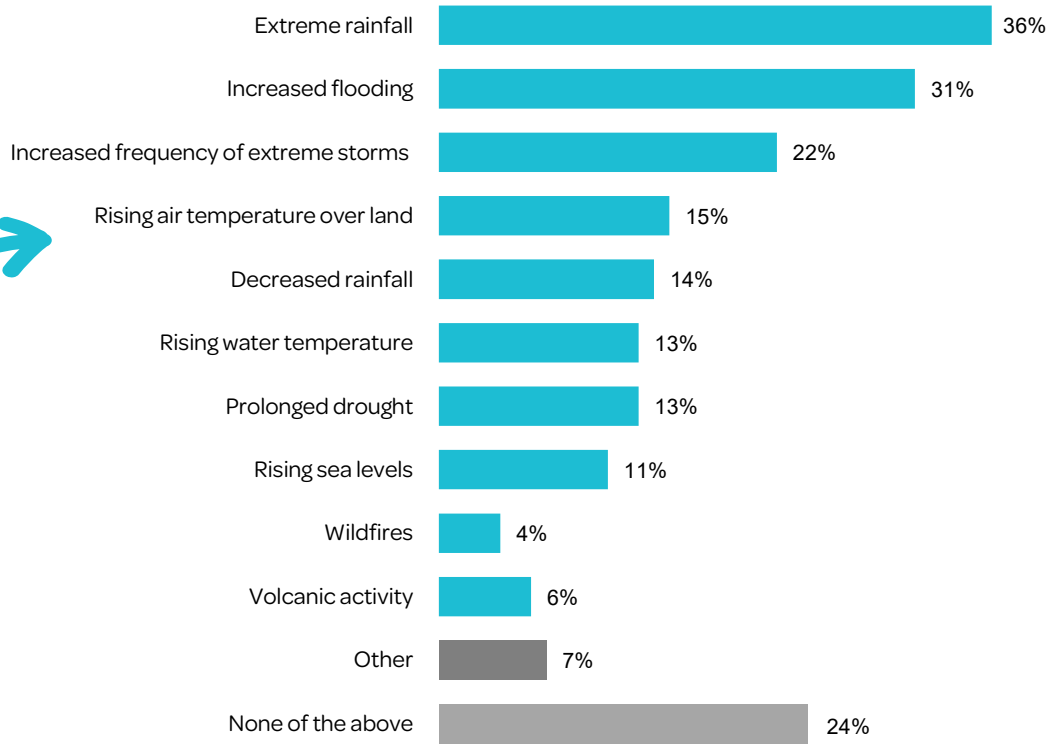
Impact of extreme weather patterns

While the impact of extreme weather is being felt by businesses across the entire Pacific, it's a particular challenge for Pacific agricultural exporters, with 76% impacted in the past 12 months, significantly above the Pacific average of 65%. Extreme rainfall (36%) and increased flooding (31%) were the most commonly reported events.

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



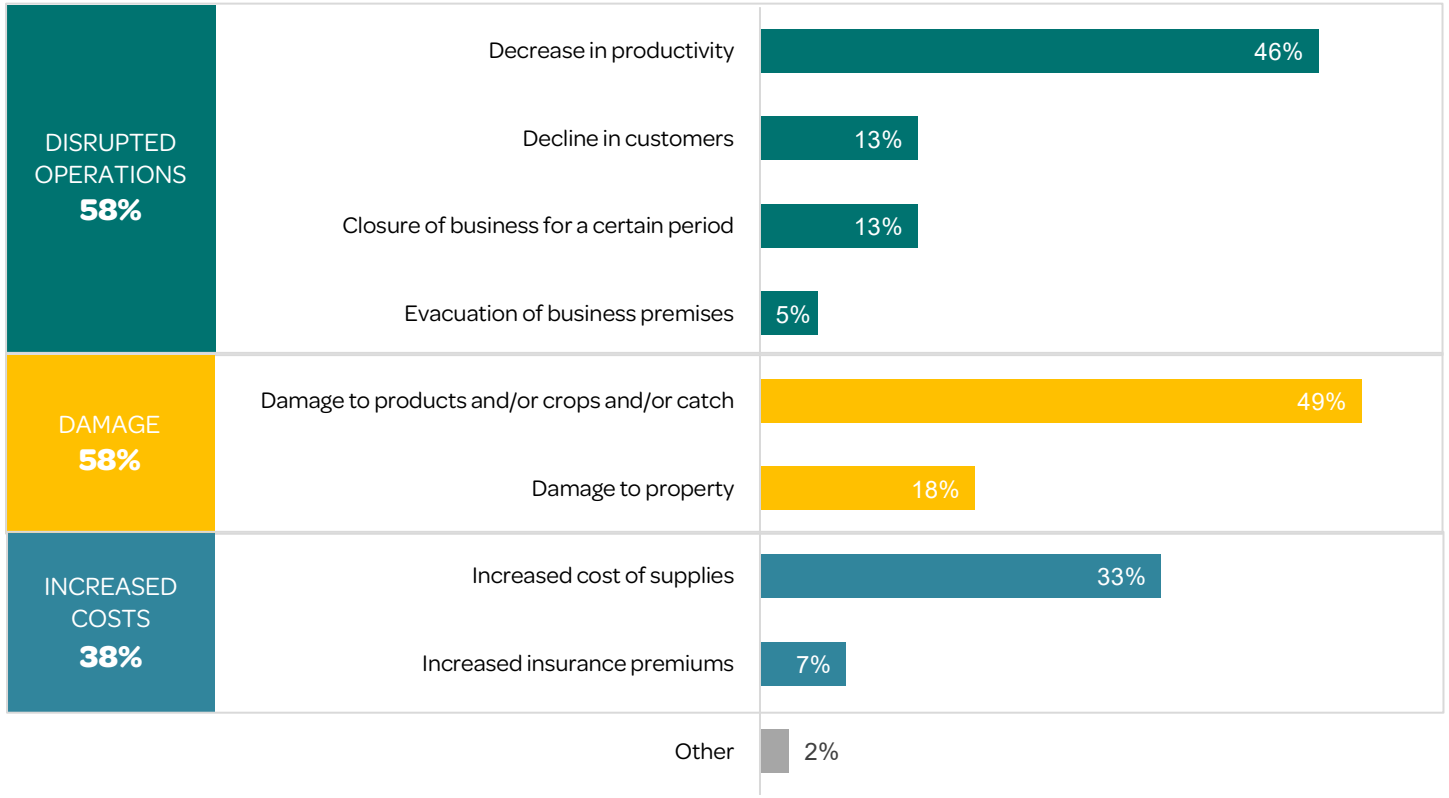
Total: 65%



Impact of extreme weather patterns

Extreme weather events impact Pacific agricultural exporters in significant and sector-specific ways. The biggest impacts were disrupted operations and physical damage, both cited at 58%, followed by increased costs at 38%. Damage to products, crops and catch emerges as one of the defining consequences of extreme weather for agricultural exporters.

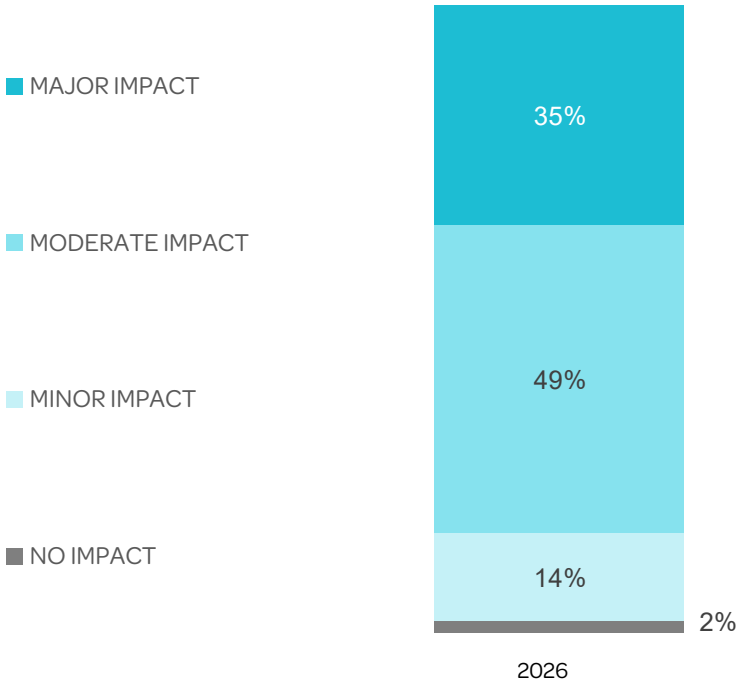
HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?



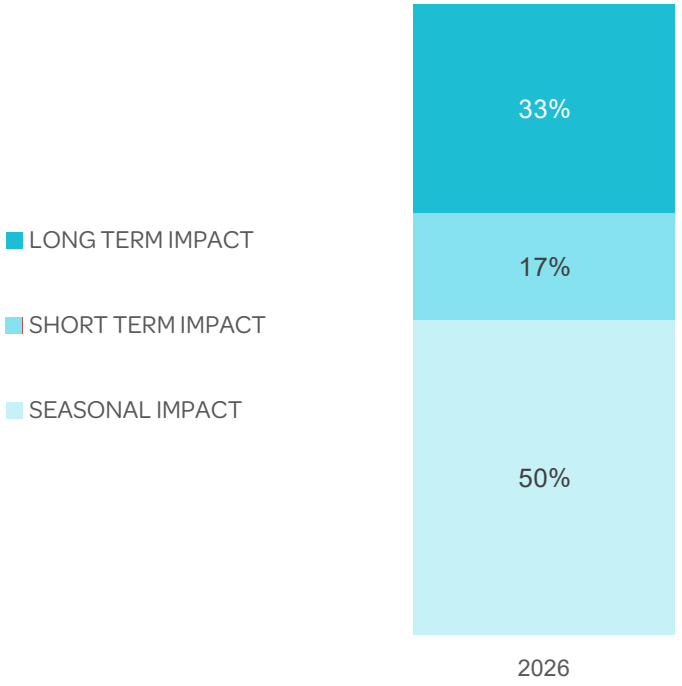
Impact of extreme weather patterns

The length and breadth of extreme weather impacts is felt acutely by Pacific agricultural businesses, with 35% reporting major effects and 33% reporting long-term impacts, highlighting the severity and persistence of weather-related disruption across the sector. This illustrates that damage to crops, land and productive capacity persist well beyond the weather events themselves.

To what extent has your business been impacted by these weather patterns?



And what was the timeframe of this impact?



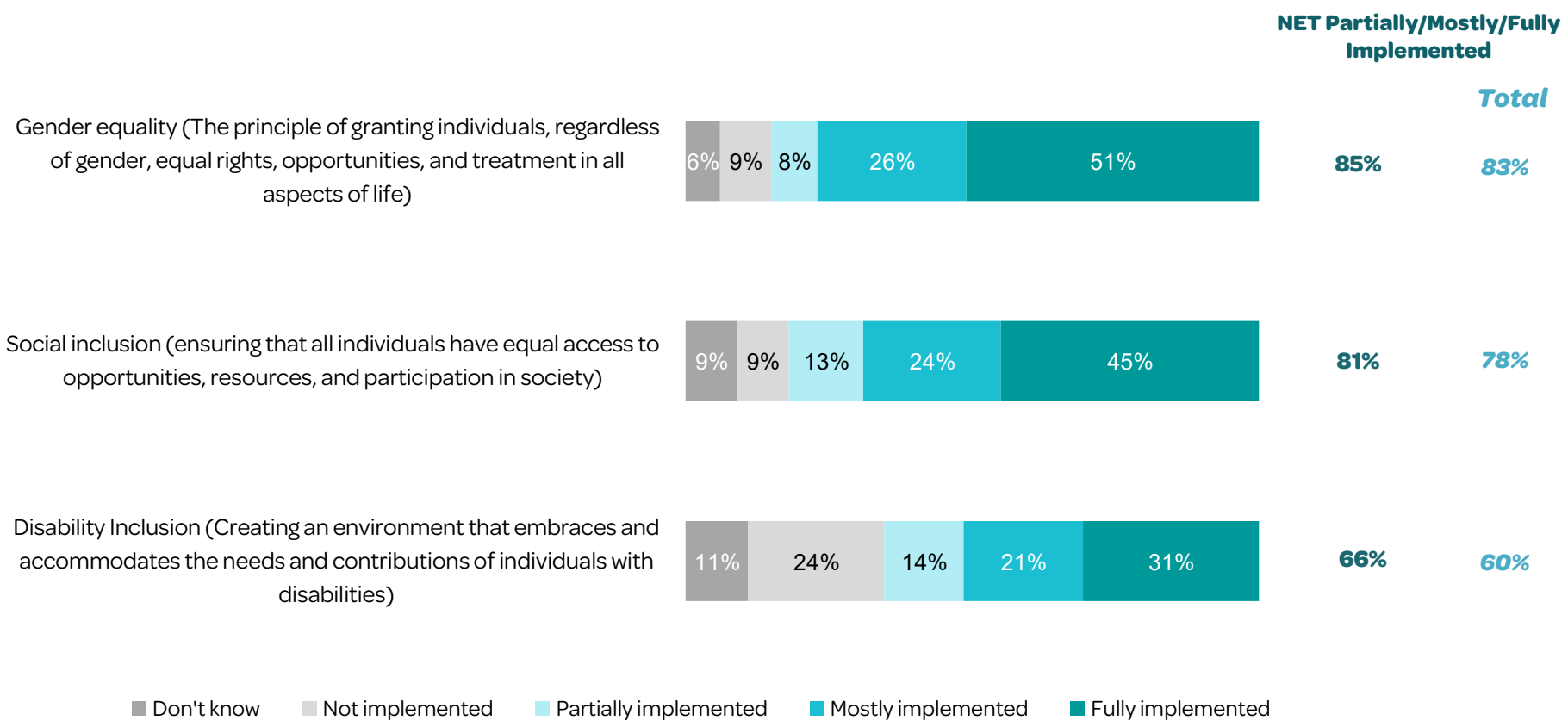


GENDER EQUALITY, DISABILITY & SOCIAL INCLUSION

Implementation of GEDSI policies and practices

GEDSI implementation in the agriculture sector sits slightly ahead of Pacific export averages on all three measures, with gender equality at 85% (vs. 83%), social inclusion at 81% (vs. 78%) and disability inclusion at 66% (vs. 60%). This illustrates a sector ahead on inclusive employment, representing a good benchmark for other industries.

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 85 responses received from agriculture export businesses.

All respondents were key influencers or decision-makers within their business.

All businesses are based in the Pacific Islands and generate revenue through the export of agricultural products to international markets.

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.

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.

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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