



Pacific Food and Beverage Exports

KEY MESSAGES

- Exports of palm oil, bottled water and tuna have increased significantly this century
- Excluding these commodities, total exports of food from Pacific Island countries and territories have declined in the last 25 years, principally driven by declines in sugar and molasses from Fiji and copra from across the region
- Fiji is a central hub for export of domestically produced foods out of the region and re-exports of foods to smaller Pacific countries
- Development of export-oriented cash crops that sometimes flourish but not persist have become a feature in several countries

CONTEXT

A BRIEF HISTORY OF FOOD AND BEVERAGE EXPORTS

During the colonial era prior to the Second World War and its immediate aftermath, the Pacific region was a net exporter of food. The great majority of exports came from plantation agriculture developed to serve colonizing economies, notably copra and sugar. In the last half century, national independence, increased market competition, trade liberalisation, the termination of preferential trade agreements, and economies of scale, among other causes, has seen agricultural exports from the region change in character significantly, and with a few exceptions, decline in quantity.

TUNA, WATER AND PALM OIL

Notable exceptions to the general trend have been tuna, bottled water and palm oil. Tuna caught in the exclusive economic zones of western and central Pacific countries now represent by the far the largest export from the region. Catches continue to increase, with nearly 3 million tonnes of tuna and related species caught in 2019. The great majority of this catch is harvested by foreign fleets and transhipped directly to distant ports, but some is landed, loined or canned and then exported. Because of the inconsistent manner in

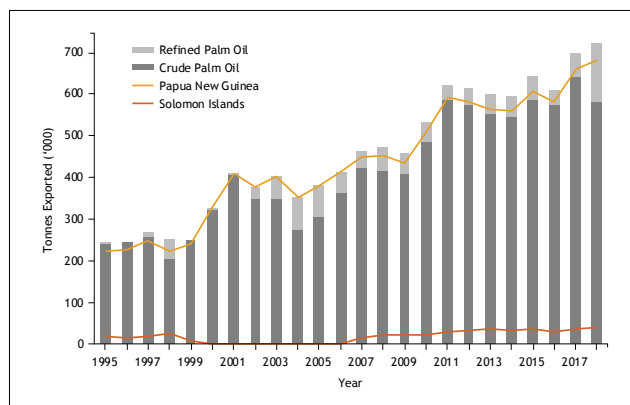


Figure 1. Palm oil exports for PNG and Solomon Islands. Almost all regional export of palm oil production comes from these two countries.

which tuna is reported in national trade statistics it is excluded from this and most summaries of international food trade. There have also been large increases in the export of palm oil, principally from Papua New Guinea (Figure 1), and bottled water from Fiji. Both palm oil and bottled water are excluded elsewhere in this brief because of the exceptional volumes in these trade flows have an overwhelming influence on trends.



Copra dries in the afternoon sun on Malekula Island, Vanuatu. Tom Perry / World Bank 2013

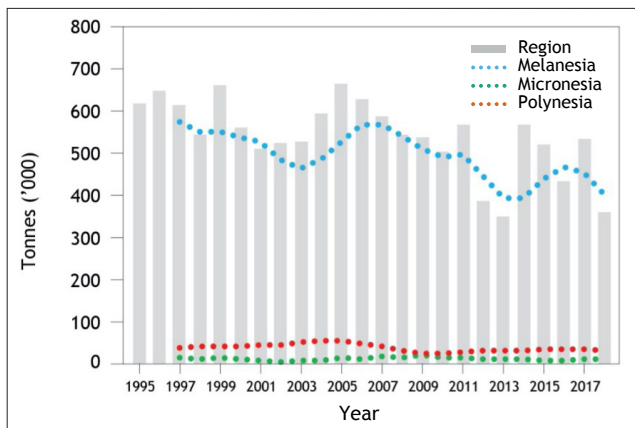


Figure 2. Total food and beverage exports for the region (grey bars), Polynesia (red), Micronesia (green), and Melanesia (blue). Finfish including tuna, salt, oil palm nuts and kernels, alcohol, tobacco, water and Papua New Guinea data excluded.

OTHER FOOD EXPORTS

Over the last 25 years exports of other foods have declined (Figure 2). In recent years, sugar and molasses (50%) and copra (7%) accounted for the majority of export tonnage (Figure 3). The net effect of these trends in international trade is that the region overall became a net importer of food around the turn of the Century and has become increasingly reliant on imports since.

The dominant food exporters in the region are Papua New Guinea and Fiji, both large Melanesian countries. Papua New Guinea exports large quantities of palm oil, coffee, copra and cocoa while Fiji exports feature sugar and rice. Neither Polynesia nor Micronesia have been major exporters of food and beverages, particularly the smaller, mostly atoll countries which export very little food, and have become increasingly import dependent. Exports of root crops to the Pacific diaspora in Australia, New Zealand and the USA have become a feature of export in many Pacific islands countries and territories. A portion of national trade, not captured in the international databases due to small quantities and/or the informal nature of the trade, is dominated by locally produced fresh perishables.

Fiji acts as an important regional trading hub, exporting both domestic production and re-exporting food from outside the region to

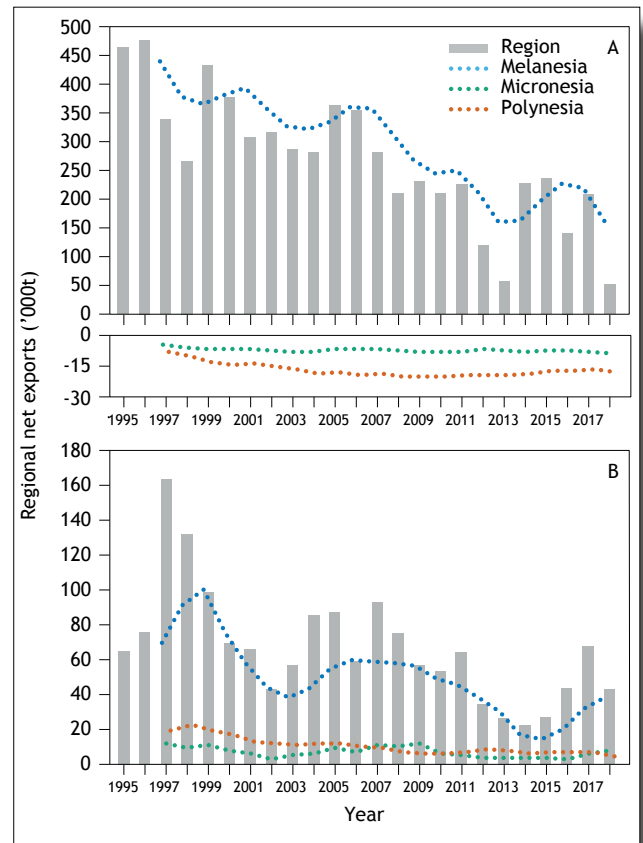


Figure 3. Net (exports minus imports) export of (A) Sugar and (B) Coconut (copra and oil) from the region (data excludes Papua New Guinea).

smaller countries (see forthcoming [Brief 16](#) on intra-regional trade). Fiji exports of sugar cane products to Europe have declined due to the ending of preferential trade agreements. Australia, despite being the largest exporter to the region, imports limited tonnage from the region. Some global regions including Africa, Western Asia and Latin America import negligible food and beverages from the Pacific region.

During the last decades there have been many examples of niche exports developing, either traditional crops (e.g. kava and taro) or through the development of non-traditional crops such as coffee, honey, squash, vanilla, and ginger. While some non-traditional crops, notably coffee and cocoa have flourished, few others have persisted and/or scaled sufficiently to disrupt overarching national food regimes.

SOURCES

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ABOUT

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