

# Auckland Pacific Business Export and Trade Research

Prepared for Auckland Council



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ECG

Auckland Council

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**ECG**

Elika Consulting Group (ECG) delivers high-quality Strategy, Engagement, and Evaluation services across complex economic, social, and cultural systems. Supported by over 40 years of combined experience, ECG offers deep expertise in indigenous Pacific methodologies, governance, and evidence-based research that informs policy, strengthens decision-making and drives economic growth.

By partnering with government, industry, and communities, ECG co-designs solutions that are culturally grounded, lifting participation to build sustainable impact for clients across Aotearoa NZ and the Asia-Pacific region.

**Auckland Council**

Auckland Council, through its Economic Development Office (EDO), plays a central role in advancing innovative, inclusive, and resilient economic growth across Tāmaki Makaurau. The Auckland Pacific Business Export and Trade Research report was commissioned by the Economic Development Pacific team in the EDO, under its Teu Le Vā - Pacific economic development work programme. Included in this work programme is the delivery of Project Ikuna, an active labour market programme that supports Pacific workers in Tāmaki Makaurau Auckland into higher-skilled, higher-quality employment, funded by the Ministry of Business, Innovation and Employment (MBIE). This report is co-funded by Auckland Council and MBIE as part of their working relationship on Project Ikuna.

To achieve the qualitative and quantitative evidence in this report, ECG was appointed by Auckland Council in July 2025 for its specialist skills in strategy, engagement and evaluation services using indigenous Pacific methodologies.

The purpose of this report is to generate new evidence on export readiness and pathways for Pacific-led businesses, ensuring Pacific peoples are recognised as contributors to Auckland's economic future. Importantly, the evidence surfaced in this report aligns with the government's *Going for Growth* agenda, which prioritises expanding New Zealand's base of high-value exporters and creating pathways to intergenerational wealth.

**Disclaimer**

This document has been prepared for Auckland Council's Economic Development Pacific team and Ministry of Business, Innovation and Employment (MBIE) Langa Le Va, Pacific Policy team as part of the "Auckland Pacific Business Export and Trade Research" Project.

All information and data contained in this report are considered relevant and accurate at the time of delivery. These results are not official statistics; they have been generated for research purposes and should be interpreted accordingly. The findings, interpretations, and conclusions expressed in this document are the responsibility of the authors and any contributing data providers.

# 01

# Executive Summary

## Auckland Pacific Business Export and Trade Research

Pacific enterprise is a growing and strategic contributor to Aotearoa New Zealand's economy, with Auckland as its cultural and commercial centre. This research was commissioned to address the evidence gap, assess the export readiness of Pacific-led businesses, and identify pathways to scale Pacific innovation and enterprise into global markets in support of the government's Going for Growth agenda.

### 1. The Pacific Economy: Scale, Momentum, and Untapped Export Potential

Pacific-led businesses are expanding in number and influence. In 2023, Aotearoa recorded 5,271 Pacific businesses, with 51% located in Auckland, confirming its role as the country's Pacific economic hub.<sup>1</sup>

Key systemic insights include:

- Pacific-owned firms grew 61% between 2013–2023, yet remain only 1.9% of all firms, indicating both progress and under-representation relative to population size.<sup>2</sup>
- Auckland hosts 63% of Pacific peoples aged 30–64, but only 3% of businesses are Pacific-owned, signalling significant headroom for enterprise growth.<sup>3</sup>
- Pacific businesses are concentrated in Construction and Professional, Scientific and Technical Services,<sup>4</sup> but have emerging strengths in food and beverage, health and wellbeing, digital and creative industries, cultural tourism, and niche Pacific products.
- A literature review<sup>5</sup> coupled with extensive stakeholder engagement for this research, could not identify Pacific exporters, creating a critical evidence gap that restricts investment, policy visibility, and export support access.

1. Nicholson Consulting. (2025). Quantifying the Pacific Economy (Report prepared for Auckland Council). Auckland Council Economic Development. [https://auckländeconomicdevelopment.com/sites/build\\_auckland/files/media-library/documents/Quantifying%20the%20Pacific%20Economy%20-%20Research%20Paper.pdf](https://auckländeconomicdevelopment.com/sites/build_auckland/files/media-library/documents/Quantifying%20the%20Pacific%20Economy%20-%20Research%20Paper.pdf)
2. Ibid., 14
3. [www://explore.data.stats.govt.nz/](http://explore.data.stats.govt.nz/)
4. Nicholson Consulting. (2025). Quantifying the Pacific Economy (Report prepared for Auckland Council). Auckland Council Economic Development.
5. See Appendices II. Stakeholders

### 2. Barriers to Export Participation: Enterprise-Level and System-Level Constraints

Research engagement and literature findings highlight consistent barriers limiting Pacific export activity.

#### Enterprise-Level Barriers

- Limited access to export compliance knowledge (customs, certification, Intellectual Property (IP), food safety).
- Insufficient access to finance, equipment, and skilled personnel to scale.
- Difficulty navigating foreign distributors, price competitiveness, and logistics.
- Pressure on small, family-based ventures with limited time and technical expertise.

#### System-Level Barriers

- Pacific exporters are invisible in official trade data systems, limiting recognition and tailored support.
- High freight and distribution costs disproportionately affect smaller enterprises.
- Fragmented support ecosystems create gaps between start-up capability and export readiness.
- Pacific business leaders are underrepresented in national export governance and trade forums.
- Lack of recognition of the informal export economy, which includes cultural goods, digital content, micro-trade, and diaspora-driven export activity.

This research illustrates a clear opportunity: Pacific innovation, cultural IP, and diaspora networks provide competitive advantages not yet reflected in New Zealand's export landscape. These constraints reinforce longstanding structural issues and highlight the need for a culturally grounded, Pacific-led export development pathway.



### 3. Export Opportunities: High-Growth Sectors Aligned with Pacific Strengths

The research identifies five priority export opportunity domains:

#### Food and Beverage / Value-Added Manufacturing

Strong demand for Pacific-origin cacao, kava, coconut oil, taro-based products, and emerging functional foods. Few Pacific firms currently manufacture at scale—indicating a clear investment gap.

#### Health and Wellbeing Products

High global demand for natural Pacific ingredients (e.g., Virgin Coconut Oil (VCO), botanicals). Brands like Misiluki show demonstrated export capability for culturally grounded Pacific wellness products.

#### Creative Industries and Screen Economy

The creative sector contributes up to \$19B to GDP<sup>6</sup> and includes globally successful Pacific-led films including *Tinā*<sup>7</sup> evidencing Pacific creatives among the most export-ready but under-capitalised.

#### Cultural Tourism and Experience Exports

Demand for Indigenous-led, authenticity-based tourism experiences is rising. Pacific cultural festivals and arts ecosystems are under-utilised as export-ready assets.

#### Technology, Digital Content and Education

Pacific digital creators (e.g., gaming, animation, virtual reality (VR), digital learning products like Pacific Kids Learning) demonstrate strong export traction in global online markets.

These sectors align with global consumer trends toward authenticity, sustainability, wellness, and culture—areas where Pacific identity provides a natural competitive edge.

6. Eaqub, S., Collins, R., & Sohanpal, N. (2025, August 14). Skills in the creative sector: A thriving sector despite training mismatch (Report to Toi Mai Workforce Development Council).

7. <https://www.nzfilm.co.nz/news/tin%C4%81-sails-past-whale-rider-at-the-new-zealand-box-office>

### 4. Insights from Pacific Businesses: What They Need to Export

Survey and talanoa engagement surfaced five critical capability gaps:

1. Knowledge of export compliance and access to accreditation support (quality assurance (QA), customs, IP, food safety).
2. Access to market research and insights tailored to Pacific sectors and target regions.
3. Stronger Pacific export networks and international partnerships.
4. Access to capital and innovation investment to build scale.
5. A structured export readiness pathway co-designed with Pacific business leaders.

Stakeholders strongly emphasised the need for data visibility, mentoring, sector-specific training, and recognising cultural IP as a strategic export asset.

### 5. Delivering on the Research Objectives — Summary

#### Evidence Gap – Business Readiness (Capability and Capacity)

- Provides the first Auckland-focused evidence base on Pacific enterprise and export readiness.
- Identifies key capability gaps: compliance, logistics, market research, access to capital, and scaling capacity.
- Establishes a baseline for a Pacific Export Readiness Pathway Programme.

#### Alignment with Going for Growth

- Confirms Pacific enterprises as an emerging pipeline for high-value exporters.
- Highlights sectors with strong global demand and potential for value-added growth.
- Supports government priorities to broaden and diversify the export economy.

#### Pacific Business Export Status (What, Who, Value, Sectors)

- Maps current Pacific export activity, participation, and sector distribution.
- Identifies critical data invisibility. Pacific exporters are not recorded in existing systems.
- Reinforces the need for Pacific identifiers and a Pacific export data dashboard.

#### Untapped Export Potential (Cultural Tourism, Creative Industries, Health and Wellbeing)

- Highlights major opportunities in cultural tourism, screen and creative industries, food and beverage value-add, and wellbeing products.
- Demonstrates strong cultural and commercial advantages through Pacific identity and IP.
- Shows these sectors are primed for market expansion with targeted support.

#### Barriers and Hindrances (Accreditation, Scale, Policy, Market Access, Partnerships)

- Identifies systemic constraints: regulatory complexity, high logistics costs, and fragmented support.
- Notes enterprise-level challenges in accreditation, scaling, and export operations.
- Calls for Pacific inclusion in trade governance, tailored compliance support, and recognition of the informal export economy.



## 02

# Context and Background

## Context

Auckland is the economic centre of Aotearoa New Zealand's Pacific population, home to more than half of all Pacific-owned businesses and a rapidly growing, youthful Pacific workforce. Pacific enterprises already contribute significantly to the national economy, yet evidence on Pacific export activity, sectoral strengths, and trade pathways remains sparse, fragmented, or not systematically captured. This lack of visibility has long constrained policy settings, enterprise development, and investment confidence, and it obscures the scale of Pacific innovation emerging across food and beverage, cultural tourism, health and wellbeing and creative industries.

The government's *Going for Growth Strategy* provides an economic mandate for strengthening the export base, lifting productivity, and unlocking innovation. Its five pillars; Developing Talent, Competitive Business Settings, Promoting Global Trade and Investment, Innovation and Science, and Infrastructure for Growth shape New Zealand's long-term approach to building a resilient, future-ready economy. These pillars create both opportunity and urgency for Auckland's Pacific enterprises, whose cultural assets, diasporic networks, and entrepreneurial activity are critical to regional and national productivity.<sup>8</sup>

As the *Quantifying the Pacific Economy* report shows, Pacific-owned firms are growing but remain underrepresented relative to Pacific population size, and key export sectors remain underdeveloped.

This research responds directly to those gaps.

8. Nicholson Consulting. (2025). Quantifying the Pacific Economy (Report prepared for Auckland Council). Auckland Council Economic Development.



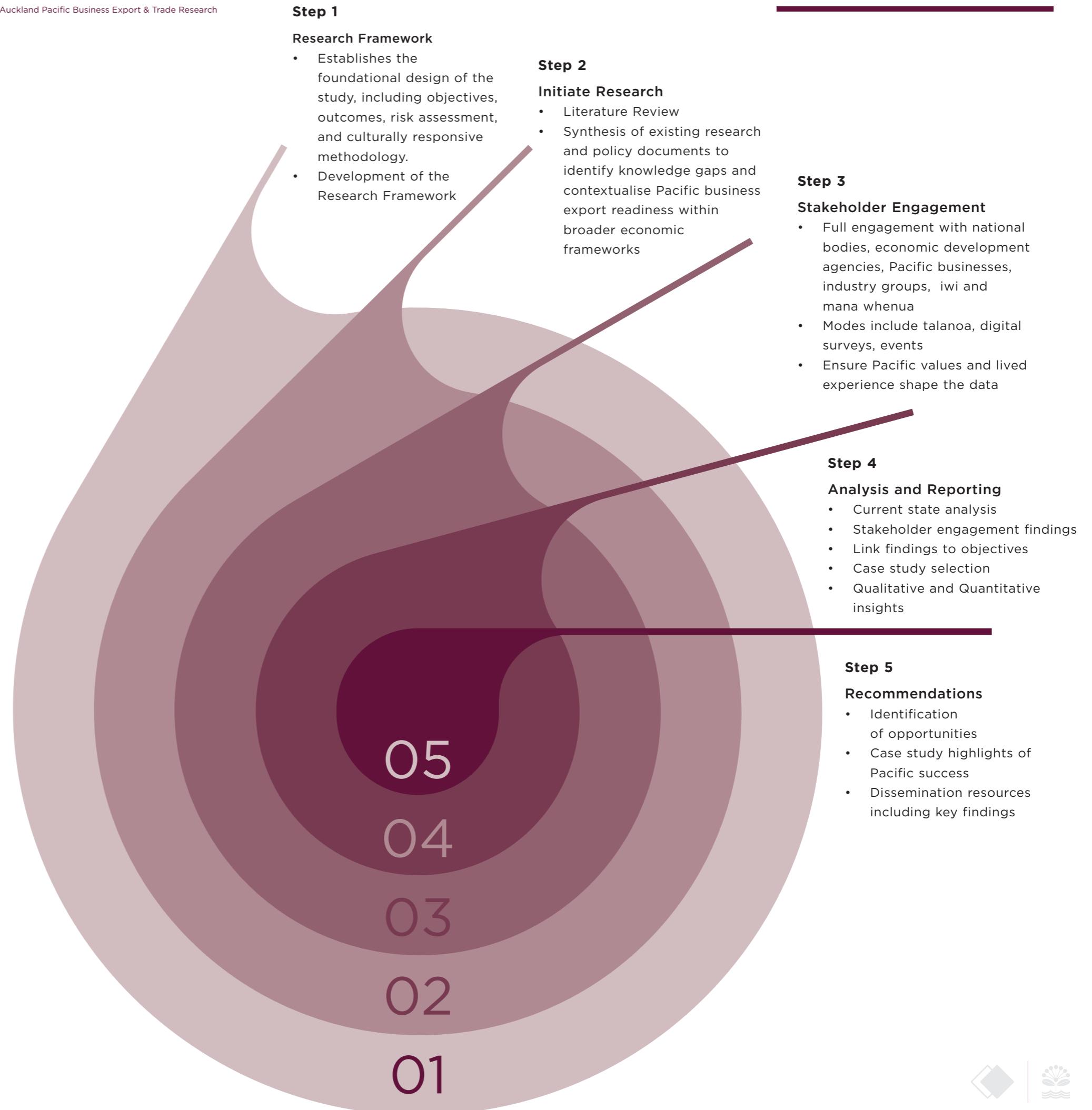
## Background

The structure of the Auckland Pacific Business Export and Trade Research infographic outlines a five-stage, end-to-end research process designed to ensure cultural integrity, methodological robustness and actionable outputs. Each step builds on the previous, to form a coherent pathway from scoping to impact:

# Structure of the Auckland Pacific Business Export & Trade Research

## Report Structure Infographic

This structured approach ensures that Pacific voices, cultural logic, and business realities drive the analysis, embedding methodologies alongside standard economic and export-readiness frameworks.



# 03

## Methodology and Approach

### I. RESEARCH FRAMEWORK OVERVIEW

The government's *Going for Growth Strategy* provides the foundation for this research, with five interconnected pillars shaping New Zealand's path to long-term productivity and resilience. These pillars reflect a national ambition to expand the base of high-value exporters, drive innovation, and ensure inclusive, sustainable prosperity.

This research framework adapts the strategy to a Pacific context by identifying business readiness, mapping export activity, and exploring untapped potential in cultural tourism, creative industries, and health and wellbeing.

#### Purpose and Focus of research project

To identify the current state, opportunities, and barriers for Auckland-based Pacific-led enterprises to engage in export and trade, unlocking pathways for Pacific innovation, enterprise, and intergenerational wealth whilst also examining barriers such as compliance, scale, and market access.

The research objectives are designed to bridge critical gaps in evidence and ensure alignment with the *Going for Growth* agenda. They focus on assessing Pacific business readiness, documenting current export status, and exploring untapped opportunities in high-potential sectors.

These objectives provide a structured pathway for identifying strengths, addressing challenges, and informing policies that enable Pacific enterprises to scale and succeed in global markets.

The study utilises a mixed-methods framework, integrating a systematic literature review, semi-structured interviews, surveys, case studies, and quantitative data analysis to produce a comprehensive and triangulated evidence base. The methodology is further characterised by sustained stakeholder engagement, involving Pacific businesses, trade officials, and relevant support agencies throughout the inquiry to ensure relevance, accuracy, and contextual validity.

Primary data collection emphasised in-person interactions, business-to-business engagement, and direct talanoa, enabling the capture of nuanced insights that are often absent from conventional export and enterprise datasets.





## Pacific Lens and Cultural Logic

This research employs a Pacific-centred methodological approach designed to ensure cultural rigour, relational depth, and epistemological alignment with Pacific worldviews. The methodology particularly the Yavu model <sup>9</sup> deliberately embeds Pacific approaches and values, including:

- Talanoa-based engagement, allowing participant-led knowledge generation to frame the narrative of export in their own terms.
- Recognition of informal-to-formal export activity, acknowledging the cultural, relational, and community-based dimensions of Pacific trade.
- Pacific data sovereignty, ensuring data is handled in a way that aligns with Pacific aspirations and collective benefit.
- Cultural IP as a key economic asset and differentiator for Pacific-led enterprises.
- These principles provide the cultural grounding required to interpret findings authentically and support Pacific-led transformation.

9. Yavu, a Fijian word meaning “foundation,” is a framework developed by the New Zealand Ministry for Pacific Peoples to guide meaningful and respectful engagement with Pacific communities. The model helps public and private sector organisations to build, nurture, and maintain relationships with Pacific peoples. <https://www.mpp.govt.nz/publications-resources/resources/yavu/#:-text=What%20is%20Yavu?,Kapasa%20Pacific%20Policy%20Analysis%20Tool>



## II. SCOPE

### Geographical Scope

The research focuses on the Auckland region (Tāmaki Makaurau), the largest Pacific population centre globally outside the Pacific Islands and the heart of the Pacific economy in Aotearoa.

### Business Scope

The research includes:

Pacific-owned businesses (50%+ Pacific ownership).

Pacific-relevant businesses producing goods or services with significant Pacific cultural identity or market relevance.

Informal or emerging enterprises, festivals, creatives, and community-based producers who contribute to the Pacific export ecosystem.

### Export Scope

The study covers goods and services exported from New Zealand, including:

Traditional exports (e.g., food and beverage, manufacturing).

Cultural and creative exports (e.g., screen, fashion, digital content, performance).

Intellectual property, cultural tourism, and experience-based exports.

### Time Scope

The research captures the period September–December 2025.



## III. LIMITATIONS

While the research draws on extensive stakeholder engagement and robust literature, several constraints shape the findings:

### Data gaps and fragmentation

Existing data sets lack Pacific identifiers and do not systematically record Pacific exporter profiles, limiting accurate measurement of export volumes and activity.

### Informal economy visibility

Pacific enterprise often operates along an informal-to-formal spectrum; these activities are undercounted in official data sets and require qualitative approaches to understand.

### Restricted national datasets

Some export-related statistical sources <sup>10</sup> require controlled access and may not disaggregate Pacific export participation.

### Small sample sizes for exporting businesses

Pacific exporters represent a small proportion of the overall business population, requiring caution in generalising findings.

### Limited longitudinal data

Trends over time are difficult to assess due to irregular or outdated Pacific-specific economic reporting.

These limitations reinforce the importance of Pacific-led methodologies and mixed methods to produce credible, culturally grounded evidence.

<sup>10</sup>New Zealand's major statistical databases: the Integrated Data Infrastructure (IDI), which holds de-identified data about people and households (education, health, income), and the Longitudinal Business Database (LBD), with data on businesses; they're linked by tax data, allowing researchers to study societal issues, while IRD (Inland Revenue Department) provides crucial tax data (GST) for linking these datasets. <https://www.stats.govt.nz/integrated-data/integrated-data-infrastructure/>



## IV. KEY DEFINITIONS

To ensure consistency and cultural relevance, the research adopts clear definitions of core terms. These include distinguishing between Pacific-owned and Pacific-relevant businesses, clarifying what constitutes exports and imports, and outlining sector-specific concepts such as cultural tourism, creative industries, and hospitality.

Anchoring the framework in these definitions is essential to accurately capture the scope of Pacific enterprise activity in Auckland. It also provides policymakers, stakeholders, and investors with a shared understanding when interpreting findings and shaping responses.

### Export

The sale and delivery of goods or services produced in Aotearoa New Zealand to overseas markets, generating foreign exchange earnings. This may also include a value add component which focuses on the domestic value incorporated into the export before it is traded overseas.

### Pacific-Owned Businesses

Enterprises majority-owned (50%+) by people of Pacific heritage.

### Cultural Tourism

Travel experiences centred on Pacific heritage, language, arts, performance, and cultural practices, offered as exportable visitor experiences and intellectual property.

### Hospitality

Businesses in food, beverage, accommodation, catering, and tourism services that may integrate Pacific cuisine, culture, or experiences.

### Import

The purchase and delivery of goods or services from overseas markets into Aotearoa New Zealand.

### Pacific-Relevant Businesses

Enterprises that, while not necessarily Pacific-owned, produce goods, services, or cultural outputs with strong Pacific identity, value, or market relevance.

### Creative Industries

Economic activities focused on creativity, culture, and technology including film, media, design, fashion, music, and performing arts where Pacific identity is a differentiating factor.

### Auckland Area

The Auckland region (Tāmaki Makaurau), the most populous and culturally diverse metropolitan centre in Aotearoa New Zealand, home to the largest Pacific population in the world outside the Pacific Islands.

### Formal Economy

The formal economy refers to all business activities that operate within recognised regulatory, legal, and institutional frameworks. Enterprises in the formal economy are registered with relevant authorities, comply with taxation and reporting requirements, and participate in regulated labour, trade, and commercial systems. Formal Pacific businesses typically have defined governance structures, access to financial services, and eligibility for government or industry export assistance.

In the context of Pacific enterprise, the formal economy represents the segment of business activity that is visible in official datasets, export records, and economic measurement tools.

### Informal Economy

The informal economy encompasses business, trade, and value-creating activities that occur outside formal regulatory and administrative systems. These activities are legal and commercially efficient, such as shared containers for artefacts from different businesses but are not consistently captured through business registration, custom processing or official economic reporting.

Within Pacific communities, the informal economy includes home-based production, cultural and creative practices, community-driven exchanges, festival-based commerce, and small-scale or relational trade often rooted in reciprocity, cultural obligation, and collective support networks.

Although not formally recorded, the informal Pacific economy plays a significant role in social and cultural wellbeing and frequently serves as a precursor to, or pathway into, formal enterprise and export activity.



## Stakeholder Definitions:

### National Bodies

National Bodies are central government agencies and Crown-mandated organisations that set national policy direction, administer trade, economic, and cultural systems, and influence regulatory settings that shape Pacific business participation in export markets. They hold system-level levers including data, policy, funding, compliance, and trade negotiation playing a critical role in enabling or constraining Pacific export growth.

### Role in this research:

Provide system settings, policy frameworks and data sets relevant to export development.  
Influence national priorities such as *Going for Growth*, trade agreements, and investment.  
Oversee national trade, economic development, statistics, foreign affairs, creative industries, and Pacific policy.

### Economic Development Agencies

Economic Development Agencies (EDAs) are industry-facing, regionally based or sector-based agencies that provide practical support to businesses, including capability building, exporter support, networking, market development, and investment facilitation. They bridge national economic strategies with local delivery and are essential for mobilising Pacific small and medium-sized enterprises (SMEs) towards export readiness.

### Role in this research:

Support Pacific SMEs across the informal-formal business spectrum.  
Deliver capability, mentoring, incubation, market-readiness, and compliance support.  
Facilitate trade missions, business-to-business connections, investment pathways, and regional economic strategy alignment.  
Provide insights into barriers and opportunities faced by Pacific businesses at the operational level.

### Non Government Organisations, Advocacy Groups and Businesses

This group includes advocacy bodies, grassroots associations, cultural and creative organisations, and Pacific-led or Pacific-serving businesses. They represent community voice, lived experience, and sector realities across creative, cultural, service, Food & Beverage, social enterprise, and digital industries. They operate at the intersection of cultural identity, entrepreneurship, and community development.

### Role in this research:

- Provide grounded perspectives on barriers, informal trade practices, cultural value chains, and export potential.
- Highlight community-driven innovations, informal economies, and cultural IP considerations.
- Advocate for equitable access to trade programmes, funding, and representation in export governance.
- Offer case studies demonstrating Pacific business innovation, resilience, and emerging export pathways.

### Iwi & Mana Whenua

Māori Indigenous peoples to Aotearoa who have historic and territorial rights over the land and are key partners in shaping Indigenous-led trade, and place-based development.

### Role in this research:

- Offer insights into Indigenous economic models, export leadership, cultural governance, and whenua-based economic opportunities.
- Provide a Te Tiriti-aligned foundation for Pacific-Māori partnership in trade and economic development.

# 04

# Findings

The findings from stakeholder engagements, talanoa discussions, and early data analysis reveal a consistent set of system-level barriers, opportunities, and priorities shaping the export potential of Pacific-led businesses in Tāmaki Makaurau and across Aotearoa. While each stakeholder group brings a distinct perspective, their insights converge on several critical themes that define the current Pacific export landscape.

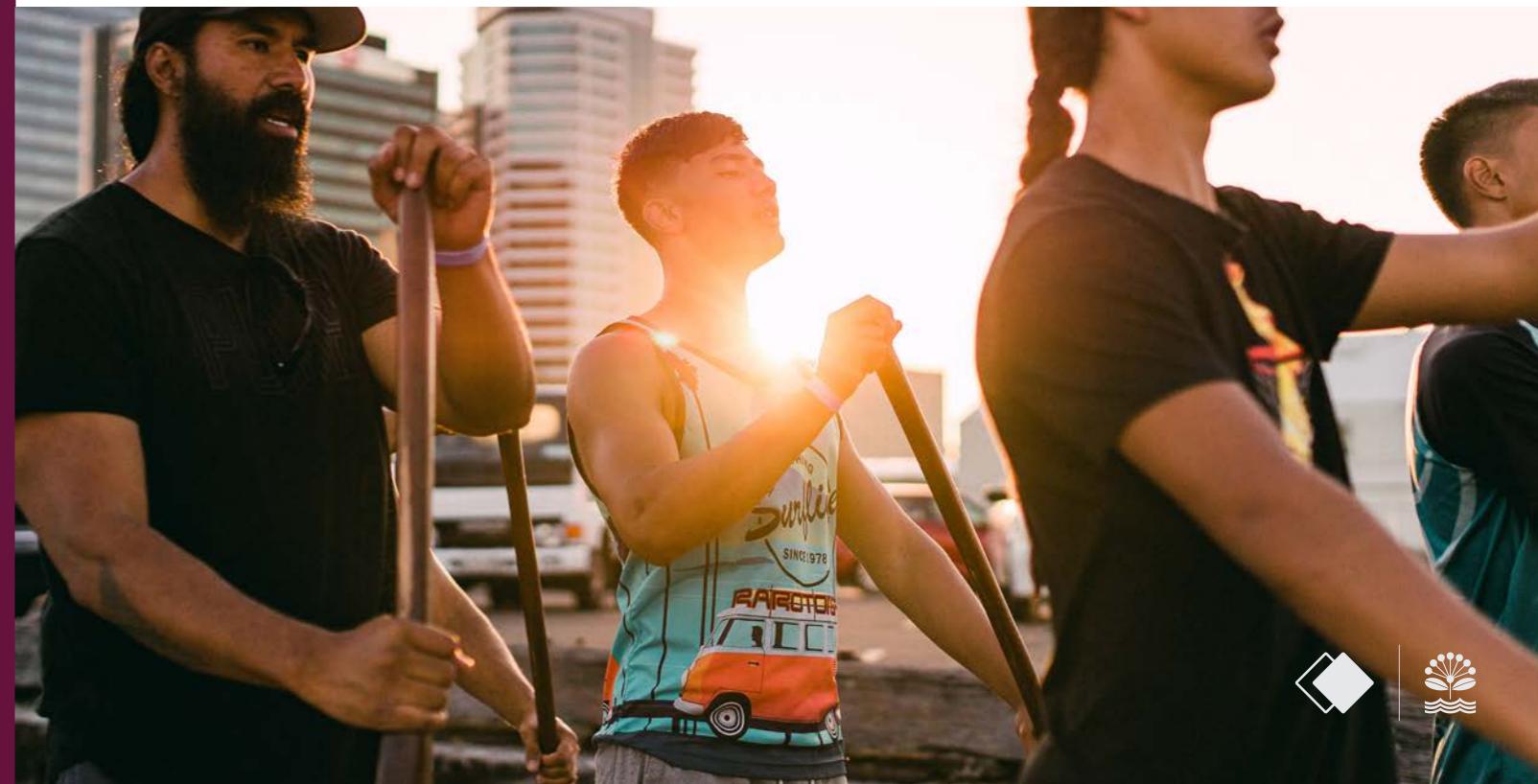
## National Bodies: Structural Preconditions and System Gaps

National agencies emphasised that for Pacific creative, cultural, and high-value products to penetrate international markets, enterprises must have access to premier production capability, international partnerships, and capital investment. These system-level views reflect a recognition that Pacific exporters face disproportionately high entry barriers, particularly in sectors where quality, scale, and global positioning determine success.

A central concern raised is the absence of targeted, reliable Pacific export data, echoing broader Pacific data sovereignty literature and the challenges noted in the *Quantifying the Pacific Economy*<sup>11</sup> report. Stakeholders highlighted that the current data landscape is fragmented, outdated, and difficult to navigate which limits the ability of policymakers, investors, and agencies to understand the scale, readiness, or potential of Pacific exporters.

Critically, national bodies have underplayed the demographic imperative: as Pacific peoples increasingly comprise a significant proportion of New Zealand's future workforce, deliberate engagement with Pacific businesses in export-led growth is essential to ensuring long-term economic resilience.

11. Nicholson Consulting. (2025). Quantifying the Pacific Economy (Report prepared for Auckland Council). Auckland Council Economic Development.



## Economic Development Agencies: Export Navigation and System Alignment

Economic development agencies and Pacific Business Councils identified the operational challenges facing Pacific enterprises within existing export settings. Although various Pacific business councils hold different sector priorities, they report common constraints around compliance, regulatory processes, and export readiness.

These organisations stressed the need to formally recognise the Informal-to-Formal Trade Spectrum, reflecting how many Pacific enterprises operate through cultural, community, and diaspora networks that remain invisible within national data systems. This invisibility constrains targeted support and obscures real export activity occurring outside formal mechanisms.

A repeated insight was the lack of Pacific leadership at national export decision-making tables. Pacific business councils argued that without Pacific voices influencing export system design particularly around investment, capability-building, and market development, the current settings will continue to underserve Pacific businesses with high export potential.

## Non Government Organisations, Advocacy Groups and Businesses: Capability, Market Access and Innovation

Pacific businesses and non government organisations shared a grounded view of the realities of navigating export markets. A lack of visibility and data was seen as a direct barrier to market intelligence, audience identification, and strategic planning.

Respondents emphasised the need for tailored support structures, including mentoring, capability-building, and pathways that help enterprises transition from informal activity to structured export participation. Export readiness is often hindered by limited access to support for accreditation, logistics, compliance, or international market research.



Importantly, stakeholders identified cultural identity, innovation, and digital creativity as emerging comparative advantages for Pacific enterprises. Creative industries, cultural tourism, and digital-first business models are seen as future-facing export domains where Pacific value propositions such as authenticity, storytelling, and cultural distinctiveness offer significant global potential.

## Iwi and Mana Whenua: Indigenous Economic Realities and Leadership

Iwi and mana whenua stakeholders highlighted the parallels between Māori and Pacific experiences of systemic underestimation and exclusion from mainstream economic frameworks. They reinforced the need to formally define and recognise the informal Indigenous and Pacific export economy, which is a substantial but currently uncounted contributor to cultural and economic exchange.

These stakeholders argued that building pathways for Indigenous-led solutions requires investment in Indigenous trade leadership, forums, and governance infrastructure. Such investment is seen not only as a corrective measure but as a strategic opportunity to position Aotearoa as a leader in Indigenous trade, cultural IP protection, and values-based export development.

## Cross-Cutting Themes and Overall Synthesis

Despite differences in focus, all stakeholder groups converge on four overarching insights:

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### **1. Data visibility remains the foremost system barrier.**

There is no comprehensive or accessible dataset that identifies Pacific exporters, export value, sectoral performance, or market pathways. This invisibility restricts coordinated action, investment confidence, and the design of export-enabling policy.

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### **2. The informal export economy is central to Pacific enterprise and must be recognised.**

Much Pacific economic activity including cultural goods, digital content, micro-exports, and diaspora trade falls outside formal classifications. Without recognising this as part of the export spectrum, policymakers risk misinterpreting Pacific capability and missing genuine growth opportunities.

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### **3. Cultural identity and digital creativity represent high-growth future export strengths.**

Stakeholders consistently pointed to creative industries, cultural tourism, food and beverage, and wellbeing products as areas where Pacific enterprises can differentiate themselves through authenticity, narrative, and cultural capital.

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### **4. Export success requires deliberate system investment in partnerships, capability and leadership.**

High capital requirements, compliance complexity, and limited access to international networks mean Pacific SMEs need structured pathways, targeted investment, and greater representation within national export governance.



# 05

## Barriers, Enablers and Trade pathways

### BARRIERS TO PACIFIC BUSINESS EXPORT: INTEGRATED ANALYSIS AND COMMENTARY

Digital survey results combined with qualitative insights from stakeholders and the contextual literature, reveal a coherent and systemic set of barriers inhibiting Pacific participation in export markets.

These constraints operate across regulatory, capability, infrastructural, and data ecosystems, reinforcing long-standing challenges highlighted in the research brief and literature review. At their core, these barriers reflect an export system not yet calibrated to recognise Pacific enterprise models, cultural assets, or informal trade activity.



#### 1. Regulatory Navigation and International Compliance

- 55% of respondents identified navigating international compliance and regulation as their top export barrier.

These findings confirm a consistent theme raised across stakeholder groups. National bodies and economic development agencies noted that Pacific businesses face disproportionate difficulty understanding and resourcing the regulatory environment across customs, accreditation, international food safety standards, IP protections, and cross-border certification. These challenges are magnified in sectors where Pacific businesses are growing fastest, such as food and beverage, health and wellbeing, and cultural/creative industries.

Stakeholders emphasised that without structured compliance support, Pacific SMEs are effectively excluded from participating in export markets at scale. This aligns with wider evidence that SMEs in general face restrictive tariffs, non-tariff barriers, and high transaction costs, but Pacific enterprises are less likely to have in-house legal, logistics, or certification expertise. Pacific exporters therefore face a double burden, firstly the universal SME compliance challenge which is secondly compounded by limited access to expert guidance and culturally tailored pathways.

## 2. High Logistics Costs and Supply Chain Constraints

- 45% identified high logistics costs
- 36% identified lack of reliable supply chain networks

Freight costs, volatile shipping schedules, and a lack of dependable distributor relationships emerged as significant structural barriers. Stakeholders particularly noted that Pacific-owned enterprises, many still in early-stage growth, cannot absorb logistic price shocks or minimum volume requirements demanded by freight operators.

These barriers are acute for businesses seeking to export physical goods such as beverages, skincare, food products, handicrafts, and textiles. The literature further confirms that a lack of processing and packaging infrastructure across the Pacific region places New Zealand-based Pacific producers in a position where they must shoulder the full cost of value-adding and distribution, often without economies of scale.

## 3. Accreditation, Standards and Quality Assurance

- 45% identified understanding international accreditation standards as a barrier.

This barrier speaks directly to readiness gaps across Pacific SMEs entering formalised export systems. Accreditation challenges include:

- Meeting country-specific product testing requirements
- Demonstrating traceability and provenance
- Achieving organic, fair trade, halal, and other certifications
- Understanding cultural IP protections for creative industries

For cultural and creative businesses (a large cohort in the survey), IP vulnerabilities and copyright enforcement were identified as pressing concerns. Lack of understanding in these areas increases business risk and discourages Pacific entrepreneurs from scaling into global markets.

The absence of accessible Pacific-centred export guides results in a mismatch between business capability and market entry requirements.

## 4. Limited International Networks and Market Access

- 27% identified access to international networks
- 27% identified limited awareness of trade agreements
- 18% identified low awareness of organisations assisting exporters

Survey respondents reported a fragmented understanding of export opportunities, trade agreements, and support agencies such as NZTE, Pacific Trade and Invest, MFAT, and the Auckland Chamber of Commerce. Stakeholder talanoa confirmed that Pacific business leadership is largely absent from national export discussions, resulting in missed opportunities for representation, advocacy, and incentivised investment.

Diaspora networks, which should be a strategic asset, remain under-utilised due to the lack of formal mechanisms linking Pacific entrepreneurs with regional and offshore partners.

This signals a systemic barrier: Pacific exporters do not have equitable access to the global relationships required to penetrate competitive markets.

## 5. Data Gaps and Lack of Visibility of Pacific Export Activity

The barrier percentages intersect with a deeper structural issue: Pacific enterprise remains largely invisible in official data systems. National bodies explicitly raised the absence of Pacific export identifiers, the complexity of accessing usable trade data, and the absence of recognition for the informal economy.

The literature also notes that the Pacific contribution to export sectors particularly creative industries, cultural tourism, wellbeing, and niche food and beverage is systematically undercounted. This invisibility reduces:

- Policy support
- Investor confidence
- Access to export services
- Ability to benchmark performance
- Government ability to identify high-growth Pacific sectors



## 6. Missing Capability Supports: Mentoring, Market Readiness and Workforce Skills

Stakeholders across civil society and businesses emphasised deficits in:

- Export-specific capability
- Mentoring from experienced exporters
- Market research access
- Investment readiness
- Digital skills and IP literacy
- Exposure to international buyers and trade missions

This barrier is compounded by demographic realities: Pacific peoples have the youngest workforce in Aotearoa, meaning future export capability will rely heavily on Pacific talent pipelines.

Without targeted capability-building, Pacific businesses remain locked into domestic markets despite strong product demand and cultural differentiation.

## 7. Informal-to-Formal Trade Transition Challenges

Stakeholders highlighted the critical importance of the informal export economy which may include unregistered micro-enterprises, cultural and creative sales, diaspora remittance-linked trade, and small-scale online exports. These activities demonstrate strong Pacific entrepreneurial intent but operate outside formal systems due to:

- Compliance complexity
- Lack of trust in institutions
- Insufficient capital
- Limited digital literacy
- Absence of culturally-aligned pathways



## OVERALL: A SYSTEM NOT DESIGNED FOR PACIFIC EXPORT POTENTIAL

The combined findings demonstrate that Pacific exporters face a multi-layered barrier landscape in which capability, systems design, infrastructure, and regulatory complexity intersect. Despite the Pacific economy's strong contribution of \$1.798B in Auckland sales alone from Pacific-owned businesses (*Quantifying the Pacific Economy 2025*), the current system does not adequately support Pacific pathways into high-value export markets.

### KEY THEMES EMERGING:

#### **Structural under-representation**

Pacific enterprises are not present in national export decision-making spaces, reducing influence and advocacy.

#### **Regulatory and compliance systems assume high-capital, high-capability firms**

This disproportionately affects emerging Pacific exporters and cultural/creative enterprises.

#### **Logistics and supply chain models favour large-scale exporters**

Pacific SMEs rarely benefit from economies of scale and face the highest cost burdens.

#### **Data systems do not account for the Pacific export journey**

The lack of Pacific identifiers constrains evidence-based policy and industry development.

#### **Untapped cultural IP and creative capital remain undervalued**

Global demand for authentic Pacific cultural products continues to rise, yet Pacific businesses face significant barriers to internationalisation.

In this context, Pacific businesses are not limited in innovation or ambition; rather the export ecosystem itself is underprepared to recognise and accelerate Pacific enterprise. Addressing these barriers requires a Pacific-led, system-level redesign grounded in cultural logic, Indigenous data sovereignty, and the Going for Growth pillars.

## ENABLERS AND TRADE PATHWAYS

Digital survey findings highlight a balanced view of what Pacific businesses consider the most critical enablers of export success. However, when combined with qualitative stakeholder insights and the broader economic context, the evidence shows that certain enablers are likely to generate faster national economic returns, higher living standards, and greater opportunity for Aucklanders. These enablers not only strengthen the Pacific business ecosystem but align closely with the *Going for Growth* pillars and the structural needs of Auckland's future economy.

#### **1. Competitive Business Settings (25%)**

Competitive business settings emerged as a top enabler, reflecting a strong stakeholder belief that system-level improvements can create the conditions for Pacific enterprises to thrive. Businesses emphasised the need for:

- Reduced barriers to compliance and certification
- Clearer regulatory guidance
- Cost-effective logistics
- Fairer distributor and market access arrangements
- Incentives for business expansion and transition from the informal to formal export economy.

Stakeholder talanoa also revealed that Pacific-led enterprises feel excluded from national export policy conversations, limiting their ability to influence rules that affect them. The creation of competitive settings that actively include Pacific perspectives such as tailored compliance support, flexible capital models, and recognition of informal-to-formal pathways would remove systemic frictions that currently slow business growth.

#### **Economic Impact:**

Competitive business settings are likely to be one of the most powerful accelerators of economic growth. Lowering compliance burdens and transaction costs and improving business environments typically produces rapid productivity gains and raises the competitiveness of SMEs that are critical for New Zealand's diversification into high-value exports.

## 2. Promoting Global Trade and Investment (25%)

Respondents identified trade and investment promotion as equally important. This aligns with qualitative feedback showing that international networks, diaspora markets, and global exposure are currently under-leveraged assets for Pacific businesses.

Key enablers include:

- Stronger access to Austrade, PTI, Auckland Chambers, NZTE and MFAT trade missions
- Targeted Pacific export delegations
- Market intelligence on Australia, Asia, and North America
- Export accelerator programmes tailored to Pacific SMEs
- Investment pathways for cultural, creative, food and beverage, and tech ventures

Stakeholders emphasised that visibility in global markets is a missing ingredient for Pacific business. Cultural Intellectual Property, Pacific creative industries, and food/wellbeing products have strong global demand but lack structured pathways into international distribution channels.

### Economic Impact:

Global trade and investment promotion will grow the NZ economy faster than domestic-only enablers. Auckland, home to 63% of the Pacific population and the majority of Pacific-owned businesses, stands to benefit disproportionately from increased export activity, foreign investment, and global market recognition.



## 3. Talent and Skills (17%)

Talent development is widely recognised as essential but is perceived as a medium-to-long-term enabler rather than an immediate accelerator. Talent constraints include:

- Limited export skills within Pacific SMEs
- Need for training in financial literacy, investor readiness, digital capability, and Intellectual Property
- Lack of Pacific participation in high-growth sectors (STEM, screen, tech, logistics)

Stakeholders noted that Pacific youth represent Auckland's future workforce and entrepreneurial base. Investment in skills today is an investment in Auckland's long-term economic resilience.

### Economic Impact:

Talent and skills development increases living standards directly through improved wages, employability, and career pathways. However, its economic return compounds over time rather than delivering immediate growth.

## 4. Innovation, Technology and Science (17%)

Digital and stakeholder engagements showed strong enthusiasm for innovation across cultural and creative industries, food technology, digital exports, and tech-enabled services. Pacific businesses are increasingly:

- Developing new value-added products (e.g. beverages, skincare, wellness)
- Innovating through screen, gaming, design, digital storytelling
- Using e-commerce and digital platforms for global reach
- Exploring VR, AI and immersive cultural tourism technology

Stakeholders emphasised that innovation is inseparable from Pacific cultural identity. Pacific creatives and entrepreneurs are already driving New Zealand's global cultural recognition noting two of the country's top-grossing films are Pacific-led and creative exports are among NZ's top export earners.

### Economic Impact:

Innovation drives high-value export growth and lifts productivity. For Auckland, where creative and tech industries are concentrated, Pacific innovation pathways could unlock billions in future export value.

## 5. Infrastructure for Growth (17%)

Infrastructure was ranked equally with talent and innovation but interpreted broadly by respondents. Enablers include:

- Digital infrastructure to support online global trade
- Export logistics hubs for Pacific SMEs
- Shared manufacturing facilities for value-added production
- Cultural infrastructure to support tourism and creative industries
- Affordable commercial and creative spaces

Stakeholders repeatedly identified infrastructure gaps in freight, processing, studio spaces, and digital access as major bottlenecks preventing Pacific businesses from scaling.

### Economic Impact:

Infrastructure investments have significant multiplier effects. By enabling production, logistics, and innovation, infrastructure reduces costs and creates long-term economic capacity for export growth.



## FROM A PACIFIC BUSINESS EXPORT PERSPECTIVE, WHICH ENABLER WILL GROW NEW ZEALAND'S ECONOMY FASTEST?

Based on the digital and stakeholder engagement data with an economic analysis, the greatest immediate impact will come from two enablers:

### 1. Competitive Business Settings

This is the fastest way to unlock productivity, reduce business costs, and increase SME competitiveness. Removing regulatory friction and making export systems simpler will accelerate Pacific business entry into global markets as well as incentivise businesses to transition from informal to formal export economy.

### 2. Promoting Global Trade and Investment

This is the most direct pathway to increasing NZ's GDP and scaling Pacific enterprises. New Zealand is a small domestic market; export expansion creates the largest and quickest economic uplift, particularly for Auckland's service-based and creative industries.

These pillars directly align with the government's *Going for Growth* objectives and have the strongest economic evidence base for immediate national impact.

## FROM A PACIFIC BUSINESS EXPORT PERSPECTIVE, WHICH ENABLER WILL INCREASE LIVING STANDARDS AND OPPORTUNITIES FOR AUCKLANDERS?

While competitive settings and trade promotion drive fast growth, Talent and Skills and Innovation will have the most profound and sustained impact on living standards, particularly for Pacific communities. They:

- Lift wages
- Improve job quality
- Increase participation in high-growth sectors
- Build intergenerational economic resilience
- Strengthen Māori and Pacific leadership in emerging global industries

Auckland's youthful Pacific population makes this especially critical.

# 06

## Case Studies

Throughout this research we have engaged directly with a wide number of Pacific businesses across various industries, pursuant to the scope of the project that included cultural tourism, health and wellbeing, creative industries and food and beverage.

The following are case studies of three Pacific businesses that we had in depth talanoa with, who are all currently exporting goods and services in the cultural digital, creative industries and hospitality sectors. We intentionally selected Pacific businesses that are in different stages of business maturity and who are in areas of potential export growth for the wider Pacific economy.

The case studies will highlight the drivers for export success, the barriers they face and the opportunities that will allow them to improve their export prospects. We have also aligned the businesses experience and export journeys to the 5 strategic pillars of the *Going for Growth* Strategy, to demonstrate the wider economic implications for Pacific business export capacity and capability.



# MENA

PACIFIC FASHION HOUSE

## Overview

MENA is a leading Samoan family-owned fashion house founded in 2002 by the Loheni family. Known for its bold Polynesian designs and strong heritage branding, the business has grown from a small boutique store into one of Aotearoa New Zealand's most recognised Pacific fashion exporters. Today, a significant portion of MENA's sales come from international customers.

## Export Journey and Performance

### Export Markets

- Australia – the largest and most mature export market. Sales patterns show that the Australian market has the highest repeat customer base.
- United States – the fastest-growing market over the past three financial years, including this financial year, despite recently announced US tariff increases affecting international apparel imports.
- Pacific Region – a smaller export market but has cultural significance for MENA and reinforces their brand authenticity and industry credibility.



## Market Growth Drivers

- Global Pacific diaspora demand for contemporary Pacific Island wear from an established Pacific fashion house.
- Strong marketing that emphasises Pacific identity through effective cultural storytelling (such as the themed annual fashion collections).
- High-value customer orders from the US in particular, who often purchase multiple items online to save on overseas postage and packaging costs.

## Digital Acceleration

MENA's global reach expanded significantly after improving its online and digital capabilities. These improvements included:

- Transitioning its catalogue of products to Shopify. This was more user-friendly for an international market but also allowed the MENA leadership to utilise the client platform capabilities such as customer journey mapping, data analytics and AI-driven insights.
- Regular and engaging social media content, that focused on the cultural story-telling element of collection themes and "raw" behind-the-scenes footage. This was a reminder that authenticity is a competitive export asset.
- Refresh of the website that houses its digital platforms and operates as an effective conduit for customers to purchase goods through Shopify. The website also drives customers to social media content, connecting them with the brand and its story.

## Export Barriers

- High freight and logistics costs, which have been compounded with the US Tariff increases.
- Navigating government export support systems has been challenging for MENA, highlighting opportunities for more tailored pathways for Pacific SMEs.
- Limited access to capital and investment partners which is preventing the physical retail store expansion into markets of high demand such as Australia which would be a doorway to other export markets in Asia and Europe.

## Growth Opportunities

- Untapped potential in the US Pacific diaspora market, where cultural authenticity and brand longevity are ingredients for success.
- Diversification of its brand into homeware, office wear and equipment in its established export markets.
- Collective freight solutions that allow multiple SMEs to export to shared markets but maintain individual business sales and management.

## ALIGNMENT TO MBIE GOING FOR GROWTH PILLARS

### 1. Developing Talent

MENA demonstrates self-taught capability in digital commerce, analytics and content strategy. Its experience highlights the need for structured export capability training, Pacific-led mentoring and digital skills development.

### 2. Competitive Business Settings

High tariffs, freight costs and fragmented compliance pathways disproportionately affect Pacific SMEs. MENA's experience shows that regulatory clarity and targeted support are essential to competing globally.

### 3. Promoting Global Trade and Investment

MENA's growth shows the value of diaspora networks, online platforms, and culturally anchored brand storytelling. These elements can shape a Pacific-specific export strategy for global markets.

### 4. Innovation, Technology and Science

Adoption of Shopify, AI reporting and hybrid manufacturing shows Pacific entrepreneurs are innovating without structured government support. Investment in creative technology and digital export innovation would accelerate sector growth.

### 5. Infrastructure for Growth

Freight, logistics and export data systems remain critical constraints to increasing Pacific exporting capacity and capability. MENA's experience underlines the need for export infrastructure that enables SMEs to consider shared logistical approaches and visibility across national export datasets.



### Concluding Insight

MENA illustrates the strength of Pacific entrepreneurship when cultural identity, digital capability and high-quality production intersect. Its export journey reinforces the pivotal need for Pacific-specific export pathways, inclusion in export data systems, and market penetration support to accelerate the growth of Pacific-led enterprises looking to export into the Pacific and beyond with their goods and services.



FOR THE CULTURE

# MILGY

PACIFIC-LED FMCG, FOOD TECH AND BEVERAGE

## Overview

Drink Da Milgy (DDM) is one of Aotearoa's fastest-scaling Pacific and Māori-owned FMCG (Fast Moving Consumer Goods) brands. It was founded in 2023 by 25-year-old Saion Angi and a couple of his friends, after several years of entrepreneurial trial, failure, and learning. Within one year, DDM went from initial concept to national supermarket shelves to become the first Pacific-owned milk brand to enter New Zealand's mainstream dairy category.

Built on a foundation of resilience, cultural ambition, and generational uplift, the brand represents a new wave of Pacific participation in high-growth consumer markets. DDM's portfolio includes chocolate milk, A2 Premium whole milk powder, protein supplements and alcohol.

DDM Chocolate milk ranked 4th out of 16 other chocolate milk brands in April 2025 in The Spinoff, leaving other high profile chocolate milk brands in its wake such as Lewis Road Creamery Fresh Chocolate Milk (6) and Primo Chocolate Supremo (5).



This Pacific business demonstrates the capability for rapid innovation, brand positioning, and market testing—while navigating significant export constraints and structural inequities.

## Export Journey and Performance

### Chocolate Milk and Dairy Export Development

- The original chocolate milk achieved large domestic success but the 17-day shelf life, limited national distribution and became an export constraint.
- DDM is now investing in research and development to extend the shelf life to 1-2 years for their products to access Japan, Korea, and other premium Asian markets that require a minimum 2-month shelf life for bulk orders.
- As a strategic pivot, DDM developed an A2 premium whole milk powder product (2-year shelf life) to enter the exporting market sooner. This product is currently being exported to China.

### Science-backed product redevelopment

DDM's protein milk product was reformulated with guidance from food scientists and researchers to attain food and beverage quality assurance standards.

This scientific approach signals how evidence-based, scalable manufacturing is a business priority - an essential component for export compliance and international competitiveness.

### China Market Entry

The A2 premium whole milk powder product has been well-received in Guiyang, China, but constraints into the market include:

- Wholesaler pressure for better pricing and extended terms due to the intense competition of the overseas milk powder industry.
- Limited consumer awareness. This has amplified the need for investment into an intentional marketing strategy to build Chinese consumer awareness.

### Export Barriers

- Capital investment into research and development to improve the shelf-life of DDM products, which is crucial for accessing high-value markets such as China and Japan.
- Limited visibility and engagement from economic development agencies has led to high reliance on personal networks and the wider Pacific diaspora to gain traction in overseas markets - which is how DDM entered the China market (a connection with another Pacific business based in mainland China).

## Growth Opportunities

- Adequate research and development that allows for scaling powdered dairy products for exports into China, Japan and Korea. This innovation will increase shelf-life and improve packaging.
- Leverage off the positive momentum the NZ Dairy industry has globally and align products to certification standards that are recognised and accepted in the Asian market.
- Embracing failure literacy as part of the research and development process for testing goods and services for export. Saion represents the new generation of young Pacific entrepreneurs who move at pace and fail or succeed fast. Either way, they apply learnings immediately to their current projects or set up new ventures.
- This approach builds confidence, redefines failure as part of the entrepreneurship journey and normalises ambition - this itself is an economic enabler.



## ALIGNMENT TO MBIE GOING FOR GROWTH PILLARS

### 1. Developing Talent

DDM's youthful leadership is refreshing and shows what can be achieved with investment into young entrepreneurs who embrace risk and whose innovation is driven by necessity and a desire to take their place on the world stage of business.

### 2. Competitive Business Settings

DDM's injection into the competitive FMCG brands market is symbolically and systemically important for Pacific representation. This is because they are already aware of the existing barriers and lack of Pacific enterprises, so initiatives that provide regulatory guidance, certification support and investment opportunities will incentivise businesses like DDM to stay the course and compete in a heavily regulated space.

### 3. Promoting Global Trade and Investment

DDM's scaling speed from concept to shelf of its products shows how informal connections through the Pacific diaspora network is a viable pathway into export markets and can allow for brand positioning and leveraging where a NZ presence already exists.

### 4. Innovation, Technology and Science

DDM's diversification and agility with its product line is encouraging, especially in a volatile market. Prioritising research and development is crucial to its success, ensuring products are constantly improving to gain market edge.

### 5. Infrastructure for Growth

DDM's success, despite limited engagement with EDAs and other business support organisations, highlights the potential acceleration of its export capacity. Ready access to established supply chains and distribution networks would amplify its export growth.

### Concluding Insight

DDM is a beacon for many Pacific youth who have a business idea but may not know how to monetise it into a good or service that has the export potential. With Pacific youth making up a significant proportion of Auckland's future workforce, DDM's strength-based approach to business, grounded in Pacific values, is a positive projection of what is to come in the future.





## INDIGENOUS EDU-TECH AND LANGUAGE EXPORT

### Overview

Pacific Kids' Learning (PKL) is a mother-founded, Pacific-led Indigenous edu-tech enterprise creating bilingual and culturally grounded digital content for Pacific children and families. Established in 2014 by Theresa Tupuola-Sorenson (education/culture), Tatiana Marich (business/finance) and Evo Leota-Tupou (technology), PKL addresses the absence of authentic Pacific children's media and the accelerating risk of language loss.

Operating a fully digital business from Aotearoa, PKL employs a seven-person core team and a wider network of Pacific creatives, educators and cultural knowledge holders across the Pacific region. Their mission is to "fill the digital space with culturally affirming, mana-enhancing content for Pacific youth" while upholding Indigenous IP, data sovereignty, and cultural integrity.

### Export Journey and Performance

PKL's flagship product—the Pacific Digital Library (PDL)—now hosts 320+ animated stories, songs and dances in 11 Pacific languages plus English. The PDL operates as a subscription and sponsored-access platform aligned to Early Childhood Education and primary curricula, making it directly useful for educators worldwide.

PKL's reach is global:

- 7.9 million YouTube views, 18,000 subscribers, and over 50,000 weekly views of their content
- Over 2,200 PDL registered users
- Users are in over 25 countries, including Australia, US, Hawai'i, Tonga, Samoa, Papua New Guinea, Fiji and the wider Pacific diaspora
- First Australian school subscription secured (New South Wales), with activations in Queensland and NSW indicating export-capable market penetration

PKL has presented and showcased its digital tools internationally—Hawai'i, Australia, the Pacific and the US—responding to demand for culturally grounded digital learning tools and Virtual Reality experiences.

A recent PKL Impact Evaluation Report shows positive results with 80-90% of teachers "strongly agreed" that PKL strengthens language, identity and wellbeing, and 98% rated content quality as "high" or "very high".



## Market Growth Drivers

PKL's expansion is propelled by several converging factors:

1. Global demand for Indigenous language revitalisation

Pacific diaspora communities across Australia, the US and the Pacific increasingly seek culturally authentic educational tools, especially digital-first content for young children.

2. A weightless product

PKL's digital products travel globally with no freight, no customs barriers, and no physical constraints—making the enterprise highly exportable and scalable.

3. Unique cultural-IP value proposition

PKL's platform serves as a Pacific-owned “Spotify for stories,” where families retain IP rights. This model resonates strongly with educators, donors and overseas governments seeking ethical, community-rooted solutions.

4. Demonstrated educational impact

Evidence from PKL's impact report shows high engagement, improved teacher capability and strong learner outcomes—making the product attractive to schools, governments and donor agencies.

5. Regional partnerships and cultural trust

PKL has built credibility with cultural elders, creators and educators, enabling content that is relevant, innovative and culturally authenticated.

## Digital Acceleration

PKL leverages a multi-platform digital ecosystem:

- Pacific Digital Library (PDL) as the primary subscription platform
- YouTube, Facebook, Instagram and Spotify for reach and engagement
- Virtual Reality storytelling pilots and STEAM-linked animations
- Live workshops and red-carpet events to deepen educator and whānau engagement

Its “village-centred production” methodology blends technology with Indigenous knowledge systems. Scripts, visuals and language go through community cultural approval processes, ensuring authenticity and intergenerational integrity.

This model not only differentiates PKL in global edu-tech markets but also positions Aotearoa as a hub for Indigenous Pacific digital innovation.

## Export Barriers

Despite strong international traction, PKL faces structural constraints typical for Pacific social enterprises:

Limited access to multi-year domestic funding

- New Zealand's funding landscape often offers short cycles, high compliance costs and re-tendering processes that de-stabilise Pacific-led enterprises—even when they outperform in their contracted key performance Indicators.

Misalignment in Australian market categories

- Pacific education resources are often classified under broader “multicultural” categories in Australia, reducing targeted investment and visibility.

Cultural-IP vulnerability

- Mainstream edu-tech markets have limited understanding of Indigenous data sovereignty, requiring PKL to build parallel systems to protect cultural content.

Limited marketing and sales capacity

- Without a dedicated commercial team, PKL's international expansion is not keeping up with demand.

Capability gaps in partner institutions

- PKL often has to step into cultural advisory roles because universities, government ministries and organisations lack Pacific cultural literacy—adding additional labour and cost.



### Growth Opportunities

Scaling school subscriptions (Australia, US, Pacific)

- High-pacific-population regions (Queensland, NSW, California, Hawai'i) represent immediate and receptive markets.

Government and donor-funded language revitalisation projects

- Digital language revitalisation is a growing priority, with demand from Tuvalu, Cook Islands, Tonga, American Sāmoa and regional institutions.

Licensing, co-production and IP partnerships

- PKL's family-owned-IP model is exportable into book publishing, animation series, STEAM curricula, virtual reality libraries and international co-productions.

In-country localisation with local partners

- Partnering with in-country schools and cultural organisations creates sustainable entry pathways while preserving PKL's ownership of IP and digital infrastructure.

Commercial evaluation and advisory services

- International donors increasingly seek robust business-case development for digital education investments—an area PKL already has strong capability in

## ALIGNMENT TO MBIE GOING FOR GROWTH PILLARS

### 1. Developing Talent

PKL builds a Pacific STEAM talent pipeline through animation workshops, virtual reality learning, and youth-facing creative technology programmes. Its early-learning, bilingual literacy model develops future coders, designers and digital workers. By converting hobbyists into salaried creatives, PKL shows that culturally grounded early education is essential to long-term Pacific workforce capability.

### 2. Competitive Business Settings

PKL faces fragmented domestic funding, re-tendering of its own programmes, and procurement systems that undervalue Indigenous IP. In Australia, Pacific work is often misclassified as “multicultural,” reducing targeted investment. These barriers show the need for procurement and funding settings that reward proven Pacific innovators and provide stable, multi-year contracts.

### 3. Promoting Global Trade and Investment

PKL exports digitally into 25+ countries through subscriptions, workshops and partnerships, demonstrating a borderless, low-logistics export model. International collaborations and advisory work in Tuvalu, Cook Islands and Tonga show strong demand for Pacific-led digital education. PKL illustrates how IP, pedagogy and services function as high-value Pacific export products.

### 4. Innovation, Technology and Science

PKL leads Indigenous digital innovation through virtual reality stories, motion-capture dance, STEAM resources and the Pacific Digital Library. Its IP and data sovereignty model protects cultural knowledge in an AI era. PKL demonstrates that Pacific enterprises can design advanced digital infrastructure and should be recognised within New Zealand’s innovation and science system.

### 5. Infrastructure for Growth

PKL has created vital soft infrastructure for Pacific language revitalisation through its digital library and impact systems. Growth is constrained by limited capital, small operational capacity and uneven access to donor pipelines. Its model shows digital platforms and IP systems must be treated as core export infrastructure within national investment agendas.

### Concluding Insight

PKL demonstrates how Indigenous digital innovation, cultural intellectual property protection, and global demand for Pacific languages converge into a scalable export model, proving Pacific-led enterprises can drive growth, capability, and international competitiveness.



# 07

# Recommendations

The recommendations presented here reflect a comprehensive synthesis of all evidence gathered throughout the Auckland Pacific Business Export and Trade Research. Drawing on quantitative analysis from *Quantifying the Pacific Economy Report*, stakeholder talanoa with national bodies, export agencies, Pacific businesses case studies, and digital survey findings, the research reveals a business ecosystem characterised by innovation, cultural distinctiveness, and strong growth aspiration.

Yet Pacific enterprises continue to face structural and operational barriers including high logistics costs, complex compliance and accreditation processes, limited access to market intelligence, under-recognition of informal export activity, and significant data visibility gaps. Pacific businesses are disproportionately located in Auckland, the heart of the Pacific economy, but remain under-represented in export activity despite clear opportunities in creative industries, food and beverage value-adding, cultural tourism, digital content, health and wellbeing, and technology.

Stakeholders reinforced the urgency of recognising the informal-to-formal export spectrum, embedding Pacific leadership in export governance, and strengthening pathways into national and international trade systems. Literature review findings further show global consumer shifts toward authenticity, cultural value, ethical production, and experiential tourism, areas where Pacific enterprises hold a competitive advantage.

When aligned with the government's *Going for Growth* pillars and Ministry for Pacific People's Delivering for Pacific Communities 2025 Strategy, the evidence signals the need for tailored, Pacific-led interventions that strengthen workforce capability, enhance competitive settings, diversify export markets, accelerate innovation, and modernise infrastructure and data systems. These recommendations therefore provide a strategic, future-focused platform to unlock Pacific export potential and position Pacific enterprise as a driver of Auckland's and New Zealand's economic prosperity.



The following 10 recommendations are proposed:

**1. Establish a Pacific Export Accelerator Programme (PEAP)**

A dedicated programme offering export readiness diagnostics, one-on-one coaching, accreditation support, sector-specific training, and Pacific navigator roles.

**2. Develop a Pacific Export Data and Insights Platform (PEDIP)**

A centralised data system tracking Pacific business activity, regional clusters, export trends, and sector performance, incorporating Indigenous data sovereignty principles.

**3. Produce Sector-Specific Pacific Market Intelligence Packs**

Tailored intelligence for creative industries, cultural tourism, health and wellbeing, technology, and food and beverage manufacturing, including compliance guidance and consumer trends.

**4. Strengthen Pacific Trade Pathways and International Market Access**

Structured regional pathways linking Pacific SMEs to Australia, the Pacific, Asia, and diaspora markets through trade missions, bilateral partnerships, and agency collaboration.

**5. Remove Structural Barriers Through Coordinated Policy Advocacy**

Joint advocacy addressing high freight costs, compliance bottlenecks, limited export capital, and distribution practices, including exploration of subsidised freight and harmonised accreditation.

**6. Establish a Pacific Export Champions and Case Study Platform**

A curated set of case studies showcasing Pacific export success to inspire confidence, visibility, and sector learning.

**7. Create a Pacific Business Export Readiness Toolkit**

A practical, culturally grounded toolkit offering templates, compliance guides, logistics maps, funding pathways, and cultural-IP protections.

**8. Connect with existing Pacific business Support Hubs in Auckland**

Physical or digital hubs in South, West, or Central Auckland providing navigation support, workshops, compliance clinics, and connections to trade agencies.

**9. Strengthen Ties with Creative, Cultural and Digital Industry Bodies**

Deepened partnerships with Creative NZ, NZ Film Commission, Pacific creatives, gaming and digital industries to scale Pacific intellectual property into global markets.

**10. Establish formalised relationships with iwi and mana whenua focused on indigenous trade and economic development**

NZ based Pacific business councils to enter into MOU's or trade agreements with iwi and mana whenua that integrate principles of indigenous trade and economic development that fosters reciprocity and partnership. This allows for representation at trade missions, economic development forums and investment symposiums.



# 08

# Conclusion

This research confirms that Auckland's Pacific business ecosystem is an invaluable economic asset that is dynamic, culturally rich, and positioned for high-growth export activity across multiple sectors. Pacific enterprises however still continue to navigate systemic barriers that limit their ability to scale, diversify, and participate fully in international trade.

The findings highlight a clear mandate: targeted, Pacific-led interventions are required to strengthen capabilities, address structural inequities, modernise data systems, and expand access to global opportunities.

By aligning the insights from this research with the government's *Going for Growth* strategy, and with Pacific economic priorities articulated by the Ministry for Pacific Peoples and Pacific communities themselves, a compelling future emerges - one where Pacific exporters contribute significantly to New Zealand's high-value export growth; where Indigenous data and cultural intellectual property are protected and leveraged; where Pacific talent, creativity, and innovation are recognised as national strengths; and where Auckland, as the heart of the Pacific economy, plays a pivotal role in shaping a more inclusive and globally connected economic landscape.

If the recommendations in this report are considered with investment, partnership and Pacific leadership at its core, Aotearoa will be better positioned to unlock the full economic potential of Pacific enterprise that will drive prosperity not only for Pacific communities but for the nation as a whole.



## 09

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## II. Engagement

A total of 73 engagements were undertaken for this research project.

These engagements included meetings, events and business to business talanoa.

Organisations included:

- Auckland Chamber of Commerce
- Cook Islands Development Association of NZ (CIDANZ)
- Creative NZ
- Ministry for Pacific Peoples
- NZ Film Commission/Te Taurapa Tūhono
- New Zealand Fiji Business Council
- New Zealand Ministry of Foreign Affairs & Trade- Pacific Connections
- New Zealand Pacific Business Council
- New Zealand Tonga Business Council
- New Zealand Trade & Enterprise/Te Taurapa Tuhono (NZTE)
- Stats NZ
- Sky TV
- Trade and Investment Queensland

### **Digital Survey Outline:**

A public online survey was created for Pacific businesses to engage and provide feedback. This was made available to Pacific business associations including the Pacific Business Trust and the various NZ Pacific Business Councils.

The survey had a total of 14 questions, including 4 demographic questions for baseline profile analysis and the remaining questions covered the 5 research objectives.

The survey consisted of the following sections:

1. Introduction and demographics - Page 1
2. Identifying the Evidence Gap- Page 2
3. Alignment with Going for Growth - Page 3
4. Understanding the Pacific Business Export landscape - Page 4
5. Discovering Untapped Export Potential- Page 5
6. Identifying Barriers & Hindrances - Page 6

**SURVEY QUESTIONS****CONSENT QUESTION****1. Select the industry or sector you trade in?**

Cultural Tourism (experiences centred on Pacific heritage), Language, Arts, Performance Cultural practices, Other)

Creative Industries

Drop down: Film & Media, Screen Production, Digital content, Music, Fashion, Art & design, Other

Hospitality (including food & beverage)

Drop down: Pacific inspired food/cuisine, beverage, Pacific inspired beverage, Accommodation, Catering, Other

Health & Wellbeing

Drop down: Natural Remedies, traditional knowledge, Pacific Wellness Products, Cosmetics

Other (please specify): \_\_\_\_\_

**2. What is your ownership model?**

100% Pacific-owned

Majority Pacific-owned (50%+) by people of Pacific heritage

Non-Pacific but serves Pacific markets

Other

**3. Where is your business located in Auckland?**

Central  North  South  East  West

Other (please specify below): \_\_\_\_\_

**4. What is the majority of your staff (not including director(s)):**

Full timers

Part timers

Contractors

Volunteers

**5. Do you think Pacific businesses are well represented in national export discussions, data and reporting?**

Yes

No

Somewhat

**6. What information would support your export goals and aspirations?**

Success stories

Regulation and compliance

Accreditation and quality assurance standards

Market research by industry

Investment opportunities

Trade Missions

Other: \_\_\_\_\_

**7. Which one of these areas do you believe will grow the NZ economy faster, increase living standards and increase opportunities for all New Zealanders?**

Talent & skills

Competitive business settings

Promoting global trade & investment

Innovation technology & science

Infrastructure for growth

**8. Describe your business stage right now?**

New or emerging (0-2 years)

Growing and building networks (3-5 years)

Established and expanding (6-10 years)

Mature and exporting (10+ years)

**9. Have you exported your products or services before?**

Yes  No  Not yet, but planning to

**10. What is the strongest overseas market for your products/services?**

- Pacific region
- Australia
- Asia
- North America
- Europe
- Digital markets

**11. What makes your business unique or different from others in your industry?**

- Pacific cultural identity
- Creative design or storytelling
- Sustainable or ethical practices
- Other please specify \_\_\_\_\_

**12. Which new markets or industries would you like to explore in the next 3-5 years?**

- Cultural Tourism (experiences centred on Pacific heritage), Language, Arts, Performance Cultural practices, Other)
  - Drop down: Film & Media, Screen Production, Digital content, Music, Fashion, Art & design, Other
- Creative Industries
  - Drop down: Film & Media, Screen Production, Digital content, Music, Fashion, Art & design, Other
- Hospitality (including food & beverage)
  - Drop down: Pacific inspired food/cuisine, beverage, Pacific inspired beverage, Accommodation, Catering, Other
- Health & Wellbeing
  - Drop down: Natural Remedies, traditional knowledge, Pacific Wellness Products, Cosmetics
- Other (please specify): \_\_\_\_\_

**13. What are the three biggest challenges/barriers your business faces when trying to export?**

- Access to international networks
- High logistics costs
- Reliable supply chain network
- Understanding international accreditation standards
- Navigating international compliance and regulation
- Awareness of government international trade agreements
- Awareness of organisations assisting in export support services
- Other: \_\_\_\_\_

Thank you for participating in this survey. Is there anything else that you would like to share?

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## III. Linking Going for Growth Pillars to Research Framework

The research framework adapts the government's *Going for Growth* pillars into a Pacific-centred export and trade context. The table below summarises how each pillar informs the inquiry focus:

### Linking Going for Growth Pillars to Research Framework

The research framework adapts the government's *Going for Growth* pillars into a Pacific-centred export and trade context. The table below summarises how each pillar informs the inquiry focus:

| Going for Growth Pillar                | Government Intent  | Research Framework Link   |
|--|--|---|
| 1. Developing Talent                   | Build skills and leadership capability for future workforce needs. | Examining <b>business readiness (capability &amp; capacity)</b> among Pacific entrepreneurs to engage in exports. Identifies where talent development (training, mentoring, succession) is required to scale Pacific-led enterprises.                 |
| 2. Competitive Business Settings       | Ensure regulatory, financial, and market settings support growth.  | Investigating <b>barriers and hindrances</b> for Pacific exporters (accreditation, scale, compliance, policy). Provides evidence on what settings currently constrain Pacific businesses and how to create a more competitive, inclusive environment. |
| 3. Promoting Global Trade & Investment | Increase international connections, FDI, and trade flows.          | Mapping the <b>status of Pacific exports</b> —what is being exported, by whom, and at what value—and identifying new <b>global market connections</b> (diaspora markets, regional networks, partnerships).  |
| 4. Innovation, Technology & Science    | Lift productivity and diversify the economy through innovation.    | Highlighting <b>untapped export potential</b> in cultural tourism, creative industries (film, media, digital), food & beverage, and Pacific health & wellbeing products. These sectors embody Pacific innovation and IP with strong export promise.   |
| 5. Infrastructure for Growth           | Build enabling infrastructure to support business expansion.       | Assessing <b>scale, supply chains, and export pathways</b> for Pacific businesses. Identifies where investment in logistics, digital platforms, and distribution networks is needed to unlock Pacific export growth.                                  |





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