

PHAMA

Pacific Horticultural & Agricultural Market Access Program

An Australian Government initiative

Technical Report Synopses

Below are a series of 16 short synopses which highlight a range of PHAMA Technical Reports across the countries where the Program operates. Please view our website phama.com.au to download the technical reports below or search for other technical reports and factsheets in our [resources](#).

| Country | Technical Report | Synopsis |
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| Tonga | Tonga Gender Analysis | This report investigates the gender aspects of value chains in Tongatapu – particularly in agriculture and handicrafts. The report identifies there is potential to expand women’s economic potential in handicrafts production and agriculture. The main systemic constraints for women to move from subsistence farming into growing crops for export are access to land and access to finance. Social constraints also exist as women and men’s roles in farming are demarcated by socially acceptable types of work tasks. The report provides 21 recommendations to improve women’s economic empowerment in cropping and handicrafts, along themes of: program governance/institutional; loan/grant schemes; budget allocation; gender expertise and training; further research; monitoring and evaluation; support for country-led initiatives; and program design and risk management. |
| Fiji | Fiji Ginger – Nematode Identification Training Program | The export of fresh ginger from Fiji is an important source of income for farmers, workers involved in its production and processing, and exporters. However, expansion into the Australian market is hampered by concerns over the possible presence of nematodes of quarantine concern to Australia. This December 2015 report provides details of a PHAMA funded training program delivered by New Zealand’s Landcare Research to build the capacity of the Fijian Ministry of Agriculture and the Biosecurity Authority of Fiji in the field sampling and identification of nematodes from ginger production sites. Results confirmed that none of the nematodes identified are of biosecurity concern to Australia. For example, no evidence of the burrowing nematode, <i>Radopholus similis</i> , was found. |

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| Solomon Islands | New Zealand Timber Industry Consultations | Forest products—mostly unprocessed round logs—are the largest export industry in SI. As the current rate of harvest is unsustainable, SI is focussed on diversifying and value-adding by more local processing of timber. This report presents the outcomes of meetings in 2015 between representatives SI timber industry representatives and the New Zealand Imported Tropical Timber Group (ITTG). The ITTG confirmed that independent third party legality assurance will become a minimum standard in NZ for timber imports and that to access NZ markets SI must demonstrate progress towards assurance in the next 1-2 years. SI doesn't currently have capacity to carry out third party legality verification, and the ITTG agreed to collaborate with SI to develop this by the end of 2017, including by establishing a timber industry association to which PHAMA could potentially provide initial secretariat support. |
| Solomon Islands | Industry Working Group Sustainability, Solomon Islands | This (2015) report presents models for future operation of five SI Industry Working Groups –coconut, cocoa, horticulture, timber and tuna – for their sustainability post-PHAMA (mid-2017). It draws on workshops with IWGs and background papers. In examining each IWG's 'strategic imperative', the report recommends that IWGs can remain relevant and sustainable post-PHAMA by broadening their scope (advisory, consultation and representational) to include planning, and addressing supply and finance barriers. IWGs require financial and technical resourcing for a secretariat which could establish institutional structures, funding mechanisms and resolve IWG legal status and relationships. To complete 'roadmaps' to the end of the program, IWGs need to define and articulate their purpose to government and industry through stronger engagement, and undertake capacity building activities for the Export Industry Development Officer, IWG members, and public sector. Three IWGs will receive funding from the Rural Development Program, and timber and tuna funding arrangements need to be secured/finalised |
| Solomon Islands | Development of work plan for horticulture Industry Working Group | Most horticultural produce in the SI is used for subsistence or sold at local markets. There is potential to expand the sector for export provided constraints can be overcome including variable quality and inconsistent production, and limited storage/transport infrastructure. Building on previous work (SOLS 19, SOLS 13) and consultations/workshops with current and future members of the Horticulture Industry Working Group (IWG) and other government and donor stakeholders, this report presents a draft 2015-2017 work-plan for the IWG covering export development opportunities and capacity building needs. Through the consultations, IWG indicated they would like continued support from PHAMA, particularly in secretariat and technical support, and assisting Biosecurity SI to progress the bilateral agreement with PNG on horticultural and agricultural exports. |

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| Solomon Islands | Timber export market mission | Forestry is the largest export industry in SI. While there continues to be strong overseas demand for SI timber, the current rate of harvest is unsustainable. This 2015 market mission builds on previous PHAMA work, and sent SI government officers to key timber markets in Australia and NZ to further their market understanding. Currently SI exports mostly rough sawn, 'green' (un-dried) round logs, but importers indicated they would pay a premium for more highly-processed timber, and this could be achieved by drying logs in SI before export. This would be especially important for selling alternate timber species. The mission identified three priorities: 1. build SI capacity in third party legality verification which is a market requirement in NZ, and eventually work towards FSC certification; 2. develop a national system for timber grading; 3. improve processing methods to ensure more consistent timber quality and presentation. |
| Solomon Islands | Cocoa marketing study (Stage II) | Australian and South-east Asian markets have strong demand for smoke-taint free, well-fermented, well-dried cocoa beans. This 2015 report is the second stage of work begun in mid-2014 (TR73), and looks at ways to improve income for cocoa growers in SI. Despite rising international cocoa prices, three 'clusters' of issues keep farm-gate prices low and prevent cocoa from being a profitable option for SI farmers, and one they see as worthwhile investing in. Addressing quality issues including smoke taint, and improving supply chain actors' understanding of market dynamics would improve farmers' negotiating power and help to secure higher prices. Increasing exporters' access to working capital would improve their ability to discriminate on quality when making buying/selling decisions. The quality of cocoa can also be improved, particularly to eliminate smoke taint, by using a better solar dryer design. |
| Regional | Framework for MAWG and IWG Sustainability Roadmaps | This report was written in 2015 to support the sustainability of PHAMA-established Market Access Working Groups (MAWG) and Industry Working Groups (IWG) in the five Pacific Island Countries where they operate, beyond the life of the PHAMA program which is currently scheduled for mid 2017. It suggests a framework structure that MAWGs and IWGs can use to generate discussion around their group's future, and to formulate their 'sustainability roadmaps'. The framework covers themes for the groups to consider including: vision, legal structure, scope, potential government and donor recognition, administrative management and internal leadership. Each road map should identify actions to be taken in the next 3, 6-12, and 12-24 months, and should outline early on the scope of the group and justify the need for its continuation. |

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| Samoa | New Access for Samoan Taro to Australia | Taro Leaf Blight (TLB) describes the effects of the pathogen <i>Phytophthora colocasiae</i> on susceptible varieties of taro, causing leaf browning and later rapid and complete defoliation, and sometimes corm rot. TLB is present in Samoa but with the development of resistant cultivars ('Samoa 1' and 'Samoa 2'), limited exports of fresh taro are occurring, to New Zealand and the USA. This report proposes a TLB research and development program to help Samoan fresh taro meet Australian Biosecurity requirements. It outlines how such a program could be developed, noting there is no certainty that acceptable measures could be developed, and that it will likely take several years and require large quantities of taro and the co-operation of knowledgeable local experts and growers. |
| Solomon Islands | Cocoa Market Study | Cocoa is one of Solomon Islands' main exports, with exports of around 4,500 tonnes of in 2015. This 2014 market analysis report examines market opportunities for SI cocoa, and proposes ways to improve export returns. It recommends improving the quality of cocoa to enable access to higher-grade, higher-price, cocoa markets. SI cocoa is currently lower grade due to smoke taint as a result of poor drying techniques. To address this, the report recommends trialing new cocoa drying technologies and methods (including sun drying), introducing quality control inspections and ensuring storage and transport methods maintain bean quality. The report also recommends improving SI supply chain actors' understanding of market dynamics so as to improve their negotiating power and secure higher prices. Building links between cocoa exporters and SI commercial banks is also recommended, to improve exporters' access to trade finance. |
| Solomon Islands | Development of testing capacity to support fish exports in Solomon Islands (stage 2) | Whole and processed tuna is the second largest export industry in SI. This project (the second stage of SOLS12) examines what investment is needed to build the capacity of the SI National Public Health Laboratory to achieve ISO 17025 accreditation within three years, and therefore able to carry out food safety testing for continued market access. As well as fixing problems of water and electricity supply and purchasing more equipment, investment is needed to boost staffing levels and improve skills in lab techniques. Methodologies contained in the laboratory's Quality Manual, as well as recordkeeping and procurement procedures, need to be reviewed and updated. The estimated cost to build required capacity to achieve accreditation is AUD\$240K. To remain economically viable the lab needs to review its fee structure and attract more commercial customers. It will also need financial support from the SI government. |

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| Vanuatu | Market access development for bee products from Vanuatu | This review builds on the work of VAN10 (Stage 1), and recommends ways to strengthen Vanuatu's biosecurity protection measures for bees and honey products to access target markets of New Zealand and New Caledonia. The review shows that Biosecurity Vanuatu already meets existing New Caledonia import requirements and, provided it implements the disease surveillance plan proposed in this review, could also make a market access submission for New Zealand. It is not economically viable at this stage to undertake the residue sampling required to access EU markets. The review found Vanuatu's legislative framework is adequate to protect against the introduction of new honey bee pests and diseases. As part of this review, staff from Biosecurity Vanuatu received training in Vanuatu and NZ in the identification and diagnosis of honey bee diseases and pests. |
| Fiji | Development of a Yaqona Quality Manual: Survey of Varieties and Yaqona grown in Fiji | Kava or "yaqona" is an important cash crop in Fiji. Consumed locally as a drink for ceremonial and social purposes, it is also exported to New Zealand, the USA and within the Pacific region. Over 2011-2013, the average annual value of yaqona exports was approximately FJD6.2 million. This report provides details of a 2014 survey of kava varieties across the main islands of Fiji. The survey found that Fiji has 13 known varieties of 'noble' (desirable for export) kava. Variety descriptors were developed for each, as well as a draft identification key using recognised botanical characteristics. The information on varieties is to be used in the development of a Fiji yaqona quality manual for use by farmers, exporters and government officials. |
| Fiji | Improved system for managing biosecurity risks associated with horticultural seed imports | Fiji's horticulture industry relies heavily on imported seed to produce fruit and vegetables for both domestic and export markets, but the imported seed is a potential biosecurity risk. This 2013 study examined Fiji's seed import policy for its effectiveness in managing the risk of pests from imported seeds without overly restricting supply. Twenty-two seed types were examined, including fruit, vegetables, herbs and tobacco. The report recommends some updates to the <i>General Conditions</i> for all horticultural seed imports, and finds that herb seeds do not pose a risk and should be allowed under the updated <i>General Conditions</i> . It further recommends papaya seeds be assessed on a case-by-case basis by Biosecurity Authority of Fiji, and that <i>Specific Conditions</i> be applied to tobacco, tomato and Brassica seed imports. A framework to accredit seed suppliers was also developed, and several approved seed treatments and suppliers agreed upon. |
| Tonga | Feasibility study to determine infrastructure requirements | This 2013 study assessed the adequacy of existing horticultural processing and marketing infrastructure in Tonga for current and projected future exports. Tonga has well established export industries in squash and |

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| | for processing and packaging horticultural products for export | watermelon (3500 tonnes/annum), root crops (3600 tonnes/annum) and coconuts (1,100tonnes/annum). Mostly these go to New Zealand, but also to Australia, Japan and the USA. Opportunities exist to expand export volumes to these markets, particularly in root crops, watermelon, and air-freighted fresh fruit and vegetables. However, such expansion is constrained by inadequate processing facilities, and for fresh fruit and vegetables, a lack of market access protocols. The report recommends that two processing facilities on Tongatapu be upgraded, and two new decentralized facilities be built. All facilities would preferably be owned and operated by the exporters. |
| Solomon Islands | Feasibility Study on Developing Exports of Selected Products from Solomon Islands to Australia | Australia's east coast is a large, affluent consumer market, where many commodity imports are cheaper than domestic products. However, high regulatory requirements make it a difficult market to access. This 2012 feasibility study assessed the export potential of 11 horticultural commodities from the Solomon Islands (SI) to Australia: banana, cassava, coconut, pineapple, taro, coffee, honey, canarium vanilla, chilli and eggplant. The study found that only coconuts and chillies would be viable for export, as others would be non-viable due to pest and disease management issues, strong competition in Australia, limited infrastructure and other supply side constraints. Coconuts are already established for export and are a high volume, low risk commodity. The report identified how volumes could be increased and efficiency improved through better transport and storage logistics. It also recommended diversification into fresh drinking nuts. Air freight of chillies during the Brisbane winter months, when there is a seasonal price premium, was identified as an opportunity. However, there is currently no market access protocol for SI chillies into Australia and significant investment would be required to establish the chilli value chain. |

