

Information brief



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Imports of rice and wheat flour in selected Pacific Island countries and territories

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A. Introduction

Rice and wheat flour are important food items imported by Pacific Island countries and territories (PICTs).

This information brief explores the levels and trends of imports of these items in eight PICTs where data were available, namely Cook Islands, Fiji, French Polynesia, Kiribati, Papua New Guinea (PNG), Samoa, Tonga and Tuvalu.

Rice and wheat flour classified according to the Pacific Harmonized Commodity Description and Coding System 2017 (PACHS17), as illustrated in Table 1, was used for the analysis. This ensured that all types of rice (e.g. long grain and broken) in every country was selected for the study. Use of the PACHS17 also allowed the analysis of the imports of rice be calculated as a per cent of total *cereals* imported and wheat flour as a per cent of all *the products* of the milling industry² imported, highlighting the significance of the imports of these commodities compared to all other commodities in their respective PACHS17 categories.

Table 1: Classification of rice and wheat flour in the PACHS17

PACHS ₁₇	Description	PACHS ₁₇	Description
Chapter 10	Cereals	Chapter 11	Products of the milling industry; malt; starches; inulin; wheat gluten
Heading:1006	Rice	Heading:1101	Wheat or meslin flour ³

For details on other commodities included in Chapter 10, refer to Appendix 1 and for those in Chapter 11, Appendix 2.

Section B provides a regional perspective of the imports of rice and wheat flour based on data reported by the eight countries. According to SPC's 2018 and 2020 midyear population estimates (Appendix 3) it was estimated

¹ PACHS₁₇ has been derived from the World Customs Organization's multipurpose international goods nomenclature.

² The milling industry also imports malt; starches; inulin; wheat gluten.

³ Includes sharps and flour.

that these countries cover around 86 per cent of the Pacific⁴ region's population. The data are therefore considered to be a reasonable regional overview of import trends for these commodities.

Section C provides individual country perspectives on the value of imports of rice and wheat flour and their percentage contribution to the total imports in their respective PACHS₁₇ categories. The analysis further looks at the trends in the imports of the two commodities and between the two of them the share of imports of each. It also looks at the per capita imports of both commodities for 2018 and 2020. The reasons for the fluctuations in the imports of rice and wheat flour could not be provided by the countries but are assumed to be mostly related to domestic demand in the countries driven by conditions prevailing in the producing countries, domestic and foreign prices and exchange rates, weather conditions and catastrophic events. Each country analysis concludes with a table that provides data, including the value of imports in national currencies, of the two commodities.

Section D provides a brief summary of the findings discussed in the paper and the conclusion.

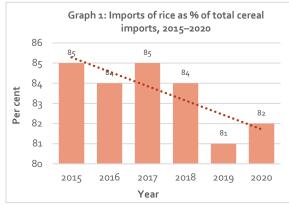
The paper also includes three appendices. Appendix 1 supplies details of the commodities classified in Chapter 10 under Cereals in the PACHS17. Appendix 2 supplies details of the commodities classified in Chapter 11 under Products of the milling industry; malt; starches; inulin; wheat gluten in the PACHS17. Appendix 3 supplies information on all PICTs midyear population estimate; as well as land area, population density and average annual growth rate.

Note: totals in this brief are subject to rounding errors and data for more recent years are provisional and subject to revisions.

⁴ Excludes Australia and New Zealand.

B. Regional analysis

The study targeted the analysis of data for the 11-year period, 2010–2020. Unfortunately, Cook Islands was unable to provide data prior to 2015; therefore, for the regional analysis, data for the years 2015–2020 have been used. Further it should be noted that only imports of rice as a per cent of total cereal imports and imports of wheat flour as a per cent of total milling industry imports are shown.

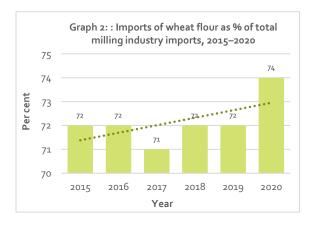


cent in 2015 to 82 per cent in 2020.

Rice imports

Graph 1 shows that rice was the main cereal imported by PICTs from 2015 to 2020. The 6-year average (2015–2020) shows that rice amounted to 84 per cent of the total value of cereals imported.

Imports of rice as a share of the total cereals showed little year-to-year variation during the period: it was highest at 85 per cent in 2015 and 2017 and lowest at 81 per cent in 2019. Overall, rice imports as a proportion of the total show a declining trend; a decline of 3 percentage points from 85 per

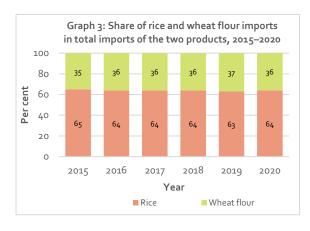


Wheat flour imports

Graph 2 shows that wheat flour was the main product of the milling industry imported by PICTs from 2015 to 2020. The 6-year (2015–2020) average shows that imports of wheat flour amounted to 72 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a share of total milling industry showed little year-to-year variation during the period: it was highest at 74 per cent in 2020 and lowest at 71 per cent in 2017.

Overall, wheat flour imports as a proportion of the total showed an increasing trend; an increase of 2 percentage points from 72 per cent in 2015 to 74 per cent in 2020.



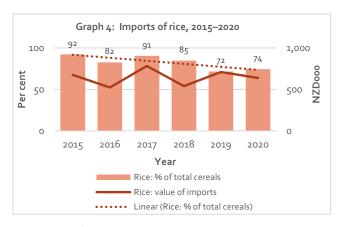
Share of rice and wheat flour imports

Graph 3 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained relatively constant.

The 6-year (2015–2020) average shows that of the total imports of rice and wheat flour, rice amounted to 64 per cent and wheat flour 36 per cent.

C. Country analysis

Cook Islands



31 per cent from 2017 to 2018.

Rice imports

Rice is the main cereal imported by Cook Islands.

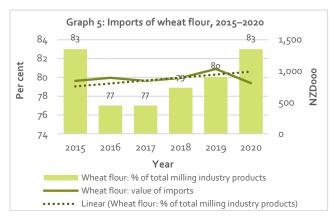
Graph 4 shows imports of rice in absolute values as well as its share in per cent of total cereals imported from 2015 to 2020.

In terms of the value of imports, the highest value of rice imported was NZD 782,000 in 2017 and the lowest was NZD 523,000 in 2016. Imports of rice showed a lot of variation over the years: the greatest increase was 50 per cent from 2016 to 2017 and the greatest decline was

In terms of its contribution to total cereals imported, the 6-year (2015–2020) average shows that rice amounted to 83 per cent of the total value of cereals imported.

Imports of rice as a share of the total cereals showed some year-to-year variation during the period: it was highest at 92 per cent of the total value in 2015 and lowest at 72 per cent in 2019. Overall, rice imports as a proportion of the total showed a declining trend; a decline of 18 percentage points from 92 per cent in 2015 to 74 per cent in 2020.

Per capita imports of rice in Cook Islands stood at NZD 36 in 2018 and NZD 42 in 2020. The 17 per cent increase in per capita rice imports is driven by an increase in the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by Cook Islands.

Graph 5 shows imports of wheat flour in absolute values as well as its share in per cent of total milling industry products imported from 2015 to 2020.

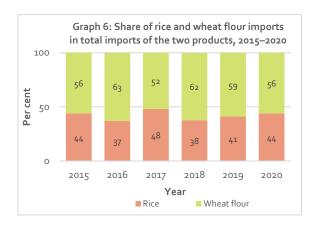
In terms of the value of imports, the highest value of wheat flour imported was NZD 1.034 million in 2019 and the lowest value was NZD 0.808 million in 2020. Imports of wheat flour did not show much fluctuation except in

2019 when compared to 2018 imports increased by 16 per cent but then declined by 22 per cent in 2020 compared to 2019 to return to its normal level.

In terms of its contribution to total milling industry products imported, the 6-year (2015–2020) average shows that wheat flour amounted to 80 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a share of total milling industry imports showed slight year-to-year variations during the period: it was highest at 83 per cent of the total value in 2015 and 2020 and lowest at 77 per cent in 2016 and 2017. Overall, wheat flour imports as a proportion of total milling industry imports showed an increasing trend; after a 6-percentage point decline from 83 per cent in 2015 to 77 per cent in 2016 and 2017, share of wheat flour then gradually increased from 77 per cent in 2017 to reach 83 per cent of the total again in 2020.

Per capita imports of wheat flour in Cook Islands stood at NZD 59 in 2018 and NZD 53 in 2020. The 10 per cent decline in per capita wheat flour imports was driven by a decline in the value of wheat flour imports.



Share of rice and wheat flour imports

Graph 6 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained relatively steady.

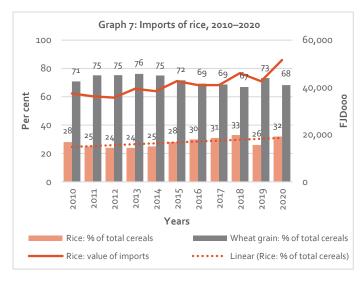
The 6-year (2015–2020) average shows that of the total imports of rice and wheat flour, wheat flour was 58 per cent and rice was 42 per cent.

Table 2: Imports of rice and wheat flour

Cook Island	S		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals	NZ\$ [000]	na	na	na	na	na	733	634	864	637	991	858
Heading:1006	Rice	1423 [000]	na	na	na	na	na	675	523	782	539	709	639
	Rice: % of total cereals	%	na	na	na	na	na	92	82	91	85	72	74
Chapter 11	Total products of the milling industry	NZ\$ [000]	na	na	na	na	na	1,021	1,152	1,100	1,128	1,292	971
Heading:1101	Wheat flour	1423 [000]	na	na	na	na	na	843	892	844	890	1,034	808
	Wheat flour: % of total products of the	%											
	milling industry	70	na	na	na	na	na	83	77	77	79	80	83
Total rice and	wheat flour imports	NZ\$ [000]	na	na	na	na	na	1,518	1,415	1,626	1,429	1,743	1,447
of which:	Rice imports	. %	na	na	na	na	na	44	37	48	38	41	44
	Wheat flour imports	/0	na	na	na	na	na	56	63	52	62	59	56

Fiji

While looking at the import data of rice and wheat flour of Fiji, it was observed that wheat grains and not rice (which is also domestically produced) is the major cereal imported. It was also noted that imports of wheat flour were negligible because imported wheat grains were processed into flour for domestic consumption and exported to other PICTs. This paper focusses on the imports of rice and wheat flour, however supplementary information is provided on the imports of wheat grains (Graph 7), production of paddy rice (Graph 8), production of wheat flour (Graph 10) and exports of wheat flour (Graph 11).



Rice imports

Wheat grain and not rice was the main cereal imported by Fiji.

Graph 7 shows imports of rice in absolute values as well as its share in per cent of total cereals imported from 2010 to 2020.

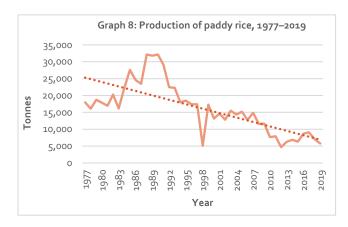
In terms of the value of imports, the highest value of rice imported was FJD 51.576 million in 2020 and the lowest value was FJD 35.645 million in 2012. Imports of rice showed little fluctuation throughout the period: the greatest increase was 21 per cent from 2019 to 2020 and the greatest decline was 7 per cent from 2018 to 2019.

In terms of its contribution to total cereals imported, the 11-year (2010–2020) average shows that rice amounted to 28 per cent of the total value of cereals imported, compared to an average of 72 per cent for wheat grain.

Imports of rice as a share of the total cereals showed slight year-to-year variations during the period: it was highest at 33 per cent of the total value in 2018 and lowest at 24 per cent in 2012 and 2013. Overall, rice imports as a

proportion of the total show an upward trend; an increase of 4 percentage points from 28 per cent in 2010 to 32 per cent in 2020.

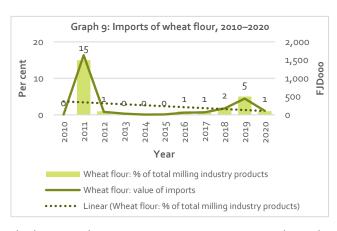
Per capita imports of rice in Fiji stood at FJD 52 in 2018 and FJD 58 in 2020. The 12 per cent increase in per capita rice imports was driven by an increase in the value of rice imports.



Production of paddy rice

Graph 8 shows the production of paddy rice⁵ in Fiji from 1977 through 2019. Over the 42 years production declined considerably.

For this same period, the highest production recorded was 32,147 tonnes in 1988 and 1990 and the lowest production recorded was 4,701 tonnes in 2012, a decline of about 85 per cent.



Wheat flour imports

Graph 9 shows imports of wheat flour in absolute values as well as its share in per cent of total milling industry products imported from 2010 to 2020.

Wheat flour is not the main milling industry product imported by Fiji. For other products classified in the same PACHS17 category as the wheat flour that Fiji may be importing refer to Appendix 2.

In terms of the value of imports, the highest value of wheat flour imported was FJD 1.635 million in 2011 and

the lowest value was FJD 7,000 in 2014. It is unclear what caused the surge in imports of wheat flour in 2011.

In terms of its contribution to total milling industry products imported, the 11-year (2010–2020) average shows that wheat flour amounted to 2 per cent of the total value of products of the milling industry imported.

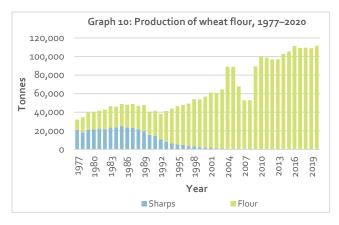
Except for 2011, imports of wheat flour do not show significant year-to-year variations during the period: it was highest at 15 per cent in 2011 and at its lowest was zero per cent in 2010 and from 2013–2015. Overall, the share of wheat flour imports show a declining trend, although this trend is distorted by the exceptionally high proportion of imports in 2011. The other imports of the milling industry, which fall outside the scope of this paper are malt, starches, inulin, wheat gluten, etc – refer to Appendix 2.

Per capita imports of wheat flour in Fiji stood at zero in both 2018 and 2020; the reason being Fiji's involvement in flour production for which they import wheat grains.

⁵ Fiji: Production of paddy rice

Classification used: Fiji Standard Industrial Classification Sub-class 01121 which concords to International Standard Industrial Classification Class 0112.

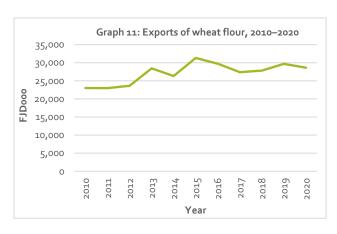
Year	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
Tonnes	17,966	16,105	18,712	17,846	16,972	20,302	16,160	22,246	27,574	24,600	23,477	32,147	31,827
Year	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Tonnes	32,147	29,038	22,479	22,284	18,019	18,496	17,370	17,385	5,092	17,301	13,170	14,612	12,852
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Tonnes	15,504	14,358	15,189	12,732	14,870	11,595	11,637	7,684	7,914	4,701	6,280	6,843	6,329
Year	2016	2017	2018	2019									
Tonnes	8,649	9,081	7,051	5,749									



Production of flour

Graph 10 shows the production of wheat flour and sharps⁶ in Fiji from 1977-2020. While the production of flour has increased over the years, the production of sharps has declined considerably. For the period 1977-2020 the:

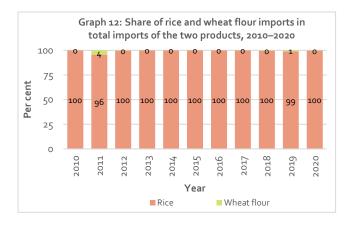
- highest flour production recorded was 111,694 tonnes in 2020 and the lowest was 11,162 tonnes in 1977; and
- highest sharps production recorded was 24,961 tonnes in 1985 and the lowest was 25 tonnes in 2020.



Exports of wheat flour

Graph 11 shows exports of wheat flour, from Fiji. The 11-year (2010-2020) average shows that Fiji exported FJD 27,167,000 worth of flour per annum.

For the period under study, the highest flour exports were valued *free on board* at FJD 31,295,000 in 2015 and the lowest was FJD 22,973,000 in 2011.



Share of rice and wheat flour imports

Graph 12 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained mainly constant.

The 11-year (2010—2020) average shows that of the total imports of rice and wheat flour, wheat flour was 1 per cent and rice was 99 per cent.

Table 3: Imports of rice and wheat flou	Table 3:	Imports o	f rice and	wheat	flour
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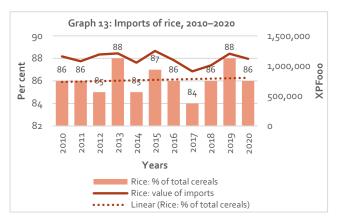
Fiji			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals		135,062	146,393	146,885	166,491	154,749	152,094	134,449	132,331	141,399	161,146	163,273
Heading:1001	Wheat grain	FJ\$ [000]	95,694	110,057	110,498	126,873	116,073	109,059	93,134	90,887	94,575	118,049	111,445
Heading:1006	Rice		37,464	36,189	35,645	39,385	38,406	42,676	40,947	40,935	46,039	42,606	51,576
	Wheat grain: % of total cereals	%	71	75	75	76	75	72	69	69	67	73	68
	Rice: % of total cereals	70	28	25	24	24	25	28	30	31	33	26	32
Chapter 11	Total products of the milling industry	FJ\$ [000]	8,554	11,170	8,867	8,550	7,280	9,002	8,748	7,856	9,730	9,007	10,236
Heading:1101	Wheat flour	135 [000]	10	1,635	79	31	7	12	58	66	178	444	108
	Wheat flour: % of total products of the	%											
	milling industry	76	0	15	1	0	0	0	1	1	2	5	1
Total rice and v	wheat flour imports	FJ\$ [000]	37,474	37,824	35,724	39,416	38,413	42,688	41,005	41,001	46,217	43,050	51,684
of which:	Rice imports	%	100	96	100	100	100	100	100	100	100	99	100
	Wheat flour imports	/0	0	4	0	0	0	0	0	0	0	1	0

⁶ Sharps are a coarser form of flour used traditionally for making chapati/roti.

7 Fiji: Exports of wheat flour

			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
PACHS17 Heading:1101	Wheat flour Exports	FJ\$ [000]	22,986	22,973	23,603	28,419	26,327	31,295	29,704	27,379	27,839	29,690	28,622

French Polynesia



Rice imports

Rice is the main cereal imported by French Polynesia.

Graph 13 shows imports of rice in absolute values as well as its share in per cent to total cereals imported from 2010 to 2020.

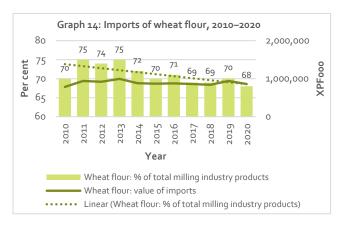
In terms of the value of imports, the highest value of rice imported was XPF 1,248.3 million in 2015 and the lowest value was XPF 908.8 million in 2017. Imports of rice showed considerable variation over the years; the highest year-on-year increase was 19 per cent between

2014 to 2015 and between 2018 to 2019. The highest decline was 17 per cent between 2016 to 2017.

In terms of its contribution to total cereals imported, the 11-year (2010–2020) average shows that rice amounted to 86 per cent of the total value of cereals imported.

Imports of rice as a share of total cereals imported showed slight year-to-year variations during the period: it was highest at 88 per cent of the total value in 2013 and 2019 and lowest at 84 per cent in 2017. Overall, rice imports as a proportion of the total show a very slight upward trend.

Per capita imports of rice in French Polynesia stood at XPF 3642 in 2018 and XPF 4004 in 2020. The 10 per cent increase in per capita rice imports was driven by an increase in the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by French Polynesia.

Graph 14 shows imports of wheat flour in absolute values as well as a proportion of total milling industry products imported between 2010 to 2020.

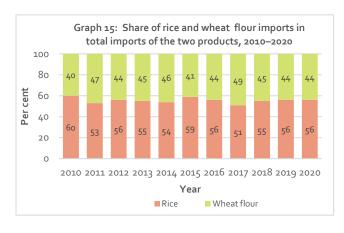
In terms of the value of imports, the highest value of wheat flour imported was XPF 994.8 million in 2013 and the lowest value was XPF 783.5 million in 2010. Imports of wheat flour showed small variations over the years;

the greatest increase was 20 per cent from 2010 to 2011 and the greatest decline was 11 per cent from 2013 to 2014.

In terms of its contribution to total milling industry products imported, the 11-year (2010–2020) average shows that wheat flour amounted to 71 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a proportion of total milling industry imports showed slight year-to-year variations during the period: it was highest at 75 per cent of the total value in 2011 and 2013 and lowest at 68 per cent in 2020. Overall, wheat flour imports as a proportion of the total showed a declining trend; a decline of 2 percentage points from 70 per cent in 2010 to 68 per cent in 2020.

Per capita imports of wheat flour in French Polynesia stood at XPF 3032 in 2018 and XPF 3085 in 2020. The 2 per cent increase in per capita wheat flour imports was driven by an increase in the value of wheat flour imports.



Share of rice and wheat flour imports

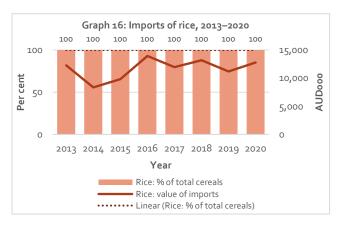
Graph 15 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained relatively steady.

The 11-year (2010–2020) average shows that of the total imports of rice and wheat flour, rice was 56 per cent and wheat flour was 44 per cent.

Table 4: Imports of rice and wheat flour

French Poly	nesia		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals	VDC [000]	1,341,615	1,255,113	1,399,787	1,377,468	1,238,388	1,436,322	1,281,123	1,077,423	1,173,085	1,370,190	1,296,070
Heading:1006	Rice	XPF [000]	1,156,520	1,076,493	1,188,272	1,207,076	1,052,107	1,248,310	1,096,566	908,837	1,008,530	1,201,350	1,116,604
	Rice: % of total cereals	%	86	86	85	88	85	87	86	84	86	88	86
Chapter 11	Total products of the milling industry	XPF [000]	1,124,772	1,245,042	1,245,810	1,324,679	1,223,534	1,235,059	1,229,080	1,248,852	1,215,500	1,335,752	1,258,952
Heading:1101	Wheat flour	Ari [000]	783,496	939,051	917,415	994,817	880,415	870,089	876,449	861,601	839,574	938,279	860,514
	Wheat flour: % of total products of the	%											
	milling industry	70	70	75	74	75	72	70	71	69	69	70	68
Total rice and v	wheat flour imports	XPF [000]	1,940,016	2,015,544	2,105,687	2,201,893	1,932,522	2,118,399	1,973,015	1,770,438	1,848,104	2,139,629	1,977,118
of which:	Rice imports	%	60	53	56	55	54	59	56	51	55	56	56
	Wheat flour imports	/0	40	47	44	45	46	41	44	49	45	44	44

Kiribati



Rice imports

Rice is the main cereal imported by Kiribati.

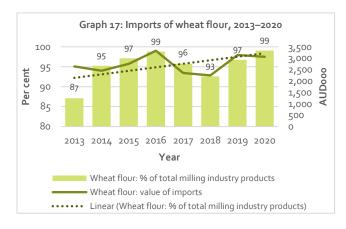
Graph 16 shows imports of rice in absolute values as well as its share in per cent to total cereals imported from 2013 to 2020.

In terms of the value of imports, the highest value of rice imported was AUD 13.943 million in 2016 and the lowest value was AUD 8.356 million in 2014. Imports of rice showed a significant decline of 32 per cent from 2013 to 2014. The highest growth recorded was 42 per cent

from 2015 to 2016.

In terms of its contribution to total cereals imported, the 8-year (2013–2020) average shows that rice amounted to 100 per cent of the total value of cereals imported for all the years.

Per capita imports of rice in Kiribati stood at AUD 115 in 2018 and AUD 108 in 2020. The 6 per cent decline in per capita rice imports was driven by a decline in the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by Kiribati.

Graph 17 shows imports of wheat flour in absolute values as well as its share in per cent to total milling industry products imported from 2013 to 2020.

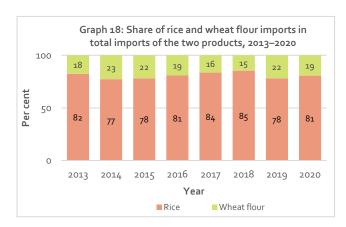
In terms of the value of imports, the highest value of wheat flour imported was AUD 3.327 million in 2016 and the lowest value was AUD 2.246 million in 2018. Imports of wheat flour showed small to moderate variations

over the years: the greatest increase was 34 per cent from 2018 to 2019 and the greatest decline was 27 per cent from 2016 to 2017.

In terms of its contribution to total milling industry products imported, the 8-year (2013–2020) average shows that wheat flour amounted to 95 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a proportion of total milling industry imports showed slight year-to-year variations during the period: it was highest at 99 per cent of the total value in 2016 and 2020 and lowest at 87 per cent in 2013. Overall, wheat flour imports as a proportion of the total showed an upward trend; an increase of 12 percentage points from 87 per cent in 2013 to 99 per cent in 2020.

Per capita imports of wheat flour in Kiribati stood at AUD 20 in 2018 and AUD 26 in 2020. The 30 per cent increase in per capita wheat flour imports was driven by an increase in the value of wheat flour imports.



Share of rice and wheat flour imports

Graph 18 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained relatively steady.

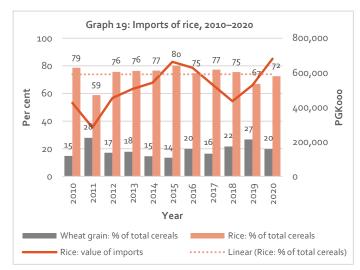
The 8-year (2013–2020) average shows that of the total imports of rice and wheat flour, rice was 81 per cent and wheat flour was 19 per cent.

I able 5: I	mports of	rice and	! wheat flour
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Kiribati			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals	AU\$ [000]	na	na	na	12,285	8,364	9,853	13,946	11,973	13,195	11,206	12,797
Heading:1006	Rice: value of imports	AU\$ [000]	na	na	na	12,278	8,356	9,837	13,943	11,965	13,185	11,194	12,791
	Rice: % of total cereals	%	na	na	na	100	100	100	100	100	100	100	100
Chapter 11	Total products of the milling industry	AU\$ [000]	na	na	na	3,028	2,571	2,836	3,367	2,455	2,426	3,242	3,090
Heading:1101	Wheat flour: value of imports	703 [000]	na	na	na	2,638	2,449	2,755	3,327	2,351	2,246	3,136	3,061
	Wheat flour: % of total milling industry	%											
	products	%	na	na	na	87	95	97	99	96	93	97	99
Total rice, whe	at grains and wheat flour imports	AU\$ [000]	na	na	na	14,916	10,805	12,592	17,270	14,316	15,431	14,330	15,852
of which:	Rice imports	- %	na	na	na	82	77	78	81	84	85	78	81
	Wheat flour imports	/0	na	na	na	18	23	22	19	16	15	22	19

Papua New Guinea

PNG not only imports rice and wheat flour, but also imports wheat grains and mills them into flour therefore imports of wheat grains are provided as supplementary information in Graph 19.



Rice imports

Rice is the main cereal imported by PNG.

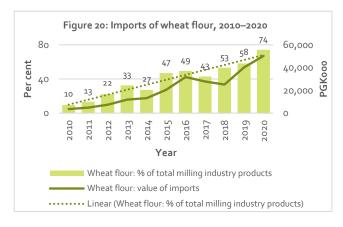
Graph 19 shows imports of rice in absolute values as well as its share in per cent to total cereals imported from 2010 to 2020.

In terms of the value of imports, the highest value of rice imported was PGK 681.216 million in 2020 and the lowest value was PGK 283.129 million in 2011. Imports of rice showed a decline of 33 per cent from 2010 to 2011 and 18 per cent from 2017 to 2018. The highest year-on-year increase was 60 per cent from 2011 to 2012.

In terms of its contribution to total cereals imported, the 11-year (2010–2020) average shows that rice amounted to 74 per cent of the total value of cereals imported.

Except for 2011 when rice imports declined by 20 percentage points from 79 per cent in 2010 to 59 per cent in 2011, imports of rice as a share of the total cereals showed slight year-to-year variations during the period: it was highest at 80 per cent of the total value in 2015 and lowest at 59 per cent in 2011. Overall, rice imports as a proportion of the total show a somewhat flat trend.

Per capita imports of rice in PNG stood at PGK 51 in 2018 and PGK 76 in 2020. The 49 per cent increase in per capita rice imports was driven by the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by PNG.

Graph 20 shows imports of wheat flour in absolute values as well as its share in per cent to total milling industry products imported from 2010 to 2020.

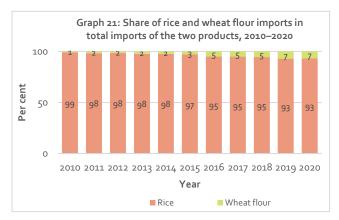
In terms of the value of imports, the highest value of wheat flour imported was PGK 50.256 million in 2020 and the lowest value was PGK 3.590 million in 2010. Imports of wheat flour showed moderate increases

during the period except from 2016 to 2017 when it registered a decline of 13 per cent and 2017 to 2018, a decline of 10 per cent. The highest year-on-year increase was 60 per cent from 2012 to 2013 and again between 2018 to 2019.

In terms of its contribution to total milling industry products imported, the 11-year (2010–2020) average shows that wheat flour amounted to 39 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a proportion of total milling industry imports showed considerable year-to-year variations during the period: it was highest at 74 per cent in 2020 and lowest at 10 per cent in 2010. Overall, wheat flour imports as a proportion of the total showed an increasing trend; an increase of 64 percentage points from 10 per cent in 2010 to 74 per cent in 2020.

Per capita imports of wheat flour in PNG stood at PGK 3 in 2018 and PGK 6 in 2020. The 100 per cent increase in per capita wheat flour imports was driven by an increase in the value of wheat flour imports.



Share of rice and wheat flour imports

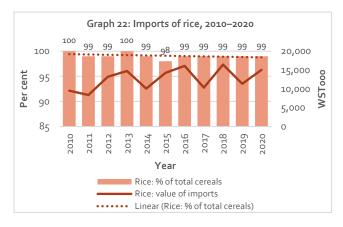
Graph 21 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained relatively stable.

The 11-year (2010–2020) average shows that of the total imports of rice and wheat flour, rice was 96 per cent and wheat flour was 4 per cent.

Table 6: Imports of rice and wheat flour

Papua New	Guinea		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals		540,455	481,343	600,172	661,882	708,488	827,406	841,756	689,268	577,231	787,946	939,905
Heading:1001	Wheat grain	Kina [000]	79,786	134,518	102,442	117,801	103,569	111,703	167,874	113,260	125,104	210,317	186,199
Heading:1006	Rice		424,832	283,129	453,828	505,548	542,372	663,220	628,933	532,169	435,589	527,858	681,216
	Wheat grain: % of total cereals	%	15	28	17	18	15	14	20	16	22	27	20
	Rice: % of total cereals	70	79	59	76	76	77	80	75	77	75	67	72
Chapter 11	Total products of the milling industry	Kina [000]	37,568	36,640	33,512	36,650	48,479	43,596	64,343	64,863	47,149	68,934	67,716
Heading:1101	Wheat flour	KITIA [UUU]	3,590	4,848	7,459	11,925	13,102	20,492	31,730	27,752	25,080	40,127	50,256
	Wheat flour: % of total products of the milling industry	%	10	13	22	33	27	47	49	43	53	58	74
Total rice and	wheat flour imports	Kina [000]	428,422	287,977	461,287	517,473	555,474	683,712	660,663	559,921	460,669	567,985	731,472
of which:	Rice imports	%	99	98	98	98	98	97	95	95	95	93	93
•	Wheat flour imports	/*	1	2	2	2	2	3	5	5	5	7	7

Samoa



Rice imports

Rice is the main cereal imported by Samoa.

Graph 22 shows imports of rice in absolute values as well as its share in per cent to total cereals imported from 2010 to 2020.

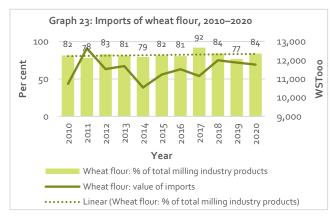
In terms of the value of imports, the highest value of rice imported was WST 16.442 million in 2018 and the lowest value was WST 8.365 million in 2011. Imports of rice showed considerable variations during the period: the highest annual increase was 60 per cent from 2017

to 2018 and the largest decline was 36 per cent from 2016 to 2017.

In terms of its contribution to total cereals imported, the 11-year (2010–2020) average shows that rice amounted to 99 per cent of the total value of cereals imported.

Imports of rice as a share of the total cereals showed very little year-to-year variations during the period: it was highest at 100 per cent in 2010 and 2013 and lowest at 98 per cent in 2015. Overall, rice imports as a proportion of the total show a slight downward trend; a decline of 1 percentage point from 100 per cent in 2010 to 99 per cent in 2020.

Per capita imports of rice in Samoa stood at WST 84 in 2018 and WST 76 in 2020. The 10 per cent decline in per capita rice imports was driven by a decline in the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by Samoa.

Graph 23 shows imports of wheat flour in absolute values as well as its share in per cent of total milling industry products imported from 2010 to 2020.

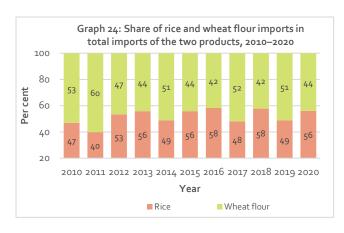
In terms of the value of imports, the highest value of wheat flour imported was WST 12.638 million in 2011 and the lowest value was WST 10.744 million in 2010. Imports of wheat flour grew by 18 per cent from 2010 to

2011 and declined by 10 per cent from 2013 to 2014.

In terms of its contribution to total milling industry products imported, the 11-year (2010–2020) average shows that wheat flour amounted to 82 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a share of proportion of total milling industry imports showed some year-to-year variations during the period: it was highest at 92 per cent of the total value in 2017 and lowest at 77 per cent in 2019. Overall, wheat flour imports as a proportion of the total showed a slight upward trend; an increase of 2 percentage points from 82 per cent in 2010 to 84 per cent in 2020.

Per capita imports of wheat flour in Samoa stood at WST 61 in 2018 and WST 59 in 2020. The 3 per cent decline in per capita wheat flour imports was driven by the value of wheat flour imports.



Share of rice and wheat flour imports

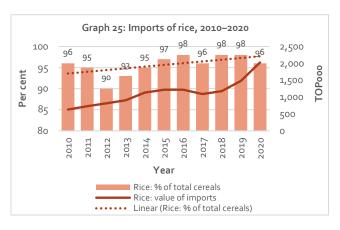
Graph 24 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice and wheat flour have remained relatively steady.

The 11-year (2010–2020) average shows that of the total imports of rice and wheat flour, rice was 52 per cent and wheat flour was 48 per cent.

Table 7: Imports of rice and wheat flour

Samoa			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals	Tala [000]	9,554	8,419	13,286	14,832	10,164	14,447	16,208	10,446	16,613	11,483	15,182
Heading:1006	Rice: value of imports	Tala [UUU]	9,524	8,365	13,206	14,759	10,072	14,223	16,101	10,308	16,442	11,357	15,047
	Rice: % of total cereals	%	100	99	99	100	99	98	99	99	99	99	99
Chapter 11	Total products of the milling industry	Tala [000]	13,182	16,181	13,857	14,365	13,276	13,756	14,305	12,155	14,247	15,459	13,999
Heading:1101	Wheat flour: value of imports	Tala [UUU]	10,744	12,638	11,528	11,690	10,545	11,240	11,521	11,163	12,002	11,880	11,768
	Wheat flour: % of total milling industry	%											
	products	70	82	78	83	81	79	82	81	92	84	77	84
Total rice and v	wheat flour imports	Tala [000]	20,268	21,003	24,734	26,449	20,617	25,463	27,622	21,471	28,444	23,237	26,815
of which:	Rice imports	%	47	40	53	56	49	56	58	48	58	49	56
	Wheat flour imports	/0	53	60	47	44	51	44	42	52	42	51	44

Tonga



Rice imports

Rice is the main cereal imported by Tonga.

Graph 25 shows imports of rice in absolute values as well as its share in per cent to total cereals imported from 2010 to 2020.

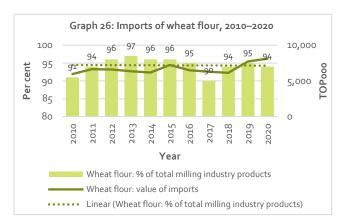
In terms of the value of imports, the highest value of rice imported was TOP 2.026 million in 2020 and the lowest value was TOP 0.631 million in 2010. Imports of rice showed an increasing trend despite a 10 per cent decline from 2016 to 2017. The highest annual increase was 37

per cent from 2019 to 2020.

In terms of its contribution to total cereals imported, the 11-year (2010–2020) average shows that rice amounted to 96 per cent of the total value of cereals imported.

Imports of rice as a share of the total cereals showed some year-to-year variations during the period: it was highest at 98 per cent of the total value in 2016, 2018 and 2019 and lowest at 90 per cent in 2012. Overall, rice imports as a proportion of the total show an increasing trend; after a 6-percentage point decline from 96 per cent in 2010 to 90 per cent in 2012 share of rice then gradually increased by 6 percentage points from 90 per cent in 2012 to reach 96 per cent in 2020.

Per capita imports of rice in Tonga stood at TOP 12 in 2018 and TOP 20 in 2020. The 67 per cent increase in per capita rice imports is driven by an increase in the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by Tonga.

Graph 26 shows imports of wheat flour in absolute values as well as its share in per cent to total milling industry products imported from 2010 to 2020.

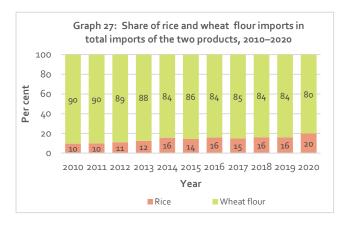
In terms of the value of imports, the highest value of wheat flour imported was TOP 8.116 million in 2020 and the lowest value was TOP 5.959 million in 2010. Imports of wheat flour showed some variation over the years:

the largest annual increase was 37 per cent from 2019 to 2020 and the biggest annual decline was 10 per cent from 2015 to 2016.

In terms of its contribution to total milling industry products imported, the 11-year (2010–2020) average shows that wheat flour amounted to 94 per cent of the total value of products of the milling industry imported.

Imports of wheat flour as a proportion of total milling industry imports showed some year-to-year variations during the period: it was highest at 97 per cent of the total value in 2013 and lowest at 90 per cent in 2017. Overall, wheat flour imports as a proportion of the total showed a flat trend.

Per capita imports of wheat flour in Tonga stood at TOP 61 in 2018 and TOP 81 in 2020. The 24 per cent increase in per capita wheat flour imports is driven by an increase in the value of wheat flour imports.



Share of rice and wheat flour imports

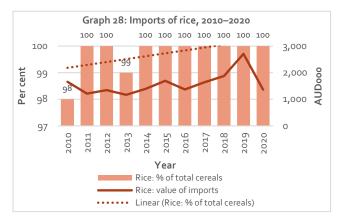
Graph 27 shows that of the total imports of rice and wheat flour the proportions of rice has slightly increased over the years and wheat flour has declined.

The 11-year (2010–2020) average shows that of the total imports of rice and wheat flour, wheat flour was 86 per cent and rice was 14 per cent.

Table 8: Imports of rice and wheat flour

Tonga			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals	TOP [000]	658	767	903	971	1,195	1,257	1,245	1,140	1,202	1,506	2,116
Heading:1006	Rice	107 [000]	631	732	815	907	1,135	1,217	1,218	1,093	1,177	1,479	2,026
	Rice: % of total cereals	%	96	95	90	93	95	97	98	96	98	98	96
Chapter 11	Total products of the milling industry	[000]	6,543	7,100	6,828	6,542	6,447	7,564	6,802	7,021	6,499	8,136	8,623
Heading:1101	Wheat flour	TOP [000]	5,959	6,651	6,587	6,360	6,163	7,231	6,488	6,294	6,136	7,729	8,116
	Wheat flour: % of total products of the	%											
	milling industry	70	91	94	96	97	96	96	95	90	94	95	94
Total rice and v	wheat flour imports	TOP [000]	6,590	7,383	7,402	7,267	7,298	8,448	7,706	7,387	7,313	9,208	10,142
of which:	Rice imports	%	10	10	11	12	16	14	16	15	16	16	20
	Wheat flour imports	/0	90	90	89	88	84	86	84	85	84	84	80

Tuvalu



Rice imports

Rice is the main cereal imported by Tuvalu.

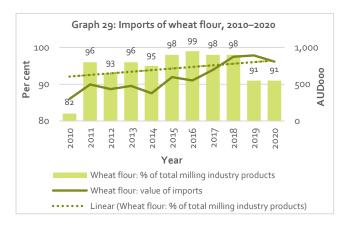
Graph 28 shows imports of rice in absolute values as well as its share in per cent to total cereals imported from 2010 to 2020.

In terms of the value of imports, the highest value of rice imported was AUD 2.707 million in 2019 and the lowest value was AUD 1.166 million in 2013. Imports of rice showed an increase of 45 per cent from 2018 to 2019 and a decline of 50 per cent from 2019 to 2020.

In terms of its contribution to total cereals imported, the 11-year (2010–2020) average shows that rice amounted to 100 per cent of the total value of cereals imported.

Imports of rice as a share of the total cereals showed little year-to-year variations during the period: it was highest at 100 per cent of the total value in 2011, 2012 and 2014–2020. Overall, rice imports as a proportion of the total show an increasing trend; an increase of 2 percentage points from 98 per cent in 2010 to 100 per cent in 2020.

Per capita imports of rice in Tuvalu stood at AUD 180 in 2018 and AUD 128 in 2020. The 29 per cent decline in per capita rice imports was driven by a decline in the value of rice imports.



Wheat flour imports

Wheat flour is the main milling industry product imported by Tuvalu.

Graph 29 shows imports of wheat flour in absolute values as well as its share in per cent of total milling industry products imported from 2010 to 2020.

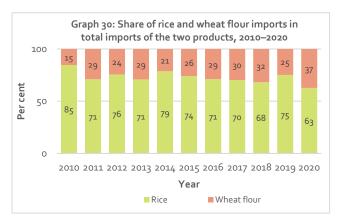
In terms of the value of imports, the highest value of wheat flour imported was AUD 892,000 in 2019 and the lowest value was AUD 301,000 in 2010. Imports of wheat flour showed considerable variations over the

years: the highest annual increase was 65 per cent from 2010 to 2011 and the largest decline was 21 per cent from 2013 to 2014.

In terms of its contribution to total milling industry products imported, the 11-year (2010–2020) average shows that wheat flour amounted to 94 per cent of the total value of products of the milling industry imported.

Except for the 14 percentage points increase from 82 per cent in 2010 to 96 per cent in 2011 imports of wheat flour as a proportion of total milling industry imports showed some year-to-year variations during the period: it was highest at 99 of the total value per cent in 2016 and lowest at 82 per cent in 2010. Overall, wheat flour imports as a proportion of the total showed an increasing trend; an increase of 9 percentage points from 82 per cent in 2010 to 91 per cent in 2020.

Per capita imports of wheat flour in Tuvalu stood at AUD 84 in 2018 and AUD 76 in 2020. The 10 per cent decline in per capita wheat flour imports was driven by a decline in the value of wheat flour imports.



Share of rice and wheat flour imports

Graph 30 shows the share of rice and wheat flour in total imports of the two products. Compared to each other it can be seen that the proportions of rice slightly declined over the years and the proportion of wheat flour slightly increased.

The 11-year (2010–2020) average shows that of the total imports of rice and wheat flour, wheat flour was 27 per cent and rice was 73 per cent.

T 1 1		c ·		CI
Table 9: 1	imports o	t rice and	wheat	tlour

Tuvalu			2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chapter 10	Total cereals	AU\$ [000]	1,689	1,220	1,350	1,173	1,397	1,693	1,366	1,643	1,876	2,709	1,362
Heading:1006	Rice	AU\$ [000]	1,660	1,214	1,344	1,166	1,395	1,692	1,366	1,641	1,873	2,707	1,361
	Rice: % of total cereals	%	98	100	100	99	100	100	100	100	100	100	100
Chapter 11	Total products of the milling industry	AU\$ [000]	366	519	466	496	397	610	559	709	889	980	885
Heading:1101	Wheat flour		301	496	433	478	377	596	552	696	873	892	809
	Wheat flour: % of total products of the	%											
	milling industry		82	96	93	96	95	98	99	98	98	91	91
Total rice, wheat grains and wheat flour imports		AU\$ [000]	1,961	1,710	1,777	1,644	1,772	2,288	1,918	2,337	2,746	3,599	2,170
of which:	Rice imports	0/	85	71	76	71	79	74	71	70	68	75	63
	Wheat flour imports	%	15	29	24	29	21	26	29	30	32	25	37

D. Conclusion

This paper looked at the imports of rice and wheat flour in eight PICTs (Cook Islands, Fiji, French Polynesia, Kiribati, PNG, Samoa, Tonga and Tuvalu) and the analysis shows that between the imports of rice and wheat flour:

- From a regional perspective rice is the leading import, followed by wheat flour: of the share of rice and wheat flour in total imports rice amounted to 64 per cent and wheat flour 36 per cent.
- From an individual country perspective:
 - o rice imports are dominant in Cook Islands, Fiji, French Polynesia, Kiribati, PNG and Tuvalu;
 - o wheat flour imports are dominant in Tonga; and
 - o rice and wheat flour are both important imports in Samoa.

The share of rice and wheat flour imports as a percentage of the total of the two commodities has remained steady in all countries, so it is expected that rice will continue to be the dominant import, followed by wheat flour, as indicated in Graph 3.

The growth in the import values of the two commodities, judging from past performance, will continue to fluctuate depending on the demand and supply of the commodities which, as mentioned in the introduction will be influenced by the conditions prevailing in the producing countries. These influences include international prices and weather conditions, for example a cyclone in Fiji that causes flooding of rice crops, will result in Fiji importing more rice in that period. Other catastrophic events can also cause similar impacts; anecdotal evidence suggests that the variation in the value of the per capita rice and wheat flour imports from 2018 to 2020 may have been driven by the impacts of the COVID-19 global pandemic.

Whatever situation befalls rice and wheat flour import levels are likely to hold as they are a major source of energy and eaten regularly by the people of PICTs.

Appendix 1: Chapter 10 in PACHS17

Table 10: Cereals

HS	HS SUB-	REGIONAL SUB-	DESCRIPTION
HEADING	HEADING	HEADING	DESCRIPTION
1001			Wheat and meslin
			-Durum wheat:
	1001.11	1001.11.00	Seed
	1001.19	1001.19.00	Other
			-Other:
	1001.91	1001.91.00	Seed
	1001.99	1001.99.00	Other
1002			Rye
	1002.10	1002.10.00	-Seed
	1002.90	1002.90.00	-Other
1003			Barley
	1003.10	1003.10.00	-Seed
	1003.90	1003.90.00	-Other
1004			Oats
	1004.10	1004.10.00	-Seed
	1004.90	1004.90.00	-Other
1005			Maize (corn)
	1005.10	1005.10.00	-Seed
	1005.90	1005.90.00	-Other
1006			Rice
	1006.10	1006.10.00	-Rice in the husk (paddy or rough)
	1006.20	1006.20.00	-Husked (brown) rice
	1006.30	1006.30.00	-Semi-milled or wholly milled rice, whether or not polished or glazed
	1006.40	1006.40.00	-Broken rice
1007			Grain sorghum
-	1007.10	1007.10.00	-Seed
	1007.90	1007.90.00	-Other
1008			Buckwheat, millet and canary seed; other cereals
	1008.10	1008.10.00	-Buckwheat
			-Millet:
	1008.21	1008.21.00	Seed
	1008.29	1008.29.00	Other
	1008.30	1008.30.00	-Canary seeds
	1008.40	1008.40.00	-Fonio (Digitaria spp.)
	1008.50	1008.50.00	-Quinoa (Chenopodium quinoa)
	1008.60	1008.60.00	-Triticale
	1008.90	1008.90.00	-Other cereals

Key

The cereal that is the focus of the study in this paper

Appendix 2: Chapter 11 in PACHS17

Table 11: Products of the milling industry; malt; starches; inulin; wheat gluten

HS HEADING	HS SUB- HEADING	REGIONAL SUB-HEADING	DESCRIPTION
1101	1101.00		Wheat or meslin flour
		1101.00.10	Sharps
		1101.00.20	Flour
1102			Cereal flours other than of wheat or meslin
	1102.20	1102.20.00	-Maize (corn) flour
	1102.90		-Other
		1102.90.10	Rice flour
		1102.90.90	Other
1103			Cereal groats, meal and pellets
			-Groats and meal:
	1103.11	1103.11.00	Of wheat
	1103.13	1103.13.00	Of maize (corn)
	1103.19	1103.19.00	Of other cereals
	1103.20	1103.20.00	-Pellets
1104			Cereal grains otherwise worked (for example, hulled, rolled, flaked, pearled, sliced or kibbled), except rice of 1006; germ of cereals, whole, rolled, flaked or ground
			-Rolled or flaked grains:
	1104.12	1104.12.00	Of oats
	1104.19	1104.19.00	Of other cereals
			-Other worked grains (for example, hulled, pearled, sliced or kibbled):
	1104.22	1104.22.00	Of oats
	1104.23	1104.23.00	Of maize (corn)
	1104.29	1104.29.00	Of other cereals
	1104.30	1104.30.00	-Germ of cereals, whole, rolled, flaked or ground
1105			Flour, meal, powder, flakes, granules and pellets of potatoes
	1105.10	1105.10.00	-Flour, meal and powder
	1105.20	1105.20.00	-Flakes, granules and pellets
1106			Flour, meal and powder of the dried leguminous vegetables of Heading 07.13, of sago or of roots or tubers of Heading 07.14 or of the products of Chapter 8
	1106.10	1106.10.00	-Of the dried leguminous vegetables of Heading 07.13
	1106.20	1106.20.00	-Of sago or of roots or tubers of Heading 07.14
	1106.30	1106.30.00	-Of the products of Chapter 8
1107			Malt, whether or not roasted
	1107.10	1107.10.00	-Not roasted
	1107.20	1107.20.00	-Roasted
1108			Starches; inulin
			-Starches:
	1108.11	1108.11.00	Wheat starch
	1108.12	1108.12.00	Maize (corn) starch
	1108.13	1108.13.00	Potato starch
	1108.14	1108.14.00	Manioc (cassava) starch
	1108.19	1108.19.00	Other starches
	1108.20	1108.20.00	-Inulin
1109	1109.00	1109.00.00	Wheat gluten, whether or not dried

Appendix 3: Population in the Pacific⁸ region

Table 12: 2018 and 2020 midyear population estimates

	Land area		2018		2020			
Country name		Midyear population estimate	Population density	Average annual growth rate	Midyear population estimate	Population density	Average annual growth rate	
American Samoa	200	56,556	283	0.2	56,800	285	0.3	
Cook Islands	240	15,153	63	0.5	15,300	65	0.4	
Fiji	18,270	887,394	49	0.5	895,000	49	0.4	
French Polynesia	3,520	276,908	79	0.4	278,900	79	0.4	
Guam	540	173,339	321	1.0	176,700	327	0.9	
Kiribati	810	114,807	142	1.7	118,700	146	1.7	
Marshall Islands	180	54,645	304	0.0	54,600	302	-0.1	
Micronesia (Federated States of)	700	104,945	150	0.3	105,500	150	0.3	
Nauru	20	11,400	570	1.5	11,700	557	1.6	
New Caledonia	18,280	271,772	15	0.2	273,000	15	0.3	
Niue	260	1,606	6	-1.1	1,600	6	-1.2	
Northern Mariana Islands	460	56,178	122	0.4	56,600	124	0.4	
Palau	460	17,861	39	0.2	17,900	40	0.2	
Papua New Guinea	452,860	8,558,701	19	2.2	8,934,500	19	2.1	
Pitcairn	47	51	1	0	50	1	n.a.	
Samoa	2,830	196,379	69	0.6	198,600	68	0.6	
Solomon Islands	27,990	681,184	24	2.3	712,100	25	2.2	
Tokelau	10	1,507	151	0.3	1,500	125	0.0	
Tonga	720	100,404	139	-0.4	99,800	133	-0.3	
Tuvalu	30	10,422	347	0.6	10,600	408	0.8	
Vanuatu	12,190	281,669	23	2.3	294,700	24	2.2	
Wallis and Futuna	140	11,559	83	-1.1	11,400	80	-0.5	

n.a. – not available

Source: SPC

⁸ Excludes Australia and New Zealand