



Pacific Trade Invest
New Zealand

Call for Applications (Open Tender)
Pacific Islands Seafood – Export Market Feasibility Study

1. Pacific Trade Invest New Zealand (PTI NZ) is seeking the services of a suitably qualified consulting firm with proven research capability to conduct a feasibility study to assess the potential to export seafood exports from selected Pacific Island Countries to New Zealand. The study will examine market demand, regulatory and import requirements, trade flows, logistics and cold chain feasibility, competitiveness and investment needs to support the development of export-ready seafood value chains across the Pacific region.
2. PTI NZ is pleased to invite suitable service providers to submit technical and financial proposal to undertake this work, in accordance with the attached Terms of Reference (ToR).
3. PTI NZ will assess proposals based on 'best value for money' with an emphasis placed on quality and compliance in accordance with the requirements of the ToR. The elements that will guide PTI NZ in the selection process are specified in the ToR.
4. **Method of Submissions**
Submissions must be forwarded in PDF format to shivani.prasad@pacifictradeinvest.com Indicate “Open Tender: Pacific Islands Seafood – Export Market Feasibility Study” in the subject line of the email.
5. **Deadline for Submissions**
Submissions must be received by PTI NZ by 5:00pm Friday, 12 June 2026. Late or incomplete submissions will not be considered.
6. **Queries**
All queries should be addressed to: shivani.prasad@pacifictradeinvest.com by 5:00pm Monday, 8 June 2026. Indicate “Open Tender: Pacific Islands Seafood – Export Market Feasibility Study” in the subject line of the email.

Terms of Reference

Pacific Islands Seafood - Export Market Feasibility Study

Pacific Trade Invest New Zealand (PTI NZ) is commissioning a feasibility study to evaluate the potential for enhancing sustainable exports of seafood products from Pacific Island Countries to New Zealand. This study aims to outline ways in which Pacific island countries can best capitalize on New Zealand's \$2 billion seafood industry and the growing consumer demand in New Zealand for seafood products.

Trade and Investment facilitation and promotion are two of four strategic focus areas for PTI NZ. We want to see more New Zealanders purchasing from the Pacific and growth in the value of New Zealand's imports from the Pacific. Similarly, we promote and connect investment opportunities in the Pacific and to better inform Pacific enterprises about how to attract investment.

PTI NZ is seeking a suitable and qualified industry expert for this Study.

Objectives

The study will examine the market demand context, noting that New Zealand's seafood demand is increasing due to health-conscious consumers and a diversifying market. The New Zealand seafood industry is a significant contributor to the national economy, generating around NZD \$5 billion in annual economic output and over NZD \$1 billion in GDP and supporting more than 14,000 jobs across fishing, aquaculture, processing and distribution. Seafood is also one of New Zealand's key export sectors, with growing emphasis on sustainability, traceability and premium positioning. Currently, Pacific Island countries represent only 0.5% of New Zealand's fish imports as of 2024.

Equally, the study will examine the seafood sector in the Pacific Island countries, where fisheries are a major source of income, employment and food security. Countries such as Fiji, Samoa, Tonga, Kiribati, Solomon Islands, Tuvalu and Papua New Guinea possess significant marine resources, particularly in tuna and other high-value species but face constraints including limited cold-chain infrastructure, high freight costs, inconsistent supply capacity and challenges in meeting New Zealand regulatory and certification requirements.

Within this context, the study will assess opportunities to improve trade flows, strengthen competitiveness and support investment into export-ready seafood value chains between Pacific Island countries and New Zealand.

Study focus and Scope:

The scope of the study encompasses a detailed analysis of the commercial, technical, regulatory, and logistical aspects of seafood exports from multiple Pacific Island countries, including Fiji, Samoa, Tonga, Kiribati, Solomon Islands, Tuvalu, and Papua New Guinea, to New Zealand. The study will provide actionable recommendations for stakeholders and investors.

The regulatory and import requirements will be documented, including New Zealand import health standards, biosecurity clearance, food safety obligations, packaging and labelling rules, and tariff implications under PACER Plus. A gap analysis for import health standards will also be conducted.

The current trade and competitive landscape will be analysed, covering recent Pacific seafood export volumes, species, product forms, seasonality, and comparisons with domestic New Zealand production and competing countries' imports.

The study will assess cost competitiveness, unique species offerings, branding opportunities emphasizing island origin and sustainability, and potential co-branding with New Zealand or Māori seafood companies.

The investment and enabling environment will be identified, focusing on policy, infrastructure, and capacity-building needs in Pacific countries to meet New Zealand standards. Opportunities to leverage donor and investor funding for export growth will also be explored.

The supply chain and logistics evaluation will include an assessment of cold chain infrastructure in Pacific countries, freight costs, consolidation hubs, and the interface with New Zealand logistics, such as port handling and distribution challenges.

Methodology

The methodology and deliverables of the study will involve a mix of research methods, including desktop reviews, stakeholder interviews, and country visits, utilizing five years of trade data (2020-2024). Staged submissions will culminate in a final report and strategic recommendations by October 2026. Where possible PTI NZ will make available copies of national fisheries strategies for selected Pacific Island countries. The consultant will be expected to compile a comprehensive list of stakeholders to consult with including but not limited to National Fisheries Authorities, MPI NZ, Seafood actors in New Zealand, Forum Fisheries Agency, the Pacific Community (SPC, Suva and Noumea) and others.

1. Definitions & Industry Mapping

- How is the “seafood industry” defined in Pacific countries and in New Zealand (capture vs aquaculture; onshore vs offshore; subsistence vs commercial)?
- Who are the local actors in the seafood sector for each country (fisheries, food safety, trade, customs, environment, etc.)?
- What are the statistical classifications (HS codes, NZ species lists, etc.)?

2. Market Access & Regulatory Pathway

- What Import Health Standards (IHS) apply to the target product categories? Are gaps present (no IHS) that would require new development?
- What documentary, treatment, and certification steps are required to meet MPI biosecurity and food safety clearance (permits, certs, manufacturer declarations, product specs, lab tests, etc.)?
- What are the costs/fees, including import permits, levies, inspection, sampling, and clearances?
- What are Food Act obligations for registered NZ food importers?
- What packaging/labelling elements must appear at transport vs retail pack levels?
- How do Consumer Information Standards (Origin of Food) Regulations apply to the seafood products?
- Information of PACER Plus tariff and Rules of Origin with actual landed cost

3. **Current seafood export situation from the Pacific to NZ**
 - What are recent volumes/values/species/product forms imported by NZ from each target Pacific country (5-year trend – stats provided by PTI NZ)?
 - Which channels dominate?
 - Seasonality & frequency; shipment lot sizes; rejection rates at border.
 - Comparative scale vs NZ domestic production & total seafood imports (highlight countries competing with Pacific imports).
4. **NZ Market Size, Segmentation & Consumer Insights**
 - Market value & growth by category (fresh, frozen, canned, prepared meals, foodservice, etc.).
 - Retail structure (Foodstuffs, Woolworths NZ, Costco, specialty/ethnic outlets, online).
 - What are the consumer purchase drivers?
 - Role and impact of third-party certifications (e.g. MSC, ASC, BAP).
 - Implications of country of origin labelling visibility at point of sale.
5. **Supply-Chain & Logistics Feasibility**
 - Cold-chain infrastructure status in focus Pacific countries; packaging formats suitable for air vs sea; consolidation hubs (trans-shipment).
 - Freight cost benchmarks (sea freight and airfreight), transit time, reliability, and risks.
 - Options for shared regional aggregation.
 - Interface with NZ logistics infrastructure to analyse current process, challenges and how to face them (port handling, inspection delays, and re-distribution networks).
6. **Competitiveness & Value Proposition**
 - Comparative cost of production & processing vs NZ alternatives.
 - Species differentiation (only available from the Pacific and in demand or potential demand in NZ).
 - Branding and marketing: storytelling (island origin, community fisheries), sustainability certifications, traceability, etc.
 - Is there any potential for co-branding with NZ or Māori-owned seafood companies?
7. **Enabling Environment & Investment Needs**
 - Policy reforms, infrastructure investments, and capacity building required in Pacific countries to reliably meet NZ import standards.
 - Opportunities to leverage donors and investors assistance/funding (e.g. PACER Plus development cooperation, NZ Aid, World Bank, etc., and private co-investment).
8. **Scenario Analysis & Strategic Options**
 - Low / base / accelerated export growth scenarios by country & product; sensitivity to freight cost, certification uptake, and NZ demand growth.
 - Phased market entry roadmap.
 - Public-private partnership models (aggregation hubs, co-investment in processing, etc.).

Scope of the Services

The Consultant shall be responsible for, but not limited to the following tasks:

1. Development of a Research Plan/Workplan. This includes the formulation of timelines, methodologies, approaches, resources, consultations, meetings, questionnaires all addressing elements outlined in this Terms of Reference.
2. Implementation of the Approved Research Plan/Workplan. This involves the collection and collation of key data and insights to:
 - Define and map the seafood industry in the Pacific Island countries and New Zealand encompassing all stages from harvest to processing, shipping, clearance (biosecurity, food safety, customs), wholesale distribution, to end consumer.
 - Document New Zealand import access pathways, regulatory requirements, and cost structures pertinent to seafood products from the Pacific.
 - Quantify and analyse current Pacific-New Zealand seafood trade including volumes, values, product forms, seasonality and tariff treatment.

- Analyse the New Zealand market size, growth, segmentation, consumer preferences, and sustainability drivers relevant to Pacific seafood offerings.
- Highlight women in the fisheries sector who operate in the formal and informal sectors of the seafood industry in their countries.
- Evaluate the feasibility of supply chain and logistics including harvest, aggregation, processing options in country vs regional hubs, freight, cold chain integrity, lead times and landed cost modelling.
- Determine gaps in the Pacific island countries supply chain
- Identify competitiveness factors such as quality specifications, certifications, branding/storytelling, Pasifika diaspora demand
- Forecast scenarios for the strategic outlook for the years 2026, 2030, and 2035
- Provide prioritised recommendations, an implementation roadmap, and investment options for governments and the private sector.

3. Development of Reports

- First Draft report: Addressing all sections outlined in the approved Research Plan/Workplan and presenting key findings and recommendations to PTI NZ for review and feedback.
- Second Draft Report: Incorporating PTI NZ and stakeholder feedback on the first draft.
- Final Report: Submission of the final report for PTI NZ approval.

Experience and Qualifications

The Consultant should demonstrate the following required skills and qualifications:

- Proven Research skills and experience in similar regional projects
- Relevant qualification and experience of key personnel in Business, Economics, Trade & Investment and Management or related fields.
- Experience in delivering feasibility studies, conducting demand & supply analysis, research or similar projects.
- Technical expertise and capacity to deliver high-quality projects and reports within tight deadlines.
- Excellent communication and people skills.

Oversight of the Project and Approach

The project oversight will be managed by the Trade Manager, reporting to the Trade Commissioner.

Duration

The project will be completed by 2 October, 2026, with staged submissions of research plans, draft reports and a final report providing prioritized recommendations and strategic roadmaps for market entry and investment.

Timeframe and Deliverables

The timeline and key deliverables of the research are as follows:

	Activity	Timeline
1	Call for Expression of Interest	25 May – 12 June 2026
2	Contract awarded	26 June 2026
3	Submission of research plan/workplan/inception	10 July 2026
4	Submission of first draft report	24 August 2026
5	Submission of second draft report	16 September 2026
6	Submission of final report	2 October 2026

Submission of Applications

Interested service provider(s) should submit the following documents:

- i) Capacity statement (max 800 words).
- ii) Current curriculum vitae.
- iii) Proposed methodology, workplan and approach to accomplish the objectives of this ToR.
- iv) Financial proposal including budget breakdown, professional fees and travel and accommodation expenses if applicable. The fees quoted should be in New Zealand dollars and inclusive of all taxes.
- v) Statement on data management and confidentiality.
- vi) Confirmation of conflict of interest and independence.
- vii) Two references preferably from comparable assignments.

Evaluation Criteria

PTI NZ will evaluate applications received based on 'best value of money' with an emphasis on quality and compliance with the requirements of this ToR.

Proposals will be evaluated as follows:

- (i) The evaluation of technical competency includes an assessment of the following:
 - Understanding of TOR and expected outcomes
 - Trade, market and supply chain analytical capability (seafood export systems)
 - Relevant qualifications of the firm and key personnel
 - Experience in Pacific fisheries/seafood value chains and export development
 - Effectiveness of proposed methodology
 - Effectiveness of proposed timeframes
 - Ability to deliver fieldwork across Pacific Island countries and NZ efficiently
- (ii) Evaluation of price competency.

Reporting and Coordination

The successful service provider shall report to the PTI NZ Trade Manager and provide regular updates on progress and any problems that may be encountered. The successful service provider shall be available for a meeting on request. The successful service provider will be required to enter into a Consultancy Agreement with PTI NZ and comply with the PTI NZ policies.

Application Procedure

Interested parties are invited to submit their interest and proposals to Shivani Prasad: shivani.prasad@pacifictradeinvest.com before 5:00pm NZ Time on Friday, 12 June 2026.

Pacific Trade Invest (PTI) is the Pacific's leading trade and investment promotion agency. PTI New Zealand (NZ) is funded by New Zealand's Ministry of Foreign Affairs and Trade (MFAT) and is part of the Pacific Islands Forum Secretariat (PIFS) trade and investment network, with offices in Australia, China, Europe and New Zealand. PTI NZ facilitates commercial opportunities for export-ready and investment-ready businesses between the economies of 16 Pacific Island Countries and Territories¹ and the rest of the world. PTI NZ improves the livelihoods of Pacific people by enabling decent work and sustainable economic growth in the Blue Pacific.

¹ Cook Islands, Federated States of Micronesia, Fiji, French Polynesia, Kiribati, Republic of the Marshall Islands, Nauru, New Caledonia, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, and Vanuatu.