AGRICULTURE & WATERWAYS

For Fiji's Health & Wealth

FIJI

NON-SUGAR AGRICULTURE SECTOR POLICY 2025-2035












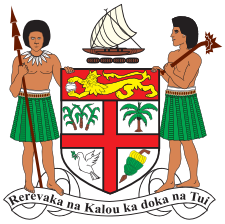

FIJI NON-SUGAR AGRICULTURE SECTOR POLICY (2025-2035)

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LIST OF ACRONYMS

EU	European Union
GDP	Gross Domestic Product
DSAD	Deputy Secretary of Agriculture Development
FAC	Fiji Agriculture Census
FNU	Fiji National University
IFC	International Finance Corporation
KPI	Key Performance Indicator
MoAW	Ministry of Agriculture & Waterways
MOU	Memorandum of Understanding
NATI	Navuso Agricultural Technical Institute
NDP	National Development Plan
SDG	Sustainable Development Goal
SDP	Strategic Development Plan
TC	Tropical Cyclone
TVET	Technical and Vocational Educational Training
UNFAO	Food and Agriculture Organization of the United Nation
USA	United States of America

FOREWORD:
MINISTER FOR AGRICULTURE & WATERWAYS

It is with great pride and optimism that I present the Ministry of Agriculture and Waterways' 10-Year Policy Framework, which charts a transformative path for the growth and development of Fiji's agriculture and water resources sectors.

As a nation, we possess a distinctive opportunity to develop an agricultural sector that is sustainable and resilient, addressing the needs of our population while simultaneously enhancing food security and to grow our economy.

The 10-year policy document of the Ministry of Agriculture and Waterways in Fiji is crucial for several reasons:

1. **Strategic Direction:** it provides a clear and comprehensive roadmap for the Ministry,outlining long-term goals, objectives, and strategies to achieve sustainable agriculturaldevelopment.

2. **Policy Alignment:** the document ensures that all initiatives and programs are aligned with the Fiji National Development Plan and international commitments, such as the UN Sustainable Development Goals (SDGs).

3. **Resource Allocation:** it helps in prioritizing and efficiently allocating resources to various projects and initiatives, ensuring that efforts are directed towards the most crucial areas.

4. **Stakeholder Engagement:** the policy document fosters collaboration and engagement with stakeholders, including farmers, industry groups, and international partners, to create a unified approach for agricultural development.

5. **Monitoring and Evaluation:** it establishes frameworks for monitoring and evaluation of the progress of agricultural programs, allowing for adjustments and improvementsbased on performance data.

6. **Climate Resilience:** the document emphasizes the importance of climate-smart agriculture and resilience-building measures to address the impacts of climate change on the agricultural sector.

7. **Economic Growth:** by promoting sustainable agricultural practices and enhancing market access, the policy document aims to boost economic growth and improve livelihoods for Fijians.

8. **Innovation and Research:** it encourages innovation and research in agriculture, to promote the development of new technologies and practices that improveproductivity and sustainability.

Over the next decade, this policy document will serve as a vital tool for guiding the Ministry in aligning its efforts to enhance agricultural productivity, improve water resource management,and strengthen food security for the present and future generations, and to achieve a sustainable,competitive, and resilient agricultural sector.

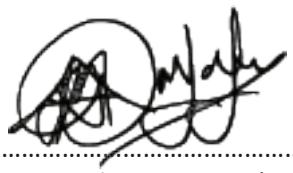
Our vision is clear, that is, to build a thriving agricultural sector, capable of supporting sustainablelivelihoods for all Fijians, while safeguarding our environment and natural resources. With a focus on modernization, inclusive growth, and the empowerment of our farmers and communities, wewill lay the foundation for a prosperous and resilient future.

This 10-year policy is a blueprint for progress, establishing both ambitious and attainable objectives for the Ministry and our stakeholders. The policy document will promote cooperation among communities, government entities, the private sector, and our international partners, ensuring all stakeholders collaborate effectively towards shared goals.

Together, let us embark on this transformative journey to shape the future of Fiji's agriculture andwaterways sector for the benefit of all Fijians.

It is with great pleasure that I present to you the 2025- 2035 Fiji Non-Sugar Agriculture Sector Policy.

Thank you, Vinaka vaka levu, and Dhaanyavaad.



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Hon. Vatimi T.T.K. Rayalu
Minister for Agriculture and Waterways

PREFACE:
PERMANENT SECRETARY FOR AGRICULTURE & WATERWAYS

As we embark on the journey of shaping the future of agriculture and water management in Fiji,it is with great pride that I present the 10-Year Policy Framework for the Ministry of Agricultureand Waterways. This policy is a testament to our collective vision for a resilient, sustainable, andthriving sector that is crucial to the well-being of all Fijians.

Over the past decade, our Ministry has played a pivotal role in transforming agricultural practices, enhancing water resource management, and ensuring that our communities are equipped to facethe challenges posed by climate change, urbanization, and the evolving global market. Through continuous collaboration with stakeholders, research institutions, and local communities, we have identified the key areas that will drive the future development of these sectors.

This 10-year policy outlines our strategic priorities, which are centered on sustainable farming practices, innovative water management solutions, rural development, food security, and the protection of our natural resources. It seeks to build on the successes of the past, whileaddressing emerging challenges and opportunities in a rapidly changing world. The COVID-19 pandemic has provided several valuable lessons that can be utilized to enhance the 2025-2035 policy framework for the Ministry of Agriculture and Waterways in Fiji, such as enhanced resilience, digital transformation, supporting local food systems, implementing healthand safety measures, climate change adaptation, stakeholder collaboration and innovation.

Integrating these insights into the Policy Framework for 2025-2035 will enable the Ministry of Agriculture and Waterways to effectively address future challenges and promote the sustainabledevelopment of Fiji's agricultural sector and grow our economy. The core of this policy lies in the dedication to prioritizing agriculture and water management as essential components of Fiji's National Development Agenda. We will work together with our stakeholders to foster growth, empower farmers, protect our waterways, and ultimately improve the quality of life for all Fijians.

I am confident that through this comprehensive and forward-thinking policy, we will lay the foundation for a more prosperous and sustainable future while ensuring that our agricultural andwater resources remain a vital part of Fiji's legacy for generations to come.

I wish to express my gratitude to the Ministry of Agriculture and Waterways staff and the European Union team for their technical support and expert guidance in developing a comprehensive Policy Framework that will facilitate progress in the agricultural sector in Fiji.

Thank you, Vinaka vaka levu, and Dhaanyavaad.

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Dr. Andrew Tukana
Permanent Secretary for Ministry of Agriculture and Waterways

EXECUTIVE SUMMARY

Fiji is a large group of islands with diverse landscapes and climates, covering over 300 islands across 1. 3 million square kilometers of ocean. The islands have a variety of ecosystems, including natural forests, freshwater, and rich coastal life. Fiji, which is located in the South Pacific, has a land area of 18,333 square kilometers and faces several similar challenges as a unique nation.

Agriculture is crucial to Fiji's economy, providing food, generating foreign exchange, and supporting about one-third of the population in rural areas. In 2023, non-sugar agriculture made up around 7. 0% of the Gross Domestic Product (GDP), with exports of $343. 4 million and importsof $1,106. 4 million in crops and livestock. Fresh agricultural products are significant for trade, but there is a need to increase export volumes amid growing competition.

In rural areas and among the outer islands, agriculture is the main economic activity, critical for many small inhabited islands. Poverty is more prevalent in these regions, particularly in the Eastern Division. A 2020 census showed 83,395 farmers, mostly male, with many engaged in subsistence farming, linking it to poverty. The agricultural sector faces challenges with an aging farmer population and a low percentage of young women working in farming. To maximize the agricultural potential, a comprehensive policy is needed to address its strengths and vulnerabilities related to climate and market issues.

Insights derived from the situation analysis report, the 2020 Fiji Agriculture Census, and other relevant documents have guided the formulation of the Fiji Agriculture Sector Policy for 2025- 2035. This development process has involved consultations with a diverse range of stakeholders, including government representatives, private sector participants, and civil society organizations.

While the government recognizes the significant contributions of the tourism and construction sectors to Fiji's economy, it remains aware of the agriculture sector's potential to support the sustained growth of tourism, manufacturing, and the overall social, economic, and ecological well-being of the nation.

The policy development process has carefully considered the expectations and aspirations articulated in the Fiji National Development Plan (2025-2029), Vision 2050, the Ministry of Agriculture & Waterways' Five-Year Strategic Development Plan, and Fiji's Pathway to a Safe, Resilient, and Innovative Food System- Horizon 2030.

Ultimately, this policy represents a national consensus on the desired trajectory for the development and sustainability of Fiji's agricultural sector.

The policy envisions a competitive, innovative, resilient, and inclusive agricultural sector, aiming for food security in Fiji. To realize this vision, four primary goals have been established: (1) Enhance the contribution of non-sugar agriculture to the Gross Domestic Product (GDP), (2) Improve the incomes of small-scale farmers, (3) Strengthen the agriculture sector's resilience against climate change, and (4) Ensure food security for all citizens of Fiji.

In light of the current agricultural landscape, the policy outlines four objectives, developed through a collaborative multi-stakeholder consultative process, to support the achievement of its vision and goals:

1. Increase market opportunities for producers.
2. Increase productivity of agriculture production
3. Promote climate resilience and environmental sustainability
4. Address critical food security issues

This Agriculture Policy document elaborates on policy statements and fundamental strategies across ten thematic areas, which include:

1. Role of the State in the further development of the agriculture sector,
2. Production support and service delivery,
3. Support for supply and value chains,
4. Sustainable soil and water management,
5. Climate change and disaster risk management,
6. Innovation,

7. Education and training,
8. Agriculture and Food Security,
9. Social inclusion in agriculture,
10. Stakeholder participation

Within these thematic areas, the policy encompasses 56 core strategies, with the belief that effective and collaborative implementation will significantly enhance the resilience of the agricultural sector, create additional formal employment opportunities, increase GDP, provide nutritional food sources, adapt to climate change, and ensure sustainable and culturally appropriate livelihoods for the people of Fiji.

This policy aims to complement the government's existing strategies and initiatives, such as the National Development Plan 2025-2029 and Vision 2050, and provide guidance to the development of the Ministry of Agriculture & Waterways' Five-Year Strategic Development Plan. The Ministry of Agriculture & Waterways will assume a leadership role in overseeing the governance framework for the policy, coordinating the monitoring and evaluation of progress across the ten thematic areas through a logical framework that specifies the indicators to be assessed for each outcome and output.

SITUATION ANALYSIS

Agriculture is the cornerstone of Fiji's economy, playing a vital role in multiple areas. The sector provides food for the nation, generates foreign exchange, and bolsters rural livelihoods, supporting approximately one-third of the population.

Non-sugar agriculture plays a vital role in the national economy, accounting for an estimated 7.0% of the gross domestic product (GDP) in 2023. Key contributors to this sector include Yaqona, taro, vegetables, cassava, poultry, bananas, and beef, which together represent the top seven agricultural commodities driving GDP growth. Notably, the contribution of non-sugar agriculture surged during the pandemic years, rising from 5.9% in 2019 to 7.5% in 2020 and peaking at 8.2% in 2021. However, it experienced a decline to 7.0% in both 2022 and 2023. These trends indicate that while non-sugar agriculture thrived amidst the economic downturn affecting sectors like tourism, this growth was largely fuelled by a temporary influx of labour from other industries. Looking ahead, a potential reversal in labour movement underscores the necessity for enhanced labour productivity to maintain agricultural progress. Although non-sugar agriculture output is expected to continue its upward trajectory, its share of GDP may gradually decrease over time.

Fiji remains a net importer of food, with food imports significantly impacting national spending and export revenues. In 2023, the country exported $343.4 million worth of crop and livestock products while importing a staggering $1,106.4 million. Between 2021 and 2023, imports surged by 44.0%, outpacing the 14.4% growth in exports, likely driven by the resurgence of tourism and increased economic activity following the Covid-19 pandemic. When focusing solely on fresh and chilled produce, imports (FJD 539.4 million) again surpassed exports (FJD 144.7 million) in 2023. Fresh/chilled and value-added crop and livestock products constituted 25.5% of exports and 15.8% of imports in terms of national trade value. In conclusion, agricultural products, particularly fresh and chilled items, are crucial to Fiji's trade landscape, with a significant portion of value addition stemming from imported inputs.

Export volumes and values must be significantly increased. However, the competition in export markets, particularly for fresh produce, is intensifying. The leading nine fresh and chilled commodities exported, ranked by value from highest to lowest, include kava, taro, turmeric, ginger, vegetables, eggs, chicken, cassava, and spices. The number of exporters dealing in fresh, chilled, and value-added crop and livestock products surged from 52 in 2016 to 201 in 2021.

Fiji benefits from advantageous trade and quarantine agreements for agricultural exports to Australia, New Zealand, the USA, Europe, Canada, China, and neighboring Pacific Island nations. Nevertheless, exporters face challenges such as limited supply during off-seasons, subpar quality of fresh produce, inadequate infrastructure, insufficient storage and cooling facilities, and ineffective post-harvest practices among farmers. Addressing these challenges and exploring new or higher-value markets within existing export destinations is essential for sustaining growth in export volumes and values.

There is a significant opportunity to replace imports of certain fresh and chilled goods, especially in light of the thriving tourism industry and the new prospects in food processing. The nine most imported items include wheat, sheep meat, rice, potatoes, beef, onions, chicken, milk, and kava. The processing sector, along with the expanding tourism market, serves as a primary outlet for these agricultural imports. Notably, aside from wheat and temperate fruits, many of the imported products are also cultivated in Fiji. A study titled 'From the Farm to the Tourist's Table' (IFC; 2018) highlighted the potential for import substitution while also pinpointing critical challenges that hinder the tourism sector from sourcing more locally grown produce. These included:

1. inconsistent supply (particularly fruits vegetables, and dairy products);
2. seasonality of produce available locally (particularly fruits and vegetables);
3. poor quality of products (particularly meat, and dairy products);

4. lack of food safety standards (especially for meat products), and
5. lack of networking between hotels, local producers, and suppliers.

Addressing these challenges is crucial for Fiji to fully leverage the tourism sector's potential for agricultural products and minimize imports. Emphasis must be placed on fostering connections between hotels, local producers, and suppliers since this presents a most effective pathway for enhancing the supply of fresh produce to both the tourism and export industries.

Agriculture plays a vital role in the economy of rural areas and the outer islands of Fiji, making it essential for the economic sustainability of over 200 small, inhabited islands. The poverty rate in rural areas stands at 41.5%, significantly higher than the 20.4% in urban areas, with the Eastern Division, which includes the outer islands, facing the highest rate at 42.7%. Therefore, a key policyfocus should be on boosting agriculture's role in alleviating poverty in these rural communities.

According to Fiji's Agriculture Census (2020 FAC), 83,395 farmers consider farming their primary economic activity. The majority of these farmers are male (85.6%), with 59.4% identifying as unpaid family members. Additionally, 40% are either self-employed or employers in semi- commercial or commercial farming, while 59% engage in subsistence farming. Data from 2023 indicates that formal agricultural production accounted for over 78% of total agricultural GDP, with subsistence and informal agriculture making up nearly all of the remainder. A significant concern is the high number of individuals involved in subsistence agriculture, which is often linkedto poverty.

The socio-economic attributes of the agricultural sector present both opportunities and challenges. A significant portion of farmers, specifically 57.3%, are aged over 40. Conversely, many young farmers, particularly those under 35, identify themselves as unpaid family labourers.

Female youth constitute a mere 4.4% of individuals who regard farming as their primary occupation. While all farmers encounter a shared set of obstacles, younger farmers experience additional hurdles, such as insufficient formal training, restricted access to land, limited market knowledge, financial constraints, and challenges in securing funding. Young women, in particular, face even greater difficulties than their male counterparts, including societal norms that restrict their control and ownership of marital assets. It is essential to focus on bridging the gender and age disparities to leverage the energy, dynamism, and innovative capabilities of young farmers.

Ongoing structural issues hinder the advancement of agriculture in Fiji. According to the 2020 Fiji Agriculture Census, only 15% of arable land is currently in use, leaving a substantial 85% of arable land underutilized. This situation is primarily attributed to customs and frameworks governing the use of traditional land, which constitutes the majority of land available for agricultural production. Many farmers have limited access to capital and primarily rely on their financial resources.

A considerable number of farmers continue to engage in subsistence farming, employing traditional production techniques, with a gradual shift towards commercial farming methods. This slow transition may be associated with market challenges as well as a lack of knowledge regarding commercial production practices and the concept of farming as a business. Those who do engage in commercial production often face high costs of production and labour, alongside low productivity levels. Additionally, many production sites are situated far from market access. Addressing these challenges requires a strategic approaches and adequate resources.

It is essential to enhance the relationship between agriculture and the environment. Agriculture plays a crucial role in providing food, contributing significantly to the socio-economic landscape, and sequestering greenhouse gases within crops and soil. Nevertheless, agricultural practices are often linked to environmental pollution, stemming from inadequate waste management, effluent runoff, soil degradation, excessive water usage, loss of biodiversity, and the emission of greenhouse gases. Therefore, it is imperative to focus on agricultural methods that prioritize soil health, mitigate adverse environmental impacts, and foster sustainable production systems. This necessitates a heightened emphasis on sound agricultural practices, the management of renewable natural resources, landscape conservation, and the preservation of biodiversity.

Moreover, it is vital to develop strategies that enhance resilience to climate-related events. As a small island developing state (SIDS), Fiji faces

significant vulnerability to climate-induced shocks.Numerous studies indicate that Fiji ranks among the top 15 countries globally most susceptible to weather-related disasters. In 2016 and 2020, Fiji experienced devastating impacts from Category 5 Tropical Cyclones, specifically TC Winston and TC Yasa. The total estimated losses in the agricultural sector from these two cyclones amounted to FJD542 million and FJD142 million, respectively. A World Bank Climate Vulnerability Assessment conducted in 2017 projected that by 2050, Fiji's annual losses attributable to extreme weather events could escalate to 6.5% of its GDP.

Food and nutrition security presents a significant challenge in Fiji. Although there is sufficient food supply at the national level, many households experience moderate to severe food insecurity, making access to a nutritious diet a persistent issue for a large portion of the population. Between 2018 and 2020, it was estimated that 14.3% of the population faced moderate or severe food insecurity. Additionally, deficiencies in essential micronutrients, including iron and zinc, are prevalent across all age demographics. The agricultural sector must play a more substantial role in addressing poverty alleviation and enhancing nutritional outcomes.

OVERALL STRATEGY FOR CHANGE

At the macroeconomic level, Fiji, similar to other comparable economies, is poised to witness a growth in opportunities within the non-agricultural sectors as the economy undergoes modernization and expansion. This development is advantageous and should not be hindered. It forms an integral part of the economic structural transformation process. Nevertheless, this evolution implies that the agricultural sector will experience a reduction in labour and must expand at rates comparable to the broader economy; otherwise, its contribution to Gross Domestic Product (GDP) will diminish over time.

In the context of Fiji's market-driven economy, the agricultural sector will effectively adapt to this economic structural transformation by enhancing productivity and capitalizing on market opportunities that yield higher returns on agricultural products. These adaptations will be further supported at the microeconomic level as farmers respond to lucrative opportunities and accessible markets. It is these favourable conditions—profitable opportunities and easily reachable markets—that have driven the notable recent growth in the production of commodities such as yaqona and ginger. Consequently, these factors will sustainably enhance farm incomes, attract investors, and accelerate the transition of farmers from subsistence to commercial production.

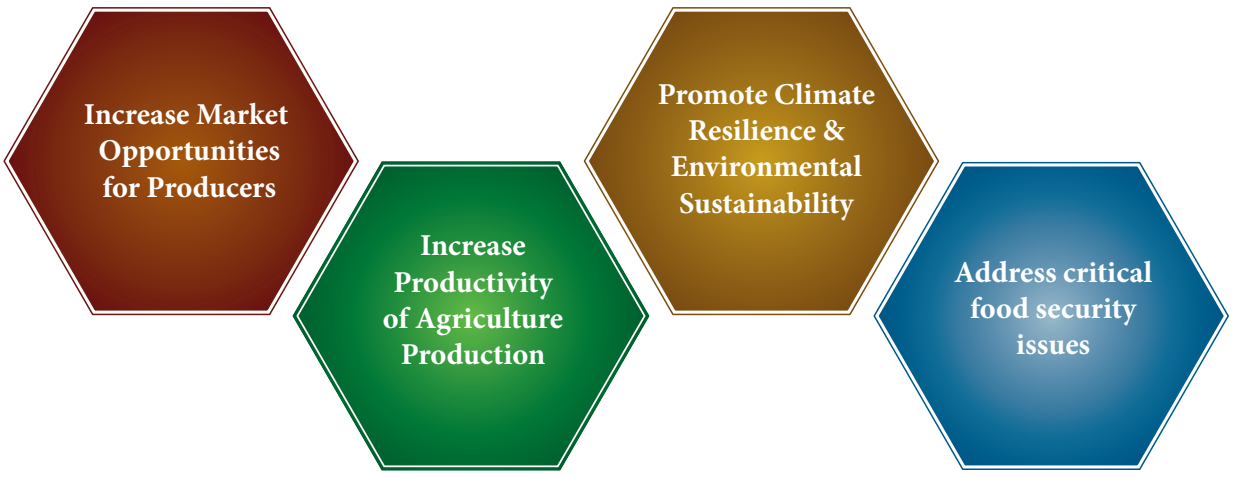
Fiji will effectively tackle several structural challenges that hinder the growth of the agricultural sector, particularly in the areas of:

I. land ownership and market,
II. agricultural financing, and
III cultural norms that prioritize subsistence farming and communal responsibilities.

Additionally, the agricultural sector faces external threats stemming from its susceptibility to climate change, which adversely affects productivity and livelihoods. To address these challenges, the focus will be on enhancing resilience, preparedness, and response strategies.

As a predominantly rural enterprise, agriculture plays a significant role in the social fabric, contributing to socio-economic development and improved living standards. Specifically, Fiji's agricultural sector has the potential to help bridge the gender gap, invest in the youth, and reduce regional inequalities, and support food security and nutritional health.

Given the current state of agriculture, the policy will prioritize four key strategic areas.



1. Increase market opportunities for producers.

The emphasis is on enhancing targeting and strengthening connections to promising growth sectors, especially in domestic tourism, export markets, and processing that support the agricultural sector. To achieve these strategic objectives, it is essential to prioritize the development of market access and pathways to export opportunities, foster private-sector initiatives, collaborate more closely with tourism organizations in the private sector, and concentrate on competitive import substitution prospects.

2. Increase productivity of agriculture production

Enhancing productivity is essential for maintaining competitiveness. Efforts to boost profitability and farmer incomes need to prioritize productivity improvements. This endeavour concentrates on enhancing human capabilities and agricultural practices, integrating technology, streamlining the supply systems for inputs and services, upgrading infrastructure, minimizing barriers to land utilization, and promoting more accessible financialresources.

3. Promote climate resilience and environmental sustainability.

The future prosperity of Fiji will increasingly hinge on our ability to effectively tackle the challenges posed by climate change and manage its consequences. Policy and strategic effortswill prioritize the enhancement of the resilience of agricultural systems to climatic and weather-related impacts, safeguarding biodiversity, reducing land degradation, and fosteringenvironmental sustainability.

4. Address critical food security issues:

The policy focuses on the critical food and nutrition security challenges facing the nation. In Fiji, the primary concerns related to food and nutrition security pertain to household access and nutritional consumption, particularly regarding micro-nutrient deficiencies, rather than the broader issue of national availability or increased production. Therefore, initiatives will concentrate on effectively reaching vulnerable communities by enhancing collaboration withthe Ministry of Health and Medical Services.

POLICY DOCUMENTS IN THE SECTOR

National policy and strategy serve as a foundational framework for agricultural policy. The keynational policy and strategy documents pertinent to the agricultural sector include:

- Fiji National Development Plan 2025-2029 and Vision 2050
- Green Growth Framework for Fiji (2014).

Current agricultural policy documents concentrate on a limited range of issues within theagricultural sector. These documents are:

- Youth in Agriculture Policy 2022 – 2027
- Policy for Gender in Agriculture in Fiji 2022 – 2027.

Furthermore, several policy documents are either in draft form or still under development,which include:

- Draft Policy on Food and Nutrition Security
- Draft Fiji National Organic Policy for Non-Sugar Sector 2024 – 2028.

POLICY FRAMEWORK

The policy framework for further development of the agriculture sector is guided by a vision,policy principles, and goals.

Vision

A competitive, innovative, resilient, and inclusive agriculture sector and a food-secure Fiji

Policy Principles

Our policy principles will underlie and infuse all our strategies and efforts to further develop andtransform the sector.

We will strive for:

1. Farming systems to be competitive, prosperous, and resilient.
2. Agriculture value chains to be private sector driven with empowered producers.
3. Agriculture activities to be socially inclusive (gender, age, disabilities, outer islanderparticipation).
4. Production location and techniques that are mindful of the environment and soil health.
5. Stakeholders (farmers and other significant value chain actors) to be included in planning forthe further development of industries and the sector.

Policy goals

The 5-year Strategic Development Plan which is the action plan for the 10 –year Policy outlines the targets for policy goals across three time frames: short-term, medium-term, and long-term. This structured approach ensures a clear roadmap for achieving the desired outcomes.

1. Increase in non-sugar agriculture contribution to Gross Domestic Product (GDP).

IMPACT INDICATOR	BASELINE (value & ref year)	TARGET (value & ref year)
Percentage increase in the volume of non-sugar agriculture production	482,997.1 mt (2023)	20% (2035)
Percentage increase in non-sugar agriculture real GDP relative to that of the other sectors of the economy.	85.8% (2013- 2023) [1]	90% (2025-2035)

Notes:

i. The growth rate of non-sugar agriculture real GDP for 2013 – 2023, was 56.8%.

ii. The growth rate of Real GDP for the other sectors (combined non-sugar) for 2013– 2023, was 66.2%.

[1] Calculation from data in Ministry of Agriculture and Waterways. Gross Domestic Product 2022- Brief Summary

iii. From points (i) and (ii) above, for the 2013 – 2023 period, the percentage increase in non—sugar agriculture GDP was 85.8% of that of the other sectors (combined)of the economy.

iv. Achieving the "at least 90%" target will mean that agriculture's contribution to overall GDP may fall slightly. If 100% were achieved, then agriculture's share of GDP would remain unchanged at the end of the 10 years.

2. Increase the number of small-scale farm holdings or smallholders transitioned to semi-commercial or medium-scale farming.

IMPACT INDICATOR	BASELINE (value & ref year)	TARGET (value & ref year)
Percentage increase in the average real income of small-scale farm holdings	8,000 FJD (2024)	50% (2035)
Percentage of smallholder farmers transitioned to semi-commercial farming level	5%	50%

Notes:

i. This indicator is related to SDG Indicator 2.3.2, which is the average income ofsmall-scale food producers

ii. The definition of small-scale agriculture holdings and using a relative approach,opted for the combination of the two criteria below

1. **Physical size of the holdings**
    a) ***Land Size:*** holdings falling in the bottom 40% of the cumulateddistribution of land size, in hectares
    b) ***Livestock:*** holdings falling in the bottom 40% of the cumulateddistribution of the total livestock heads

2. **Economic Size of the holdings**: as expressed by the bottom 40% of thedistribution of total revenues

iii. The baseline was established based on the data obtained from the Agriculture Production Survey carried out by the Ministry of Agriculture & Waterways in 2024, marking the inaugural instance of such a survey.

iv. This was calculated using a standard formula provided by FAO for SDG 2.3.2 indicator: $\boldsymbol{Y} = \boldsymbol{R} - \boldsymbol{C} + \boldsymbol{\Delta S}$ i.e. Gross Income = Revenues – Costs + Stock Variation

3. Increased resilience of the agriculture sector to the effects of climate change.

IMPACT INDICATOR	BASELINE (value & ref year)	TARGET (value & ref year)
Proportion of agricultural area under productive and sustainable agriculture increased	19% (2024)	50% (2035)

Notes:

i. This indicator is related to SDG Indicator 2.4.1 which is the proportion ofagricultural area under productive and sustainable agriculture

ii. The area under productive and sustainable agriculture captures the threedimensions of sustainable production: environmental, economic, and social.

iii. The baseline was estimated based on the data obtained from the Agriculture Production Survey carried out by the Ministry of Agriculture & Waterways in 2024,marking the inaugural instance of such a survey.

iv. The formula used was $\frac{\textit{Area under productive and sustainable agriculture}}{\textit{Agricultural Land Area}}$

4. Improved food security.

IMPACT INDICATORS	BASELINE (value & ref year)	TARGET (value & ref year)
Percentage increase in the volume of Cereals and grains production (e.g. rice and maize)	9,171 tons (2023)	35%
Percentage increase in the volume of Roots andtubers production (e.g. Taro, Cassava, Sweet Potato, Yam, Kava)	212,438 tons (2023)	35%
Percentage increase in the volume of pulse production (e.g. cowpea, pigeon pea, peanut, etc.)	1,576 tons (2023)	10%
Percentage increase in the volume of Protein-richfood production (e.g. Sheep, Goat, Pig, Eggs, Broiler, Duck, Milk, Beef, Honey)	98,000 tons (2023)	10%
Percentage increase in the volume of Fruit Production(e.g. Banana, Pawpaw, Pineapple, Guava, Mango, Dragon Fruit)	39,951 tons (2023)	10%
Production increase in the volume of the Vegetables and Leaves production (e.g. Leafy Vegetables, Eggplant, Pumpkin, Okra, Tomatoes)	77,850 tons (2023)	40%
Percentage increase in the volume of Spices Production (e.g. Tumeric, Ginger, Chillies, Vanilla)	20,113 tons (2023)	15%

THEMATIC AREAS, POLICY STATEMENTS, AND CORE STRATEGIES

This Non-Sugar Agriculture Policy document details policy statements and core strategies in ten (10) thematic areas. The following sections outline the ten thematic areas, accompanied by the corresponding policy statements and core strategies designed to implement these policy statements effectively.

THEMATIC AREA 1

Role of the State in the further development of the Agriculture Sector

Introduction

The role of the state is a fundamental policy issue since it provides shape and direction to government interventions. Globally, development evidence and experience in market-based economies highlight that the State is a relatively inefficient producer of private goods and servicesand further, that its activities often crowd out private sector activity.

In Fiji, consistent with the practice in most market-oriented economies, the state largely plays a facilitative role by providing a conducive business climate, and investing in the set of goods and services that it can best produce – i.e., the public goods and services that support private sectordevelopment. Public goods and services may include necessary infrastructure, and enabling services, such as productivity-enhancing research, extension services, and services to facilitate marketing and trade. The state also may intervene in markets, for limited periods, to assure the supply of some 'strategic' private goods not provided or well-distributed by the private sector.

Public interventions in non-sugar agriculture are facilitated primarily through the Ministry of Agriculture & Waterways. Additionally, there are interventions from the Ministry of iTaukei Affairs, the Ministry of Rural and Maritime Development, the Ministry of Trade, Cooperatives, Small and Medium Enterprises, and the Ministry of Youth and Sports.

Policy Statement

Provide a conducive business climate and be an efficient and effective provider of public goods and services in support of private sector activity.

Core Strategies

1. Increase collaboration, coordination, and planning among Ministries that intervene inagriculture, based on a more robust intervention framework for cooperation.

2. Review and define strategies for efficient and effective delivery of public goods andservices. This, necessarily, will involve;
    - identifying the set of essential public items,
    - Identifying the set of strategic private items, and
    - Identifying items that should be private sector activity.

3. Identify timeframes for effecting a smooth transfer of production of private goods (such as seedlings) from the public to the private sector.

4. Strengthen, orient, and properly resource extension services to deliver advisory services and technical assistance to farmers in their farming areas and on farms. The aim is for effective and efficient service delivery to large-scale commercial farming and to transformsmall-scale production. This will require;

a. review of extension methods in use,
b. addressing issues on infrastructure, office equipment, network connectivity and staff welfare
c. addressing issues of mobility and working hours of extension officers, and
d. setting performance standards for extension officers (e.g., days per week in field advisory visits).

5. Increase investment in research into varieties and breeds for improved productivity and resillience to climate change.

THEMATIC AREA 2
Production Support and Service Delivery

Introduction

Large-scale commercial agricultural production relies on a variety of inputs and services. Essential farm inputs encompass seeds, breeding stock, fertilizers, pesticides, water, medicines, and equipment. The services required include veterinary assistance, machinery services, extension advisory services, market information, insurance, credit, and regulatory support. In Fiji, the distribution of these vital inputs and services encounters unique challenges due to the dispersion of farmers across numerous islands, often residing in small communities with limited transportation and communication infrastructure. Nevertheless, commercial farmers is anticipated to have convenient access to these resources.

In Fiji, the provision of support and services to farmers is achieved through a combination of delivery systems, which include free-market mechanisms, closely regulated markets, and public-sector initiatives. For example, veterinary medications are primarily distributed through a public- sector-driven approach, while extension and veterinary services are provided by the state, and fertilizers are predominantly managed through free-market channels.

A significant challenge in agricultural development lies in creating systems that are the most effective, efficient, and responsive for delivering various products and services to a diverse farming community, which includes both large-scale commercial and small-scale farmers.

To successfully implement the relevant policies and strategies, it is essential to define clear criteria for categorizing farming levels. The Ministry of Agriculture and Waterways has identifiedtwo primary criteria that define the farm level, aligning with the standards set by the UNFAO through a relative approach. These criteria encompass the physical dimensions of the holding, which include both land area and livestock numbers, as well as the economic dimensions of the holding.

According to the criteria outlined, the 2024 Fiji Agriculture Production Survey revealed that 83.6% of agricultural households in Fiji engage in small-scale farming. Notably, approximately two- thirds (70.0%) of these small-scale farms possess less than 1 acre of land. To ensure consistencyand comparability on both regional and global scales, the policy will use the term small-scale farm holdings instead of subsistence, medium-scale, and large-scale farm holdings during the implementation and reporting phases.

The standard criteria of farming levels in Fiji are as follows;

Criteria's	Variables	Small-scale/ Smallholder	Medium-Scale/ Semi-Commercial	Large Scale/ Commercial
1. Physical Size	a) Cultivated Agriculture land Size	< 4.226 acres	≥ 4.226 ≤ 8.452 acres	> 8.452 acres
	b) Herd Size	< 4.911 Livestock Tropical Unit		
		Dairy: 1 – 5 Milking cows	Dairy: 6 - 12 Milking cows	Dairy: > 13 Milking cows
		Beef: 1 – 10 Cows	Beef: 11 - 20 Cows	Beef: > 20 Cows
		Sheep: 1 – 30 Ewes	Sheep: 31 - 100 Ewes	Sheep: > 100 Ewes
		Goat: 1 – 30 Does	Goat: 31 – 120 Does	Goat: > 120 Does
		Pig: 1 – 3 Sows	Pig: 4 – 10 Sows	Pig: > 10 Sows
		Apiculture: 1 – 20 Hives	Apiculture: 21 - 40 Hives	Apiculture: > 41 Hives
		Broiler: 1 – 500 birds	Broiler: 501 - 1000 birds	Broiler: > 1000 birds
		Layers: 1 – 120 layers	Layers: 121 - 250 layers	Layers: > 250 layers
		Ducks: 1 – 200 ducks	Ducks: 201 – 400 ducks	Ducks: > 400 ducks
2.Economic Size	Agriculture Income	FJD 0 – FJD 8,600	≥ FJD 8,600 FJD ≤ FJD17,200	> FJD 17,200
Need to satisfy all conditions (1. a, 1. b, and 2+absolute cap) to be classified at a farming level				

Policy Statement

Foster effective, efficient, and responsive input supply systems to support farming.

Core Strategies

1. Reassess and strengthen input supply delivery systems. The preference will be for supply systems that are private-sector driven and allow easy access to all farmers.

2. Empower the private sector to deliver inputs and services. This can be done through instituting quality assurance, certification programs, and reforms (such as supplier engagement agreements and incentives, and re-examining public sector pricing for goods and services) to foster conducive environments for accountable, efficient, andresponsive service delivery by the private sector.

3. Supply high-quality genetic materials by establishing seed banks/nucleus herds/ flocks with the participation of both state and private sectors.

4. Enhance coordination and expand mechanization efforts in agriculture to meet the unique requirements of farmers while ensuring easy access.

5. Review and refine land tenure systems.

6. Review and refine systems for access to financing. The preference is for systems to bemore supportive of agricultural investment by commercially-oriented entities, and for financing to be provided by the financial institutions.

7. Reassess and mount aggressive programs of knowledge transfer and training for farmers, emphasizing commercial production techniques and management principles.

THEMATIC AREA 3:
Support for Supply and Value Chain

Introduction

Farm products are harvested and channelled into domestic markets, the tourism industry, exportmarkets, and processing. To enhance the distribution of produce and maximize benefits for both producers and consumers, it is essential to strengthen market linkages that focus on relevant entities, institutions, and systems.

Domestic markets and processors in Fiji are generally well served. Producers in outer island areasneed to be better integrated. Large buyers, such as supermarket chains and hotels, prefer marketing channels that give the assurance of consistent supply at relatively stable prices and relatively convenient (e.g., one phone call) purchasing. The ascendant tourism sector needs to be more meaningfully integrated into domestic food systems. Fiji's fresh and chilled exports to majorcountries need to grow beyond diaspora markets and small ethnic food stores and target larger and higher-value channels. Issues of standards, certifications, and increased reliability of suppliesneed to be mainstreamed and addressed.

Policy Statement

Improve market linkages and volumes to tourism and export markets.

Core Strategies

i. Improve linkages between the farm sector and domestic tourism (to increase volumes, quality, and responsiveness to tourism demands).

ii. Access more export markets and higher-valued niches in new and existing export markets through market scoping, research, intelligent and market promotion.

iii. Facilitate private sector investment in processing that has direct backward linkages to the farm sector.

iv. Promote the adoption of more profitable higher-valued commodities or those in which Fiji has a comparative advantage, along with relevant production systems.

v. Implement good agricultural practices, including standards to support organic production and meet tourism demands.

vi. Address risks in production and marketing. This includes larceny and post-harvest issues.

vii. Assess and improve the resilience of supply chains to diverse shocks and disasters. This may include an examination of storage capacities, reserves, and cooling systems.

viii. Improve off-farm infrastructure (e.g., access roads, water management, etc.).

ix. Negotiate and regulate minimum buying price of commodities agreed by growers and exporters for the benefit of both parties involved.

x. Address ease of doing business bottlenecks.

THEMATIC AREA 4:
Sustainable Soil and Water Management

Introduction

The World Economic Forum ranked the water crisis as the highest concern for the next decade[2]. This is exacerbated by the adverse impacts of climate change. Internationally, attention is being given to conserving and replenishing water resources through catchment area conservation andenrichment, and increasing water productivity using modern technology and use of precision irrigation techniques, etc. Fiji, subject to a climate with a dry season and a rainy season, has to address water management issues from two sides, both conserving water and also the removal of excess water.

Soil degradation and loss also is an important issue. Soil degradation and declines in soil health often are the result of poor agricultural practices and uncontrolled deforestation.

Policy Statement

Promote soil conservation and sustainable management of land and water resources.

Core Strategies

i. Promote good agricultural practices and organic farming methods to enhance soil health and sustainable water use.

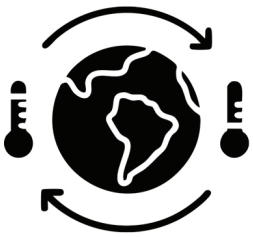
ii. Promote sustainable management of watersheds and waterways, flood control, river banks, and coastal protection to safeguard agriculture and communities.

iii. Undertake adaptive management of waterways hazards.

iv. Improve utilization of land through better irrigation, improved drainage, and, where applicable, agro-forestry.

v. Reduce overuse and soil contamination from synthetic inputs through programs for sampling and assessment of soil nutrient levels to then facilitate precise nutrient management practices.

[2] https://www.unesco.org/en/articles/imminent-risk-global-water-crisis-warns-un-world-water-development-report-2023



THEMATIC AREA 5:
Climate Change and Disaster Risk Management

Introduction

A World Bank Climate Vulnerability Assessment (2017) projected that by 2050 Fiji's annual losses due to extreme weather events could reach 6.5% of GDP. Agriculture particularly is prone to theeffects of climate change.

Agriculture is affected by and at the same time contributes to climate change. Climate change phenomena include volatile and extreme weather events, rising sea levels, and rising temperatures. Agriculture contributes to global warming and climate change through its emissions of greenhouse gases and the destruction of forests. The relatively unprotected environment in which agriculture production occurs means that there are ever-present dangersfrom weather and climate phenomena. Fiji's exposure to the impacts of climate change is heightened because it lies in the zone for tropical cyclones and has over 200 inhabited islands, many of which are very small with insufficient freshwater resources.

Disaster risk management is spearheaded by the Ministry of Rural and Maritime Development and Disaster Management. However, sectoral responsibilities lie with the individual ministries.

Policy Statement

Promote sustainable agriculture through climate mitigation, adaptation, and resilience.

Core Strategies

i. Climate Mitigation to sequester and reduce emissions through acts such as encouraging agroforestry, use of renewable energy resources, precision farming techniques, and smarttechnologies.

ii. Climate Adaptation to changing conditions through deploying climate-resilient breeds andspecies, smart irrigation and water management strategies, and early warning systems.

iii. Resilience for Food and Nutrition Security by enhancing the capabilities of farmersthrough capacity building, knowledge transfer, support for climate-smart practices, and post-harvest management.

iv. Research and Innovation to advance climate-resilient agriculture and sustainable agriculture practices (including organic production).

v. Disaster Response Management through strengthening infrastructure resilience, establishing early warning systems, and disaster response planning for the agriculture sector.

THEMATIC AREA 6:
Innovation

Introduction

The development and adoption of productivity-enhancing technologies and techniques is a majoravenue in any strategy for expanding production and increasing incomes in the agricultural sector.Additionally, labour-saving technologies can be important in reducing drudgery in agriculture and so expand the attraction of agriculture to youth and women, and also address challenges of labour shortages. Technology also can provide solutions to some of the human and environmental challenges associated with agricultural production.

Traditionally, the research and extension services of the Ministry of Agriculture & Waterways have been regarded as the responsible institutions for technology development and adoption. However, contributions can also be made by universities and the private sector, including individual farmers. More broadly, the benefits of innovation can be magnified if a culture of innovation is ingrained in the wider agriculture society, the education system, the agriculture research institutions, and the extension system.

A key issue is the effectiveness of research. This can be addressed through a system for the prioritization of research and development, and through reforms (organizational/institutional) to enhance private sector participation and increase funding sources.

Policy Statement

Increase the agriculture sector's contribution to the national economy through innovation.

Core Strategies

i. Increase in funding for research. This will facilitate better attention to existing and emerging priorities and foster work on more recent productivity-enhancing technologies that use sensors and data analysis, such as precision agriculture, and smart agriculture.

ii. Strengthen linkages among agriculture-oriented research institutions within and across the national boundary with the aim to enhance the effectiveness of resource use.

iii. Establish a framework (public, private, and academic) to recommend the national research agenda (annually), review progress against the agenda, promote collaboration among private-public-academia, and examine issues of funding.

iv. Review and reassess the organization and autonomy of the MoAW Research Divisionto achieve greater effectiveness and financial sustainability.

v. Create opportunities for public-private partnerships for developing innovation and information sharing to address specific issues.

vi. Strengthen extension and research collaboration.

vii. Include courses in innovation in technical and university programmes.

THEMATIC AREA 7:
Education and Training

Introduction

Institutions engaged in the development of human resources in agriculture in Fiji, beyond the primary and secondary levels, include universities, technical schools, farm schools, and the technical divisions of the Ministry of Agriculture and Waterways. These institutions provide training opportunities for youths and women, persons engaged in farming, staff of private sectoragribusiness firms, and the technical and professional staff of the Ministry of Agriculture and Waterways.

There are concerns that, in aggregate, institutions are not meeting the need for specialists, suchas vets and para-vets, nor adequately equipping graduates with the required knowledge and skills. There is concern about insufficient collaboration and coordination between the Ministry of Agriculture and Waterways and the academic institutions. These concerns suggest the need for a critical relook at the systems for human resource development and their applicability to thefuture growth and development potential of the sector.

Policy Statement

Strengthen knowledge and skills in the agriculture sector through effective systems for training and education to meet future needs.

Core Strategies

1. Develop an industry/sector training plan that will support innovation in the sector. The training program should cater to the varying levels of education and skills of persons in orthat will enter the system and propose education and training pathways to meet industry needs. This should include university education, Technical and Vocational Educational Training (TVET), farmer-training programs, Ministry and institutional in-service training programmes, etc.

2. Revisit bilateral agreements between Fiji and other countries and universities. Fully utilizeopportunities for training, in particular, to
    - build and enhance the pool of subject matter specialists and specialist skills inthe country,
    - provide exposure to new approaches and technologies to enhance productivityand food security,
    - enhance market opportunities.

3. Engage with the Fiji Higher Education Commission in developing and standardising course materials for use by staff and farmers.
4. Review the Memorandum of Understanding (MoUs) between MoAW and the Fiji National University (FNU), and other tertiary education institutions to include and better orient programmes to industry needs.
5. Develop and implement the MoAW training policy/strategy. This should include an in- house program of training for technical, professional, and administrative staff.
6. Rehabilitate and expand the Navuso Agricultural Technical Institute (NATI) and TUTU Rural Training Centre as centers for farming community agriculture vocational training.

THEMATIC AREA 8:
Agriculture and Food Security

Introduction

Food security is a national, multi-sectoral, and multi-agency priority in Fiji. The food security dimension of (national-level) food availability is satisfied through a mix of domestic production and imports, with the country being close to self-sufficiency in several commodities including chicken, and most root crops. Household accessibility and nutritional intake, however, are dimensions of food security that require attention. Moderate or severe food insecurity was estimated to affect 14.3% of the population in the period 2018-2020.

Malnutrition is a major issue. There is a high dependence on processed foods and low consumption of fruits and vegetables. The prevalence of stunting in children under 5 years of age was 7.5% in 2020, and obesity in the adult population was 30% in 2016. Micronutrient deficiencies, particularly iron and zinc, are major challenges affecting all age groups. The prevalence of anaemia among women of reproductive age was estimated at 32% in 2019.

Public policy for addressing food security emphasizes a multi-sectoral approach. Two key agencies are the Ministry of Health and Medical Services and the Ministry of Agriculture and Waterways. The Ministry of Health and Medical Services has the mandate to identify, address, and monitor nutritional issues.

The Ministry of Agriculture and Waterways through collaboration with the Ministry of Health and Medical Services can deliver food production strategies to support food and nutrition security targets. The collaborative approach is reflected in the Draft Policy on National Food and Nutrition Security, which identifies ten strategic areas, proposes multi-sector governance, and sets out actions to be taken by the Ministry of Agriculture and Waterways and other Ministries.

Policy Statement

Improve food security through increased household access to locally produced healthy and nutritious foods.

Core Strategies

1. Facilitate approval and implementation of the draft Policy on National Food and Nutrition Security, including the establishment of multi-sector committees and the MoAW Focal Point.

2. Collaborate with the Ministry of Health and Medical Services and the Ministry of Women, Children, and Social Protection to improve awareness of items that can be grown/reared to address specific nutritional deficiencies (particularly anaemia) and for a healthy plate

3. Implement programs to assist affected households, communities, and schools to grow/rear foods (including Indigenous foods) that can be used to address specific nutritional deficiencies.

4. Support the Ministry of Education in a program of school gardening for healthy eating.

THEMATIC AREA 9:
Social Inclusion in Agriculture

Introduction

The contributions of men and women, the young and old, the disabled, and rural and urban communities are important for a thriving agricultural sector. However, women, youth, the disabled, outer-island residents, and those in informal settlements in Fiji face more obstacles to meaningful participation. These disadvantaged groups each have special challenges that differ from the core challenges facing most producers in Fiji.

Policy and strategy to increase the inclusion of women, youth, outer islanders, and other disadvantaged groups must address the specific circumstances and problems affecting each of these groups. A one-size-fits-all strategy will not succeed. Thus, a strategy should distinguish between the general problems (such as inadequate financing) affecting all groups in agriculture and the distinct problems and issues hindering increased participation and progress of each of the specific disadvantaged groups.

This distinction will allow general issues to be addressed through sector-focused interventions while more forcefully targeting the specific issues critical to the greater participation of women, youth, the disabled, outer-islanders, and other disadvantaged groups. For instance, women tend to have less control over decision-making, youths have inadequate levels of technical training and skill in agriculture, and outer-island residents have restricted market opportunities often tied to the availability of sea transport.

Policy and strategy for women and for youth have direction from specific policy documents. No comprehensive policy/strategy document is guiding the inclusion of the disabled in agriculture or outer-island agricultural development.

Policy Statement

Increase the participation of women, youth, the disabled, and outer-islanders in the Fiji agro- economy.

Core Strategies

1. Implement the Youth in Agriculture policy and in particular recommendations thataddress
   - the unattractiveness of agriculture to youth,
   - deficits in technical education and skill training, and
   - the involvement of youth in discussion and decision-making fora.

2. Implement the Gender in Agriculture policy, and particularly the recommendations for theappointment of suitably empowered high-level Focal Points in the Ministry of Agriculture.

3. Incorporate gender and youth quotas (50:50) across all agricultural investment initiatives, including capital programs, projects, training, meetings, and other related activities, to guarantee an equitable allocation of agricultural resources.

4. Develop a strategy document to boost the inclusiveness of the disabled in agriculture.

5. Develop a strategy document on outer-island agricultural development.

6. Address outer islander issues on costs and reliability of
   a. input supply chains and
   b. systems for enabling ready access to markets and a stable flow of agricultural produce from the outer islands.

THEMATIC AREA 10:
Stakeholder Participation

Introduction

The State is a facilitator of private-sector activity and a supplier of essential public goods and strategic private goods. Agricultural production is carried on primarily by the private sector. TheState, as a facilitator, needs increased stakeholder participation to more effectively support the production and entrepreneurial activities of the private sector, and for the sustainable management of renewable natural resources.

Stakeholder participation is vital for the effective design, planning, and implementation of policies and strategies. The aim should be for stakeholder participation to be institutionalized. This canoccur through revitalized MoAW Task Forces and Committees that include representation from key stakeholder groups, as is appropriate. The stakeholders should come from four broad groups, value chain private sector organizations, government representatives, civil society, and disadvantaged groups – youth, women, disabled, and outer-islanders.

In this framework, it is important to be clear on the roles and responsibilities of the representative organizations and the Ministry to enhance clarity, minimize duplication, and maximize complementarity.

Policy Statement

Enhance transparency, inclusivity, and efficiency in the planning of initiatives, policies, and programmes.

Core Strategies

1. Establish a framework for the meaningful participation of stakeholders in developing andmonitoring the implementation of strategies and plans. This should focus on revitalizing/establishing a set of MoAW Task Forces and Committees with appropriate stakeholder representation.

2. Review the business model, roles, and responsibilities of the key stakeholders of MoAW,including farmer clusters and farmers' organization bodies.

GOVERNANCE ARRANGEMENTS AND IMPLEMENTATION APPROACH

The policy is structured to align seamlessly with the existing frameworks and initiatives of the Fijian Government, notably the National Development Plan (2025 – 2029) and Vision 2050.

The execution of the policy will be directed by a ministry-specific action plan, referred to as the Strategic Development Plan. This plan outlines commitments to specific actions and targets, as well as the identification of budgetary resources necessary to achieve the desired outcomes across the ten thematic areas. The Action Plan will be in harmony with the strategic objectives of the ministry and will be incorporated into the regular annual costed operational plan, refer to Table 10.1 for the linkage of NDP, 10-Year Non–Sugar Agriculture Policy, and 5-Year MoAW SDP.

Table 10.1: Linkage of National (NDP) and Sectoral Priorities (10-Year Policy and SDP)

NDP Policy	10-Year Non-Sugar Agriculture Policy Thematic Areas (2025-2035)	5-Year SDP Priorities (2024-2028)
Policy 1 - Strengthen Food and Nutrition Security for all	Thematic Area 8: Agriculture and Food Security	SP1- Improved food and nutrition security for all Fijians
Policy 2 - Improve Livelihood for Farming Households	Thematic Area 2: Production support and service delivery Thematic Area 4: Sustainable soil and water management Thematic Area 7: Education and training Thematic Area 9: Social inclusion in agriculture Thematic Area 10: Stakeholder participation	SP1- Improved food and nutrition security for all Fijians SP2- Improved Livelihoods of Farming Households SP3- Improved community resilience and Adoption of Sustainable Resource Management and Climate Smart Agriculture SP4- Increased Commercial Agriculture SP5- Improved MOAW performance and service delivery

NDP Policy	10-Year Non-Sugar Agriculture Policy Thematic Areas (2025-2035)	5-Year SDP Priorities (2024-2028)
Policy 3 - Strengthen local and International market access	Thematic Area 1: Role of the State in the further development of the agriculture sector Thematic Area 3: Support for supply and value chains Thematic Area 10: Stakeholder participation	SP1- Improved food and nutrition security for all Fijians SP2- Improved Livelihoods of Farming Households SP3- Improved community resilience and Adoption of Sustainable Resource Management and climate-smart agriculture SP4- Increased Commercial Agriculture SP5- Improved MOAW performance and service delivery
Policy 4 - Improve Community resilience and adoption of sustainable resource management and climate-smart agriculture	Thematic Area 4: Sustainable soil and water management Thematic Area 5: Climate change and disaster risk management	SP3- Improved community resilience and Adoption of Sustainable Resource Management and Climate Smart Agriculture
Policy 5 - Enhance commercial agriculture	Thematic Area 2: Production support and service delivery Thematic Area 3: Support for supply and value chains Thematic Area 6: Innovation	SP1- Improved food and nutrition security for all Fijians SP2- Improved Livelihoods of Farming Households SP3- Improved community resilience and Adoption of Sustainable Resource Management and Climate Smart Agriculture SP4- Increased Commercial Agriculture

NDP Policy	10-Year Non-Sugar Agriculture Policy Thematic Areas (2025-2035)	5-Year SDP Priorities (2024-2028)
Policy 6 - Develop necessary policies to facilitate iTaukei business venture ownership	Thematic Area 2: Production support and service delivery Thematic Area 3: Support for supply and value chains Thematic Area 4: Sustainable soil and water management Thematic Area 5: Climate change and disaster risk management Thematic Area 6: Innovation Thematic Area 7: Education and training Thematic Area 8: Agriculture and Food Security Thematic Area 9: Social inclusion in agriculture Thematic Area 10: Stakeholder participation	SP1- Improved food and nutrition security for all Fijians SP2- Improved Livelihoods of Farming Households SP3- Improved community resilience and Adoption of Sustainable Resource Management and Climate Smart Agriculture SP4- Increased Commercial Agriculture SP5- Improved MOAW performance and service delivery

MONITORING AND REVIEW ARRANGEMENTS

To facilitate effective coordination, the Ministry will organize an annual stakeholders' symposium aimed at monitoring the policy's progress, providing a platform for the exchange of best practices for actors in the agriculture sector, and enhancing coordinated implementation work for the sector.

Consequently, the Ministry of Agriculture and Waterways will assume a pivotal role in the overarching governance framework for the policy. The Monitoring and Evaluation Unit within the Ministry will spearhead the assessment of the policy's advancement in relation to the Action Plan, utilizing an indicators framework to evaluate each outcome and objective.

The governance structure will include the Permanent Secretary of Agriculture and Waterways, the Deputy Secretary, Directors, and representatives from key stakeholders within the sector.

ALLOCATION OF RESOURCES

The Fiji Non-Sugar Agriculture Sector Policy is set to span a decade, commencing in 2025 and concluding in 2035. A mid-term evaluation of the policy will take place at the five-year mark in 2030, followed by a subsequent review in 2035.

The framework of indicators presented in Annex I outlines the metrics intended for assessment concerning the policies, outcomes, and outputs. This framework has been guided by the Sustainable Development Goals (SDG) targets and indicators, as well as the existing surveying and statistical capabilities of national institutions.

This includes the data generated from future Fiji Agriculture Censuses, annual production surveys, and interim data collection efforts conducted by the Fiji Bureau of Statistics and the statistical divisions within agriculture-related ministries. Additionally, new criteria and metrics will be introduced on an annual basis to thoroughly assess the progress and overall impact of the policy.

The existing budget allocations will facilitate the ministry's execution of specific strategies detailed in the policy; nonetheless, new budgetary funding will be required to tackle new strategic priorities over the forthcoming decade. The Ministry of Agriculture and Waterways will formally request the new additional capital funds during the regular budget preparation process, subject to cabinet approval.

Furthermore, thematic area 9 of the policy, which emphasizes inclusion, seeks to guarantee that the design of projects and programs provides equitable benefits to women, youth, individuals with disabilities, residents of outer islands, and other marginalized groups. This approach aims to promote a more equitable distribution of government resources across various demographic segments within the agricultural sector.

The ministry will assess this progress through its monitoring activities related to the policy, employing key indicators specified in the logical framework (Annex I).

ANNEX 1: POLICIES OUTCOMES AND INDICATORS

The table below will guide the Ministry of Agriculture & Waterways in measuring the impact of the Fiji Non- Sugar Agriculture Sector Policy 2025-2035.

POLICIES	OUTCOMES	INDICATORS	BASELINE	TARGET (2035)
POLICY 1: ROLE OF THESTATE Policy Statement: Provide a conducive business climate andbe an efficient and effective provider of public goods and services in support of private sector activity.	1.1 MoAW Extension serviceseffectively and efficiently deliver on-farm advisory services	MoAW extension methods assessedand recommendations implemented	Assessment to beundertaken and reports produced (2024)	100% implementation of the recommended methods
		Performance standards and expectations for extension officers reviewed and implemented	Review all existing MoAW SOPs (2024)	100% adoption of processes in the SOPs
		Extension officers properly resourced to execute extension advisory farm visits	20% of extension officers properly resourced (2024)	100% resourced extension officers
		Number of farmers visited	26,000 (2024)	90,000
	1.2 MoAW is an efficient provider of public goods forfarming	MoAW identifies and develops listsof public goods and the set of strategic private goods that it will supply to farmers.	List to be developedin 2024	100% implementation of the lists of items
	1.3 MoAW and other Ministries better delineate, coordinate, and collaborate	Coordination framework established	Coordination Framework to be established in 2025	100% establishmentof MoAW Coordination Framework
		Number of coordination and collaboration meetings at the level of DSAD and above	4	40

POLICIES	OUTCOMES	INDICATORS	BASELINE	TARGET (2035)
POLICY 2: PRODUCTION SUPPORT & SERVICEDELIVERY **Policy Statement: Foster effective, efficient, and responsive input supplysystems to support farming.**	2.1 Increased access to land and financing for commercial agriculture	Proportion of arable land used for agricultural purposes.	15%	50%
		Number of commercial leases for agricultural land delivered annually	50	250
		Number of agricultural loans provided by institutions annually	50	150
	2.2 Farm management and business skills strengthened.	Increase in proportion of smallholder farmers transitioned to commercial farming	5%	50%
		Percentage of semi-commercialfarmers adopting good farm management and business practices.	5%	50%
	2.3 Private sector empowered to deliver farm inputs and services	Prices for goods and services provided by the private sector to farmers reviewed	To be reviewed in2025	
		Number of supplier engagement agreements for private sector delivery of farm inputs and services(e.g., tractor services, or seedlings, or medications, or farm inputs) completed.	MoAW Agreementswith input suppliers database to be established in 2025	100% implementation of the scope of the agreement
	2.4 Agriculture Mechanization coordination improved	MoAW to develop a National Agricultural Mechanization Policy and a Coordination Division	National Agricultural Mechanization Policyto be developed in 2025	100% implementation of the Policy Action Plan

POLICIES	OUTCOMES	INDICATORS	BASELINE	TARGET (2035)
POLICY 3: VALUECHAINS **Policy Statement: Improve market linkages and volumesto tourism and export markets.**	3.1 Increased domestic agricultural production	Percentage increase in volume ofcrop production	402,660 tons (2023)	20%
		Percentage increase in volume oflivestock production	80,337 tons (2023)	10%
	3.2 Increased supply of domestic produce to tourismand export markets	Percentage increase in Volume offresh/chilled crop and livestock export	16,108.9 tons (2023)	15%
		Percentage increase in the proportion of farmers linked or contracted as suppliers to Hotels	2% of 83,000 farmers (2024)	10%
POLICY 4: SOIL &WATER MANAGEMENT **Policy Statement: Promote soil conservation andsustainable management of landand water resources.**	4.1 Increased knowledge and skills of farmers on sustainable resource management and climate-smart agriculture practices	Percentage increase in the proportion of farmers who have adopted sustainable resource Management and climate-smart agriculture practices.	3% of 83,000 farmers (2024)	13%
		Percentage increase in the proportion of farms adopting good farm husbandry practices	2% of 70,991 farm holdings (2024)	10%
		Percentage increase in the proportion of agricultural area under productive and sustainable agriculture	19%	50%
	4.2 Improved land and water management in farming communities	Percentage increase in the proportion of communities adopting good land use practices	2% of the agriculture communities (2024)	10% of the agriculture communities
		Percentage increase in the proportion of communities with enhanced resilience to floods	2% of the agriculture communities (2024)	10% of the agriculture communities
POLICY 5: CLIMATECHANGE **Policy Statement: Promote sustainable agriculture through climate mitigation, adaptation, and resilience.**	5.1 Improved disaster risk management and recovery	Percentage of vulnerable farming households affected by disaster supported.	90%	90%
		Increase in proportion of agricultural area under irrigation	5%	50%

POLICIES	OUTCOMES	INDICATORS	BASELINE	TARGET (2035)
POLICY 6: INNOVATION **Policy Statement: Increase the agriculture sector's contribution to thenational economy through innovation**	6.1 Linkages among agricul-ture-ori-ented research institu-tions (MoAW, other Ministries, universities, private companies, etc.) strengthened	Number of meetings per year forplanning, exchange, and collab-oration on the national research agenda	1 Annual Meeting/Sympo-sium(2025)	10 Meetings completed
	6.2 Proposals for autonomyand reorganization of MoAW research division assessed	Study report assessing all implications with recom-mendations	Assessment to commence in 2025	50% of the Recommendations implemented
	6.3 Innovation introducedto technical and university programmes	Introduction into curric-ulum	Assessment to commence in 2025	50% adoption of newly introduced curriculum
POLICY 7: EDUCATION TRAINING **Policy Statement: Strengthen knowl-edgeand skills in the agriculture sector through effec-tive systems for training and ed-ucation to meet future needs.**	7.1 Industry/ sector training reviewed, as-sessed and plan developed.	Comprehensive sector training planwith path-ways for all levels. Also to include a review of Navuso andTUTU	Agriculture Sector Training Plan to be developed in 2025	70% implementation of the Agriculture Sector Training Plan
	7.2 MoAW training policy/strategy developed	MoAW training plan with pathwaysfor all techni-cal levels	MoAW Training policy to be developed in 2025	70% implementation of training policy action plan
	7.3 Navuso and TUTU rehabilitat-ed and expanded	Increase in the propor-tion of youths trained in Navuso and Tutu Training Centre	List of youths trainedin Navuso and Tutu Train-ing Centre to be obtained in 2025	50% increase in the proportion of youths trained in Navuso and Tutu from 2025 base year
		Increase in the propor-tion of youthgraduates from Navuso and TUTU who are engaged in sustainable commercial farming	List of youth graduates from Navu-so and Tutu Training Centre adopting sustain-ablecommercial farming to be obtained in 2025	50% increase in the proportion of youth graduates from Navuso and Tutu who adopting sustainable commercial farming from the 2025 base year

POLICIES	OUTCOMES	INDICATORS	BASELINE	TARGET (2035)
POLICY 8: FOODSECU-RITY **Policy State-ment: Improve food and nutrition se-curity through increased household access tolocally produced healthy and nutri-tiousfoods.**	8.1 Increased production and access to local safe andnutri-tious food	Percentage increase in the volumeof Cereals and grains production (e.g. rice and maize)	9,171 tons (2023)	35%
		Percentage increase in the volume of Roots and tubers production (e.g. Taro, Cassava, Sweet Potato, Yam, Kava)	212,438 tons (2023)	35%
		Percentage increase in the volumeof pulse production (e.g. cowpea, pigeon pea, peanut, etc.)	1,576 tons (2023)	10%
		Percentage increase in the volume of Pro-tein-rich food production (e.g.Sheep, Goat, Pig, Eggs, Broiler, Duck, Milk, Beef, Honey)	98,000 tons (2023)	10%
		Percentage increase in the volume of Fruit Production(e.g. Banana, Pawpaw, Pineapple, Guava, Mango, Dragon Fruit)	39,951 tons (2023)	10%
		Production increase in the volumeof the Vegetables and Leaves production (e.g. Leafy Vegetables,Eggplant, Pumpkin, Okra, Tomatoes)	77,850 tons (2023)	40%
		Percentage increase in the volumeof Spices Production (e.g. Tumeric, Ginger, Chillies, Vanilla)	20,113 tons (2023)	15%
	8.2 Improved multi-sector coordination of national food and nutrition security action	Number of key nation-al food andnutrition security actions Implemented.	Launch of the Foodand Nu-trition Security Policy	100% implementation
	8.3 Programmes to assist affected households/ communitiesto rear foods to address specific nutritional deficiencies	Increase in the proportion of communities/households/ schoolsadopting home gardening	5% of the communi-ties 5% of peri-ur-banhouse-holds 5% of schools	20% of the communities 20% of peri-urban households 50% of schools

POLICIES	OUTCOMES	INDICATORS	BASELINE	TARGET (2035)
POLICY 9: SOCIAL INCLUSION **Policy Statement: Increase the participation of women, youth, the disabled, and outer-islanders in the Fiji agro-economy.**	9.1 Increased participationof women in semi-commercial or commercial agriculture	Percentage of women small-scalefarmers who have graduated into medium-scale or large-scale commercial operations.	Listing of women small-scale farmersto be established in 2025	50% of women small-scale farmers who have graduated into medium-scale or large-scale commercial operations
	9.2 Increased participationof youth in semi-commercial or commercial agriculture	Percentage of youth small-scalefarmers who have graduated into medium-scale or large-scale commercial operations.	Listing of youth small-scale farmersto be established in 2025	50% of youth small-scale farmers who have graduated into medium-scale or large-scale commercial operations
	9.3 Increased agriculture income of small-holder farmers.	Percentage increase of average agriculture income of small-scale holdings	$8,000 (2024)	50%
		Percentage of small-scale holdingswho have graduated into semi- commercial or commercial Agriculture.	Listing of small-scalefarmers to be established in 2025	50% of small-scale farmers who have graduated into medium-scale or large-scale commercial operations
	9.4 Outer-islanders better integrated into the agro-economy	Strategy document on outer-islandagricultural development developed	Strategy to be developed in 2025	100% implementation of action plan
		Costs and reliability issues hampering access to Viti Levu Markets improved.	Review of markets inViti Levu and provide reports in 2025	100% implementation of action plan
	9.5 Increased participation of the disabled in semi-commercial or commercial agriculture	Strategy document to boostinclusion of the disabled developed.	Policy to be developed in 2026	100% implementation of action plan
POLICY 10: STAKEHOLD-ER PARTICI-PATION **Policy Statement: Enhance transpar-ency,inclusivity, and efficiency in the planning of initia-tives,policies, and programmes.**	10.1 Improved formulationand implementation of agriculture sector policiesand programmes	Percentage of policies developed/ updated on time.	5	100% updated
		Framework for meaningful institutionalized stakeholder participation developed	To be developed in2025	100% implementation of action plan
		MoAW Task Forces and Committees, to meet current needs, revitalized	Established Task Forces to managecritical areas of MoAW	100% implementation of tasks assigned to Task Forces

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Ministry of Agriculture and Waterways
Phone: (+679) 338 4233 Email: agrihelp@govnet.gov.fj
Private Mail Bag, Raiwaqa