

# HUD PD&R Regional Reports

## Region 9: Pacific



### Quick Facts About Region 9

Honolulu, Hawaii

By [Holi Urbas](#) | 1st Quarter 2025

#### Sales market conditions—

First quarter 2025: mixed (slightly tight to balanced)  
Fourth quarter 2024: mixed (tight to slightly soft)  
First quarter 2024: mixed (balanced to slightly soft)

#### Apartment market conditions—

First quarter 2025: mixed (tight to slightly soft)  
Fourth quarter 2024: mixed (tight to slightly soft)  
First quarter 2024: mixed (tight to soft)

### Overview

The economy in the Pacific region continued to expand as of the first quarter of 2025. However, job growth slowed considerably compared with a year ago, and the unemployment rate rose slightly. As of the first quarter of 2025, nonfarm payrolls in the region increased 0.2 percent year over year compared with a 1.4-percent gain a year ago. Nationally, year-over-year payroll growth slowed from 1.5 to 1.3 percent during the same period. Home sales market conditions ranged from slightly tight to balanced throughout most of the region as of the first quarter of 2025 compared with balanced to slightly soft conditions a year ago. Regionwide home sales were relatively stable during the 12 months ending February 2025 compared with a 5-percent decline nationally and a 16-percent regional decline during the 12 months ending February 2024 (Cotality, with adjustments by the analyst). The average home sales price in the region rose 6 percent to \$750,500 compared with a 2-percent gain a year earlier, but was slower than the 7-percent increase nationwide. Apartment market conditions in the region were mixed as of the first quarter of 2025, ranging from tight to slightly soft, with vacancy rates falling in 8 of the 10 highlighted areas in this report

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PD&R

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(CoStar Group). Three areas had stronger rent growth than the national average rate of 1 percent.

- As of the first quarter of 2025, all states in the region except Arizona added jobs from a year ago. Payroll growth accelerated in Hawaii but slowed in California and Nevada.
- Declines in Arizona and Hawaii offset increasing home sales in California and Nevada (Cotality, with adjustments by the analyst). Home price growth accelerated from a year ago in all states in the region and highlighted areas in this report.

## Economic Conditions

Nonfarm payrolls in the Pacific region increased from a year ago as of the first quarter of 2025, continuing a trend of year-over-year job growth that began as of the second quarter of 2021. As of the first quarter of 2025, nonfarm payrolls in the region rose by 36,500 jobs, or 0.2 percent, year over year to 23.34 million jobs compared with a 1.4-percent annual gain as of the first quarter of 2024. Only 3 of the 11 payroll sectors added jobs during the past year compared with 6 sectors a year ago. The current level of payrolls regionwide is 5.1 percent higher than the prepandemic level as of the first quarter of 2019, compared with 6.2 percent higher nationally. Hawaii is the only state in the region in which payrolls do not exceed the prepandemic level despite accelerating job growth in the past year.

The education and health services, the government, and the transportation and utilities sectors accounted for all job

- Single-family home construction in the region fell 4 percent year over year as of the first quarter of 2025—equal to the rate of decline nationally—because of declines in Arizona and Nevada. Multifamily construction as of the first quarter of 2025 decreased 22 percent year over year, with building activity falling in every state in the region except Nevada. Nationally, multifamily permitting fell 5 percent.

growth in the region during the past year, and losses in the eight remaining sectors mostly offset the combined addition of 250,600 jobs. The 177,300 jobs added in the education and health services sector reflect a 4.4-percent gain from a year ago. The sector is currently the largest employment sector in the region, accounting for 18 percent of all jobs and nearly 71 percent of the jobs added in the last year. In the government and the transportation and utilities sectors, payrolls increased by 66,200 and 7,100 jobs, or 1.9 and 0.6 percent, year over year, respectively.

Elevated interest rates have dampened venture capital investment, a primary source of funding for the extensive network of high-tech industries throughout the region and their associated employment sectors. As a result, many sectors lost jobs during the past year, the largest of which

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**The economy of the Pacific region continued to expand as of the first quarter of 2025, with year-over-year job growth in 3 of the 11 payroll sectors.**

	First Quarter		Year-Over-Year Change	
	2024 (Thousands)	2025 (Thousands)	Absolute (Thousands)	Percent
<b>Total Nonfarm Payrolls</b>	23,306.9	23,343.4	36.5	0.2
Goods-Producing Sectors	2,850.4	2,784.2	-66.2	-2.3
Mining, Logging, & Construction	1,320.0	1,294.7	-25.3	-1.9
Manufacturing	1,530.4	1,489.5	-40.9	-2.7
Service-Providing Sectors	20,456.5	20,559.2	102.7	0.5
Wholesale & Retail Trade	2,982.6	2,962.1	-20.5	-0.7
Transportation & Utilities	1,122.3	1,129.4	7.1	0.6
Information	624.6	603.1	-21.5	-3.4
Financial Activities	1,152.3	1,129.9	-22.4	-1.9
Professional & Business Services	3,546.9	3,482.5	-64.4	-1.8
Education & Health Services	4,027.9	4,205.2	177.3	4.4
Leisure & Hospitality	2,831.0	2,813.7	-17.3	-0.6
Other Services	765.0	763.2	-1.8	-0.2
Government	3,404.0	3,470.2	66.2	1.9

Note: Numbers may not add to totals due to rounding.

Source: U.S. Bureau of Labor Statistics



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occurred in the professional and business services and the manufacturing sectors, with respective year-over-year declines of 64,400 and 40,900 jobs, or 1.8 and 2.7 percent. Those losses represent the second consecutive year of declines in both sectors. The information sector contracted for the third consecutive year, falling by 21,500 jobs, or 3.4 percent, year over year as of the first quarter of 2025. With the most recent contractions, payrolls in the manufacturing and the information sectors are now 5.2 and 2.7 percent below prepandemic levels, respectively.

As of the first quarter of 2025—

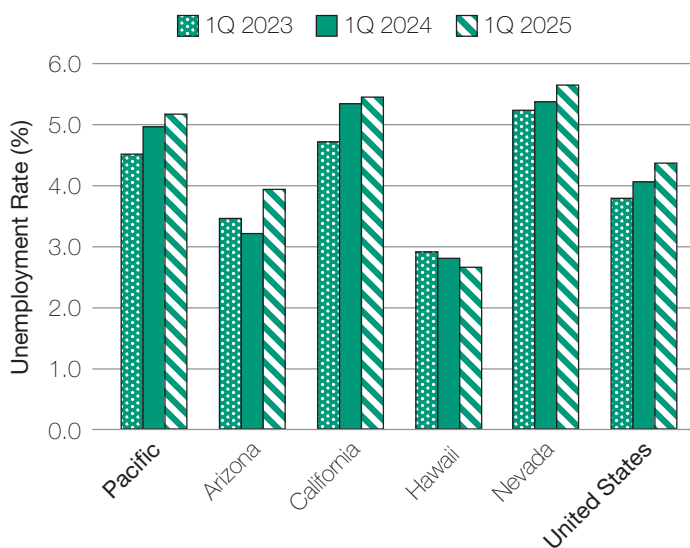
- California added the most jobs in the region year over year, increasing by 30,700, or 0.2 percent, to 17.88 million jobs, a significantly slower rate than the increase of 184,400 jobs, or 1.0 percent, a year earlier. The education and health services sector accounted for 60 percent of all jobs added in the state during the past year, but the manufacturing, the information, the professional and business services, and the wholesale and retail trade sectors lost a combined 149,200 jobs, largely offsetting gains.
- The fastest year-over-year job growth in the region occurred in Hawaii, where nonfarm payrolls increased 1.8 percent, or by 11,600 jobs, to 647,800 jobs—1.5 percent below prepandemic levels—accelerating from a gain of 0.9 percent a year earlier. All but two sectors added jobs during the last year, with the strongest gains in the leisure and hospitality sector, which added 3,300 jobs, or 2.8 percent, followed by the government sector, which rose by 2,900 jobs, or 2.3 percent.
- In Nevada, nonfarm payrolls increased by 8,700 jobs, or 0.6 percent, to 1.56 million jobs, decelerating sharply from a 2.8-percent year-over-year gain as of the first quarter of 2024. The education and health services and the government sectors led job growth, with a combined 10,700 jobs added, but the combined loss of 4,900 jobs in the transportation and utilities and the professional and business services sectors partially offset the gains.

## Population

The rate of population growth in the Pacific region doubled from a year ago, with an 0.8-percent increase from 2023 to 2024 (U.S. Census Bureau population estimates as of July 1). Despite the recent uptick, population growth in the region was slower than in the nation, which grew 1.0 percent compared with 0.8 percent from 2022 to 2023. In all states of the region, net in-migration was responsible for much of the recent population growth. In California and Hawaii—where housing costs are high—international immigration more than offset domestic net out-migration, resulting in net in-migration accounting for roughly one-half of population growth in each state. In Nevada

- Job losses occurred in Arizona, where payrolls fell by 14,500, or 0.4 percent, to 3.25 million jobs compared with a 3.1-percent increase as of the first quarter of 2024. Three of the 11 sectors added jobs during the past year, with the largest increase of 15,900 jobs in the education and health services sector. By comparison, nine sectors added jobs in the state as of the first quarter of 2024.
- The unemployment rate in the region averaged 5.2 percent, the highest among the 10 HUD-defined regions in the country, up from 5.0 percent a year ago. Nevada and California had the highest rates in the region at 5.7 and 5.5 percent, respectively, and Arizona and Hawaii had rates less than the 4.4-percent national average rate.

**In the Pacific region, Arizona and Hawaii had lower unemployment rates than the nation as of the first quarter of 2025.**



1Q = first quarter.  
Source: U.S. Bureau of Labor Statistics

and Arizona, where housing is generally more affordable, net in-migration was responsible for more than 90 percent of population growth. Nevada and Arizona were among the 10 fastest growing states in the nation.

From 2023 to 2024—

- Relatively affordable housing in Arizona and Nevada contributed to net in-migration, particularly from higher-cost markets in California and Hawaii, with respective population growth of 1.5 and 1.7 percent, up from respective growth rates of 1.3 and 1.2 percent from 2022 to 2023.

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During 2024, population growth in the Pacific region accelerated from a year ago, with increased growth rates in all four states.

	Population Estimate (as of July 1)			Percentage Change	
	2022	2023	2024	2022 to 2023	2023 to 2024
<b>United States</b>	334,017,321	336,806,231	340,110,988	0.8	1.0
Pacific Region	51,136,455	51,327,470	51,727,260	0.4	0.8
Arizona	7,377,566	7,473,027	7,582,384	1.3	1.5
California	39,142,414	39,198,693	39,431,263	0.1	0.6
Hawaii	1,440,359	1,441,387	1,446,146	0.1	0.3
Nevada	3,176,116	3,214,363	3,267,467	1.2	1.7

Source: U.S. Census Bureau

Net natural change increased most significantly in Arizona because of a 3-percent decline in deaths but decreased slightly in Nevada because the 3-percent decline in births more than offset the 2-percent drop in deaths.

- The population in California increased 0.6 percent to 39.43 million compared with 0.1 percent growth a year earlier, remaining the most populous state in the nation. The increased growth rate was primarily the result of a 30-percent reduction in domestic net out-migration and a 23-percent increase in international immigration, primarily

from Asia and Latin America, which respectively accounted for 41 and 49 percent of the foreign-born population moving to the state from 2010 to 2023 (2023 American Community Survey 1-year data). Net natural change rose 4 percent from a year earlier because deaths declined faster than births.

- In Hawaii, the population increased 0.3 percent to 1.45 million, faster than the 0.1-percent increase from 2022 to 2023. Similar to California, international net in-migration was greater than domestic net out-migration, contributing to overall net in-migration, and net natural change increased slightly.

## Sales Market Conditions

Sales housing markets in the Pacific region were mixed, ranging from slightly tight to balanced as of the first quarter of 2025, compared with balanced to slightly soft conditions a year ago. An increase in the supply of homes for sale—partly the result of accelerating sales price growth throughout the region, which encouraged potential sellers to list their homes—contributed to stable home sales during the past year. Approximately 555,700 homes sold in the region during the 12 months ending February 2025, unchanged from a year ago, when home sales fell 17 percent year over year (Cotality, with adjustments by the analyst). The average home price rose 6 percent year over year during the 12 months ending February 2025 to \$750,500, increasing from a 2-percent gain a year ago. In March 2025, the regionwide inventory of homes for sale reached 3.3 months, up from 2.9 months a year ago compared with less than 2 months of supply during the corresponding month in 2021 and 2022 (Redfin, a national real estate brokerage, with adjustments by the analyst). Hawaii had the most inventory available and the largest increase from a year ago among states in the region, with the supply increasing from 5.9 to 7.5 months. California had the lowest supply at 2.7 months and the smallest increase from a year ago, when the supply was 2.5 months.

The 341,200 homes sold in California represented slightly more than 60 percent of regional home sales during the past

12 months and reflect a 1-percent increase from a year ago after falling 18 percent during the previous 12-month period (Cotality, with adjustments by the analyst). All six California areas cited in this report had increasing home sales compared with double-digit declines a year ago, and the largest gain of 12 percent was in the San Jose-Sunnyvale-Santa Clara (hereafter, San Jose) metropolitan area. Approximately one-fourth of all home sales in the state occurred in the Los Angeles-Long Beach-Anaheim (hereafter, Los Angeles) metropolitan area. The average home price in California was \$891,100 during the 12 months ending February 2025, up 6 percent from a year ago and tripling from the 2-percent gain during the previous 12 months. Only the San Jose metropolitan area had price growth swifter than the state average, with prices rising 8 percent year over year in contrast to a 3-percent decline a year ago.

In Nevada, home sales increased 1 percent year over year during the past 12 months, and the average home price increased 6 percent to \$518,500 compared with a year ago, when home sales and prices were down 21 and 1 percent, respectively. Home sales and price trends in the Las Vegas-Henderson-North Las Vegas (hereafter, Las Vegas) metropolitan area are similar to those of the state because the area is the largest population center in Nevada.

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As of the first quarter of 2025, home sales in the Pacific region were relatively unchanged from a year ago because increases in California and Hawaii offset declines in Arizona and Nevada.

	12 Months Ending	Number of Homes Sold				Price		
		2024	2025	Percent Change	Average	2024 (\$)	2025 (\$)	Percent Change
Region 9	February	558,100	555,700	0	AVG	\$707,200	\$750,500	6
Arizona	February	144,400	139,900	-3	AVG	\$478,700	\$495,500	4
Phoenix-Mesa-Chandler	February	95,200	92,600	-3	AVG	\$539,900	\$554,200	3
California	February	337,800	341,200	1	AVG	\$838,100	\$891,100	6
Los Angeles-Long Beach-Anaheim	February	78,850	79,700	1	AVG	\$1,111,500	\$1,177,000	6
Oxnard-Thousand Oaks-Ventura	February	6,250	6,600	6	AVG	\$938,500	\$979,900	4
Sacramento-Roseville-Folsom	February	30,450	31,450	3	AVG	\$632,600	\$655,300	4
San Diego-Chula Vista-Carlsbad	February	27,200	27,800	2	AVG	\$997,600	\$1,059,000	6
San Francisco-Oakland-Fremont	February	34,600	36,200	5	AVG	\$1,239,400	\$1,290,000	4
San Jose-Sunnyvale-Santa Clara	February	12,750	14,300	12	AVG	\$1,565,500	\$1,685,000	8
Hawaii	February	16,050	14,100	-12	AVG	\$829,700	\$874,100	5
Urban Honolulu	February	10,150	9,325	-8	AVG	\$802,500	\$843,200	5
Nevada	February	59,900	60,600	1	AVG	\$487,200	\$518,500	6
Las Vegas-Henderson-North Las Vegas	February	44,400	45,000	1	AVG	\$486,300	\$518,000	7

AVG = average.

Notes: All figures are rounded. Includes new and existing single-family homes, townhomes, and condominiums.

Source: Cotality, with adjustments by the analyst

Home sales declined in Arizona and Hawaii during the past 12 months but at slower rates than a year ago. In Arizona, home sales were down 3 percent year over year during the 12 months ending February 2025 compared with a 16-percent drop a year ago, and the average home price rose 4 percent, accelerating from a 1-percent gain a year ago. Home sales trends were similar in the Phoenix-Mesa-Chandler (hereafter, Phoenix) metropolitan area. In Hawaii, sales declined 12 percent year over year during the past 12 months, slowing from a 17-percent decline a year ago, and the average home price rose 5 percent to \$874,100 compared with 2-percent growth a year ago.

As of the first quarter of 2025 (preliminary data)—

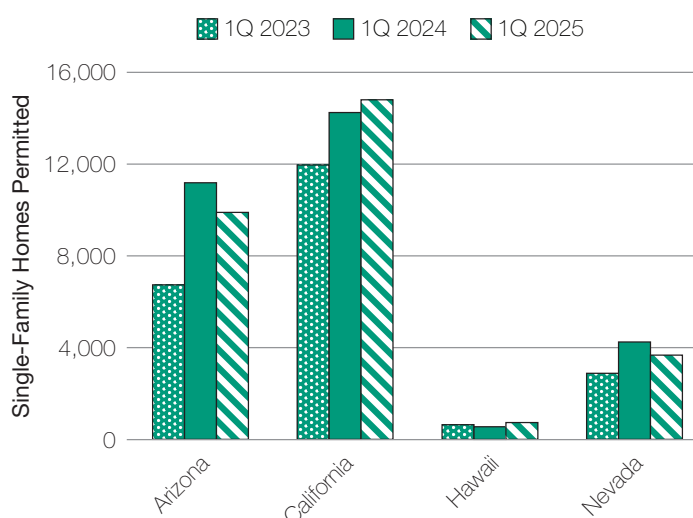
- Homebuilding in the region, as measured by the number of single-family homes permitted, declined 4 percent from a year earlier to approximately 29,150 homes, following a 36-percent year-over-year increase as of the first quarter of 2024. Declines in new home construction in Arizona and Nevada more than offset increases in California and Hawaii.
- The largest increase in single-family home construction activity in the region was in California, up by 550 homes, or 4 percent, year over year to 14,800 homes permitted compared with a 19-percent increase a year earlier. Homebuilding increased by 460 homes, or 23 percent, in the Los Angeles metropolitan area, partially attributable to a mayoral executive order in late January 2025 that accelerated the permitting process for residents seeking to rebuild after the wildfires destroyed approximately 11,075

single-family homes in Los Angeles County (California Department of Forestry and Fire Protection [CAL FIRE]).

- Single-family home permitting in the region increased the fastest in Hawaii, up 33 percent year over year to 750 homes compared with a 15-percent reduction a year

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As of the first quarter of 2025, single-family home permitting in the Pacific region declined 4 percent from a year ago, equal to the national decline.



1Q = first quarter.

Note: Based on preliminary data.

Source: U.S. Census Bureau, Building Permits Survey

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earlier. Single-family permitting activity increased most significantly in the Kahului-Wailuku-Lahaina metropolitan area to 190 homes, a 48-percent increase from a year ago, accounting for 34 percent of the statewide gain. Much of the recent construction activity in the metropolitan area is a result of continued residential rebuilding efforts after the August 2023 wildfires.

- New home construction in Arizona and Nevada declined, falling 12 and 14 percent year over year, respectively, to 9,900 and 3,675 homes permitted. In the largest metropolitan areas of each state, homebuilding activity was similarly muted, declining 15 percent in the Phoenix metropolitan area and 17 percent in the Las Vegas metropolitan area compared with the first quarter of 2024.

## Apartment Market Conditions

As of the first quarter of 2025, apartment market conditions in the Pacific region were mixed, ranging from tight to slightly soft compared with tight to soft conditions a year ago. The stabilized apartment vacancy rate in the region was 5.0 percent as of the first quarter of 2025 compared with 5.1 percent a year ago, less than the comparable national rate, which rose from 6.1 to 6.3 percent (CoStar Group). Approximately 95,750 apartment units were completed in the region during the 12 months ending March 2025, whereas 88,700 units were absorbed. Despite lagging behind completions, the recent absorption was the strongest during any corresponding period since 2000, reflecting a 63-percent increase from a year ago and a more than five-fold increase from the recent low of 13,850 units absorbed during the 12 months ending March 2023. Regionwide, rents averaged \$2,079 as of the first quarter of 2025, up 1 percent year over year and equal to the national growth rate.

Damage from the Pacific Palisades and Eaton wildfires in Los Angeles County in early January 2025 was considerable, although the effect was more pronounced for the single-family rental market than the apartment market—which continues to track with national trends—because of limited multifamily development in the areas most affected. In total, the wildfires

resulted in \$1.83 billion in property damage (Federal Emergency Management Agency [FEMA]), including the destruction of approximately 12,350 dwelling units, almost 90 percent of which were single-family homes (CAL FIRE). Approximately one-third of the units lost were renter-occupied (FEMA). The loss of rental units resulted in a sharp increase in the average rent for a single-family home, as depicted by the Cotality Single-Family Rent Index, which compiles rent data from listings in the Multiple Listing Service. The index for Los Angeles County rose 7.2 percent from February 2024 to February 2025, the fastest increase of the nearly 100 metropolitan areas covered. By comparison, the index rose only 2.9 percent nationally.

Slightly tight to tight apartment market conditions prevailed in 7 of the 10 highlighted areas in this report. All seven areas had declining vacancy rates, ranging from 0.2 to 0.8 percentage point, and rent growth equal to or greater than the 1-percent national average. The largest year-over-year decline in the stabilized vacancy rate as of the first quarter of 2025 was 0.8 percentage point in the Riverside-San Bernardino-Ontario (hereafter, Riverside) metropolitan area, where 15,400 units were absorbed during the past 12 months compared with negative net absorption of 2,700 units a year earlier.

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**As of the first quarter of 2025, vacancy rates in the Pacific region declined from a year ago in all but two featured areas of this report.**

	Market Condition	Vacancy Rate			Average Monthly Rent		
		1Q 2024 (%)	1Q 2025 (%)	Percentage Point Change	1Q 2024 (\$)	1Q 2025 (\$)	Percent Change
Urban Honolulu	Tight	3.9	3.6	-0.3	2,224	2,242	1
Las Vegas-Henderson-North Las Vegas	Slightly Soft	8.1	8.2	0.1	1,502	1,498	0
Phoenix-Mesa-Chandler	Slightly Soft	7.9	8.2	0.3	1,625	1,591	-2
Los Angeles-Long Beach-Anaheim	Slightly Tight	4.4	4.3	-0.2	2,372	2,399	1
Riverside-San Bernardino-Ontario	Slightly Tight	5.5	4.7	-0.8	2,077	2,103	1
San Diego-Chula Vista-Carlsbad	Slightly Tight	4.4	4.2	-0.3	2,499	2,516	1
Oxnard-Thousand Oaks-Ventura	Slightly Tight	3.8	3.5	-0.3	2,575	2,633	2
San Francisco-Oakland-Fremont	Balanced	6.0	5.5	-0.5	2,770	2,823	2
San Jose-Sunnyvale-Santa Clara	Slightly Tight	4.6	4.2	-0.4	3,061	3,146	3
Sacramento-Roseville-Folsom	Slightly Tight	5.6	5.4	-0.2	1,841	1,855	1

1Q = first quarter.

Sources: Market condition—Economic and Market Analysis Division; vacancy rate and average monthly rent—CoStar Group



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Absorption increased 84 percent in the San Jose metropolitan area, which also had the highest rent and swiftest rent growth among the areas featured in this report during the past year.

In the San Francisco-Oakland-Fremont (hereafter, San Francisco) metropolitan area, market conditions were balanced, with a 5.5-percent vacancy rate, down from 6.0 percent a year ago because absorption outpaced new deliveries. Apartment market conditions were slightly soft in the Phoenix and Las Vegas metropolitan areas because new deliveries outpaced absorption during the past 2 years. The stabilized vacancy rate rose in both areas from a year ago, and rent growth underperformed the national and regional averages, with a 2-percent drop in the Phoenix metropolitan area and no change in Las Vegas.

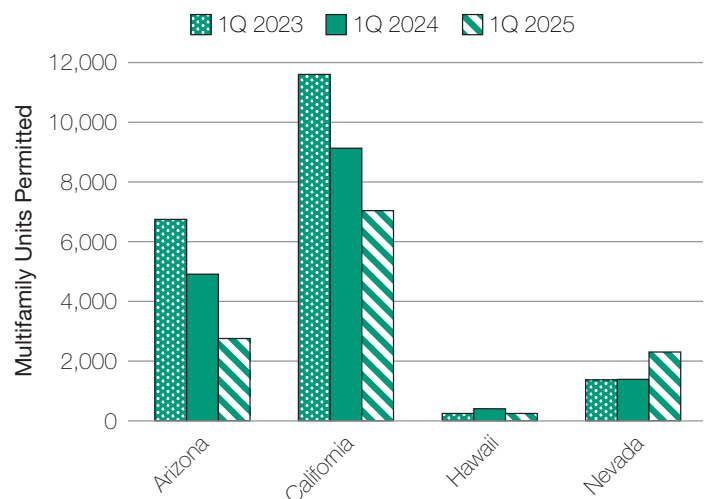
As of the first quarter of 2025 (preliminary data)—

- Multifamily construction in the region, as measured by the number of units permitted, fell 22 percent from a year ago to 12,350 units, similar to the decline a year earlier. Nationally, multifamily construction declined 5 percent year over year as of the first quarter of 2025.
- The most significant decline in multifamily construction activity was in Arizona, where 2,175 fewer units were permitted, a 44-percent decline from the 4,925 units permitted during the first quarter of 2024. The 2,175-unit, or 48-percent, decrease in multifamily permitting in the Phoenix metropolitan area accounted for all of the statewide decline.
- In Hawaii, multifamily construction declined by 180 units, or 43 percent, year over year to 230 units. Declines in the Kahului-Wailuku-Lahaina and Urban Honolulu metropolitan areas accounted for all of the decrease.
- Multifamily permitting also declined significantly in California, where 7,050 units were permitted—2,100, or 23 percent, fewer units compared with the number of units permitted during the first quarter of 2024. Sharp declines in the

San Diego, Sacramento, and San Jose metropolitan areas offset notable increases in the Riverside, Santa Maria-Santa Barbara, Los Angeles, and San Francisco metropolitan areas.

- Nevada was the only state in the region with increased multifamily construction activity, with 2,300 units permitted, up by 910 units, or 65 percent, from a year ago. A 66-percent increase in the Las Vegas metropolitan area, to 1,500 units permitted, contributed to the statewide increase.
- An estimated 112,000 units were under construction throughout the region, down 67 percent from a year ago (CoStar Group). The Phoenix, Los Angeles, and San Diego metropolitan areas accounted for the largest shares of regional multifamily construction activity, with respective shares of 20, 17, and 7 percent.

**Multifamily permitting activity declined in the Pacific region during the first quarter of 2025 from a year ago because of declines in all states except Nevada.**



1Q = first quarter.

Note: Based on preliminary data.

Source: U.S. Census Bureau, Building Permits Survey

# Terminology Definitions and Notes

## A. Definitions

Absorption	The net change, positive or negative, in the number of occupied units in a given geographic range.
Stabilized Apartment Vacancy Rate/ Average Monthly Rent	Data are for market-rate and mixed market-rate and affordable general occupancy apartment properties with five or more units, including those that are stabilized. A property is stabilized once the occupancy rate reaches 90 percent or at least 18 months have passed since the property was changed from “under construction” to “existing” on the CoStar Group website.
Building Permits	Building permits do not necessarily reflect all residential building activity. Some units are constructed or created without a building permit or are issued a different type of building permit. For example, some units classified as commercial structures are not reflected in the residential building permits. As a result, the analyst, through diligent fieldwork, makes an estimate of this additional construction activity. Some of these estimates are included in the discussions of single-family and multifamily building permits.
Home Sales/Home Sales Prices	Includes single-family home, townhome, and condominium sales.

## B. Notes on Geography

1.	The metropolitan statistical area definitions noted in this report are based on the delineations established by the Office of Management and Budget (OMB) in the OMB Bulletin dated July 21, 2023.
2.	The territories of Guam, American Samoa, and the Commonwealth of the Northern Mariana Islands are part of HUD’s Pacific region, but the analysis on these territories is limited because of a lack of available data.