NEW HEBRIDES FOOD DISTRIBUTION STUDY

INTERIM REPORT
ON STORES AND MARKETS
IN VILA AND SANTO
JANUARY-FEBRUARY 1976

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SECTION ONE -- VILA MARKET

The fresh vegetable market in Port Vila is one of the major components of the food distribution system within the urban area. The market survey described in this report was undertaken on six market days in January and February I976.[I] An earlier survey was conducted on four successive Fridays in July I965 by Drs H.C.Brookfield and Paula Brown Glick (Brookfield, Glick and Hart, I969) and Dr Jean-Marc Philibert examined the marketing undertaken by the people of Erakor village during July-September I972. Other sample surveys of market prices have been made by the Bureau of Statistics.

Prior to I963, when the majority of the Vietnamese in the New Hebrides were repatriated, most produce sold in the Vila Market came from market gardens established by Vietnamese on the edge of the town. At the time of the I965 survey 'a new pattern of supply was not yet firmly established' but the majority of sellers were New Hebrideans from seven Efate villages (Brookfield, Glick and Hart, I969: I20-2) Since then, people of virtually all the other villages of Efate have begun to sell surplus produce in the market, or plant crops especially for the market. Several other changes have now occurred (see below)which indicate that the 'new pattern of supply' is now well established. This paper presents the basic results of the I976 survey. Interpretation and analysis of the data, and comparisons between market activities and other parts of the food distribution system will be provided in later reports.

The survey in January-February I976 was undertaken by seven field-workers. The techniques of recording were as follows:

I. on arrival at the market each seller was given a numbered ticket and asked to bring it back on subsequent market days; new sellers after the first day were given tickets distinguished by a particular colour;

2. on a recording form the seller's name, number, village, and the date were noted;

3. the type of produce, number of selling units (e.g. bundles, baskets sticks) and asking price of each in New Hebrides frances (FNH)[2] were recorded as the seller laid out the produce;

4. when the seller prepared to leave the market the unsold produce was enumerated;

[I] Wednesday January 28, Friday January 30, Saturday January 31, Wednesday February 4, Friday February 6 and Saturday February 7.

[2] FNH - New Hebrides francs. At the time of the survey the exchange rate offered by the banks averaged I00 FNH to A$I.I0. Both FNH and A$ are legal currency in the New Hebrides but although the formal exchange rate is as above, it is customary for coins to be accepted as equivalents (i.e. 20 FNH = 20 Cents) in the market, and by most stores. Banks and wholesalers apply the official rates. The larger stores serve a predominantly non-Melanesian clientele and most transactions will total more than $I.00 or I00 FNH. For them, the loss in accepting coins at par is not particularly serious. For market vendors and small 'trade store' operators, many of whose individual sales total less than I00 FNH, the loss of 9 or I0 per cent entailed in accepting Australian coins as equivalent to FNH coins is serious.

5. during the day sellers were interviewed for biographical details, and such items as cost of transport to the market, frequency of attendance, and number of years they had been selling in the market;

6. samples of selling units of most products were weighed to provide information for calculating volume of produce and prices per unit of weight.

On return to Canberra the records were coded and tabulations computed at the Australian National University. During the six survey days a total of 365 different sellers were recorded as having attended on one or more days. These sellers spent a total of 747 vendor/days[3] in the market during the six days of enumeration. Of these 747, 29 represent vendors known to have been present but whose produce was, for one reason or another, not enumerated. In order to arrive at estimates of total produce offered and sold these 29 vendor/days have been assigned values equal to the mean values for the other 718 vendor/days. In cases where enumerators were not able, because of the rush of departing sellers, to record the unsold produce of individual vendors, the amount of each product unsold by individual vendors has been assumed to equal the mean proportion of that product unsold by all other vendors whose records were complete. Underenumeration of unsold produce was greater for the first two days as, on later days, enumerators were more experienced and vendors, knowing our procedure, tended to call our attention to their impending departure. Overall, complete records of goods offered and unsold were obtained for 80 per cent of vendor/days and largely complete records were obtained for 95 per cent of the vendor/days. It is probable that a small number of vendors appeared in the market and were not enumerated at all. As a result of the system of issuing numbers to vendors, and checking with them whether or not they had been present on earlier days, we are confident that underenumeration from this source does not exceed 5 per cent and it is probably much less. Unless otherwise noted, the tabulations and statistics given in the remainder of this report are based on the figures adjusted as described above, and assume no underenumeration.

At the time of the survey, the main market area was located on reclaimed land on the seaward side of the main street (Boulevard Higginson), opposite the Maison Barrau store, and with an extension opposite the Condominium Office building and the Burns Philp store. This is basically the same site as in 1965 (Brookfield, Glick and Hart, 1969:119) although at that time the reclamation had not begun and sellers occupied the narrow strip between the road and the beach. In early 1976 part of the site was backed by a fence surrounding the construction area for a new petrol station and the new market building. The latter was being financed by the oil company as one of the conditions for establishing a garage on this site. Two other sites were also used by vendors - one was an area of open ground opposite the Post Office and the other the footpaths of Hong Kong Street outside the predominantly Chinese-owned stores. On occasions, some vendors at this site spread their produce in the adjacent street at the rear of the Service des Coopératives building. In 1965 some vendors occupied the steps of the C.F.N.H. (Comptoirs Français des Nouvelles-Hébrides) store (often referred to as 'Ballande'). However, this site is no longer used.

[3] Vendor/day - one market visit by one seller. A seller who attended the market on all six survey days would thus contribute six vendor/days.

Table 1 shows the total number of sellers at each site on the six market days of the survey and also shows that a few sellers bring produce to town on some other days. When cruise ships are in port approximately 70 people may offer curios and fruit for sale at the wharf, while a number of traders sell clothing from temporary stalls.

Although the market is the most visible of the outlets for sale of fresh vegetables, the major stores sell 'European' types of vegetables, usually imported from Australia. Many of the small stores and cooperatives purchase some basic staples, such as taro, yams, sweet potatoes or bananas from growers. In the afternoon some market vendors with unsold produce dispose of it in this way; alternatively they hawk it around in the suburbs, or sell (or give it away) to acquaintances. The major institutions, such as the hospitals, boarding schools, colleges, police barracks, and the gaol, obtain most of their supplies from regular contractors. In a later report an estimate will be made of the relative importance of these contractual sources in the total supply of fresh vegetables in Vila.

Table 1

Number of Sellers, by Site

(January 26 to February 8, 1976)

	Main Site				
Date	Opposite Maison Barrau	Opposite B.P.	Opposite Post Office	Hong Kong Street	Total
January					
Monday 26	-	-	-	-	0
Tuesday 27	12	-	3	7	22
Wednesday 28*	103	7	20	9	139*
Thursday 29	4	-	1	-	5
Friday 30*	61	6	10	6	83*
Saturday 31*	96	19	14	16	145*
Sunday 1	-	-	-	-	0
Monday 2	4	-	-	6	10
Tuesday 3	12	-	-	4	16
Wednesday 4*	86	11	29	17	143*
Thursday 5	1	-	-	-	1
Friday 6*	84	15	10	5	114*
Saturday 7*	81	14	11	17	123*
Sunday 8	-	-	-	-	0

* Survey day

Source: Field surveys.

Some stereotypes of Vila Market

During our period of fieldwork, and on earlier visits to Vila, we heard many opinions and 'facts' about the market. 'Friday is always the biggest market day'. 'Saturday is always the biggest market day'. 'The produce is usually poor quality'. 'The market is smaller (larger) than several years ago'. 'Prices have risen rapidly'. 'There is no bargaining in the market'. 'The prices are uniform throughout the market'. 'Sellers will not drop their price at the end of the day'. 'They [the sellers] often do not make enough to pay their fares'.

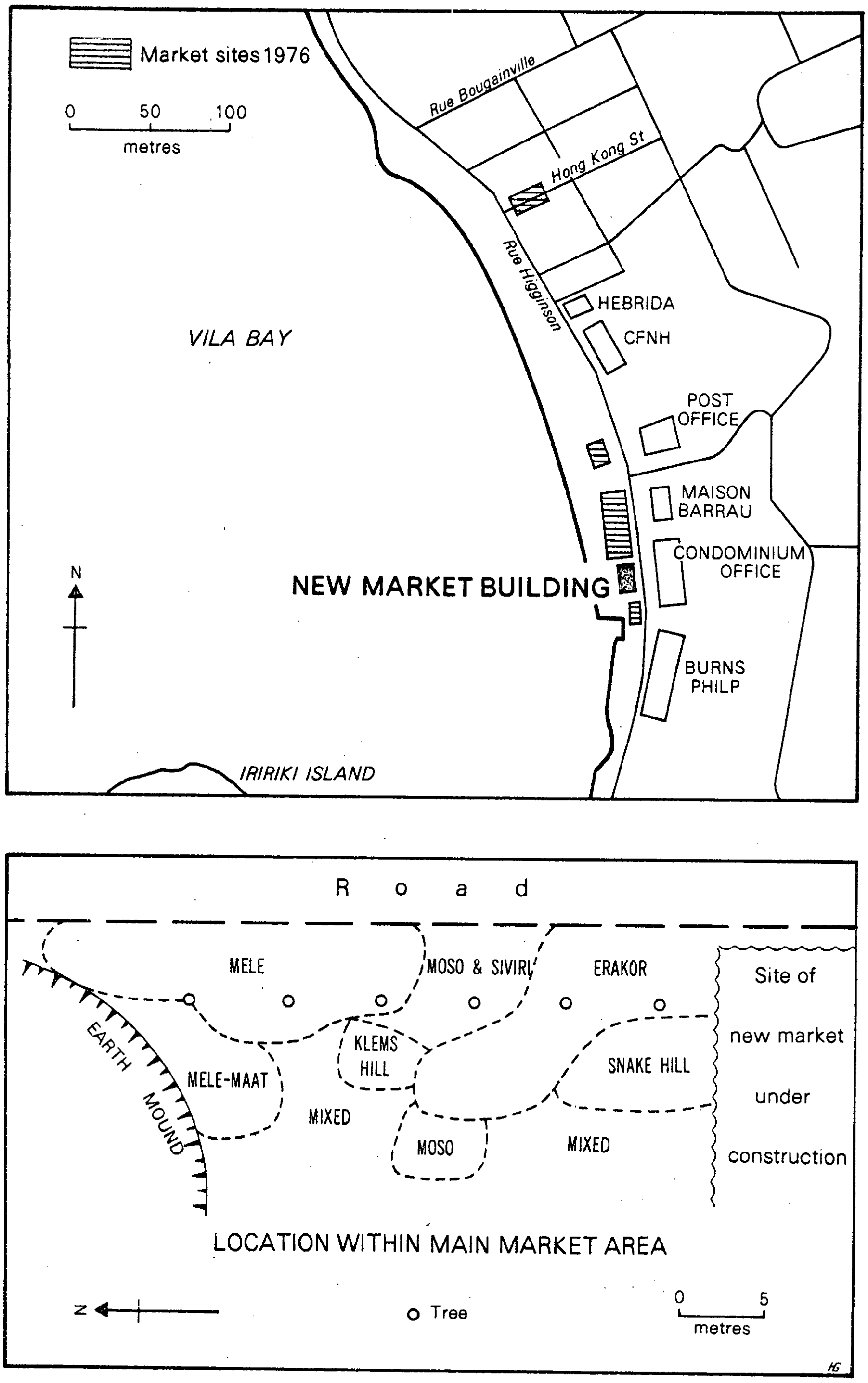
As would be expected few of these statements are completely accurate. Many seem to be based on the inevitably biased observations of people who regularly visit the market at only one time of the day; who rarely patronise the market at all; or who have not had cause to observe closely the selling and buying behaviour of others in the market. Although our survey was not long enough to be completely definitive, the fact that we were in the market each day from its start at 5.30 a.m. to the time the last sellers left (usually about 1.30 or 2.00 p.m.) did enable us to observe the marked daily cycle of activity. We were also able to record evidence suggesting that most of the above statements are not entirely accurate. As some of the statements noted are often put forward as characteristics of markets and marketing behaviour elsewhere in Melanesia, some of our evidence does raise wider questions about possible changes in marketing by Melanesians, or alternatively, about the conclusions drawn in some earlier marketing studies.

Location within the Market

The market day begins at first light, at about 5.30 a.m., as the first taxis and trucks arrive with sellers from Erakor and Mele villages. The sellers from these two villages quickly occupy the prime areas under the casuarina trees at the two ends of the main site, laying sacks, mats or leaves on which to spread their produce (Figure 1). Later arrivals from Erakor or the eastern villages tend to spill over into the area opposite Burns Philp while sellers from the northern villages squeeze in between the Erakor and Mele groups. The people from Mele-maat set up behind those from Mele and the specialist growers from the Klems Hill and Snake Hill areas are normally established at the back of the market where there is more space and easy access from the rear for their trucks.

Well before 8.00 a.m. the main site is normally fully occupied, except for space at the rear. The last arrivals at the main site are usually shell sellers from Fila Island who arrive by canoe about 8.30 a.m., just before the main European and tourist buyers appear, and occupy the extreme end of the area opposite Burns Philp.[4] After 7.00 a.m. trucks arrive from the most distant villages of the north coast and the sellers take positions under the shade of trees opposite the Post Office. Some sellers from the northern villages, or from the small islands such as Emau or Pele, may not arrive until 9.30 a.m. and they usually also go to the area opposite the Post Office. The Hong Kong Street sellers, most of whom come from Eratap, arrive in two or three groups between 7.30 a.m. and 8.30 a.m. In general, location within the market is fairly consistent with sellers from

4 As the Fila Island people were selling only shells and curios (not fresh vegetables or food) during our survey, they were not enumerated in the market survey.



Market sites 1976
0 50 100
metres
VILA BAY
Rue Bougainville
Hong Kong St
Rue Higginson
HEBRIDA
CFNH
POST OFFICE
MAISON BARRAU
CONDOMINIUM OFFICE
BURNS PHILP
NEW MARKET BUILDING
N
IRIRIKI ISLAND
Road
MELE
MOSO & SIVIRI
ERAKOR
Site of new market under construction
EARTH MOUND
MELE-MAAT
KLEMS HILL
MIXED
SNAKE HILL
MOSO
MIXED
LOCATION WITHIN MAIN MARKET AREA
N
Tree
0 5
metres

Figure 1

each village or area having their own 'market territory'. Within each territory a seller may vary her position from day-to-day. This regularity of group locations should be taken into account in the allocation of places in the new market building.

The Market Day

There are distinct phases in market activity during the day. The earliest buyers are Chinese and Vietnamese ladies, often in traditional dress, who are in the market as the first sellers arrive about 5.30 a.m. Some were seen to rummage in the trucks for purchases before these were set out. Specialist produce such as bean sprouts and leafy vegetables are quickly snapped up and these first buyers then shop in more leisurely fashion for a wider range of local staples whilst they wait for later sellers to arrive. Their purchases are stacked at the edge of the market where they are picked up by Asian-owned trucks and cars from 7.30 a.m. onwards. By 7.30 a.m. the Asian women are gossiping in small groups at the back of the market and usually leave soon after 8.00 a.m.

About 80 per cent of the sales in the first hour or two must be to those Asian women who seldom bother to move away from the main market. The first Saturday of the survey was Chinese New Year and with only one or two Asians present sales on this day did not really start until about 6.30 a.m.

From 6.30 a.m. onwards Melanesian shoppers begin to appear and form the bulk of the buyers until the mid-morning slump. A great deal of talking is involved either way and it is difficult to distinguish between those just chatting with friends and those purchasing.

At about 7.30 a.m. the French (both men and women) start to shop en route for work. British and Australian women appear about an hour later and the tourists just after this. It is little wonder that the British and Australians complain about the quality of market produce. By the time most of them appear in the market the best fruit and vegetables have been sold in the previous two or three hours.

The peak in the number of buyers in the market occurs about 7.30-8.00 a.m. when Melanesians, Asians and Europeans are all represented. In the main market this might amount to 40-45 people. The last period of steady selling occurs between 9.00 and 10.00 a.m. but the first trucks and taxis do not appear to pick up sellers until 11.00 a.m. Between 9.00 and 11.00 a.m. several of the sellers take the opportunity to slip away to shop, have a drink at Burns Philp, visit government offices, or attend to other business. Purchases usually include household goods such as sugar, rice, tea, soaps and soap powders and there is a marked preference for buying from European rather than Asian stores.

By this time the sun is high and sellers try to rearrange their remaining produce in the shade of the trees. Similarly they themselves seek shade, often some distance from their produce.

The market begins to break up about 11.00 a.m. Just after 11.30 a.m. a large number of office workers pass by, returning home for lunch, but the traffic rush is such that little market purchasing is generated. Most of the sellers have gone by 12.30 p.m. although in the main market odd stragglers persist until 1.00 or 2.00 p.m. A few of the distant villagers leave the main market or the area opposite Burns Philp and move to Hong Kong Street or the area opposite the Post Office where sellers persist until about 4.00 p.m. although there is very little activity during the afternoon. The length of time these villagers stay here seems to be more a function of transport availability than of marketing prospects. During the midday period some Post Office site sellers, if they have transport, will drive off to the lower income suburbs of Vila to try and sell on a door-to-door basis.

It is clear that one of the main changes in the market since 1965 is in the timing of activities. In 1965 few sellers arrived before 7.00 a.m. (pers. comm. Caroline Nalo, 8 March 1976 and H.C. Brookfield, September 1976). Brookfield et al. noted that the 'Pango and Erakor women mostly arrive between 1.30 and 2.30 p.m., so that the number of vendors reach a peak about 2.30 p.m. ...The peak trading period...[is] between 4.00 p.m. and 4.45 p.m., after work in the town ceases for the day' (Brookfield, Glick and Hart, 1969:121). Clearly the whole cycle of market activity has moved into the morning since 1965. The reason is unknown. It may be because sellers from more distant villages wish to reach home before nightfall, and because, as competition between sellers has increased, some have tried to take advantage of the arrival of the first buyers by getting to the market earlier themselves. Availibility of village-based vehicles in recent years may allow earlier departure from the villages.

Size of Market

Attendance at the market varies considerably from day to day. Although Wednesday, Friday and Saturday are the recognised 'market days' a few sellers appear on most other days, except Sunday (Table 1). Most sellers on 'non-market days' may be people who come to town for other purposes and bring some produce to sell in the hope of covering their fares, but during the period of our survey at least one of the regular sellers from Erakor appeared on 'non-market' days. In 1965 Friday was the only 'market day' (Brookfield, Glick and Hart, 1969) although there was some minor market activity on Wednesdays and Saturdays on the steps of the C.F.N.H. store and (on Saturdays) in the main market site (pers. comm. Caroline Nalo, 8 March 1976). Total activity has increased considerably since 1965 and one might predict the extension of significant marketing from a 3 day to 5 or 6 day activity in the near future, particularly when all weather cover is provided in the new building. Since 1965 the population of Greater Vila has increased from about 6,500 to 17,300.

During our survey, we recorded a total of 365 different sellers in the market. Of these 44 per cent came on only one day of the fortnight, but 28 (8 per cent) sold on 5 or 6 market days.

Table 2

Number of Sellers

Present on	Number
1 day	162
2 days	107
3 days	51
4 days	17
5 days	18
6 days	10
Total	365

Source: Field survey.

Using the Jolly stochastic technique (Krebs, 1972:625-6) for estimation of the size of a 'marked population', it is possible to estimate the total number of people from Efate (and adjacent islands) who sell in the market on a reasonably regular basis. We estimate this figure to be of the order of 450. The mean number of sellers on the six survey days was 124, an increase of 46 per cent over the mean of 85 per day during the 1965 survey[5] (Brookfield, Glick and Hart, 1969:22).

Table 3 shows the estimated value in New Hebrides francs (FNH) of goods offered and sold in the market on the six survey days. As noted above this excludes the shells and curios offered by the specialist vendors from Fila Island.

Table 3

Value of Produce and Sales

Day	Value of food offered FNH	Value sold FNH	Per cent of produce sold	Average value sold per seller FNH
1	217,980	137,130	62.9	987
2	132,500	78,170	59.0	942
3	252,510	171,020	67.7	1,179
4	223,770	139,170	62.2	973
5	183,210	111,360	60.8	977
6	192,730	141,860	73.6	1,153
Total	1,202,700	778,710	64.7	1,042

Source: Field survey.

The total value of food produce offered for sale in the market was 1,202,700 FNH, giving a mean of 200,450 FNH per market day. In the 1965 survey the mean value of food produce offered was 55,425 FNH at the then exchange rate of 100 FNH to A$1.00. The fact that the market is now held on three days per week instead of weekly makes the increase in value of goods offered per day even more striking. Over the six survey days 64.7 per cent of the produce offered was sold, excluding any that may have been sold to stores or householders after the sellers left the market.

Few data are available on the seasonality of sales in the market though volume of produce offered is probably greatest in the middle of the year. If we crudely assume sales during the two weeks of the survey are representative of those in all fortnightly periods of the year, we may estimate total annual sales of foodstuffs in the Vila Market to be approximately 20,000,000 FNH (A$220,000). This makes no allowance for sales by vendors on non-market days or outside the market sites and these might increase the total by between 5 and 10 per cent.

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[5] During the July 1965 survey rain affected market attendance on two of the four survey days. Attendance was about 20 per cent lower than on fine days (Brookfield, Glick and Hart, 1969:122). The six days of the 1976 survey were all fine, apart from short showers in mid-morning on two days and these did not affect the number of sellers.

To give some indication of the volume of goods transported to the market and offered for sale, Table 4 sets out estimates of the weight of a selection of products offered over the six days of the 1976 survey.

Table 4

Volume of Goods for Sale

Product	Volume in kg (6 days)	Mean volume per day (kg)
Yams*	1,507	251
Taro	8,538	1,423
Manioc	1,039	173
Sweet potato	1,945	324
Bananas	14,975	2,496
Coconuts	6,534	1,089
Citrus fruits	1,569	261
Chinese cabbage	194	32

* This figure is relatively low as the yam season was just beginning at the time of the survey.

Source: Based on value of products offered for sale and mean prices per kilogram of weighed samples.

The Sellers

In 1965, of the 178 sellers who attended the market during the four survey days, seven were non-Melanesians, and included Vietnamese, Chinese, 'part-Europeans' (Métis) and one European. These seven brought in 17.2 per cent of the produce offered for sale (Brookfield, Glick and Hart, 1969:120-2). In the 1976 survey, only one of the 365 sellers was an Asian, an elderly lady who sold in the market on two days. There were no European vendors in 1976 although several of the larger and regular suppliers ('specialists' in Brookfield *et al.*'s terminology) are of mixed European-Melanesian ancestry.

Table 5 shows the number of sellers from each village, the number of vendor/days contributed by the sellers of each place, and the total value of produce sold by them. Since 1965, the area serving the market has extended from just seven villages, four located in a zone stretching from Erakor in the south through Mele and around to Siviri in the north,[6] to encompass virtually the whole island and the nearby offshore islands as well (Figure 2). Improvements in the circuminsular road have no doubt been a major factor allowing this expansion. On the other hand this can scarcely explain the fact that Eratap which did not have any market sellers in 1965 now ranks third in the number of sellers and vendor/days contributed (Table 5). The other major change in suppliers is the disappearance of the Vietnamese, Chinese and European 'specialists' who, in 1965, had gardens on the northern outskirts of Vila and in the north between Siviri and Saama (Brookfield, Glick and Hart, 1969:119). In 1976 the 'specialist' growers are those of the Klems Hill and Snake Hill area on the 'plateau' to the northwest of Mele-maat where a number of small holders grow produce as a full-time commercial activity on small freehold properties.

[6] Erakor, Pango, Fila Island, Mele in the southwest and Lelepa, Moso and Siviri in the west and north (Brookfield, Glick and Hart, 1969:118-9).

Table 5

Village/Location	Goods offered FNH	Goods sold FNH	Per cent sold	No. of vendors	No. of Vendor/days	Average sales /vendor day FNH	Basic return fares FNH
Southern Efate							
Eratap	113,160	73,050	64.6	30	75	974	150
Erakor	254,920	146,310	57.4	53	175	836	150
Pango	5,390	2,790	51.8	5	6	465	190
Nambatri	3,110	1,130	36.3	1	2	565	-
Les Lagunes	2,330	1,050	45.1	1	2	525	200
Tagabe	2,410	1,170	48.5	3	5	234	200
Mele	171,780	113,330	66.0	58	131	865	70
Mele-maat	48,050	39,550	82.3	15	30	1,318	120
Southwest 'Plateau'							
Klems Hill	25,210	20,100	79.7	4	10	2,010	160*
Snake Hill	44,700	33,320	74.5	4	19	1,753	140*
West and North							
Lelepa Is.	52,750	35,700	67.7	20	22	1,622	210
Moso Is.	47,100	32,330	68.6	19	23	1,406	340
Siviri	31,830	19,980	62.8	10	17	1,175	200
Saama	21,510	13,370	62.2	10	17	786	200
Emoa	4,690	2,780	59.3	5	5	556	200
Paunangis	46,840	22,530	48.1	21	32	704	200
Pele	32,700	24,530	75.0	24	33	743	240
Emau Is.	36,680	19,420	52.9	17	21	925	?
Tanaliu	26,840	13,110	48.8	6	12	1,092	300
East							
Epau	55,130	41,900	76.0	18	30	1,397	300
Forari	9,740	4,520	46.4	5	5	904	200
Pangpang	17,840	9,100	51.0	4	8	1,137	300
Eton	124,830	92,780	74.3	24	55	1,687	300

*Estimate

Source: Field survey.

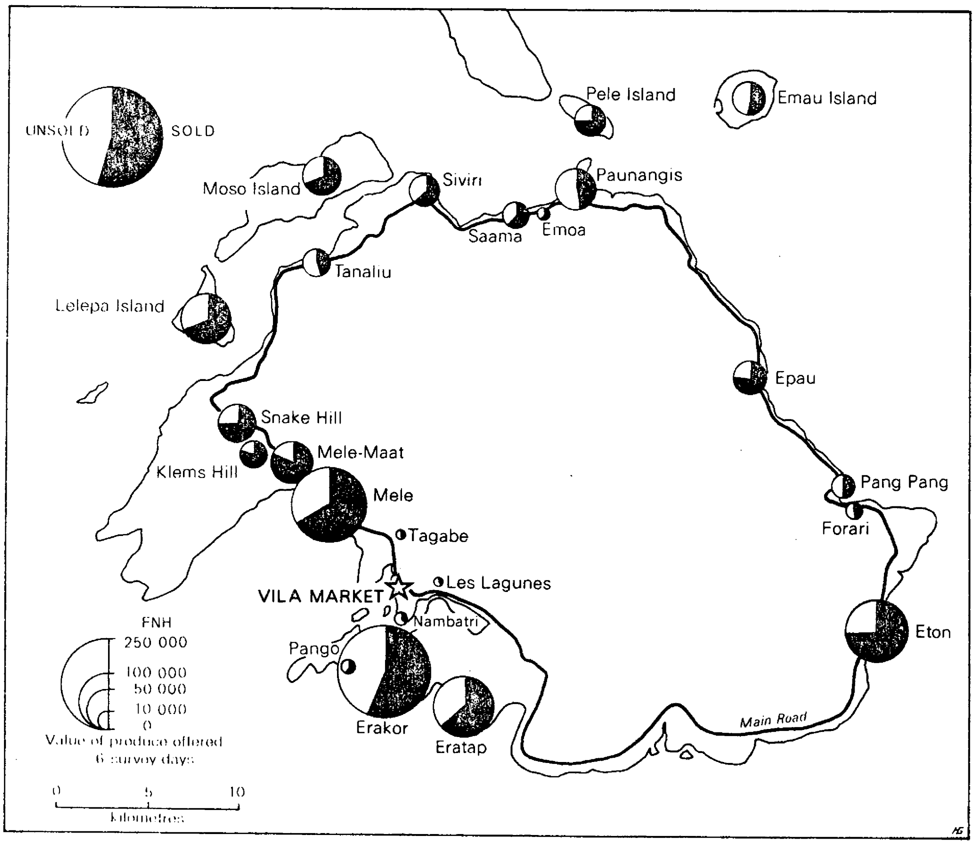

UNSOLD
SOLD
Pele Island
Emau Island
Moso Island
Siviri
Paunangis
Saama
Emoa
Tanaliu
Lelepa Island
Epau
Snake Hill
Mele-Maat
Klems Hill
Mele
Pang Pang
Forari
Tagabe
VILA MARKET
Les Lagunes
Nambatri
Eton
Pango
Erakor
Eratap
Main Road
FNH
250 000
100 000
50 000
10 000
0
Value of produce offered
6 survey days
0
5
10
kilometres

Figure 2

Table 6

Product*	Value offered FNH	Value sold FNH	Per cent sold	No. of vendor/ days product offered
'Water' Taro *(Colocasia)*	24,830	16,910	68.1	60
'Dry' Taro *(Xanthosoma)*	151,670	87,400	57.6	351
Breadfruit	700	300	42.9	2
Coconuts	77,750	51,030	65.6	377
Manioc (cassava)	20,980	11,760	56.1	84
Sugarcane	12,270	6,790	55.3	110
Sweet Potato - kumala	44,740	38,980	87.1	67
Yams	62,070	45,770	73.7	132
*Native staples**	*395,010*	*258,940*	*65.6*	
Island cabbage	26,260	20,280	77.2	237
Palm heart	3,050	1,810	59.3	14
Nuts - assorted	6,400	5,490	85.8	31
Snake beans	1,300	1,130	86.9	11
Leaves - various	6,090	5,220	85.7	33
Kava root	5,700	5,200	91.2	3
Cooking leaves	7,980	6,960	87.2	59
Naviso *(Saccharum edule)*	2,730	2,470	90.5	7
Naus *(Spondias cytherea)*	25,690	19,310	75.2	113
Other native foods	*85,200*	*67,870*	*79.7*	
Bats ('flying foxes')	3,130	2,510	80.2	10
Coconut crabs	60,400	34,360	56.9	61
Other crabs	64,570	49,820	77.2	127
Eggs	80	80	100.0	1
Fowls	10,900	8,700	79.8	18
Fish	9,430	7,830	83.0	31
Shellfish	23,960	15,870	66.2	64
Other animal produce	270	270	100.0	2
Animal produce	*172,740*	*119,440*	*69.1*	
Cooked fish	3,220	2,250	69.9	10
Laplap	69,340	49,160	70.9	146
Other cooked food	3,740	3,690	98.7	8
Cooked food	*76,300*	*55,100*	*72.2*	
Sweet bananas	25,580	12,520	48.9	148
Eating bananas	93,040	50,300	54.1	312
Cooking bananas	101,440	59,010	58.2	341
Other bananas	22,970	12,230	53.2	89
Grapefruit - Pamplemousse	18,080	11,080	61.3	79
Pineapples	8,040	6,770	84.2	74
Pawpaw	7,260	4,100	56.5	93
Oranges	13,630	11,880	87.2	44
Limes - lemons	30,520	8,340	27.3	142
Melons	3,580	1,010	28.2	11
Avocado - butterfruit	7,070	4,160	58.8	50
Other fruit	6,810	4,040	59.3	60
Fruit	*338,020*	*185,440*	*54.9*	
Aubergines	710	500	70.4	14
Beans	30	30	100.0	1
Chinese cabbage *(Brassica chinensis)*	2,970	2,970	100.0	11
English cabbage	810	770	95.1	7
Sweet corn	3,300	2,220	67.3	12
Lettuce	2,370	2,210	93.2	8
Parsley	6,840	5,960	87.1	26

Contd.

Table 6 continued

Green peppers	230	190	82.6	6
Pumpkins	5,190	3,300	63.6	42
Radishes	360	360	100.0	3
Onions	2,650	2,480	93.6	12
Watercress	22,850	18,160	79.5	44
Other vegetables	4,100	3,490	85.1	23
Cucumber	6,650	5,530	83.2	56
Vegetables	*59,060*	*48,170*	*81.6*	
Non-food/other	36,640	20,260	55.3	136

Source: Field survey.
* The general categories conform to those used by Brookfield, Glick and Hart, 1969.

The overwhelming majority (94 per cent) of sellers are women. The only men who regularly appeared during the survey were some of the 'specialists' from Klems Hill and Snake Hill. Some of the sellers have been operating in the market for many years. Of those from whom biographical data were obtained, 24 per cent had sold in the market for more than 10 years. Obviously the age of sellers (which falls between 30 and 39 years for those for whom we have data) influences such a figure but it is clear that marketing has been a long-term occupation for many women. Twenty six per cent of sellers were present for at least three of the six days of the survey. The average sales per seller per market day are over 1,000 FNH (Table 3) and this compares with a daily wage rate of between 400 and 500 FNH for unskilled workers such as gardeners, messengers, or labourers in employment with the British Residency in early 1976. Clearly for many sellers, marketing must now be regarded as much more than the 'occasional activity' which it was seen to be in 1965 (Brookfield, Glick and Hart, 1969: 118).

Products

Over 60 different food products were recorded on sale in the market. Table 6 lists the main products and gives the total values of each sold during the survey. The summary categories (native staples, other native foods, etc.) coincide with those used by Brookfield, Glick and Hart, except for 'curios' which were not enumerated in 1976. The report on the 1965 survey does not record the values sold, only the value of goods offered for sale. For comparison Table 7 gives comparable figures for both surveys.

Table 7

Percentage of Value of Goods Offered by Produce Categories - 1965* and 1976

	% 1965	% 1976
Native staple food	26.8	34.0
Other native food	1.0	7.3
Animal produce	8.7	14.9
Cooked food	14.9	6.6
Fruit	19.4	29.1
Vegetables	27.2	5.1
Curios	2.0	-
Non-food/other	-	3.2

*Brookfield, Glick and Hart, 1969:124

Specialisation by product

Brookfield, Glick and Hart report some tendency for particular villages to specialise in different categories of crops. For example, in 1965 '61 per cent of the offerings from Erakor village comprised native staples', the women from Mele offered European vegetables as well as staples, while the Fila Islanders offered cooked food. New Hebridean and non-New Hebridean 'specialists' offered 89 per cent of the total vegetables on sale, and north Efate tended to contribute a relatively high proportion (43 per cent) of the fruit on offer (Brookfield, Glick and Hart, 1969:124).

The 1976 survey showed some obvious changes (Table 8).

Table 8

Proportion of Total Produce Offered by Categories

Village	Native staples	Other native foods	Animal produce	Cooked food	Fruit	Vegetables	Other	Total
Southern Efate								
Eratap	36.1	5.9	29.1	1.4	25.9	0.4	1.2	
Erakor	34.0	9.5	13.5	0.3	36.4	3.9	2.4	
Pango	10.9	0.4	3.9	31.7	51.4	1.7	0.0	
Nambatri*	0.0	0.0	0.0	0.0	43.1	56.9	0.0	
Les Lagunes*	20.8	0.0	8.3	0.0	42.7	28.1	0.0	
Tagabe*	24.9	0.0	0.0	12.5	36.5	24.9	1.2	
Mele	46.9	4.7	0.2	1.6	32.9	8.4	5.3	
Mele-maat	78.2	2.3	1.4	0.2	14.8	2.4	0.6	
Southwest 'Plateau'								
Klems Hill	19.0	21.4	4.2	4.0	8.0	36.0	7.4	
Snake Hill	32.6	10.7	15.5	0.7	24.9	15.0	0.6	
West and North								
Lelepa Is.	7.9	2.0	45.1	20.1	23.6	0.0	1.3	
Moso Is.	23.8	9.9	17.6	9.6	35.6	1.1	2.3	
Siviri	16.4	11.7	3.9	17.1	43.9	2.6	4.5	
Saama	8.6	17.0	1.6	46.6	26.2	0.0	0.0	
Emoa	33.8	15.9	0.0	40.0	10.3	0.0	0.0	
Paunangis	37.0	8.5	18.2	15.4	19.6	0.1	1.1	
Pele	16.8	3.0	20.1	49.9	9.6	0.3	0.3	
Emau Is.	15.6	8.2	9.2	8.9	32.5	0.5	25.1	
Tanaliu	21.5	1.7	3.5	13.9	54.8	0.8	3.8	
East								
Epau	36.1	12.1	20.4	1.7	24.5	4.1	0.1	
Forari	63.9	4.9	0.0	0.0	31.2	0.0	0.0	
Pangpang	34.2	8.1	29.0	1.7	22.5	0.6	3.9	
Eton	34.0	4.8	25.5	4.1	22.1	7.4	2.1	

*Represent very small quantities.

Source: Field survey.

The non-New Hebridean specialists have dropped out of the market and the Fila Islanders no longer offer produce or cooked food and do not appear in our survey. The relative importance of native staples has fallen significantly since 1965 for villages such as Erakor, Mele and Pango, while fruit is now a much more important item for these villages. Pango village and several of the northern villages are distinctive for their specialisation on cooked foods. In general the 'specialists' from Klems Hill and Snake Hill are the main suppliers of non-native vegetables, although with 36 and 15 per cent respectively of their produce (by value) being in this category, they are not nearly as 'specialised' as the 'New Hebridean specialists' and 'other specialists' of the 1965 survey. 'Vegetables' made up 68 and 76 per cent of the produce offered by these two groups in 1965 (Brookfield, Glick and Hart, 1969:125).

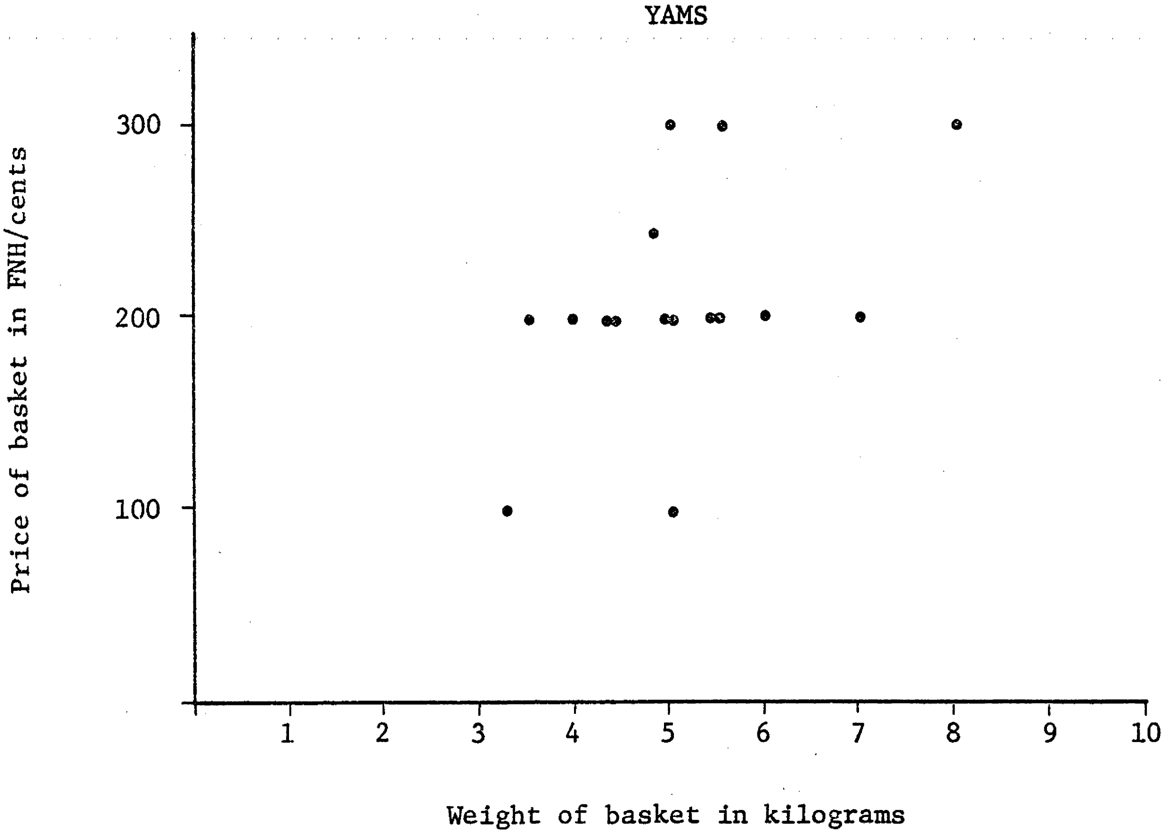
Prices and marketing behaviour

Pricing systems in the Vila Market are, at first sight, very similar to those found in 'informal sector' markets in other parts of Melanesia. Goods are not sold by units of weight, but by units of price in multiples of 10 FNH (or 10 cents). Thus limes or lemons may be sold at two (or three) for 10 cents. Green vegetables are offered in bundles at 20 to 30 cents, with bundles of the one price being of only approximately equal weight. Taro, yams or sweet potato are sold in baskets of varied size and usually priced at $1.00, $2.00 or $3.00 levels. Bananas may be sold either in whole bunches or in 'hands', with the latter bringing considerably higher prices per kilo (Table 9). A superficial uniformity in prices appears to exist across the market but this is more apparent than real and a buyer can 'shop around' quite successfully for 'bargains' based on the variable size of baskets or bundles at any one price level (see Figure 3).

Table 9

Average Prices per kilo

'Water' taro (taro ailan)	39	Other crabs	40
'Dry' taro ('Fijian' taro)	19	Shellfish (in shell)	20
Coconuts	12	Sweet bananas (bunches)	11
Manioc	20	Sweet bananas (hands)	30
Sugar cane	14	Eating bananas (bunches)	14
Sweet potato	23	Eating bananas (hands)	20
Yams	41	Cooking bananas (bunches)	17
Island Cabbage	15	Grapefruit (Pamplemousse)	25
Palm heart	22	Pawpaw	12
Nuts	17	Oranges	67
Kava root	200	Limes	48
Naviso	57	Avocado	25
Naus	23	Pumpkin	14
Coconut crabs	200	Watercress	39



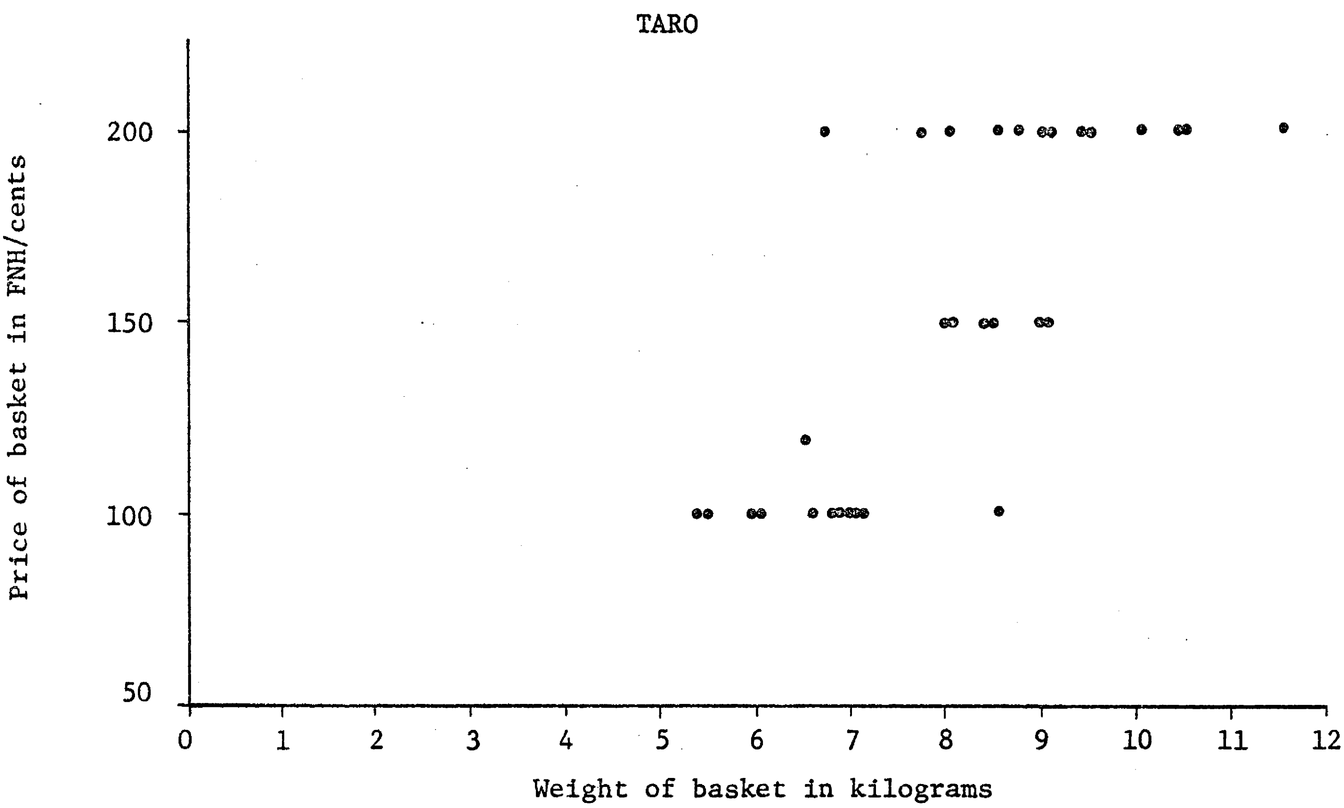


FIGURE 3: Price variations of yams and taro

There appears to be a general concensus amongst sellers that units (baskets, bundles or heaps) within a certain size range should sell at such and such a price. In the early morning sellers may exhibit uncertainty about prices and then there is quiet consultation between adjacent sellers about the right asking price for particular items - a specific bunch of bananas, or a basket of yams. Some sellers however, have price tags (usually qooted in dollars and cents) on their produce when they set it out.[7]

In order to ascertain mean prices, a representative selection of baskets, bundles or other sale units of most products was weighed and prices recorded. Table 9 sets out the mean price per kilo of each item. As noted above (and see Figure 3) the variation from these mean figures can be considerable. Nevertheless the figures do enable comparisons to be made with prices of a smaller range of products collected quarterly by the Condominium Bureau of Statistics since I97I. Table I0 gives data on prices since I97I.

Table I0

Prices I97I - I976
(FNH per kilo)

	I97I 3rd quarter	I972 Ist quarter	I973 Ist quarter	I974 Ist quarter	I975 Ist quarter	I976 Ist quarter	I977 Ist quarter
Taro ('dry')	I4	II	I6	24	23	2I	I9
Yam	23	30	56	5I	47	29	50
Manioc	I3	I2	I5	I4	I7	I9	I9
Cooking bananas	II	I3	28	I6	24	22	2I
Eating bananas	I4	I2	I6	I4	2I	20	23
Island Cabbage	II	I3	I5	I5	I4	I2	I9

Note: I97I - I975 figures from Bureau of Statistics. Figures not available for the first quarter of I97I. The samples taken by the Bureau were often small and given the great price variability illustrated by Figure 3, the above figures should be taken as approximations only. Some price fluctuations may be seasonal. For example, in I975 the price of yams per kilo as recorded by the Bureau of Statistics varied as follows:

March, 48 FNH; April, 47; May, 50; June, 40; July, 29; August, 4I; September, 37.

No prices were recorded for January, February, October, November, and December, months where few yams are available.

Source: Bureau of Statistics

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7. This practice may follow from the requirement of the price control regulations for all stores to display prices on goods offered.

In general very little 'active' selling, such as calling to buyers or shouting products and prices, occurs in the Vila Market. The main attempts at bargaining are usually initiated by Asian buyers who may offer smaller sums than requested. They meet with limited success. There is a great deal of resentment against the Asian women for trying to bargain. One Erakor vendor complained vigorously about this, saying that as the village women had to pay fixed prices in a taxi or at Chinese stores, so the Asians should abide by market custom. There are examples, however, of more 'active' selling by some vendors. One regular seller from Erakor sometimes called the attention of prospective customers to her goods and was also willing to drop the price of a hand of bananas from 50 cents to 40 cents for a known European buyer. In addition she bought oranges from a young seller at 5 cents each and sold them at the normal price of 10 cents. She was not alone in this last instance.

Other examples of flexible, rather than active, selling were the friendly bargaining, or perhaps banter by French buyers over size of bunches of bananas, and the occasional dropping of prices at the end of the market day. In one instance, two women from Mele halved the price of a bag of taro (usually $3.00) for a sale to a Frenchman and his Polynesian wife who then went through it and reproachfully picked out a rotten one! In one (rare) instance a seller asked two Royal Navy sailors from a visiting ship for 30 cents for a grapefruit which normally would sell for 10 or 20 cents. The sailors paid, and this caused gales of laughter after they had left; the seller being mock scolded. On the other hand fruit sellers at the wharf when tourist ships were in port seem to offer their goods at prices comparable to those asked in the regular market.

Sellers' transport costs

Table 5 gives the basic return fare between each village and the market. In fact transport costs may vary according to the type and ownership of the vehicle used. In general, fares in normal sedan type taxis tend to be higher than those charged on taxi trucks. This is particularly the case with so called 'family transport', i.e. trucks owned by a family, or 'company transport' which is normally a truck owned by an informal group. In some cases a cooperative-owned taxi or taxi truck is used. In all these latter cases it seems that a somewhat lower fare is charged than if a normal car taxi were hired. Fares cover both the seller and the seller's produce but it is interesting to note that the fare to the market from Erakor which is a standard $1.50 return, is sometimes made up of a $1.00 fare to the market with produce and a 50 cent fare back. Virtually all the growers in the Klems Hill and Snake Hill area use their own trucks and do not cost individual trips. The Klems Hill and Snake Hill fares shown in Table 5 are interpolated from those of Mele-maat and Lelepa. Fares from Lelepa and the other small islands include an additional boat component, of 40 cents in the case of Lelepa.

When 'company transport' is used by a group from a village, a total hire charge may be made for the truck, irrespective of the number of passengers. Thus from Moso Island there is a 40 cent boat fare for each individual plus the shared cost of a truck hired for $12.00. Truck charges from Siviri and Saama are $10 and $12 respectively. In the Emoa area a fare of between $2 and $4 applies apparently depending on the number sharing a vehicle. From Paunangis 'family transport' allows a fare of $2.00 per head while 'company transport' for Pele Island gives a similar road fare of $2.00 per head.

It is important to note that pricing policies probably vary from operator to operator in the case of family transport or company transport and that the provision of transport is not necessarily regarded as a commercial operation. For example, the fares may not include allowance for depreciation and there is apparently a significant social element in truck ownership and use.

Returns to sellers

One frequent assertion made about the Vila Market, as well as similar markets elsewhere in Melanesia, is that many sellers do not make sufficient sales to cover their transport costs to the market. Calculations show that of 699 vendor/days for which we have data on both transport cost and amended value of sales, fares exceed returns on only 36 (5.2 per cent) of the individual vendor/days. We do not have data on the other costs of production and marketing and therefore can only give information on gross returns.

Table 5 shows mean sales per vendor/day for the vendors from each village or area. The highest daily incomes are recorded by the specialist growers of the Klems Hill and Snake Hill area but sales per head by sellers of Eton village and Lelepa Island do not fall far behind. Although Erakor and Mele lead in terms of sales per village, daily sales per head by vendors from these two villages are below the mean of 1,050 FNH. The distribution of vendor/days by value of goods sold is given in Table 11.

Table 11

Sales - FNH	Vendor/days	% of vendor/days
Under 10	11	1.5
10 - 100	13	1.8
110 - 200	23	3.2
210 - 300	41	5.7
310 - 400	47	6.5
410 - 500	52	7.2
510 - 600	53	7.4
610 - 800	98	13.6
810 - 1000	89	12.4
1010 - 1500	130	18.1
1510 - 2000	88	12.3
2010 - 2500	38	5.3
2510 - 3000	17	2.4
Over 3000	18	2.5

Source: Field survey.

Conclusion

This is a preliminary report aimed at providing some basic factual data on the Vila Market. Later reports will provide more detailed analysis and interpretation. The market is only one part of the food distribution system of the island of Efate and later reports will examine other components of the system - food imports, food retailing, and bulk purchasing of locally grown produce for institutions. The relative importance of the market in the whole system can only be assessed when data on these other components have been analysed but it is clear from the information presented above that the market is now an integral part of the economic life of all parts of Efate. Through the market, all villages in the island, and some on neighbouring islands, benefit from the expanding population and market for food crops which Vila provides. Whether any measures to organise or 'rationalise' the marketing system would bring real benefits to vendors or consumers is an open question. It may have the effect of reducing the benefits of market participation which are now available to villagers from all over the island.

SECTION TWO - SANTO MARKET

The urban patterns of the Pacific are not greatly different from those of other parts of the Third World with the exception of the scale and size of settlements. In most Pacific countries one large urban settlement dominates the urban hierarchy: in Tonga it is Nuku'alofa; in Fiji, Suva; and in the New Hebrides, Port Vila. These towns are the centre of most of the economic, political and military activities of their countries. They contain a sizeable proportion of the indigenous urban population and they are growing rapidly. When one reads of the increasing urban problems of unemployment, inadequate housing, etc., it is these larger towns which are the foci of such problems (see Spoehr, I963 and Brookfield with Hart, I97I).

But there is a forgotten part of this urban pattern - these are the smaller, secondary settlements that string out from the larger urban centres. These secondary centres perform an important role in the network or trading and administrative relations between the countryside and the larger cities.

Santo fits almost perfectly into this pattern. It is the second largest town in the New Hebrides, acting as the major regional focus for much of the northern part of the Condominium. It is the administrative centre for the Northern District of the New Hebrides which covers the island of Santo, together with Aoba, Maewo, Malo and the Banks islands. The population is largely one of semi-subsistence farmers with enclaves of European copra plantations. Santo is also the trading centre for much of this region; in addition to handling direct imports, small trading boats also leave the port to collect copra and sell trading goods. Santo is linked to Vila by both air and sea services and there is considerable contact between the two urban centres.

Santo's history too is remarkably similar to that of other smaller Pacific towns. Established in I899, it remained a small colonial service centre catering primarily for the needs of its European inhabitants prior to the Second World War. During the Second World War it was a major base for the Allied forces in the Pacific war and many of the surrounding population were engaged in wage employment (see Bennett, I957 and Bonnemaison, I977).

After the Second World War it dropped back into its role as a service, trading and administrative centre for the region -- a town designed and dominated by its expatriate inhabitants. During much of this period the town was divided culturally into four groups. There were small and separate populations of French and English residents who had little social contact; a larger population of Chinese and Vietnamese who were, and still are, a major element in the trading activity of the town; and finally, a population of indigenous people variously employed as servants and unskilled labourers who kept close contact with their rural villages.

This rather static picture was interrupted in the I960's by a rapid increase in the town's population (largely indigenous). Thus the population of the town grew from I.384 in I955 to 3,804 in I972. It also experienced radical changes in its ethnic structure with the repatriation of its Vietnamese population and a very large increase in the number of New Hebrideans (see Table I). This rapid growth in the number of New Hebrideans

Table 1

Increase in Santo Population 1955-1972 by Ethnic Group

	1955 (1)			1967 (2)			1972 (3)	
	No.	Per cent total	Per cent increase	No.	Per cent total	Per cent increase	No.	Per cent total
Europeans	448	(32)	-31	310	(12)	+15	358	(9)
Asians	746	(54)	-76	176	(7)	-	175	(4)
Pacific Islanders (3)	190	(13)	+791	1693	(68)	+71	2905	(76)
Other	-	-	-	323	(13)	+13	366	(10)
Total	1384	(99)	+80	2502	(100)	(99)	3804	(99)

(1) Bennett (1957):p. 123
(2) Bonnemaison (1977):p. 62
(3) Pacific Islanders includes New Hebrideans, and other Pacific Islanders.

was important for it created a consumer market for the sale of native foodstuffs which had not existed before. There was also a surge in commercial building associated with an accumulation of capital in the latter part of the 1960's when many new buildings were completed. This was aided by the completion of a land reclamation programme which permitted new commercial building.

By 1975 new currents had begun to affect the town. The movement towards political independence had accelerated at a pace which left the majority of the French and British residents bewildered and the Asians scared. In the spatial picture of this emerging independence, Santo is rather special. The majority of the plantations which partly circle the town are French-owned and a history of Catholic and Protestant missionary influence has left a series of villages outside this semi-circle variously committed to the French and British administrations. Thus, villages side by side are often strong political rivals. Another element in this political melting pot has been the growth of a group of dissidents calling themselves the Na-griamel who have attempted to set up an independent state complete with the symbols of the nation-state, such as a flag. The Na-griamel, variously reported to be funded by French commercial interests and a discontented American whose real estate investment in Santo had been invalidated by the Condominium government, operated a radio station and vigorously expressed their opposition to independence. There were occasional clashes between the Na-griamel and supporters of the New Hebrides National Party in Santo streets. All this led to a highly volatile political atmosphere which accounted for some problems faced in fieldwork (see Sope, n.d.).

However, this political atmosphere seemed to have little effect on the life of Santo during the market survey. The rhythm of the day remained undisturbed. The day started with the arrival of marketers from outlying villages in the dawn at 5.00 a.m; the opening of Chinese shops between 6.30 and 7.00 a.m; and then European shops and banks from 9.00 a.m.

Shopping and commercial activity occurred in two main periods; the first between 7.00 a.m. and 11.00 a.m; a second between 4.00 p.m. and 6.00 p.m. In the lull between these two bursts the town settled into a dusty torpor.

The retailing and commercial activities of Santo are located along the main street, Rue Higginson, which stretches along the former waterfront for about half a mile. Functionally there appears to be very little specialization with no marked concentration, but if one were to search very closely it might be suggested that there is something of a commercial core, with agency houses of Burns Philp and Comptoirs Français des Nouvelle Hebrides in close proximity to the major French and English banks. But the majority of buildings are Chinese-owned stores, often quite large, which sell everything from clothes to canned food. A few of the older, wooden buildings remain but the majority are concrete, two-storey structures with residence above and shop below.

The retailing structure of the town is divided into five main parts. First, there are the large foreign-owned stores of which Burns Philp and Comptoirs Français des Nouvelle Hebrides are the two representatives; secondly, a large number of Chinese-owned stores; thirdly, the co-operative stores operated by the French and British administrations; fourthly, a small number of indigenously-operated stores and finally, a group of market-sellers who operate principally on three days of the week. This report investigates the activity of the market-sellers. Another report will deal with the other parts of the retailing structure.

The Santo Market

Unlike the Port Vila market which has attracted the attention of other researchers (see Brookfield, Brown-Glick and Hart, 1969, and Philibert, 1976), the Santo market has not been subjected to previous study. In part this can be explained by its recency. It appears to have grown up as a spontaneous development, due to the decision of one individual in 1968 to bring produce from his village to sell. He soon was joined by some of his fellow villagers and since that date many other villages from surrounding areas have started sending produce to the market.

Information on these market-sellers was collected during January-February 1976, in the following manner:

1. Field observation established the location and daily pattern of selling.

2. The market-sellers were then surveyed on six days[1]; at the end of a month, when it was assumed purchasing was generally lower among wage workers, and at the beginning of the month when purchasing was higher after monthly wage payments.

3. The techniques of recording were as follows:

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[1] These were Wednesday, Friday, Saturday, January 28, 30 and 31 and Wednesday, Friday, Saturday, February 4, 6 and 7.

a) Recording sales of market produce

(i) On arrival at the market each seller was given a numbered ticket and asked to bring it back on subsequent market days: new sellers, after the first day, were given tickets distinguished by a different colour.

(ii) On a recording form the seller's name, number, and village and the date were noted.

(iii) The type of produce, number of selling units (e.g. bundles, baskets, sticks, etc.) and asking price in New Hebridean francs (FNH)[2] were recorded as the seller laid out his produce.

(iv) When the seller prepared to leave the market the unsold produce was enumerated.

(v) Some samples of produce were weighed to calculate volume/price data.

b) Recording personal information on market-sellers

(i) During the day sellers were interviewed for biographical details and such items as cost of transport to market, frequency of attendance and number of years they had been selling.

On return to Canberra the records were coded and tabulations computed at The Australian National University. During the survey a total of 166 different sellers were recorded as offering goods for sale. These sellers spent a total of 202 vendor/days[3]. The much smaller number of sellers in the Santo market, compared with the Vila market, meant that there was no need to adopt estimating techniques for produce sold but not recorded, for the field investigators were able to complete this task. However, the political situation in Santo did affect the coverage of the survey as the sellers from the Na-griamel movement refused to give information. An attempt has been made to estimate their sales in Table 4.

Location of Market

In contrast to the Port Vila market where the majority of sellers were located on one site, the Santo sellers were spread out in several locations (see Table 2). As Figure 4 shows these locations are generally in front of certain stores and associated with a particular village group of market-sellers. The reasons for this patterning are complex and appear to bear no relationship to laws of retail location formulated by Western theorists. Interviews with the market-sellers revealed that the relationship with the shop owner was a prime factor. Thus, for instance, the group

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2 Following market practice, and for the purpose of the survey, FNH 100 = A$1.00. (But see Section One.) The official exchange rate was FNH 100 = A$1.10

3 Vendor/day - one market visit by one seller. A seller who attended the market on all six days would thus contribute six vendor/days.

of market-sellers who came from Tongoa invariably located themselves in close proximity to the local dentist, Mr Hutton who, they claimed, offered them some protection because he owned a plantation close to their village and knew some of the villagers. While Ken Hutton confirmed this point it does not seem that the sellers approached him for permission to locate in front of his business. Rather they seem to have assumed tacit approval. In the case of the Na-griamel sellers who operate from the shell of the fire-destroyed CFNH store, the relationship with the French is clearly important. The sellers outside the Chinese stores seem to have a more careful arrangement, the Chinese owners being willing to have the sellers outside in the hope of tempting them to make purchases. In some cases they may be even willing to extend credit.

The Burns Philp store was the location of the first sellers in 1968 and the original seller reported that he located here because it was the biggest store in town. He also claims that Burns Philp made him and his villagers pay rent[4].

It is popularly believed in Santo that these separated selling clusters are a reflection of hostility among villagers, and while this may be true of the Na-griamel group it does not seem to be the case among the other groups.

Within the village selling clusters there does not appear to be any prevailing pattern. Sellers unload their goods from trucks and lay them out on mats on the pavement. Unlike Asian sellers they do not always sit beside their produce. Rather they tend to retire a few paces back from their goods and identify themselves when a customer picks up an item of produce. Indeed, it is not always possible to identify the ownership of produce for the goods of owners are often mixed up when displayed. Again there are very good reasons for this. In many cases the villagers are selling as a group and pool the day's returns, although this did not always occur. Further research will be needed to establish the degree to which the family, as opposed to the village, retains the profits from sales.

Images of the Market - the Market Day

The market appears to play a very insignificant role in the life of Santo. Most Santo residents, including the indigenous population, buy a large proportion of their foodstuffs from other retail outlets. For the majority of people the sellers seem to be small in number, offering very little variety in produce, and not of great importance. Most Europeans do not utilise the sellers. They see them in the late morning sitting passively under the shelter of shop-awnings or trees. The market is primarily for the indigenous population, particularly a small but important group of Polynesians who frequent the market regularly, and the Chinese who are always looking for leafy, green vegetables and some root crops such as sweet potato. But the general image of the market is very much that of the Melanesian stereotype, being characterized by lack of marketing sophistication and competitiveness.

In fact the market plays a crucial role in the network of rural-urban relations between Santo and some of the larger villages in the rural hinterland. On each of the market days, from early in the morning, small Japanese

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[4] I attempted to verify the accuracy of this statement from Burns Philp sources without success.

trucks bring in the sellers from villages up to 50 kilometres away. These sellers have often been up most of the night travelling over atrocious roads to reach the market. It is still dark and cool when the first of the trucks arrive, generally with the sellers from Hog Harbour or Port Olry. They set up their goods outside John's Store or Lo Cho Min's and immediately begin to sell to Melanesian buyers. From about 6.30 a.m. a steady stream of Chinese housewives begin to appear. At this time the sellers from the Tangoa area arrive, locating themselves near the dentist Hutton's shop. Other smaller groups filter into the town settling down in different locations. Between 7.00 and 9.00 a.m. is the maximum selling time. The final group to arrive comes from the village of Narango to the southwest. They have been selling for the longest time and they claim that they cater for a fairly established clientele although this is not particularly obvious.

By 11.30 a.m. the sun is already very hot and the sellers have retired to the shelter of shop verandahs or the few trees. They sit quietly, often dozing, or taking walks to purchase soft drinks or ice cream and candy. Some sellers go off to visit friends in the town, others to visit the hospital or government officials. By 3.00 p.m. many of the groups are preparing to leave. The goods they have not sold are taken back to the village.

The trip to the town is certainly more than a visit to sell goods. The marketing of goods is used as a vehicle to cover the costs of utilising urban services which are not available in the villages. In this respect the market is a crucial part of improving the network of urban-rural relations.

The Size of the Market

As indicated in Table 2, attendance at the market varies quite markedly. The two principal market days are Wednesday and Saturday — a pattern similar to Port Vila. It is significant, however, that there were considerably smaller numbers of sellers on Friday. While field data were not collected for the non-survey market days there were occasional sellers who did offer goods for sale. When the first large village group of sellers began to operate in 1968 they came only on Saturday so that the market has shown a considerable expansion in terms of the number of days in which sellers offer goods.

TABLE 2

Santo
Numbers of Sellers, by Site on Survey Days

Date		Main Site(1)					
	L.C.M.	Hutton	B.P.	John's Store	Wong Jock	Other(2)	Total
January							
Wednesday 28	2	11	4	11	8	3	39
Friday 30	10	2	0	2	3	1	18
Saturday 31	12	16	12	4	8	0	52
February							
Wednesday 4	0	5	21	7	6	0	39
Friday 6	4	4	1	0	0	0	9
Saturday 7	3	8	13	9	12	0	45
Total	31	46	51	33	37	4	202

(1) These are locations in front of the stores.
(2) Truchmuch and Lo Po stores.

The Santo market is noticeably affected by bad weather conditions. The inadequate and bad network of roads from many of the villages to Santo is frequently cut by flooding — a situation which had existed just prior to my arrival in Santo in January 1976. This is further accentuated by the considerable distances that villagers had to travel.

The survey recorded a total of 166 different sellers (see Table 3) of whom only 18 per cent returned to the market for more than one day during the survey period. This compared with 55 per cent in the case of the Port Vila sellers. This is an important point of contrast with the Vila market for field observations and interviews suggested that if the survey had been conducted over a longer period, for example six weeks, the percentage of sellers who returned to the market would be much larger. What appears to have happened in the case of the Santo sellers is that the sending villages have institutionalised a pattern whereby most adult females and few males manage to get into town once a month to sell commodities and take advantage of the town's amenities. The mean number of sellers in the Santo market was 33.6 which made it a much smaller market than that of Port Vila (124.5).

TABLE 3

Santo
Number of Sellers

Present on		Number
1 day		136
2 days		26
3 days		2
4 days		2
	Total	166

Source: Field survey.

This fact is reflected in Table 4 which shows the estimated value of goods offered and sold in the market. The total value of food produce offered for sale was 349,280 FNH giving a mean of 58,213 FNH per day — this was only 29 per cent of the mean value of goods offered daily in the Port Vila market. The contrast with the Vila market is hardly surprising for the Santo market is still very recent and services a much smaller population (see Table 1).

The exclusion of the Na-griamel vendors from the survey certainly deflates this figure. Therefore an estimate of the sales for the 53 Na-griamel vendors[5] who were in the market during the six survey days has been included. This increases considerably the value of produce brought to the market and sold. We have no reliable indications on the per cent of produce sold by the Na-griamel vendors. Observation suggested that their product mix was very similar to that of the other vendors. Studies of the economic activities of the Na-griamel movement suggest that they encouraged marketing of goods in Santo as a means of raising revenue for the movement. However interviews in Santo suggested that the New Hebridean population who largely sympathized with the National Party were no longer patronising the Na-griamel sellers.

TABLE 4

Santo
Value of Produce and Sales

Day	Value of food offered FNH	Est. Na-griamel	Value sold FNH	Est. Na-griamel	Per cent of produce sold	Average value sold by seller FNH
1	63,170	(69,649)	35,600	(39,251)	56.4	913
2	26,770	(32,719)	12,550	(15,339)	46.4	697
3	87,460	(119,417)	44,960	(61,388)	51.4	865
4	79,690	(116,470)	30,920	(45,191)	38.8	793
5	15,170	(21,912)	9,940	(14,358)	65.5	1,104
6	77,020	(83,866)	40,120	(43,686)	52.1	892
Total	349,280	(444,033)	174,090	(219,213)	(49.4)49.8	877(860)

The smaller scale and character of the Santo market is also revealed in the data on the sales (see Table 4). The Santo market-sellers have a considerably lower value of sales per seller than the Port Vila sellers with an average value of sales of 877 FNH (860 FNH including Na-griamel) compared to the figure of 1042 FNH for the Port Vila sellers. This is partly a consequence of the fact that they sell only 49 per cent of their foodstuffs compared to almost two-thirds in Vila. This seems to suggest that the Santo market is oversupplied but as we shall see it also reflects an inability on the part of the market-sellers to recognise that they must diversify their products for the market, or react by adjusting their prices to meet conditions of oversupply in the market.

While no figures exist for seasonality of sales, the vendors indicated that they would offer a greater variety of goods and generally expected greater sales in the middle of the year, as in Port Vila. If the sales for the two weeks period is at all representative then the total sales for the year by these vendors would be approximately 4526349 FNH or $A49,790, excluding the Na-griamel sales.

The Sellers

Table 5 shows the pattern of selling by village/locations for the period of the survey[6]. As we have indicated there has been a considerable expansion in the number of villages involved in selling since 1968, stretching in the north to Port Olrey and in the west to Tongoa. Santo shows a markedly different pattern to Vila in that there has been no growth of production for marketing in areas adjacent to the town, although one or two squatter farmers have emerged in what Bonnemaison describes as the 'banlieue jardin' of the marginal Melanesian settlements (see Bonnemaison, 1977:77). This pattern is largely a reflection of the fact that there is little land available adjacent to the town. Most of this land is owned either by government or plantation owners. Thus the marketing network has leap-frogged this European 'cordon sanitaire' and villages located outside it have begun to bring in goods[7]. It is also a reflection of the extension and 'improvement' of roads to the north and east which give trucks carrying produce access to the villages.

This table suggests that there are some significant differences between villages in terms of the number of vendor/days, value of goods and average sales. The 'other' category, which includes the two or three 'specialist' growers from close to Santo, has sales which are in excess of the Vila market average sales. Other villages show considerable variation. Perhaps the most surprising are the Narango and Lourou sellers who are suffering from excessive competition, as is indicated by their low percentage of goods sold. Approximately 50 per cent of the value of sales comes from two villages, Hog Harbour and Tangoa; another 11 per cent from 'other' locations.

The majority of sellers in the market were women (86 per cent); a figure lower than that of Vila but still reflecting the predominant role of women in the marketing process. According to the survey data the majority of sellers had been operating for less than four years (75 per cent) but there were some 8 per cent who claimed to have sold for more than 10 years. This information appears to contradict the historical data on the origins of the market. But questioning of some of the informants who had claimed to have marketed goods for more than 10 years suggested that this meant perhaps one visit to Santo per year at the time of 'life-rites' when they had brought goods to be sold.

For most of the respondents, market selling was certainly a 'part-time' occupation; over 83 per cent reported that they also engaged in some form of agriculture which in this case generally meant tending gardens in their villages. Education levels, while not high, showed that 53 per cent of respondents had more than three years education, most of this in mission schools close to their villages.

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6 Village/location refers to either a village or to a location in which there is more than one village.

7 This point needs some explanation for Bonnemaison's survey of Melanesian allotments within Santo indicates that a high proportion are given over to 'jardins-vivriers' (produce gardens) and in a footnote he suggests that the women sell this produce in Santo. 'Leurs femmes revendant au jour le jour une partie important de la production de leurs jardins vivriers sur les trottiers du Boulevard Higginson dans le centre de Luganville' (Bonnemaison, 1977:fn2, p. 77). Our surveys do not support this observation as there were only a small number of women sellers from the Melanesian suburban areas within town limits. This suggests that either there has been a sharp change in the vendors in the market over one year or that Bonnemaison's observations were not particularly accurate.

TABLE 5. SANTO

Village/ location	Goods offered FNH	Goods sold FNH	Per cent sold	No. of vendors	No. of vendor/ days	Average sales vendor/ day FNH	Basic return fare FNH
Hog Harbour	127,960	63,360	44.5	63	75	845	214
Tangoa	50,230	25,600	51.0	21	34	753	220
Kole	31,360	17,010	54.2	15	18	945	225
Narango	45,950	15,130	32.9	17	21	720	279
Nubuloninbuk	24,120	11,650	48.3	11	12	971	206
Port Olry	13,470	6,150	45.7	10	10	615	200
Lonpere	7,010	5,480	78.2	7	7	783	200
Lourou	8,310	2,520	30.3	4	4	630	200
Other	28,970	19,430	67.1	10	13	1,495	
Na-griamel (est.)	(94,758)	(44,648)	(47.1)	(44)	(53)	(842)	

TABLE 6

Santo
Age of Market Sellers

10 - 19 years	18.5 per cent
20 - 29 "	24.8 "
30 - 39 "	17.2 "
40 - 49 "	21.7 "
50 - 59 "	13.4 "
60 plus "	4.5 "

The age structure of the vendors revealed in Table 6 shows that approximately 40 per cent were below 30 years — a much higher percentage than that recorded for the Vila vendors. Age data on the vendors, however, should be related to surveys of household production and participation at the village end, for it is clear that these women market vendors are simply part of the wider household or village production unit. Unlike the Vila sellers the Santo surveys do not indicate a population which is primarily committed to marketing. Rather, with average net sales after transport costs of 659 FNH, they earn a useful input to their cash income from other sources such as copra sales.

Products Sold

A wide range of products is offered for sale in the market (see Tables 7 and 8). These tables show some interesting variations in products offered for sale compared to the Port Vila market. Of most interest is the fact that almost 50 per cent by value of the products offered for sale in the Santo market (cf. Vila 34 per cent) are made up of native staples of which taro is 64 per cent (compared to 44 per cent in Vila).

TABLE 7

Product	Value offered FNH	Value sold FNH	Per cent sold	No. of vendor/ days product offered
'Water' taro (*Colocasia*)	30,450	10,200	33.5	34
'Dry' taro (*Xanthosoma*)	77,350	35,980	46.5	160
Coconuts	18,500	8,550	46.2	121
Manioc (cassava)	2,500	900	36.0	13
Sugarcane	4,330	1,940	44.8	38
Sweet potato (kumala)	28,770	18,240	63.4	75
Yams	5,800	2,950	50.9	18
Native staples	167,700	78,760	47.0	
Island cabbage	16,530	7,810	47.2	138
Palm heart	100	100	100.0	1
Nuts - assorted	11,120	9,300	83.6	23
Snake beans	720	560	77.8	1
Leaves - various	20	0	0.0	1
Kava root	1,200	0	0.0	2
Cooking leaves	1,090	710	65.1	27
Nauso (*Saccharum edule*)	170	20	11.8	2
Naus (*Spondias cytherea*)	1,060	340	32.1	9
Other native foods	32,010	18,840	58.9	
Bats (flying foxes)	200	200	100.0	1
Coconut crabs	25,920	12,860	49.6	39
Other crabs	8,690	3,300	40.0	15
Fowls	2,500	2,220	88.8	7
Fish	70	70	100.0	1
Shellfish	4,280	1,680	39.3	33
Animal produce	41,660	20,330	48.8	
Cake	300	160	53.3	1
Cooked fish	360	120	33.3	1
Cooked Fowl	200	200	100.0	1
Laplap	390	160	41.0	2
Soup, drinks, etc.	140	70	50.0	1
Cooked vegetable	660	660	100.0	2
Other cooked food	1,750	1,310	74.9	8
Cooked food	3,800	2,680	70.5	

Table 7 continued

Table 7 continued

Product	Value offered FNH	Value sold FNH	Per cent sold	No. of vendor/ days product offered
Sweet bananas	4,540	1,690	37.2	35
Eating bananas	13,310	6,670	50.1	79
Cooking bananas	23,320	8,580	36.8	103
Other bananas	4,810	1,610	33.5	17
Grapefruit - pample mousse	3,120	1,620	51.9	17
Pineapples	14,080	7,970	56.6	67
Pawpaw	1,500	670	44.7	23
Oranges	13,270	8,940	67.4	37
Limes - lemons	5,940	2,870	48.3	38
Melons	2,020	1,080	53.5	11
Avocado - butterfruit	2,030	850	41.9	13
Other fruit	830	690	83.1	8
Fruit	88,770	43,240	48.7	
Beans	220	220	100.0	4
Chinese cabbage (*Brassica chinensis*)	1,000	1,000	100.0	2
English cabbage	140	120	85.7	2
Chokos	50	50	100.0	1
Sweet corn	830	400	48.2	7
Lettuce	220	220	100.0	2
Green peppers	770	650	84.4	6
Pumpkins	1,060	510	48.1	20
Radishes	40	0	0.0	1
Tomatoes	100	0	0.0	1
Onions	70	70	100.0	2
Watercress	6,970	4,050	58.1	31
Cucumber	3,870	2,950	76.2	39
Vegetables	15,340	10,240	66.7	

The sellers managed to sell only 47 per cent of these native staples compared to almost two-thirds in Vila. Vegetables and cooked food, while they made up only a small proportion of the goods offered for sale, were the best selling commodities, reflecting a similar demand in Vila.

Thus, in terms of the range of products offered the Santo market is much less specialized than that of Vila. Surveys of the Vila market have noted a tendency for villages to specialize in certain products. While there is some indication of this tendency emerging in the Santo area it is nowhere as developed as in Efate. The majority of villages rely upon native staples, although the Tongoa, Lourou, and other groups tend to concentrate on other native food, animal produce and vegetables, since these are products that sell better in the market (see Table 9).

TABLE 8

SANTO AND PORT VILA
Per cent of Value of Goods Offered by Produce Category

Product	Vila	Santo
Native staples	34.0	48.0
Other native food	7.3	9.2
Animal produce	14.9	11.9
Cooked food	6.6	1.1
Fruit	29.1	25.4
Vegetables	5.1	4.4
Non food/other	3.2	0.0

TABLE 9

Proportion of Total Produce Offered by Categories

Village/ location	Native staples	Other native food	Animal produce	Cooked food	Fruit	Vegetables
Hog Harbour	57.9	4.9	12.1	0.4	22.1	2.7
Tangoa	29.2	17.1	16.5	1.1	24.3	11.9
Kole	34.7	5.1	31.6	1.4	26.6	0.6
Narango	56.3	5.5	0.0	1.3	35.4	1.5
Nubuloninbuk	58.0	6.3	0.0	3.7	25.5	6.4
Port Olry	52.1	7.3	6.7	2.7	25.8	5.4
Lonpere	66.1	5.3	11.4	0.0	16.8	0.5
Lourou	18.1	6.5	49.9	0.0	13.2	12.3
Other	37.5	23.9	3.2	0.0	29.5	6.0

Prices and Marketing Behaviour

Pricing systems in the Santo market seem very similar to those reported in other markets in the Pacific (see Brookfield, 1969). Goods are sold by units rather than weight and generally in multiples of 10 FNH (10 cents). Thus limes or lemons are laid out in groups of 2 or 3 on a mat and sold for 10 cents; leafy vegetables are sold in bunches which are approximately the same size. Taro, yam and sweet potatoes are sold in baskets which range in size from 8 kg to 18 kg and cost from 100 to 200 FNH. Bananas sell in bunches or hands and the price varies according to the type of banana. Prices in the Santo market for a selected range of commodities are generally much lower than those of the Vila market (see Table 10) except for nuts which are a small sale speciality food. There is less sophistication in the grouping of units for sale than in the Vila market. Thus, for instance, baskets of

TABLE IO

Average Prices per Kilo (FNH)
Ist quarter I976

Product	Vila	Santo
Taro	2I	8
Yam	29	9
Manioc	I9	n.a.
Cooking bananas	22	I2
Eating bananas	20	2I
Island cabbage	I2	n.a.

taro ranging from 8 to I8 kg in weight would be offered for sale at I00 FNH. Unlike the Vila market, prices were never marked on goods for sale. These low prices for the native staples appear to be due to market saturation for most of these commodities and the low percentage of commodities sold. However, the vendors did not react by offering to lower their prices as the day wore on; produce was simply packed up and taken back to the village.

Superficially then, the sellers exhibited the pattern of'passive marketing' described by Brookfield, but during fieldwork I saw several cases of some form of bargaining initiated by Chinese customers. The reaction on the part of the sellers was generally to remain solid on the offered price but if the haggling was persistent they might give way, generally with bad grace.

'Market talk', which I was unable to verify, reports that two or three Chinese shopowners have arrangements with sellers to buy 'leafy vegetables' for sale in their shops. In one case which I observed one of these shopowners certainly bought a large supply of watercress which he then resold to a Taiwanese fishing ship at an excellent profit. Another example was the case of one seller who sold a 60 kg bag of peanuts to a Chinese trader for 2000 FNH, far below its market price. But generally the sellers have a fairly rudimentary pricing and selling system. Even the small number of 'speciality' sellers from close to Vila adhere to this pattern.

Sellers' Transport Costs

Given the fact that the majority of sellers travel considerable distances to Santo it might be expected that transport costs would lower their income appreciably. As Table II shows this is certainly the case. Transport costs ange from 2I to almost 40 per cent of the average sales. Most vendors are brought to Santo by the operators of small Datsun trucks. These are often operated by individuals or groups of individuals ('companies') from the village of the seller. There appears to be no attempt to charge according to the distance travelled. Thus sellers from Narango, one of the closest villages, pay considerably more than those from Port Olry, the most distant. Most sellers certainly make sufficient to cover their costs, however, as is indicated by Table I2.

TABLE 11

Village/Location by Average Sales per Vendor/day (FNH), Basic Return Fare and Percentage Reduction of Sales by Transport Costs - Santo

	Average sales vendor/day (FNH)	Basic return fare (FNH)	Percentage reduction of average sales
Hog Harbour	845	214	25.3
Tangoa	753	220	29.2
Kole	945	225	23.8
Narango	720	279	38.7
Nubuloninbuk	971	206	21.2
Port Olry	615	200	32.5
Lonpere	783	200	25.0
Lourou	630	200	31.0

TABLE 12

Sales (FNH)	Vendor/days	% of Vendor/days
Under 10	3	1.5
10 - 100	6	3.0
110 - 200	7	3.5
210 - 300	11	5.4
310 - 400	12	5.9
410 - 500	18	8.9
510 - 600	16	7.9
610 - 800	46	22.8
810 - 1000	24	11.9
1010 - 1500	37	18.3
1510 - 2000	13	6.5
2010 - 2500	5	2.5
2510 - 3000	2	1.0
Over 3000	2	1.0

Conclusion

The general picture of the Santo market that emerges from this report suggests four broad conclusions.

First, the market plays a highly significant role in rural-urban linkages between Santo and the surrounding areas. Selling produce in Santo provides many women from villages with the opportunity to come to Santo. On such visits they can also meet friends, go to the hospital or buy speciality commodities, although most reported that they preferred to buy from co-operatives in their village.

Second, the market has expanded largely in response to the rapid growth of Melanesian population in the town during the 1960s. Despite some opinions that the market was operated by Melanesians resident in the town, selling goods grown on their town allotments, this was certainly not the case in early 1976.

Third, even after the deduction of transport costs the majority of vendors earn in daily sales about the equivalent of an unskilled labourer's daily wage. This is a strategy which enables them to funnel money back into their rural villages. It is, of course, carried out with considerable time and labour input both in agricultural production, transport and selling time.

Fourth, while the growth of the market shows a direct relationship to the rapid increase in population (particularly New Hebridean since 1967) it does appear that the market is becoming saturated. Low prices are, at least in part, a reflection of oversupply, particularly in the native staple foods. The Santo sellers are only too aware of this situation but do not know how to remedy it. Many of them commented on the increase in the number of sellers in the town over the last two years.

Conventional 'development' solutions to this problem would probably seek to 'rationalize' the marketing system in some manner. Certainly some measures might increase the sellers' income; for instance, encouragement in growing more diversified produce for the market. But they would be of little value without a wide range of other inputs such as improvement in roads, etc. For the moment the Santo market provides an adaptation on the part of rural villagers to the growing urban market. It allows a persistence of 'traditional' systems to be blended with the elements of the modern market place. As such, rural villagers are adapting rather than being modernized and integrated into the urban system.

SANTO STORES

An earlier report (McGee, I975) drew attention to the problems arising from the increasing reliance of urban populations of the Pacific upon imported foodstuffs. The reasons for the emergence of this pattern and some suggestions for its remedy were put forward in that paper. But as then indicated, while there is some information on the proportion of imported food that urban populations consume, there is virtually no information on the pattern of distribution and sales of these foodstuffs within the urban centres. Thus one is forced back on macro-data to try to get some measures of the relative importance of foodstuffs. (See Table I)

In the previous section, an attempt was made to describe the importance of the indigeneous market's contribution to the food distribution system of Santo. In this report the major components of the system - the store outlets- are described and analysed.

The foodstuff distribution system is conventionally divided into three main components: producers, wholesalers, and retailers. In the earlier study of the Santo street market we showed that the distribution network was in fact rather simple. The majority of producers sold products which had been self-grown (family-produced) in gardens in their villages. In the case of the foodstuffs sold through retail stores in Santo, the distribution system is far more complex, for most have been imported. Table 2 shows the broad pattern of imports into the New Hebrides between I973 and I975, indicating that food forms a significant proportion of total imports.

TABLE 1

PERCENT OF FOOD IMPORT COSTS BY PRINCIPAL FOOD CATEGORIES, 1972 PACIFIC

Country	Meat and meat preparat.	Dairy products and eggs	Fish and fish preparat.	Cereals, cereal products	Fruit and vegetable	Sugar honey,etc	Coffee tea,etc.	Miscell-aneous	Total fo categori shown *
American Samoa	38.7	8.1	15.7	13.3	8.9	8.5	4.2	2.2	99.6
British Solomons	21.5	7.6	6.9	37.7	7.0	10.2	3.7	5.0	99.6
Cook Islands(1970)	36.9	10.6	9.2	17.9	4.9	9.3	4.6	5.8	99.3
Fiji	12.3	9.8	29.1	27.0	11.9	1.5	4.8	3.2	99.6
Gilbert and Ellice Is.	22.2	7.4	3.4	32.9	6.4	15.3	6.0	5.6	99.3
Guam	33.9	8.5	7.5	15.3	16.7	5.0	3.4	9.3	99.6
New Hebrides	14.7	8.6	22.3	27.4	11.1	8.7	2.3	4.6	99.7
Niue	32.1	13.1	12.4	17.1	8.7	7.2	2.1	6.2	99.0
Norfolk Island	19.5	9.0	-	7.9	8.4	7.9	3.6	6.2	99.6
New Caledonia	26.0	15.1	5.6	13.3	22.8	7.2	3.4	6.2	99.6
Papua New Guinea	29.9	6.5	11.7	25.8	9.3	8.6	2.9	54.9	99.6
French Polynesia	34.1	11.6	6.1	13.3	20.3	7.1	3.0	4.2	99.7
Tonga	34.7	9.4	4.7	22.8	2.3	12.4	1.6	11.6	99.5
Western Samoa	24.9	10.7	13.0	28.9	4.6	13.8	2.0	1.6	99.5

* Categories of live animals and feeding stuff for animals not included

Source South Pacific Commission (1974)

TABLE 2

PERCENTAGES OF TOTAL IMPORTS INTO NEW HEBRIDES BY VARIOUS CATEGORIES

	Period		
Category	1973	1974	1975
Food and live animals	21.1	21.9	17.4
Beverages , tobacco	7.1	6.0	5.1
Crude materials(inedible) -except fuels	2.2	2.7	2.0
Mineral fuels,oils,etc.	6.2	9.1	10.1
Animal , vegetable oils ,fats	0.4	0.4	0.4
Chemicals	5.1	4.7	4.4
Manufactured goods	21.6	21.3	16.2
Machinery,transport equipment	18.9	17.9	23.4
Miscellaneous manufactured articles	10.3	9.2	9.6
Not classified	7.0	6.8	11.3
Total absolute value of imports('00,000 NHF)	24,477	37,958	27,538

Source New Hebrides Condominium Statistical Bulletin
Ref: 1.3

THE DEVELOPMENT OF SANTO RETAILING

Historically, retailing activity in Santo has always been in the hands of expatriates. The first commercial activity in Santo was a trade store established by a French company in 1889 (Compagnie Caledonienne des Nouvelles-Hebrides), but until the Second World War and the post-war copra boom the number of trading stores remained very small. Much of the trade in the surrounding region was carried out by trading vessels working out of Vila. After 1946 however, Santo began to grow rapidly, particularly in the area east of the Sarakata River away from the administrative centre of St. Michel. This was further encouraged by the upgrading of a large wharf in the area.

Thus a sharp ecological division of the town was evident by the early fifties.In the area west of the Sarakata was located the Comptoir Francais des Nouvelles-Hebrides (CFNH)store, the French public school, some warehouses, a wharf, and the Burns Philp store. There were also a cinema,Condominium offices, the Catholic Mission and a hospital. This was the principal European residential area. East of the river in the Sarakata district was the major Asian residential area with stores, bars and a hotel. The British District Office was located further to the east. At this period the largest community was the Asian (largely Vietnamese) comprising 54% of the population. Of the Europeans, the majority were French. There were only a small number of Melanesians.(See Bennett 1957.)

By the early 1970's, this ecological situation had changed dramatically. Virtually all the activities of the town had become concentrated in the Sarakata and Canal districts- the major administrative, commercial, transportation and recreation facilities were focused here. The stores of Burns Philp and CFNH had relocated to this area, as had the French district office. In addition a large number of new large ferro-concrete shop-houses had been constructed on reclaimed land from the Second Harbour. The population structure of the town also changed dramatically with the departure of the Vietnamese, and the rapid growth in numbers of Pacific Islanders (nearly 4000 by 1972) who now formed 76% of the population. Most of the New Hebrideans were located in settlements on the fringes of the town.

The occupational structure of the town also reflected this segregation , although this is not particularly clear from Table 3, which gives the occupational distribution by broad groupings. In fact, a more detailed breakdown of the categories reveals that each of the major ethnic groups were heavily concentrated in certain occupations: Europeans in teaching , administration and managerial jobs, Asians in sales jobs, and Pacific Islanders in domestic service and general labouring.

TABLE 3

SANTO: MAJOR OCCUPATIONS BY MAIN ETHNIC GROUPS (1972)

	Ethnic group				
Occupation	European	Asian	Pacific Is.	Other	Total
Professional,technical,etc.	64	1	51	2	118
Administrative and managerial	13	2	2	2	19
Clerical and related workers	39	6	105	5	155
Sales workers	21	47	59	2	129
Service workers	17	2	231	3	253
Agriculture,etc.	5	4	118	3	130
Production and transport workers	33	13	561	22	629
Other(inadequately defined)	1	1	14	4	20
Total	193	76	1141	43	1453

Source 1972 Census

This occupational structure was also reflected in sharp differences between income levels. Thus 78% of the New Hebrideans employed earned less than I0,000NHF ($A I00) per month in I972, compared with only 2% of the Europeans and Asians. While the income data almost certainly represents an underestimate, as household income data currently being processed indicates, the highly disparate distribution of income has importance consequences in the purchasing pattern prevailing in Santo; for it means that the majority of the town's population have only a rather limited income for food purchases. What is more, this income is generally paid on a monthly basis, so that most purchases are concentrated in the week after pay day at the end of the month, and fall off sharply as the month progresses.

THE FOOD RETAILING STRUCTURE OF SANTO

The January-February 1976 survey of food retail outlets, which complemented the survey of the Santo market, recorded data on a total of 33 outlets. Earlier surveys had suggested that there would be 46 stores which were involved in foodstuff sales, but the fieldwork showed that several of these stores had ceased to operate. Of the current 38, five store-owners refused to co-operate.

The survey was conducted during the last week of January and the first week of February in an attempt to minimise the problems arising from monthly wage payments and the resultant large purchases in the first week of the month. Nevertheless, the collected data is still subject to some limitations. First, five stores refused to co-operate. In the final analysis, some effort has been made to allow for this loss by estimating their likely sales on the basis of ownership type - of the non-respondent stores, three were Asian family and two were European-owned. Secondly, there was undoubtedly considerable underestimation in recorded sales by the store operators, which would particularly affect the data pertaining to Asian family operations.

Data was collected in the following manner.

1. A basic questionnaire on the characteristics of stores was administered.
2. A stock inventory of selected items was made. This covered brands, prices and sources of supply, as well as quantities.
3. A sales record sheet covering a two-week period, for selected items, was left with the operators. Several check visits were made during the period. In some instances records were not kept but store owners provided average monthly sales figures which were adjusted for the sales period.

a) Types of stores

Stores selling foodstuffs in Santo fall into three main categories. The largest group are town-stores, varying greatly in size but all owned by either individuals or families -generally Chinese, with a few French. The second group are the co-operatives operated by either the French or

British. Finally, there are three large <u>firm-operated</u> stores owned by Burns Philp and CFNH (one being a smaller branch of Burns Philp). (See Table 4.)

TABLE 4

OWNERSHIP BY STORE TYPE OF SANTO STORES SELLING FOODSTUFFS

	Ownership type		
Store type	Firm	Family/individual	Co-operative
Large firm	3	-	-
Town store	-	26	-
British co-op.	-	-	2
French co-op.	-	-	1
Other *	1	-	-

* This is a fishing company which caters principally for boats in the fleet. It is excluded from later discussion on stock and sales of food outlets.

Source: Santo store survey January-February 1976

The physical appearance of these stores does not vary markedly. The majority are concrete structures with tin roofs, but a few of the smaller shops are built mainly of wood. With the exception of the large firms and large family-operated stores,most were relatively small, with less than 50 square metres display area. Almost all however had additional storage areas for their commodities. (See Table 5.) All but one of the stores had a refrigerator (the exception being the smallest British co-operative).

A surprising number of the stores (13 out of the 33) have been established for less than 5 years, which reflects both an expansion of Chinese business after the copra boom of the early seventies, and the establishment of co-operatives. (See Table 6.)

TABLE 5

PHYSICAL CHARACTERISTICS OF SANTO STORES

	Ownership type of store				
	CO-OPERA-TIVE	FIRM	ASIAN FAMILY	EUROPEAN SMALL	FISHING COMPANY
SIZE OF DISPLAY AREA-square metres					
1-50	3	1	18	2	1
51-100	-	-	3	1	-
100-200	-	-	-	1	-
200-299	-	1	-	-	-
600	-	1	-	-	-
no information	-	-	1	-	
SIZE OF STORAGE AREA-square metres					
none	1	-	7	-	-
1-50	2	1	8	4	1
51-100	-	-	2	-	
101-200	-	-	2	-	-
300-600	-	1	1	-	-
1560	-	1	-	-	-
no information	-	-	2	-	-
ADDITIONAL STORAGE AREA?					
yes	2	3	11	2	1
no	1	-	10	2	-
no information	-	-	1	-	

Source: Santo store survey January-February 1976

TABLE 6

LENGTH OF OPERATION OF SANTO STORES

Establishment time of store - years	Ownership type of store: CO-OPERATIVE	FIRM	ASIAN FAMILY	EUROPEAN SMALL	FISHING COMPANY
0-5	3	-	10	3	-
6-10	-	-	5	1	-
11-15	-	-	3	-	-
16-20	-	1	1	-	1
more than 20	-	2	1	-	-
no information	-	-	2	-	-

Source: Santo store survey January-February 1976

In terms of the daily trading times, most of the larger establishments are characterized by formal firm-type operations, and opened regular hours. On the other hand, the remainder of family-operations worked for more than 10 hours a day; in many cases opening at about 7 a.m. and closing at 1 p.m., opening again at 3 p.m. and closing at 8 or 9 p.m. A similar weekly trading pattern existed, with smaller stores working a longer week. (See Table 7.)

An important aspect of food retailing in Santo relates to the fact that only a few stores are solely concerned with foodstuff sales (Table 8). Thus only 1 of the 33 stores surveyed sold nothing but food. Virtually all the other stores carried a substantial amount of non-foodstuff stock, in a quite diverse range from clothing to fish hooks.

The employment stucture of the stores showed some interesting contrasts. The average number of full-time workers per store was 2.7 persons; however, the two largest stores accounted for 17% of all such employees. Approximately half the stores employed some part-time workers, to give an overall average 1.2 persons. However, the major distinction was in terms of unpaid family and paid non-family workers. Two-thirds of the stores utilized unpaid family labour- these were principally Asian-owned and operated (Table 9).

TABLE 7

TRADING HOURS OF SANTO STORES BY TYPE

	Ownership type of firm				
	Co-operative	Firm	Asian family	European small	Fishing company
HOURS PER DAY					
7-9	-	2	2	1	-
10-12	-	-	6	-	-
11-12	-	1	13	-	1
more than 12	3	-	1	2	-
DAYS PER WEEK					
5 and a half	-	-	-	1	-
6 or 6 and a half	3	3	5	1	-
7	-	-	16	1	1
no information	-	-	1	1	-

Source: Santo store survey January-February 1976

TABLE 8

PERCENTAGE OF FOOD IN STOCK OF SANTO FOOD-CARRYING STORES

	Ownership type of store				
Food as percentage of stock	Co-operative	Firm	Asian family	European small	Fishing company
less than 25%	1	1	13	1	1
25-50%	2	2	2	1	-
50-99%	-	1	4	1	-
all food	-	-	1	-	-
no information	-	-	2	1	-

Source: Santo store survey January-February 1976

TABLE 9

EMPLOYEE STRUCTURE OF SANTO STORES

	Number of workers						
	0	1	2	3-6	8 or more	! Total	% all workers
full time	2	5	14	10	2	! 90	70.3
part time	17	7	3	6	-	! 38	29.7
paid relatives	30	-	2	1	-	! 8	6.3
unpaid relatives	13	4	8	8	-	! 51	39.8
paid non-relatives	11	8	6	6	2	! 62	48.4
unpaid non-relatives	30	1	1	1	-	! 7	5.5

Entries in table give number of stores with relevant number of workers in each category.

Source: Santo store survey January-February 1976

b) Operators

Information was also collected on the personal features of the store managers/operators. The most important characteristic was ethnicity: 19 Chinese, 2 Vietnamese, 6 New Hebridean, 5 European, with one Japanese (this last in charge of the fishing company). In general, the ethnic origins of the store operators/managers are closely related to the type of store. The speciality food shops and firms are operated by Europeans, the family-operated stores by Asians, and the co-operatives by New Hebrideans. It should be noted that there were some cases where New Hebrideans acted as managers for European- owned small shops, and that most of the larger stores employed some New Hebridean assistants.

The majority of operators have spent a considerable period in Santo,most more than 16 years.Only the New Hebrideans are comparatively recent migrants, having been transferred by the co-operative movement. With the exception of the Europeans,education levels of the store operators/ managers are low. (See Table 10.) However, unlike Vila, where New Hebridean operators are quite numerous, retailing activity in Santo appears to open few avenues for New Hebrideans other than as shop assistants.

TABLE 10

PERSONAL CHARACTERISTICS OF STORE OPERATOR/MANAGERS

	Ethnic group of manager				
	EUROPEAN	VIETNAMESE	CHINESE	NEW HEBRIDEAN	JAPANESE
STORE TYPE					
Firm	3	-	-	-	-
Asian family	-	2	20	-	-
European small	2	-	-	2	-
Co-operative	-	-	-	3	-
Fishing company	-	-	-	-	1
TOTAL	5	2	20	5	1
LENGTH OF RESIDENCE IN SANTO					
0-5 years	-	-	2	4	-
11-15 years	1	-	-	1	-
16-30 years	3	-	13	-	-
more than 35	-	-	3	-	-
all life	-	2	1	-	-
no information	1	-	1	-	1
YEARS SCHOOLING					
none	-	2	7	-	-
3-6	-	-	4	3	-
7-12	1	-	1	1	-
13-15	1	-	3	-	-
more than 15	1	-	-	1	-
no information	2	-	5	-	1

Source: Santo store survey January-February 1976

THE DISTRIBUTORY STRUCTURE OF SANTO TOWN

a) Multiplicity of Outlets

Santo has been a trade centre for the northern part of the New Hebrides for close to fifty years. At first, it was the point of trans-shipment of copra to Vila but now, with the construction of a wharf capable of taking large steamers, it functions as a port of direct export and import. In 1972 its population numbered 3804 and that has probably grown to around 4000 in 1976, although the circulatory migration of New Hebrideans makes any growth estimate very approximate.

In terms of food distribution, Santo is served by a multiplicity of outlets. As mentioned previously, there are 38 stores selling some kind of foodstuffs; and as Table 12 shows, this gives an average of 105 individuals per establishment. This is a somewhat lower figure than that recorded in Manila, and substantially lower than that of the USA. If the figures for daily average number of market sellers (28) were added to this the number of individuals per food selling establishment falls to 61; by contrast, a similar figure for Dagupan, a market town in the Northern Philippines, is 81.

TABLE 12

INDIVIDUALS PER ESTABLISHMENT IN FOOD PRODUCTS
(EXCLUDING MARKET VENDORS)

	Ratio	Date
Santo	105	1976
Manila	118	1968
USA	666	1966
Great Britain	198	1961
Vila	181	1976

Source: Santo store survey January-February 1976
Dannhaeuser 1977

TABLE 13

INDIVIDUALS PER ESTABLISHMENT IN FOOD PRODUCTS
(INCLUDING MARKET VENDORS)

	Ratio	Date
Dagupan (Phil.)	81	1974
Santo	61	1976
Vila	67	1976

Source: Santo store survey January-February 1976
Dannhaeuser 1977

While such figures only approximate reality, both Vila and Santo are certainly characterized by a food outlet to individual ratio far in excess of that of most developed countries. How is it possible for this multiplicity of outlets to survive?

Firstly, this situation is partly related to the high proportion of household expenditure spent on food, particularly by the New Hebrideans who make up about two-thirds of the population in Santo and Vila. (See Table 14.)

TABLE 14

PERCENTAGE OF HOUSEHOLD EXPENDITURE SPENT ON FOOD AND DRINK BY ETHNIC GROUP (1974)

	New Hebridean	European	Other
Vila	53.3	32.5	39.6
Santo	51.4	37.6	40.7

Source : Bureau of Statistics

These figures compare with 26% of household income spent on food in the urban areas of USA in 1968; 38% in France in 1966, and 28 % in Great Britain and 53% in the Philippines in 1971 (Dannhaeuser, 1977). This means that New Hebrideans spend almost as much as Europeans on food despite their lower overall incomes (see Table 15). It should be pointed out in this respect that the 'other' (principally Asian) figure is almost certainly deflated because of utilisation of goods from their own stores.

Secondly, this large number of store outlets means lower turnover which apparantly is still not completely unprofitable. However, as will be suggested in a later part of the report, sales are quite highly concentrated among a few stores so the smaller stores are very marginal operations.

TABLE 15

HOUSEHOLD EXPENDITURE PATTERN; SANTO 1976

Percentage of average weekly expenditure
- figures in brackets give absolute weekly expenditure in NHF

	NEW HEBRIDEAN		EUROPEAN		OTHER	
Food	40.1	(3091)	29.2	(3374)	33.1	(2797)
Drinks and tobacco (1)	11.3	(873)	8.4	(971)	7.6	(639)
Clothing (2)	11.9	(919)	5.3	(617)	7.2	(610)
Rent, water, fuel and electricity	3.3	(251)	7.1	(816)	6.6	(562)
Household (3)	9.3	(716)	12.4	(1428)	16.1	(1362)
Transport and communication (4)	12.3	(952)	18.1	(2088)	15.3	(1292)
Recreation, health education (5)	11.8	(907)	19.5	(2258)	14.1	(1192)
TOTAL		7,709		11,552		8,453

(1) Includes cordials, soft and hard drinks, cigarettes, tobacco, etc.
(2) Includes materials, shoes, hire etc.
(3) Includes furniture, floor coverings, art objects, appliances, linen, domestic services etc.
(4) Includes parts, repairs, petrol, taxes, vehicle purchase, fares, postal charges etc.
(5) Includes medical, educational, hifi, toys, cinema, entertainment, etc.

Source: Bureau of Statistics

b) Systems of Foodstuff Distribution

Santo exhibits two major market systems, associated with type of product. One system moves fresh foodstuffs from surrounding villages to the consumer in the city, via the market. The other system primarily involves the downward distribution of foodstuffs which are imported.

Three levels of foodstuff distribution can be delineated. First,there are the firms and the larger Chinese stores and French-owned shops, which import directly through the Port of Santo. Secondly, there are the British co-operatives, which receive a major part of their goods through their headquarters in Vila. Thirdly, there are the bulk of the smaller Asian stores which buy from the larger firms. Three Asian family enterprises and one firm are the principal suppliers to the small foodstores, acting thus as both retailers and wholesalers. There appears to be little complete reliance upon any one wholesaler: if a small shop-keeper is short of produce he goes to the supplier who has adequate stocks of the required goods and who offers the most reasonable wholesale price.

Discussions with various shop owners indicated that the distribution pattern has changed quite radically. In the past, the major firms and Asian family wholesalers received goods from Vila, but the upgraded Santo wharf has enabled a break from this old reliance. It is now cheaper in most cases to import foodstuffs directly .

Table 16 shows the source countries of various commodities by the type of store responsible for the direct importation. Not surprisingly, Australia and France predominate.

Table 16

PRINCIPAL SOURCE OF DIRECT IMPORTS BY COMMODITY AND STORE TYPE

Commodity	Ownership type of importer: Firm	Asian family	European small *	Co-operative
Rice,sugar,salt,tea, potatoes,jam,soft drink	Australia	Australia	Australia	-
Tinned meat,tinned fruit,powdered milk	Australia France	Australia	France Australia	-
Tinned fish	Australia France	Australia Japan	France	-
Biscuits	Australia Fiji France	Australia Fiji France	Australia	-
Coffee	Australia France	Australia New Guinea France	New Caled.	-
Butter	Australia	Australia France	France New Zealand	-
Wine	France	France	France	-
Beer	Australia France	Australia	France	-
% of stores in category with principal supply direct importation	100.0	27.3	50.0	0.0

* information only available on one store

Source: Santo survey January-February 1976

c) Stock of Foodstuffs

The range of stock carried by stores varied. Thus the larger firms and Asian stores carried a foodstuff range very similar to that of a smaller supermarket in most developed countries, with the majority of items packaged or displayed in refrigerated space. The smaller stores and co-operatives had a much less extensive range and tended to concentrate upon basic foodstuffs such as rice, sugar and canned foods. Bread was a major component of sales in these stores, and, in some of the smaller stores, a very important source of income.

Data was collected on the value of stocks of 30 selected food items, since it was impracticable to survey and compare full ranges. The chosen items were selected as most important after discussion with store owners and observation. Table 17 gives results for the four main store groupings. Firms and Asian family stores are seen to be very dominant in terms of stock.

TABLE 17

VALUE OF FOOD STOCK FOR 30 SELECTED ITEMS

Store type	value-FNH	% of total
Co-operatives	205,069	3.9
Firms	1,033,624	19.8
European family	325,200	6.2
Asian family	3,658,057	70.1
Total	5,221,950	

Source : Santo store survey January-February 1976

The most interesting finding however relates to the product mix of inventories. Table 18 shows percentage of total stock recorded for major categories by each of the four groupings. A sharp distinction in inventories is revealed. Thus the co-operatives had larger percentage supplies of rice; the European and Asian family stores larger supplies of tinned food; beer and wine made up significant proportions of the firms and Asian family stores' stocks. The differential in rice is probably explained by the fact that many of the larger Asian family stores and firms stored rice in other storage areas which were not inventoried. In some cases new shipments of rice were awaited. Apart from this, the pattern of inventories broadly supports the author's own observations.

TABLE 18

PERCENTAGE STOCK OF 30 SELECTED ITEMS OF FOODSTUFF BY STORE TYPE

	Rice	Tinned food	Biscuits	Beer and wine	Other
Co-operatives	18.6	33.4	4.7	5.4	37.9
Firms	1.0	37.5	12.2	21.8	27.5
European family	6.3	51.3	3.3	10.2	28.8
Asian family	6.3	45.8	6.3	23.0	18.6

Source : Santo store survey January-February 1976

d) Sales of Foodstuffs : January 24 - February 9, 1976

Data was collected on the sales of 13 major foodstuff items, a summary of which is presented in Table 19. Before discussing these results, some comments need to be made upon the validity of this data. Within the four major store groups there were some refusals to supply sales data, or else it was considered after field checking that the data was unreliable. This led to the exclusion of one of the four European family stores and four of the Asian family stores. While it may be assumed that the remaining data is reasonably accurate, it should be stressed that there may be some underestimation, particularly for such items as tinned fish and meat.

The sales data is considered under two main headings:

1. Pattern of foodstuff sales

2. Main sellers of foodstuffs

1. Pattern of foodstuff sales

In terms of total sales of the 13 selected foodstuffs, rice makes up 20.3 per cent in the two week period surveyed. Sugar is the second largest sales item, with 12.6 per cent,while the other commodities are fairly equally distributed with the exception of some low turnover items such as tinned fruit, salt and soft drink.

There are however , significant differences in the pattern of foodstuff sales for the major store groups, which deserve comment. First, two thirds of the rice is sold through the firms and co-operatives which make up only 22 per cent of the respondent stores. Secondly, the Asian family stores dominate in the sale of tinned meat and fish. Thirdly, almost 90 per cent of biscuits are sold by the Asian family stores, while bread is a disproportionately important item for the co-operatives and European speciality shops. None of the other commodities show any marked concentration of sales in any particular store group.

2. The main sellers of foodstuffs

While it is true that the two firms were responsible for almost 28 per cent of sales, with the exception of frozen chicken, imported tinned fruit, and potatoes, they did not control a large proportion of the market.

There was however a marked concentration of total sales within the Asian family firms; 74.4 per cent of the sales were carried out by three firms, leaving average fortnightly sales for the remaining 15 shops of only NHF 25,351. This compares with average sales for the firms of NHF 330,453 , for the co-operatives of NHF 82,028 and for the European small stores of NHF 24,219. Thus, sales are quite heavily concentrated, eight stores being responsible for over 81 per cent of the sales.

TABLE 19

MAJOR FOODSTUFF SALES IN SANTO STORES- FORTNIGHT PERIOD

Store Type	Total	Rice	Tinned meat	Tinned fish	Tinned fruit	Bread	Biscuit	Import. potatoes	Sugar	Salt	Local sft.drk.	Import. sft.drk.	Powder. milk	Frozen chicken
Co-operatives														
Actual sales-NHF	246,084	98,694	15,120	16,120	4,035	35,480	6,677	-	13,185	10,941	4,455	5,620	12,335	23,422
% of own sales	100.0	40.1	6.1	6.6	1.6	14.4	2.7	0.0	5.4	4.4	1.8	2.3	5.0	9.5
% of survey sales	10.3	20.3	8.1	7.2	5.1	22.0	5.7	0.0	4.4	19.5	16.1	2.7	8.3	12.0
Firms														
Actual sales-NHF	660,906	129,524	16,310	23,058	32,101	6,048	3,874	188,991	66,620	9,300	1,489	51,823	36,260	95,508
% of own sales	100.0	19.6	2.5	3.5	4.9	0.9	0.6	28.6	10.1	1.4	0.2	7.8	5.5	14.5
% of survey sales	27.6	26.6	8.7	10.3	40.7	3.7	3.3	92.7	22.1	16.6	5.4	25.0	24.3	48.8
European small														
Actual sales-NHF	69,876	7,610	6,338	3,361	884	15,550	1,795	250	5,445	325	3,544	11,430	4,818	8,526
% of own sales	100.0	10.9	9.1	4.8	1.3	22.3	2.6	0.4	7.8	0.5	5.1	16.4	6.9	12.2
% of survey sales	2.9	1.6	3.4	1.5	1.1	9.6	1.5	0.1	1.8	0.6	12.8	5.5	3.2	4.4
Asian family														
Actual sales-NHF	1420714	250,935	149,996	181,470	41,794	104,225	105,190	14,607	216,295	35,572	18,194	138,710	95,518	68,208
% of own sales	100.0	17.7	10.6	12.8	2.9	7.3	7.4	1.0	15.2	2.5	1.3	9.8	6.7	4.8
% of survey sales	59.3	51.6	79.9	81.0	53.0	64.6	89.5	7.2	71.7	63.4	65.7	66.8	64.1	34.9
Total														
Actual sales-NHF	2397580	486,763	187,764	224,009	78,814	161,303	117,536	203,848	301,545	56,138	27,682	207,583	148,931	195,664
% of total sales	100.0	20.3	7.8	9.3	3.3	6.7	4.9	8.5	12.6	2.3	1.2	8.7	6.2	8.2

Note : Figures in this table do not contain estimates for sales of the 3 Asian family and 2 European stores not surveyed nor for the 4 Asian family and 1 European small stores for which sales data were not available.

Source : Santo store survey January-February 1976

CONCLUSION

There can be no denying that trade performs an important role for both the urban population of Santo and the surrounding rural areas. No attempt has been made in this analysis to discuss the role of Santo as a wholesale entrepot supplier for surrounding rural areas, but it is unquestionably important (although in view of the growth of co-operatives as suppliers to the rural areas, this role may be declining).

With respect to the overall pattern of foodstuff sales, Table 20 shows that the store outlets dominate foodstuff sales in the town, accounting for 93 per cent of yearly foodstuff sales. As well, it must be remembered that foodstuff sales for the stores are only recorded for 13 basic items, and that there was a higher unadjusted non-response rate for the stores than amongst the market sellers. Thus the proportion of store sales is almost certainly higher than that given in the table. The market must therefore be seen as a relatively insignificant source of food supply.

Within the store outlets, there is a concentration of sales in firms and Asian family stores which make up over 80 per cent of the sales. Further, the two firms and three largest Asian family stores sell 63 per cent of the yearly foodstuff sales. The European-owned small outlets and the co-operatives are not important, so the overall structure of food retailing is characterized by an extreme concentration of sales.

TABLE 20

ESTIMATED TOTAL YEARLY SALES : MAIN SANTO FOOD OUTLETS

Type	Value-FNH	Per cent of total
Co-operatives	6,398,184	7.6
Firms	17,183,556	20.4
European small	3,633,552	4.3
Asian family	51,303,558	60.9
Market	5,699,538	6.7
	84,218,388	100.0

This pattern is also true of wholesaling, for these five outlets are responsible for the majority of food imports and wholesaling to smaller operations.

A clear pattern of foodstuff distribution in Santo is evident. Four points in particular emerge.

1. Imported foods, primarily distributed and sold by a small number of firms and Asian family stores, dominate sales.

2. The co-operatives have as yet made only a small impact on the foodstuff market.

3. A very small proportion of foodstuffs are sold through the numerous smaller Asian-owned stores, which are very marginal operations.

4. The indigeneous sellers are responsible for only a small part of foodstuff sales.

What are the implications of these conclusions to policy-making? First, any policy which is designed to increase the role of indigeneous marketing, either through co-operatives or indigeneous production, must take into account the dominance of imported foodstuffs and the high concentration of ownership and sale of these foodstuffs. Secondly, it seems that any such policies will begin to squeeze the smaller stores first, for already their sales are low. Policy formation on foodstuff sales and distribution needs this kind of data in order to develop viable programmes.

VILA STORES

The retail stores in Port Vila, together with the fresh comestible market described in the first report in this series, comprise the major components of the urban food distributive system. Unlike the market there has been no previous attempt to analyse retail store activity in Vila although geographical distributions have occasionally been mapped as part of a wider exercise (Bonnemaison 1974). From the limited literature it would appear that urban retail activity was largely in the hands of *métis* until the 1930s when Nanyang Chinese took over most of the stores. The Vietnamese, in contrast, seem to have participated in only a minor way as employees within the retail sector (Bennett 1957).

In January 1976 a survey was undertaken of all stores selling food in the Port Vila urban area. In addition to the town of Vila itself, coverage extended to the nearby villages of Mele and Mele-Maat in the north and Pango, Fila and Erakor in the south. Using as a basis lists and maps of retail activity prepared in 1974 by the Bureau of Statistics, all stores selling food were identified in the field. These stores were subsequently investigated by a team of eight fieldworkers in the following way:

1. A basic questionnaire on the characteristics of the stores and their operators was administered;
2. A stock inventory of selected items was made. This covered brands, prices and source of supply, as well as quantities;
3. A sales record sheet covering a two week period of selected items was left with the operators. Several check visits were made during this period. In some instances records were not kept; in others average monthly sale figures were available from store records.

In January 1976 there were 146 retail stores in greater Port Vila, of which 69 sold some food; 56 were in Vila itself, 3 in Mele, 2 in Mele-Maat, 3 in Fila, 3 in Pango and 2 in Erakor.

Basic Characteristics

(a) Stores

Two-thirds of the establishments covered in the survey were simple town stores, owned by individuals or families. The remaining third comprised, in descending order of frequency, village stores, cooperatives and large, firm-operated shops (Table 1). The physical appearance of the stores correlated more with location than with type. Most of the urban outlets were reasonably modern ferro-concrete structures, whereas village stores and village cooperatives tended to be built wholly or partially of wood. One notable exception to this general spatial pattern was the CFNH (Comptoirs Français des Nouvelles Hébrides) store in Port Vila. This long established Pacific trading firm still operated in a corrugated metal building on Boulevard Higginson. In contrast, the nearby Burns Philp store, formerly housed in similar fashion, is now a modern ferro-concrete structure (Table 2).

TABLE 1 Store Types

	Number	Per cent
Firm	5	7.2
Town	47	68.1
Village	8	11.6
Cooperative	9	13.0

Definitions:

Firm - owned by registered company.
Town - owned by individual or family groups and located in the urban area.
Village - owned by individual or family groups and located outside the urban areas.
Cooperative - owned and operated by registered cooperative society.

TABLE 2 Basic Store Characteristics

Type	Family or individual ownership	Wood used in construction	Supermarket organization	Display area under 50 m²	No special storage space	Open less than 5 yrs.	Open 7 days	Open more than 12 hrs. per day.
Firm	-	-	100.0	-	-	25.0	20.0	-
Town	100.0	28.3	8.5	48.9	43.2	45.7	63.0	74.5
Village	85.7	100.0	-	87.5	100.0	75.0	50.0	87.5
Coop.	-	77.8	44.4	55.5	22.2	33.3	33.3	55.5

Figures represent the percentage of stores in each type with the characteristics noted.

Most of the large firms and British co-operatives were organized along supermarket lines, i.e. with customers selecting their own purchases and paying at a restricted exit point (Table 2). Traditional counter service existed in most of the other stores, both village and urban, except for a few of the newer shops such as Au Bon Marché and TVR. However, irrespective of structure or organization almost all stores had refrigeration facilities.

With the exception of the large firms, most stores were relatively small with less than 100 m^2 of display and sales area; half were under 50 m^2. In contrast, the firm stores covered at least 250 m^2, with most exceeding 400 m^2 (Table 2). Similar disparities occurred with storage areas since most of the smaller stores had no storage space other than that available within the shop itself. The larger town stores and firms, however, sometimes had separate storage facilities in addition to those attached to the main retail outlet (Table 2). This is particularly true of stores which dealt in the direct import of franchised commodities and also acted as wholesalers.

Despite the range of contrasts in store type, appearance and organization, a large number of stores had been established only recently. Almost half had been open for less than five years (Table 2). This characteristic may well reflect the recent rapid growth and 'westernization' of Port Vila and its surrounding peri-urban area (Bonnemaison 1976), to which the store owners have responded by concentrating on the sale of imported and/or non-indigenous foodstuffs. In general, the older stores are 'company' or Chinese owned whilst the newer ones tend to be under Vietnamese or New Hebridean management, although this is not an exclusive relationship (Table 5).

In terms of daily operating times, most of the larger establishments were characterized by a more formal firm-type organization and operated for 8 or 9 hours per day. In contrast, almost all of the other stores operated for more than 12 hours per day (Table 2). This was largely due to their very early opening hours, aimed at the sale of bread for breakfast. The bread trade thus featured prominently in the retail activity of such stores and its significance will be discussed more fully below.

There was less distinction in weekly operating times, almost all stores being open for 6 days per week and over half for 7 days (Table 2). In general, the more formally structured firms and co-operatives tended to close on Sundays but this was by no means a uniform characteristic. Of all the stores surveyed, 43 per cent were open virtually all day and every day. Chinese New Year fell during the survey but very few stores closed even for half a day.

As might be expected the stores showed marked contrasts in their employment structure. All of the large firms employed 8 or more full-time workers, whereas the others usually had only one full-time employee. However, half of the town stores employed more than one full-time worker and in addition tended to have one or two part-time staff or unpaid relatives 'helping out'. In general, this was more characteristic of the Asian owned stores.

The discussion to this point has examined the stores primarily on the basis of formal characteristics. However, a number of the small stores, particularly those operated by Melanesians, cannot be assumed to be purely business ventures. The stock held was very small, consisting primarily of staples plus a miscellany of other items. Some stores were even operated from a room within a house, accounts were not usually kept and restocking was financed by whatever money was available at the time. When a family member required food, it was simply taken from the shelves without payment being made. In similar vein, no records are kept of money taken from the cashbox to make purchases at another store. In short, such stores acted as extended larders for the family concerned.

One example of this type of store can be found in Tagabe (anonymity preserved). The establishment in question is operated by a man with nine years of schooling, including three in high school, who has been employed by the Condominium for the past seventeen years. The store is registered in his wife's name and is operated on a very informal basis with children and various relatives acting as shop assistants. The stock in the store is small but not excessively so, with a restricted range of goods. These are replenished only when stocks are exhausted. No single supplier is used and the proprietor simply shops around for the best price. Occasionally local vegetables are bought from the market for sale. However, the main stock turnover and profit maker is bread, and the shop opens very early in the morning to catch the breakfast trade, often closing for a time in the late morning or afternoon. The loaves are bought for NHF 12 a piece and sold at NHF 15; this gives a margin of NHF 9000 per month on the 100 loaves bought and sold each day.

Although there is not really sufficient information for detailed analysis, it is clear that the location of various stores greatly influences their sales (Figures 1 and 2). For example, store no. 3 lies between the larger stores at Tagabe and quite a large residential area lying just east of those stores. This means that it has quite large bread sales given the size of the store. Indeed it sells as many loaves as does its much larger neighbours, stores 2 and 4. On the other hand, store no. 1, which is just around the corner, is on the margin of the residential area with only plantations beyond so that bread sales are only about one-third of those of store no. 3.

Another case of poor location is store no. 200 which lies in a secluded valley north of store no. 16. There are only about a dozen houses in the vicinity and the store is located right on the edge of the residential area. Moreover, the road into the area is extremely poor so that there is little chance of people travelling any distance to patronise it.

(b) Operators

The most notable feature of the store operators/managers in Port Vila is their ethnic variation (Table 3). Collectively Asians comprise the largest group, with Vietnamese slightly outnumbering Chinese. New Hebrideans are as numerous as Vietnamese with Europeans constituting a relatively small proportion of the overall total. In general the ethnic origins of the managers are closely related to store type (Table 4). Asians and Europeans tend to operate the town stores and firms respectively, while New Hebrideans manage the village stores and co-operatives.

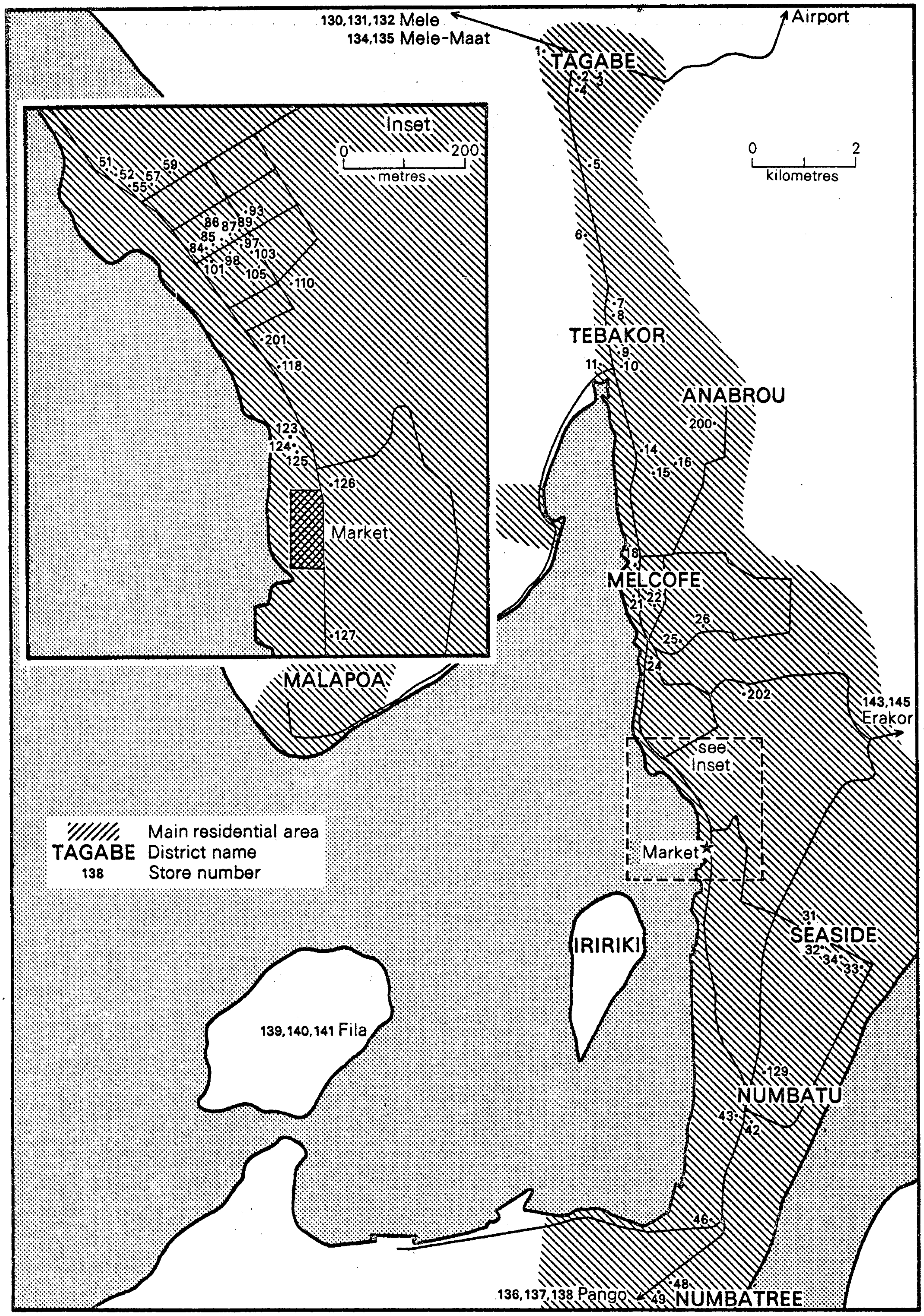

Figure 1: Port Vila: Residential Area, District Names and Store Survey Numbers

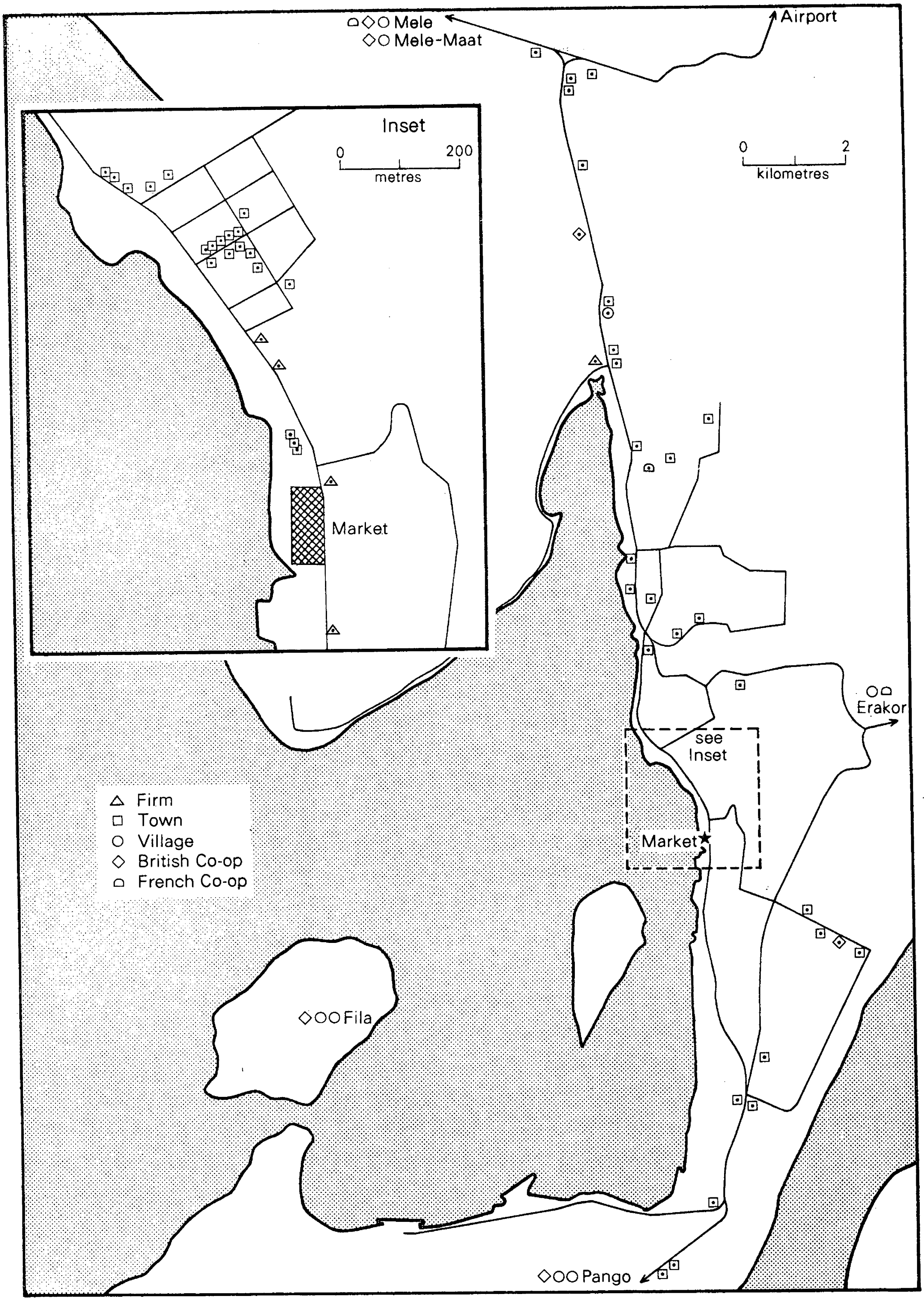

Figure 2: Port Vila: Distribution of Store Types

TABLE 3

Ethnic Grouping of Store Managers/Operators

	number	per cent
European	9	13.0
Vietnamese	21	30.4
Chinese	16	23.2
New Hebridean	22	31.9
Métis	1	1.4

TABLE 4

Store Type and Ethnic Group of Manager/Operator

Store Type

Ethnic group	Firm	Town	Village	Co-op
European	80.0 (44.4)	10.6 (55.6)	-	-
Vietnamese	20.0 (4.6)	40.4 (90.5)	12.5 (4.8)	-
Chinese	-	34.0 (100.0)	-	-
New Hebridean	-	12.8 (27.3)	87.5 (31.8)	100.0 (40.9)

figures in parentheses are row percentages
figure without parentheses are column percentages

In addition to these general observations on ethnic variation, the distribution map reveals a very clear spatial patterning (Figure 3). The centre of Port Vila is a mixture of European, Chinese and Vietnamese ownership but conspicuously lacks New Hebridean owned stores. These are restricted to the villages and 'suburbs'. In contrast, the Chinese stores are confined almost exclusively to the old centre of Vila, with the exception of two outlets in the south. The Vietnamese on the other hand, constitute a minority in the central areas but dominate food retailing in the suburbs, particularly to the north where the former Vietnamese settlements were located (Bennett 1957).

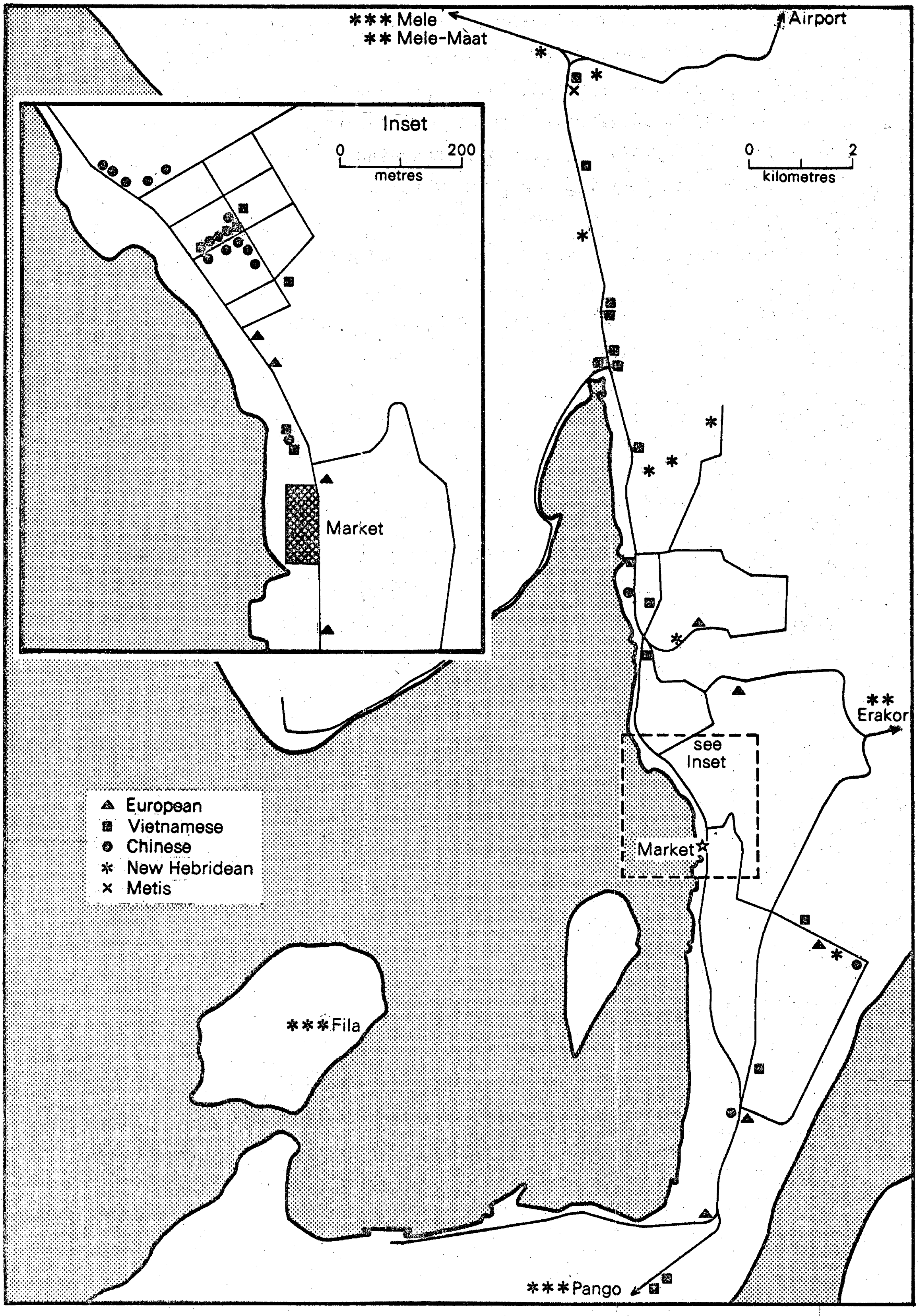

Figure 3: Port Vila: Distribution of Stores by Ethnic Group of Manager/Operator.

Apart from the ethnic factor there is little else to distinguish between store operators, other than educational attainment (Table 5). Whilst this is expectedly high amongst the managers of the large firms, the New Hebrideans in general seem to have a higher level of formal education than many of the Asian operatives in the town stores. It would appear that retailing activity, whether in an independent village store or employment in co-operative management, offers the educated New Hebridean an important avenue of economic advancement. There is evidence that many New Hebridean storekeepers have other commercial or wage interests, several own taxis or taxi trucks, for example. A number of the Asian operators also have multiple sources of income.

TABLE 5

Basic Manager/Operator Characteristics

Ethnic group of manager/ operator	Store open less than five years	Resident in Vila for 35 years or all life	Less than 6 years schooling
European	42.9	57.1	-
Vietnamese	52.4	20.0	41.1
Chinese	25.0	53.4	53.4
New Hebridean	59.1	47.4	33.3

Figures represent the percentage of each ethnic group complying with the characteristics noted.

Stock and Sale Characteristics

In terms of the number of food items traded, almost one-third of the stores had more than 1000 items in stock. There was an expected, but only general, correlation of stock holdings with the size and type of store; all of the large firms stocked more than 1000 items, whilst the smallest stocks were usually recorded in the village stores. However, there was a great range of stock holdings in the town stores and in many the number of food items was quite limited. This was most typical of the traditional, general Asian dry goods store which sells almost everything. In general, although data on the proportional value of sales were limited, food seemed to bring in financial returns over and above its proportion of total stock, probably due to its relatively rapid turnover vis-a-vis larger and more expensive consumer goods.

The survey inventoried selected items from stock and these totals were multiplied by an average unit price to produce a rough comparative figure for the value of food stocks held in each retail store. Several caveats must be noted before these figures are examined: first, the average price was calculated from retail prices observed in all stores and thus does not allow for differences in retail mark-up between stores; and second, the figures relate only to stock held within the display area of the store and do not include stocks held in other storerooms, on or off the premises; third, spot inventories of this nature cannot allow for fluctuations affecting some stock items or for the speed of shelf turnover. For example, many goods normally imported by sea were in short supply at the time of the survey as a result of two cyclones which had prevented cargo ships from docking in Port Vila.

Within the recorded inventories there was a large range of values from over NHF 1 million for one of the large firms down to less than NHF 10,000 for some village and town stores. The distribution graph (Figure 4) indicates several major groups of stock holdings by value. As Table 6 indicates these groups correlate reasonably well with store type. In general, the stores with the highest inventory totals were the large firms, although some of the newer suburban stores also had considerable stocks on hand. At the other end of the scale were the more general stores in the centre of Vila, together with the village stores and co-operatives. However, whilst total stock values may be similar amongst these various types of store, the proportional importance of food in total sales varied greatly because the general town stores stock and sell a much wider range of consumer goods than do any of the village outlets.

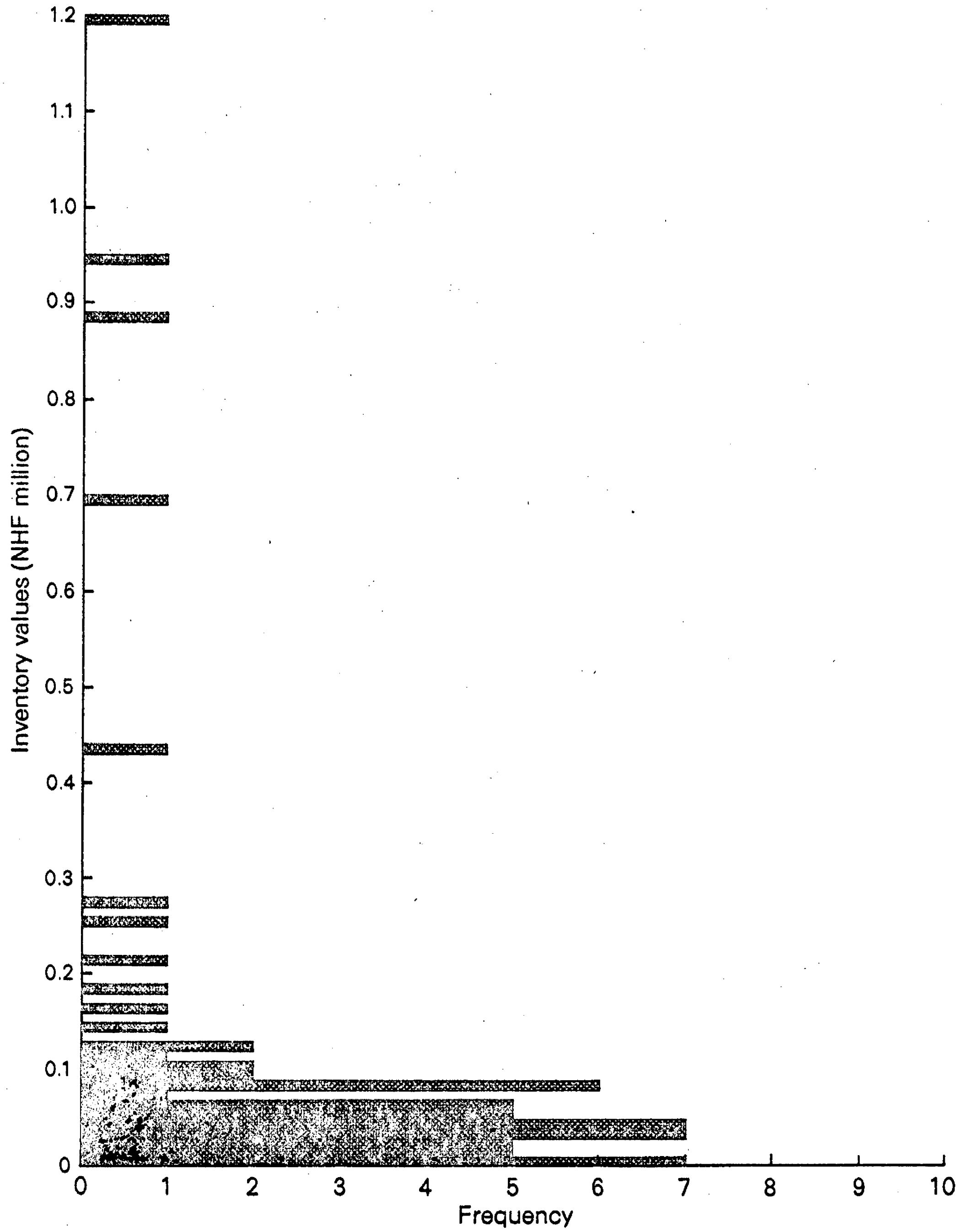

Figure 4: Distribution Graph of Total Stock Values for All Stores

TABLE 6

Percentage Distribution of Store Types by Total Stock Value (NHF)

Store type	Under 29,999	30,000 to 69,999	70,000 to 129,999	130,000 to 399,999	400,000 plus
Firm	-	-	20.0	-	80.0
Town	22.2	37.8	26.7	11.1	2.2
Village	62.5	25.0	12.5	-	-
Co-op	22.2	55.6	11.1	11.1	-

In terms of the stock holdings for each selected item (Table 7), wine was surprisingly the most valuable. All of the main firms and one or two of the newer supermarkets carried considerable stocks of this relatively expensive commodity; some of the smaller stores carried stocks too. The next most important stock commodities were the more expected staples of rice, tinned commodities such as meat and fish, powdered milk and biscuits. More unexpected, to those naive enough to consider that sub-tropical islands still supply their own fruit and fruit drinks, was the importance of tinned fruit, tinned juices and imported soft drinks. It was also noticeable that local vegetable produce did not feature prominently in the retail stores' inventories; a fairly clear indication of the functional separation between the market and the stores.

TABLE 7

Commodity Stock Value as a Proportional of Total Recorded Stock Value

Commodity	Percentage of Total Stock Value
Wine	17.6
Tinned meat	16.7
Rice	10.5
Biscuits	7.4
Tinned fish	7.1
Tinned fruit and juice	6.7
Powdered milk	6.7
Frozen chicken	4.5
Imported soft drink	4.0
Beer	3.8
Coffee	3.3
Imported jam	2.6
Others (less than 2% individually)	9.1
	100.0

Several commodities were stocked by almost all stores (Table 8), usually the basic tinned or dry goods which both stored and sold well. However, there were definite associations between the variation in goods stocked and store type (Table 9). The firms were disproportionately represented in the supply of most of the tinned or bottled items, and also in those commodities which were distinctly European in preference, such as frozen chicken, butter, jams and imported potatoes. The town stores on the other hand dominated the supply of basic 'staples', whether imported or local, such as rice, bread and local soft drinks. Some items were obviously 'urban' in supply, such as frozen chicken, beer, bread, and fresh meat and fish. Village or co-operative specialities seemed to be the very basic tinned meat, sugar and salt. Interestingly, rice was not a significant stock item in the village stores. Presumably the availability of local garden produce reduced demand.

TABLE 8

Ubiquity of Commodity Stocks

Commodity	Percentage frequency stocked
Tinned fish	98.6
Tinned meat	97.1
Sugar	97.1
Rice	92.8
Tea	92.8
Biscuits	91.3
Powdered milk	91.3
Salt	89.9
Imported soft drink	87.0
Fruit and fruit juice	79.7
Bread	79.7
Coffee	76.8
Butter	73.9
Local soft drink	66.7
Imported jam	50.7
Frozen chicken	46.4
Beer	40.6
Local meat	37.7
Wine	36.2
Local fish	30.4
Imported potatoes	26.1
Bananas	20.3
Coconuts	20.3
Taro	11.6
Yam	7.3
Cucumber	5.8
Island cabbage	5.8
Local potatoes	2.9
	n = 69

TABLE 9

Percentage of Total Value of Food Items Stocked in Each Store Type

Commodities

Store Type	percentage distribution of store types	Rice	Tinned meat	Tinned fish	Tinned fruit and juices	Bread	Biscuits	Imported potatoes	Sugar	Salt	Tea	Coffee	Butter	Meat	Fish	Jam	Beer	Local soft drinks	Imported soft drinks	Wine	Powdered milk	Frozen chicken
Firm	7.2	3.4	30.4	40.8	66.0	10.8	43.9	48.5	14.1	19.5	31.7	58.3	40.5	13.1	8.6	62.9	22.8	0.8	32.0	83.8	59.1	27.5
Town	68.1	85.3	52.4	44.1	26.5	77.4	44.9	51.5	60.1	55.4	55.6	38.2	44.9	76.9	90.9	34.0	74.0	91.6	57.3	14.0	29.5	69.5
Village	11.6	2.7	4.8	4.9	0.8	7.0	3.5	-	4.4	10.2	5.5	1.3	3.2	2.6	-	0.6	-	2.9	5.8	-	2.8	-
Co-op	13.0	8.6	12.3	10.2	6.8	4.8	7.7	-	21.4	14.8	6.9	2.2	11.3	7.4	-	2.5	3.3	4.8	4.9	2.2	8.6	3.0

In addition to variations within store type, distinct patterns also emerged in the sources of food supply within Port Vila. Virtually all large firms imported most of their own stock directly from abroad, usually from Australia, although New Zealand seemed to be extending its influence because of a more reliable transport service. Many of the larger town stores also imported directly from overseas and in turn some of these stores, together with the firms, acted as redistributors to a wide network of town, village and co-operative outlets (Figure 5). Crucial in these networks were the franchise monopolies which some stores have obtained for certain commodity brands, particularly in the supply of cigarettes and beer.

The principal distributor* was Burns Philp with its modern retail store and new Tebakor supermarket. In terms of the frequency it was mentioned as a source of supply by the various Port Vila stores, Burns Philp was twice as important as its nearest rival Fung Kwan Chee, a traditional Chinese comprador (Table 10). Other important distributors were the new supermarket of Au Bon Marché, the import agency of Roy Gallimore and the SIDIV Co-operative. Within the distributive network most recipient stores tended to purchase from one major supplier, with Burns Philp again having the largest exclusive network.

TABLE 10

Sources of Stock Supply Within Each Store Type

Store type	Direct import	Au Bon Marché	Burns Philp	SIDIV	Fung Kwan Chee	Gallimore	Co-op Federation	Others
Firm	94.3	-	-	-	-			5.6
Town	12.9	10.3	30.3	5.7	16.2	6.7	1.9	16.0
Village	-	1.9	47.6	-	22.3	2.9	-	26.3
Br. Co-op	18.4	-	14.5	-	-	-	48.7	18.4
Fr. Co-op	-	-	24.4	-	28.9	-	-	46.7
Total	17.6	7.8	28.4	4.3	15.0	5.3	4.4	17.2

* Distribution networks were calculated from the frequency with which individual stores were mentioned as a supplier of each commodity. They are not based on detailed records or the value of supplies and must be considered indicative rather than representative.

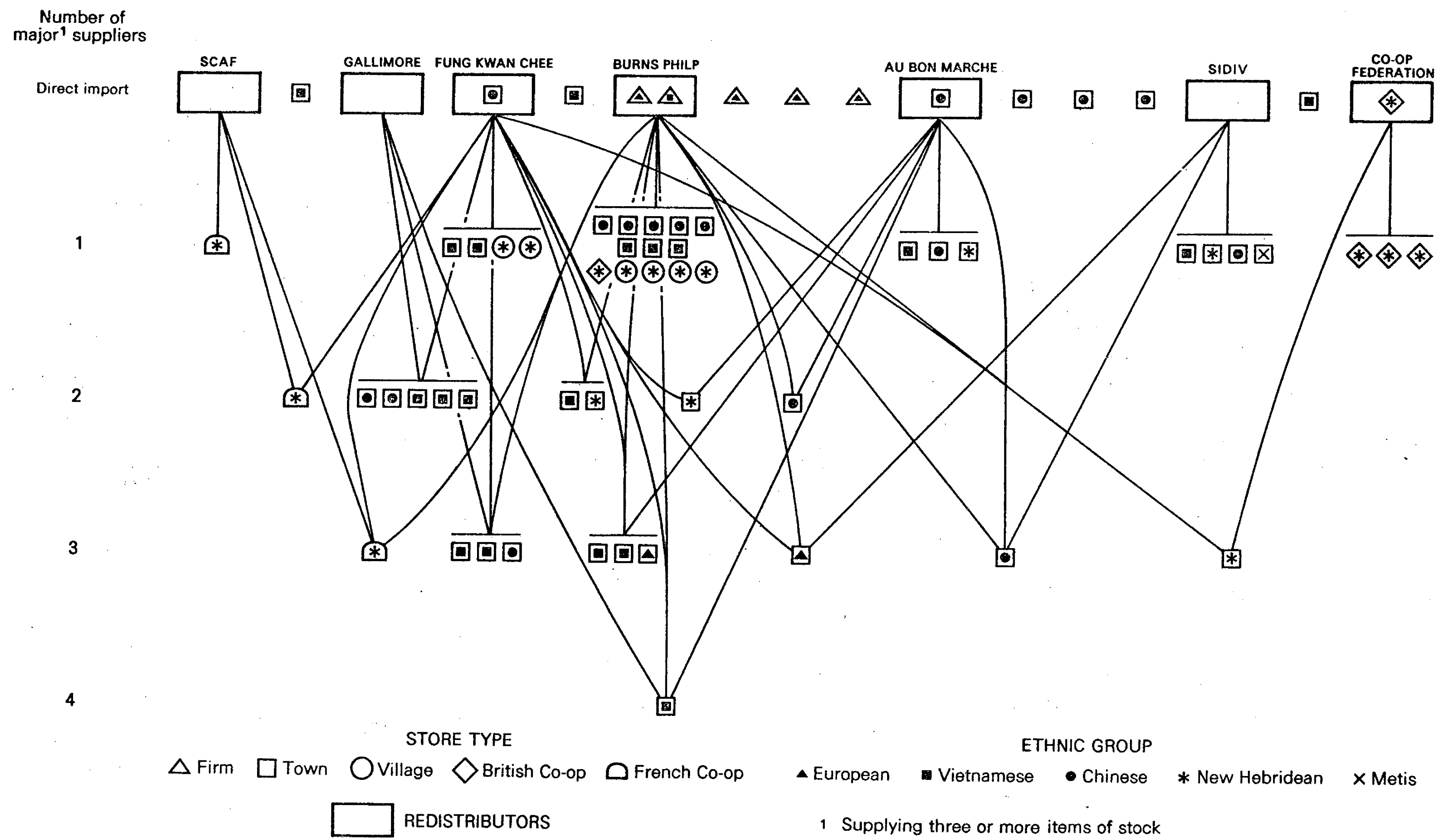

Figure 5: Stores by Type, Ethnic Group of Manager/Operator and Major[1] Commodity Supplier

Overall there seemed to be little relationship between distributive patterns and the major variables of store type and ethnic group of operation. It is likely that the networks are the product of complex interpersonal relationships of which the ethnic factor is only a small part. Vietnamese owned stores did tend to be least committed to one supplier, although the recent emergence of the Vietnamese sponsored SIDIV Co-operative may change this. Within the major supply networks a similar range of products was supplied although the more traditional Fung Kwan Chee tended to feature less prominently than Burns Philp or Au Bon Marché in the distribution of 'western' products, such as tinned fruit, butter, beer and imported soft drinks (Table 11).

TABLE 11

Stock Commodities by Major Source of Supply

Selected Commodities	Direct Import	Au Bon Marché	Burns Philp	SIDIV	Fung Kwan Chee	Gallimore	Co-op Federation	Others
Rice	18.9	5.4	24.3	4.1	18.9	14.9	5.4	8.1
Tinned meat	17.8	7.8	31.1	4.4	20.0	7.8	4.4	6.7
Tinned fish	16.5	7.7	36.3	4.4	18.7	5.5	4.4	6.5
Tinned fruit & juice	20.6	11.1	30.2	3.2	14.3	6.3	6.3	8.0
Bread	-	3.9	7.8	2.0	5.9	2.0	2.0	76.4
Biscuits	19.2	9.0	28.2	3.8	19.2	10.3	5.1	5.2
Imp. potatoes	35.7	7.1	21.4	7.1	14.3	-	-	14.4
Sugar	19.8	11.1	28.4	6.2	17.3	3.7	4.9	8.6
Salt	16.0	12.0	32.0	5.3	17.3	6.7	4.0	6.7
Tea	19.2	9.0	37.3	5.1	15.4	5.1	5.1	7.8
Coffee	19.7	6.1	37.9	4.5	15.2	3.0	4.5	9.1
Butter	19.7	6.6	42.6	4.9	11.5	4.9	6.6	3.2
Imported jam	29.3	9.8	22.0	4.9	17.1	-	4.9	12.0
Beer	18.4	7.9	42.1	10.5	13.2	-	-	7.9
Imported soft drink	19.7	9.1	36.4	4.5	15.2	1.5	6.1	7.5
Wine	27.6	6.9	27.6	-	10.3	-	-	27.6
Powdered milk	18.8	8.8	26.3	5.0	20.0	7.5	5.0	8.6
Frozen chicken	39.1	4.3	43.5	4.3	4.3	-	4.3	0.2

Direct import of food commodities was not associated exclusively with redistribution of goods. Several of the larger stores imported a number of their foodstuffs. Most notable in this category were the major French establishments of CFNH, Hebrida and Maison Barrau; none of which were reported as participating in the redistribution of goods, even to French co-operatives.

The evolution of the present distributive system seems to have been significantly affected by retail politics in the New Hebrides. Under the old system the expatriate colonial stores had monopolized commodity imports. The dominance of such stores in the Chamber of Commerce had maintained this system. In more recent years, other retail associations have emerged to challenge this hegemony, such as ASCOMARIN which is a small traders association and SIDIV which is a Vietnamese leaning co-operative organization of independent stores. However, these new systems are themselves dominated by a *nouveau êlite* of large stores. Significantly, New Hebridean participation in all of these retail organizations is minimal.

Whilst data deficiencies for both stock and sales values reduced the significance of many conclusions drawn in this analysis, there was undoubtedly a clear correlation between the amount of inventoried stock and sales totals over the fortnightly recording period (Table 12). Rice was by far the most frequently purchased commodity, amounting to one quarter of the value of all sales monitored (Table 13). Other major sales items were the basic staples of bread, tinned meat and fish, potatoes and sugar. In this context it is interesting to note the large turnover in two imported items, potatoes and soft drinks, for which local production sources could be developed.

TABLE 12

Grouped Stock and Sale Values By Store Identification Number

Stock NHF \ Sales NHF	Under 30,000	30,000 - 69,999	70,000 - 129,999	129,999 - 499,999	500,000 or more
Under 30,000	97 138 200 132 59 123 140 51 93 15	145 124 33 131			
30,000 - 69,999	25 139 86 105 8 21 136 84 34	137 87 5 52 85 1 135	16 48 3 103 10	130	
70,000 - 129,999	110 24 134 57	143 49 7	129 46 42	2 9	126
130,000 - 399,999	89 55	98	101	31	
400,000 or more				118 11	43 127

TABLE 13

Fortnightly Sales Values of Monitored Items

	Value (NHF)	Percentage of Total Recorded Sales
Rice	1,726,337	25.0
Bread	778,240	11.3
Tinned fish	731,801	10.6
Imported potatoes	652,210	9.5
Imported soft drink	620,261	9.0
Sugar	591,228	8.6
Tinned meat	523,921	7.6
Frozen chicken	327,679	4.8
Powdered milk	289,026	4.2
Tinned fruit and juice	221,141	3.2
Biscuits	218,462	3.2
Local soft drink	164,618	2.4
Salt	52,693	0.8
Total	6,897,617	100.0

The overall pattern of sales varied widely but over 90 per cent of total sales came from firm and town stores (Table 14), with the latter being much more important. There were notable variations in sales patterns between the two, with the large firms being prominent in the sale of imported items of European preference, such as potatoes. In contrast, the town stores specialized in tinned meat, bread, sugar, salt, local soft drinks, milk and frozen chicken.

The sales patterns of the village and co-operative outlets varied markedly from those of the firm and town stores. Significantly rice was less important in the villages, where local staples are still grown. But the most remarkable feature was the importance of bread sales, and to a lesser extent sugar, as a proportion of total sales figures.

These variations were also reflected in sales tabulated against the ethnic group of the store manager (Table 15). The importance of bread, rice and sugar in the New Hebridean stores was particularly noteworthy. Together these staples accounted for 61.2 per cent of monitored sales by value in such stores and in several individual outlets bread alone accounted for well over half the value of total sales.

For the small stores the bread trade was extremely important in bringing customers into the store for early morning purchases, with bread and sugar seemingly the most important. The basic Melanesian breakfast seemed to be bread and tea or coffee. The small french loaf, or *patart*, weighed 210 grammes and sold at NHF 15 which gave the storekeeper a mark-up of NHF 3 over the cost price. A number of small Chinese stores were primarily clothing, hardware and miscellaneous stores but they did keep a small amount of food stuffs and sold bread, again primarily to bring people into the shop. The stores in the centre of town, however, did not sell so much bread since much of the trade took place very early in the morning. Hence the early opening hours of many suburban stores e.g. 5:30 or 6:00 a.m.

TABLE 14

SALES BY STORE TYPE

COMMODITY

Store Type		Rice	Tinned meat	Tinned fish	Tinned fruit	Bread	Biscuit	Imported potatoes	Sugar	Salt	Local soft drink	Imported soft drink	Powdered milk	Frozen chicken	Total
Firm	a	27.3	4.7	15.8	3.5	3.2	3.2	19.0	7.6	0.4	0.2	10.0	2.6	2.7	
	b	41.7	23.8	56.7	41.4	10.9	36.0	76.7	33.7	17.8	2.7	42.7	23.5	21.6	38.2
Town	a	23.1	8.7	7.6	2.6	15.1	2.8	4.1	9.0	0.9	4.2	9.3	4.8	6.7	
	b	49.4	68.8	38.4	43.9	71.6	48.0	23.3	56.1	62.8	94.7	55.2	61.8	75.9	53.6
Vill-age	a	16.0	9.8	9.3	2.5	22.2	6.5	-	16.1	3.4	0.8	6.4	6.4	0.6	
	b	1.7	3.4	2.3	2.1	5.2	5.3	-	4.9	11.6	0.9	1.9	4.0	0.3	2.6
Co-op	a	32.4	5.6	4.9	7.3	24.8	4.9	-	8.1	1.1	0.7	0.4	8.0	1.9	
	b	7.2	4.0	2.5	12.7	12.3	8.6	-	5.3	7.8	1.6	0.3	10.7	2.2	5.5
Total		25.0	7.6	10.6	3.2	11.3	3.2	9.5	8.6	0.8	2.4	9.0	4.2	4.8	100.0

a percentage of total sales for that store type

b percentage of total sales in that commodity

TABLE 15

SALES BY ETHNIC GROUP OF MANAGER/OPERATOR

COMMODITY

Ethnic Group		Rice	Tinned meat	Tinned fish	Tinned fruit	Bread	Biscuit	Imported potatoes	Sugar	Salt	Local soft drink	Imported soft drink	Powdered milk	Frozen chicken	Total
European	a	26.4	5.2	14.8	3.3	4.9	3.2	17.9	7.7	0.4	0.3	10.3	2.6	3.1	
	b	43.6	28.1	57.8	42.3	17.9	41.6	78.2	37.1	20.4	5.1	47.5	25.3	27.2	41.4
Vietnamese	a	20.8	7.3	8.3	4.4	15.4	3.6	1.7	8.2	1.0	6.0	12.7	3.9	6.7	
	b	20.2	23.4	19.1	33.5	33.2	27.7	4.5	23.2	30.9	61.6	34.4	22.7	34.6	24.4
Chinese	a	25.3	12.6	7.7	1.2	13.1	1.9	7.5	9.0	0.9	2.4	5.9	6.0	6.3	
	b	22.0	36.3	15.8	8.4	25.3	13.4	17.3	22.9	26.1	22.0	14.3	31.4	29.2	21.8
New Hebridean	a	28.4	7.4	6.2	4.1	21.3	4.4	-	11.5	1.4	2.2	2.7	6.9	3.5	
	b	14.1	12.1	7.3	15.8	23.5	17.3	-	16.5	22.7	11.3	3.8	20.6	9.1	12.5
Total		25.0	7.6	10.6	3.2	11.3	3.2	9.5	8.6	0.8	2.4	9.0	4.2	4.8	100.0

a percentage of total sales for that store type

b percentage of total sales in that commodity

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APOLOGIA

Due to the ill-health of two of the co-authors of this report, several major aspects of the food distribution system have yet to be covered. In addition, few firm conclusions on the nature of the whole system, together with recommendations for change, have been put forward. It is hoped that a more complete final Study Report will be available sometime during the first half of 1978.