

AN ASSESSMENT OF THE ILLEGAL IVORY TRADE IN VIET NAM

DANIEL STILES

A TRAFFIC SOUTHEAST ASIA REPORT



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Cover: Viet Nam ivory carving usually includes subjects aimed at both the Chinese and local market

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Daniel Stiles



Daniel Stiles/TRAFFIC Southeast Asia

Jewellery and low quality carvings are the most common types produced by Vietnamese ivory carvers

CONTENT

Acknowledgements	iii
Glossary of terms and acronyms	iv
Executive summary	v
Background	1
Introduction	2
Methodology	4
Legal position of trade in ivory	6
Results	9
Sources and price of raw ivory	9
<i>Sources</i>	9
<i>Prices</i>	10
Ivory workshops and craftsmen	11
Retail outlets, number of items for sale and prices	12
Ho Chi Minh City	13
Phu Quoc and Ha Tien	15
Hué	15
Ha Noi	16
Ha Long City	17
Buyers	17
Trends in the ivory market in Viet Nam	18
Discussion and conclusions	20
Compliance with CITES	20
Trade in ivory	21
<i>Sources and prices of raw ivory</i>	21
<i>Number of craftsmen</i>	21
<i>Number of outlets and items</i>	21
<i>Retail prices of worked ivory</i>	22
<i>Buyers</i>	22
<i>Ivory substitutes</i>	22
<i>Overall assessment</i>	23
Recommendations	23
References	25

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GLOSSARY OF TERMS AND ACRONYMS

ASEAN-WEN	Association of South East Asian Nations-Wildlife Enforcement Network
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CITES MA	CITES Management Authority
CoP	Conference of the Parties (to CITES)
ETIS	Elephant Trade Information System
HCMC	Ho Chi Minh City
MIKE	Monitoring the Illegal Killing of Elephants programme of CITES
TRAFFIC	The wildlife trade monitoring network, a joint programme of WWF and IUCN

EXECUTIVE SUMMARY

Viet Nam acceded to CITES on 20 April 1994. A series of government laws and decrees prohibit the hunting of elephants and other listed wild species (Prime Minister's directive 134/TTg, 1960; Council of Minister's decree 39/CP, 1963) and the use, trade and transport of products derived from them (Ministry of Forestry decision number 276/QD, 1989; Council of Minister's decree 18/ HDBT, 1992; Prime Minister's directive 359/TTg, 1996; Government Decree No. 48/2002/ND-CP, 2002; Government Decree 82/2006/ND-CP, 2006). The elephant is classed in category IB, patterned after CITES Appendix I, which means there is a complete ban on all trade of the species' products. In July 2000 the Revised Criminal Code set out regulations for the prosecution of cases of illegal exploitation of rare and precious wild species, including elephants.

Since 1999, TRAFFIC has been carrying out country surveys of trade in ivory, along with trade in live elephants in some cases. TRAFFIC carried out an investigation of Viet Nam's role in elephant and elephant product trade in 2000 (Anon., 2002). In 2008, TRAFFIC set out to compile existing and new information on the trade specifically in elephant ivory in Viet Nam in consultation with relevant experts and stakeholders.

The following locations were surveyed between 4 April and 4 May, 2008:

Ho Chi Minh City
Vung Tau
Phu Quoc island
Ha Tien
Nha Trang
Hué
Ha Noi
Ha Long City

The main findings of this survey were:

- A total of 669 retail outlets were surveyed in the eight localities. Of these, 73 (11%) were selling ivory, totalling 2 444 items.
- Ho Chi Minh City (HCMC) had the most outlets (49) and ivory items (1 776) with Ha Noi second with 10 outlets and 407 pieces. Hué was a distant third with eight outlets selling a total of 141 items.
- At least 17 craftsmen work ivory in Viet Nam in the places surveyed, with the highest number in and around Ha Noi, followed by HCMC and Hué.
- Most of the raw ivory used in 2008 was said to originate in Laos, with small amounts coming from Viet Nam and Cambodia. Mammoth ivory from Russia is also used in small quantities. No African raw ivory was found.
- Raw ivory prices were extremely high, possibly the highest in the world in 2008. Tusks weighing 1–3 kg sold for USD500–1 242/kg, with verbal reports of up to USD1 500/kg. Small, solid cut pieces and tusk tips weighing less than 1 kg were even more expensive, ranging from USD769/kg to USD1 863/kg.

- The cause of the great ivory price rise seen in 2008 is continued demand for ivory from local and foreign consumers coupled with a restriction of supply. Seizures made in Viet Nam and elsewhere in recent years of African and Asian ivory suggest that most raw ivory supply is directed towards China.
- Worked ivory prices were commensurately high.
- The main buyers of ivory were visiting Chinese (including Hong Kong and Taiwan) and Thais, local Vietnamese, American-Vietnamese and Europeans, in that order.
- The scale of the ivory market is smaller than in 1990, based on the number of craftsmen working ivory and the number of outlets selling ivory, but there are signs that demand is increasing.
- African ivory was being illegally imported and used from the late 1990s to at least 2004. No evidence of African ivory being smuggled into Viet Nam was identified during the 2008 survey. The absence of African ivory imports is placing increased pressure on Asian elephants in Viet Nam and neighbouring countries to satisfy demand.
- Fewer ivory items were seen in HCMC and Ha Noi shops in 2008 than in 2001, 2 182 compared to 3 039, but worked ivory is increasingly being sold directly to buyers through middlemen or on the Internet, bypassing retail outlets.
- The average size and weight of worked ivory items is decreasing over time, with a higher proportion of <5 cm pieces seen in 2008 than in 2001.
- Viet Nam has complied with recommendations in *CITES Resolution Conf. 10.10 (Rev. CoP14)* to control the ivory industry by enacting legislation that prohibits all possession and dealing in raw and worked ivory. A major loophole in enforcing this legislation is that retail outlets are allowed to sell ivory in stock at the time of the prohibition (1992). This allows some shopowners to restock illegally with recently made worked ivory.
- Viet Nam has also fulfilled its obligations to the CITES Monitoring the Illegal Killing of Elephants (MIKE) programme by setting up a monitoring site (Cat Tien National Park) and establishing the baseline data.
- Viet Nam has unfortunately not implemented certain of the recommendations contained in *CITES Resolution Conf. 10.10 (Rev. CoP14)*. Its reporting record to ETIS has been extremely erratic and incomplete and it has not established a nationwide procedure, particularly in retail outlets, informing tourists and other non-nationals that ivory is illegal to purchase and it is illegal for them to export ivory and import it into their home countries.
- *Overall assessment* – The scale of the Viet Nam ivory market remains modest on a global scale. Although there were 28% fewer worked pieces seen for sale in HCMC and Ha Noi in 2008 than in 2001, the great increase in prices of raw and worked ivory, the larger number of outlets selling ivory, and the observed upsurge in activity of craftsmen working ivory between 2001 and 2008 all strongly suggest that demand for ivory is rising, though a restriction of supply between 2001 and 2008 also contributed to the price rise. Less ivory on the shelves of outlets may in fact be the result of increased sales coupled with

decreased availability of raw material to enable replacement. A contributing factor to fewer pieces seen in shops could be the fact that more buyers order items directly from craftsmen through middlemen, or commission items on the Internet, so the ivory never enters a retail outlet. Viet Nam has not complied with some important recommendations of CITES *Resolution Conf. 10.10 (Rev. CoP14)* and there are weaknesses in national legislation that allow the continued trading in illegal ivory.

RECOMMENDATIONS

International

- Viet Nam should fully implement the recommendations contained in CITES *Resolution Conf. 10.10 (Rev CoP14)* “Trade in Elephant Specimens”.
- Viet Nam’s CITES MA should dedicate staff to monitor and record all elephant specimen seizures, particularly ivory, and make timely and accurate reports to ETIS.
- Viet Nam should continue its cooperation with MIKE and ensure that adequate staff and funds are allocated to carry out the monitoring and reporting programme.
- The government should continue its participation in the ASEAN-WEN initiative and increase efforts to control the illicit trafficking of ivory and other wildlife products to and from other countries.

National

- The government should enact or amend legislative directives to stipulate clearly that the purchase, possession, trade, transport and offer for sale of raw and worked ivory is prohibited, regardless of the date of acquisition or manufacture.
- Viet Nam should clearly identify and assign the government authorities responsible for enforcing laws that result in border seizures and internal confiscations of illegal wildlife products, including ivory, and encourage these authorities to act.
- The government authorities responsible for enforcing wildlife trade laws should be properly trained and motivated both through national training programmes and workshops, for example programmes conducted under ASEAN-WEN.
- Offenders of wildlife trade laws should be prosecuted and penalized according to the law.
- All ivory seen for sale in retail outlets should be confiscated by the government and destroyed. The government might consider donating the finer, more artistic pieces to museums around the country with strict prohibitions about their commercial use, other than display.

BACKGROUND

At the beginning of the 20th century large parts of Viet Nam were forested and there were sizeable populations of both wild and domesticated elephants. At this time Viet Nam was exporting trained elephants to Thailand, Cambodia, Laos and Myanmar to work in the timber industry (Do Tuoc and Santiapillai, 1991). As elsewhere in Asia, elephants were the main method for transporting felled logs out of the forests. Between 1943 and 1983 forest cover had fallen from about 44% to 24% of the country, most of it being found along the border with Laos and Cambodia (Kemf and Santiapillai, 2000). Elephants in Viet Nam suffered heavily during the second half of the 20th century when approximately 50% of the country's forests were lost as a result of war, logging and conversion to agricultural land, resulting in habitat fragmentation and exposure of the elephants to poachers (Khoi and Tuoc, 1992; Duckworth and Hedges, 1998; Anon., 2002; Martin and Stiles, 2002). Since 1990, Viet Nam has been reforesting and by 2005 almost 40% of the country was classified by the FAO as forest, though over 20% of the 13 million ha total was plantation forest and largely unsuited for wildlife (FAO, 2007).

Viet Nam has less than 0.5% of the global population of the Asian Elephant *Elephas maximus* (Kemf and Santiapillai, 2000; Khoi and Tuoc, 1992; Heffernan and Cuong, 2004), classified as Endangered on the IUCN Red List (IUCN, 2007). With only a few elephant groups, each comprising from one to about 30 individuals at most, the elephants of Viet Nam are approaching extirpation (Duckworth and Hedges, 1998; Heffernan and Cuong, 2004). The number of wild elephants in Viet Nam was estimated to be 1 500–2 000 in the late 1980s and 300–600 in 1997, plummeting to 135 in 2000 (Santiapillai and Jackson, 1990; Duckworth & Hedges, 1998; Kemf and Santiapillai, 2000). Recent estimates of wild elephant numbers are even lower, ranging from 59–81 (Heffernan and Cuong, 2004) to 130 for the whole country (Viet NamNet, 2006).

Lair (1997) estimated that there were about 225 domesticated elephants left in Viet Nam in 1996. In the 1980s there were approximately 500 in Dak Lak Province alone. The total number of elephants in captivity in Viet Nam was estimated in 2006 to be 165, with 138 of them privately owned; 27 elephants were in zoos and 127 were involved in eco-tourism activities (Dublin *et al.*, 2006).



Ivory has a very long history of use in Viet Nam, though no pieces are known to be used in the last one thousand years until the late 19th century

that illegal elephant poaching and ivory working and trading continue in Viet Nam, which also involves cross-border activities with other South-East Asian countries and China.

This study, carried out in April-May 2008, constitutes a monitoring and evaluation undertaking with the primary objective of determining the current status and trend of ivory trafficking in Viet Nam.

INTRODUCTION

Illicit commercial trade in elephant ivory is increasing globally and threatens the conservation status of many elephant populations in Africa and Asia. In spite of recent efforts under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) to curb the world's unregulated domestic ivory markets, the Elephant Trade Information System (ETIS) analysis to CITES CoP14 (Milliken *et al.*, 2007) showed an increasing trend in global illegal ivory trade since 2004. More than any other factor, a rapidly emerging demand for ivory in China is driving this increase. However, other consuming markets such as Thailand, Egypt and the USA (Martin and Stiles, 2008) are also heavily implicated in the trade, while Viet Nam may be becoming a more important player (TRAFFIC, 2008a).

Various measures have been introduced under CITES in the hope of reducing threats to elephant populations through the regulation of international ivory trade. The first of these actions was to include the Asian Elephant *Elephas maximus* in Appendix I and the African Elephant *Loxodonta africana* in Appendix II at the first meeting of the Conference of the Parties in 1976. By 1989, because of the decline in most populations of the African Elephant, the Parties agreed to transfer *L. africana* to Appendix I. This decision of the 7th Meeting of the Conference of the Parties to CITES constituted a ban on all commercial international trade in all elephants and elephant products, including ivory (Dublin *et al.*, 1995; Nash, 1997a).

The 1989 ban initially served to reduce ivory demand significantly in Europe, the USA and Japan, which led to a decline in elephant poaching in most parts of Africa.

There is evidence, however, that the trade ban might have had the opposite affect on Asian Elephants, as Asian ivory traders attempted to replace African ivory with Asian ivory (Stiles 2004a). In countries with weak law enforcement, such as Cambodia, Laos and Viet Nam, wild elephant numbers for the three countries dropped from an estimated total of 6 250 in the late 1980s to 1 510 in 2000 (Santiapillai and Jackson, 1990; Kemf and Santiapillai, 2000; Martin and Stiles, 2002; Stiles 2004a).

The 10th Conference of the Parties to CITES (CoP10) in 1997 formulated a specific Resolution on Trade in Elephant Specimens, which was subsequently revised at the 12th and 14th Conference of the Parties [*Resolution Conf. 10.10 (Rev. CoP12 and CoP14)*]. Regarding control of internal ivory trade, this Resolution recommended to those Parties in whose jurisdiction there is an ivory carving industry that is not yet structured, organized or controlled that comprehensive internal legislative, regulatory and enforcement measures be adopted to:

- a) register or license all importers, manufacturers, wholesalers and retailers dealing in raw, semi-worked or worked ivory products;
- b) establish a nationwide procedure, particularly in retail outlets, informing tourists and other non-

nationals that they should not purchase ivory in cases where it is illegal for them to import it into their home countries; and

c) introduce recording and inspection procedures to enable the Management Authority and other appropriate government agencies to monitor the flow of ivory within the State, particularly by means of:

i) compulsory trade controls over raw ivory; and

ii) a comprehensive and demonstrably effective reporting and enforcement system for worked ivory.

The Resolution also directed the CITES Secretariat to seek information from each Party identified as having sufficient controls over internal ivory “indicating the procedures, action and time frames that are needed in order to establish the measures necessary to properly effect the recommendations regarding internal ivory trade”.

Given that domestic ivory trading is officially illegal in Viet Nam, the recommendations in paragraphs (a) and (c) above have already been complied with, and there are now regulations in Viet Nam law providing penalties for ivory possession and dealing. The government should, however, comply with paragraph (b).

Since 1999, CITES has developed two formal monitoring systems for monitoring elephants: Monitoring the Illegal Killing of Elephants (MIKE) and the Elephant Trade Information System (ETIS). MIKE provides a framework international system by which to track illegal killing of elephants, while ETIS tracks illegal trade in elephant specimens through analysis of elephant product seizure records. Each of these monitoring systems require regular reporting and other actions.

Comprehensive analyses of ETIS records have been provided to CITES Conference of the Parties in 2002, 2004 and 2007 as a formal agenda item. The first ETIS analysis in 2002 demonstrated that illegal trade in ivory was most directly correlated to the presence of large-scale domestic ivory markets that exhibit poor law enforcement (Milliken *et al.*, 2002).

Decision 13.26 calls for the continued monitoring of “*all domestic ivory markets outside Africa to ensure that internal controls are adequate and comply with the relevant provisions of Resolution Conf. 10.10 (Rev. CoP12) on trade in elephant specimens*” and that “*priority should be given to China, Japan and Thailand*” in this regard.

Each of the ETIS reports issued to date have demonstrated that illicit trade in ivory is most directly correlated to the presence of large-scale, poorly regulated, domestic ivory markets in Asia and Africa. In such places, there is likely to be a high perception of corruption and poor law enforcement effort. The CoP14 ETIS analysis revealed that Viet Nam had joined a cluster of countries that were identified as playing a secondary, though important, role in the illicit ivory trade. ETIS concluded that these countries fell within a cluster that exhibits poor law enforcement effort and they potentially could become more prominent problematic players in the illicit trade in future (Milliken *et al.*, 2007).

Since CoP13 in 2004, the CITES authorities in Viet Nam have engaged with their counterparts in the Association of South East Asian Nations (ASEAN) to create a regional network to combat illegal trade in wild animals and plants. This led to the ASEAN-Wildlife Enforcement Network (ASEAN-WEN) being

formally launched by ASEAN Ministers on 1 December 2005 at a meeting in Bangkok, Thailand. Officials from a range of agencies, including CITES Management Authorities, Customs, immigration services and the police, came together for the first regional ASEAN-WEN meeting in Bangkok in May 2006, and the second meeting in Bogor, Indonesia, in May 2007 and had its ththird meeting in Vientiane, Lao PDR, in May 2008

The Network aims to facilitate the establishment of national task forces or committees to bring a multi-agency response to wildlife crime and, in turn, national ASEAN-WEN focal points will help coordinate a sub-regional response. ASEAN-WEN has also begun to liaise with law enforcement agencies in other parts of the world, the CITES Secretariat, and regional and international law enforcement networks and organizations, such as ICPO-Interpol and the World Customs Organization. Viet Nam has been participating actively in this network.

Since 1999, TRAFFIC has been carrying out country surveys of trade in ivory, along with trade in live elephants in some cases. TRAFFIC carried out an investigation of Viet Nam's role in elephant and elephant product trade in 2000 (Anon., 2002). In 2008, TRAFFIC set out to compile existing and new information on the trade specifically in elephant ivory in Viet Nam in consultation with relevant experts and stakeholders.

METHODOLOGY

The aim of the survey was to gather as many quantitative data as possible on indicators that reveal the scale and nature of the ivory market in Viet Nam and degree of local demand for ivory. The indicators were prices of raw and worked ivory, number of craftsmen engaged in working ivory, and numbers of retail outlets and worked ivory items seen for sale in the outlets. In addition, the size and type of ivory item for sale is recorded and qualitative information about the sources of raw ivory, transport destinations and methods, and buyers were collected.

Methods consisted of visiting locations where ivory was known or thought to be crafted and/or sold from previous studies (Anon., 2002; Martin and Stiles, 2002; Stiles, 2004b) and from a review of recent guidebooks and the Internet that gave locations of shops and markets where antiques and souvenirs were sold. The types of outlets where ivory was found for sale were: market souvenir stalls, antique shops, souvenir shops, jewellery shops and luxury hotel shops. Native Vietnamese speakers accompanied the researcher during part of the survey to act as guide and interpreter. Vendors were interviewed to ascertain where they obtained the ivory, how well it was selling in order to assess turnover, who the main buyers were and if they knew where any ivory carving workshops were located. In spite of increased government surveillance of retail outlets since the TRAFFIC (Anon., 2002) and Martin and Stiles (2002) publications, most ivory vendors were surprisingly forthcoming with information. They provided useful information as to the whereabouts of ivory craftsmen and middlemen, which in turn resulted in details about the source and prices of raw ivory.

Ivory craftsmen and workshops that could be located were visited and interviewed in an attempt to find out where they obtained their raw ivory, what prices they paid for different weight and type classes of ivory and where they sold their products. They were also asked if they exported their products anywhere or if they sold on the Internet.

Identifying the sources of ivory, both raw and worked, poses certain problems. Informants usually seem to know and state honestly where they obtain their ivory, but it is sometimes difficult to be able to verify with certainty. Raw ivory was viewed on several occasions during this study and informants invariably said that it came from Laos. The unworked tusk sections definitely appeared to be from forest, as opposed to African savannah, elephants, but with semi-worked cut pieces it is not possible to identify origin by visual inspection. Tusk sections of mammoth ivory can usually be distinguished from elephant ivory by colour, cortex and/or freshness of the ivory. Mammoth ivory often (but not always) is brown or yellow in tint, cracked, with a thick, rough cortex. Top quality mammoth ivory in semi-worked cut form can be very similar to elephant ivory that has come from elephant tusks that have lain in the forest or were buried for a long period. A researcher simply has to use his/her best judgement based on the perceived reliability of an informant and inspection of the pieces.

Photographs were taken whenever possible; in most shops, middlemen premises and ivory workshops this proved to be possible. Digital photographs of ivory displays helped considerably in determining counts of items, especially when these proved too numerous to record on site.

The presence and type of ivory substitute items were also noted (mammoth ivory, resins, bone, etc.). The word ivory in this report always refers to elephant ivory unless otherwise stated.

These data were analysed and the counts, types and prices of ivory items were broken down for display in tables following the system developed by Martin and Stiles (2002, 2003, 2005, 2008) to allow for standardized comparisons of the indicators between place and time. The retail prices used are the asking prices. The exchange rate varied slightly during the survey period, but in all instances in this report the rate used is VND 16 100 = USD 1 (May 2008).

The indicator data and qualitative information of this survey were compared to the results of previous investigations in order to assess changes in ivory industry scale and ivory demand. The results are always

affected by the amount of work effort that is put into a survey of this type. The same researcher carried out the 2001 (Martin and Stiles, 2002), 2002 (Stiles, 2004b) and 2008 surveys in HCMC and Ha Noi. The work effort was comparable in 2001 and 2008 for these cities. In 2002 more detailed information was collected on ivory craftsmen and raw ivory sources, prices and consumption in the Ha Noi area. In 2008 more locations were surveyed than previously, but the comparisons to assess trends were made using only HCMC and Ha Noi results. The methods and work effort were the same in the 2001 and 2008 surveys, rendering the results comparable.



Daniel Stiles/TRAFFIC Southeast Asia

Tiny tusk tips and worked ivory for sale in HCMC's An Dong Market. The two tusk tips here were priced at USD 1 653 and USD 1 863 per kg

The following locations were surveyed between 4 April and 4 May, 2008:

Ho Chi Minh City
Vung Tau
Phu Quoc island
Ha Tien
Nha Trang
Ha Noi
Ha Long City

This report represents a fairly comprehensive survey of ivory retail outlets and the identification of ivory carving workshops in the two largest cities and important tourist centres in Viet Nam.



Daniel Stiles/TRAFFIC Southeast Asia

Items were commonly labelled *nga voi*, Vietnamese for ivory, throughout Viet Nam, even though it is illegal to sell ivory

LEGAL POSITION OF TRADE IN IVORY

Viet Nam acceded to CITES on 20 April 1994. A series of government laws and decrees prohibit the hunting of elephants and other listed wild species (Prime Minister's directive 134/TTg, 1960; Council of Minister's decree 39/CP, 1963) and the use, trade and transport of products derived from them (Ministry of Forestry decision number 276/QD, 1989; Council of Minister's decree 18/ HDBT, 1992; Prime Minister's directive 359/TTg, 1996; Government Decree No. 48/2002/ND-CP, 2002; Government Decree 82/2006/ND-CP, 2006). The elephant is classed in category IB, patterned after CITES Appendix I, which means there is a complete ban on all trade of the species' products. In July 2000 the Revised Criminal Code set out regulations for the prosecution of cases of illegal exploitation of rare and precious wild species, including elephants (Anon., 2002; Martin and Stiles, 2002).

The legal position of the internal and international trade in elephant and other wildlife products is clear, but elephants are still poached in Viet Nam and ivory continues to be carved and sold openly in shops, along with a great variety of other wildlife products. These include bear and tiger teeth, claws and skins; deer and bovid skulls and antlers/horns, bekko (products made from the scutes of the Hawksbill Turtle *Eretmochelys imbricata*) and stuffed sea turtles, and bush meat is commonly sold in markets and restaurants (Stiles and Martin, 1995; Nash, 1997b; Venkataraman, 2007).

In regard to ivory, a major weakness in legislation occurs in two areas:

- worked ivory can apparently be sold as pre-legislation or "old" ivory, encouraging fraudulent dating of items;
- absence of regulations specifying the responsibilities of the relevant enforcement agencies regarding ivory.

The CITES Management Authority (MA) for Viet Nam is the Forest Protection Department in the Ministry of Agriculture and Rural Development. The Scientific Authorities are the Institute of Ecology and Biological Resources in the Viet Nam Academy of Sciences and Technology, the Forestry Sciences Institute of Viet Nam in the Ministry of Agriculture and Rural Development, the Research Institute for Marine Fisheries in the Ministry of Fisheries, and the Centre for Resources and Environmental Studies in Ha Noi National University.

As a Party to CITES, Viet Nam is obligated to prepare and submit relevant reports as required by *Resolution Conf. 10.10 (Rev. CoP14)*, which recommends *inter alia* that:

a) The systems known as Monitoring the Illegal Killing of Elephants (MIKE) and the Elephant Trade Information System (ETIS), established under the supervision of the Standing Committee, shall continue and be expanded with the following objectives:

- i) measuring and recording levels and trends, and changes in levels and trends, of illegal hunting and trade in ivory in elephant range States, and in trade entrepots;
- ii) assessing whether and to what extent observed trends are related to changes in the listing of elephant populations in the CITES Appendices and/or the resumption of legal international trade in ivory;
- iii) establishing an information base to support the making of decisions on appropriate management, protection and enforcement needs; and
- iv) building capacity in range States.

The Vietnamese government's participation in ETIS has been extremely erratic and incomplete overall. Through *Resolution Conf. 10.10 (Rev. CoP12)*, CITES Parties were obligated to report the details of elephant product seizures to the CITES Secretariat or to TRAFFIC directly for inclusion in ETIS since 1997. As of 5 March 2007, the ETIS data set for Viet Nam comprised seven seizure cases, but most of these cases were received from credible NGO sources in the country rather than from reports submitted directly by the government agencies themselves. Further, since 2006, no seizure cases have been reported by any sources at all. Consequently, the rate of reporting elephant product seizure data to ETIS remains poor.



The average weight of ivory pieces has been declining with increased scarcity of ivory and rising prices

Daniel Stiles/TRAFFIC Southeast Asia

The most recent ETIS report placed Viet Nam in Group 7 in its analysis. This group has one of the lowest mean law enforcement effort, effectiveness and rates of reporting score of any group. The Corruption Perception Index (CPI) average ratio is 3.6, which means that perceived corruption is fairly high. The law enforcement effort ratio is measured, firstly, by the 'mean CPI' (i.e. the total Corruption Perception Index score for each country in the period 1998-2006 divided by the number of entities in the cluster divided by the number of years); scores range from 1.0 (highest perception of corruption) to 10.0 (lowest perception of corruption). It is measured, secondly, by the 'mean LE/reporting ratio' in the period 1998-2006 (i.e. the total number of in-country seizures divided by the total number of seizures divided by the number of entities in the cluster); ratios range from 0.00 (no law enforcement effort) to 1.00 (best law enforcement effort). Group 7's LE/reporting ratio was 0.11, extremely low (Milliken *et al.*, 2007).

Group 7 was described by (Milliken, *et al.*, 2007) as:

Members: *United Arab Emirates, Benin, Djibouti, Gabon, Ghana, Macao SAR, Malaysia, Mozambique, Rwanda, Sudan, and Viet Nam.* This cluster of 11 countries and territories, the largest grouping in the analysis, stands as a bit of a 'catch-all' group. It includes seven entities – Benin, Gabon, Ghana, Macao SAR, Malaysia, Rwanda and Viet Nam – which have never featured in the cluster analysis in previous ETIS reports. As demonstrated by the 'mean number of seizures' and 'mean weight' variables, the frequency and scale measures for this group are in the lowest range compared to any other cluster. This indicates that, when viewed as an aggregate, these countries are infrequently implicated in ivory seizures that generally only have modest weight values. In fact, all of the African countries and the United Arab Emirates and Viet Nam rarely if ever contribute ivory seizure data to ETIS, while Macao SAR and Malaysia are sporadic contributors of data at best. As such, trade dynamics come into focus largely through the seizure information supplied by others, which may serve to understate the degree of involvement of these countries or territories. With 84% of the trade by weight being seized since 1998, these countries have become far more active in the illicit trade in recent years. Another worrying factor is that this cluster has a low value for CPI, indicating a high perception of corruption, and one of the poorest values for law enforcement effort. While there is certainly some variability when considered individually, overall these countries generally play problematic roles in the illicit trade in ivory as medium-scale suppliers, transit countries or end-use markets. The mid-range score for domestic ivory markets suggests that some countries have active internal ivory markets, which certainly includes Gabon, Ghana, Macao SAR, Mozambique, the Sudan and Viet Nam, and mostly modest ivory carving industries have been identified in some of these countries (Martin, 2005; Martin and Stiles, 2000 and 2003; Stiles, 2004b). In future iterations of this analysis, some of these countries, most probably Viet Nam along with three others, could move into clusters that consist of more prominent problem countries unless the authorities move aggressively to curtail illicit trade in ivory, particularly that associated with their domestic ivory markets.

Viet Nam is required as part of the MIKE programme to establish one site to monitor the illegal killing of elephants. The government has satisfied this requirement and the monitoring site is Cat Tien National Park, with an estimated 10 elephants according to a survey completed in 2006 (CITES, 2007).

RESULTS

Sources and prices of raw ivory

Sources

Vietnamese ivory craftsmen said they used exclusively Asian elephant ivory from Viet Nam and neighbouring Laos and Cambodia up to the early 1990s. Up to this time there were few tourists and the demand for worked ivory was low; domestic elephants could supply ivory demand. In 1990 there were an estimated 1 459–1 631 wild elephants in the country, with the highest numbers seen in Dak Lak (480–05), Gia Lai-Kon Tum (250) and Lai Chu (126–243) Provinces (Do Tuoc and Santiapillai, 1991). Economic liberalization and an increase in tourism raised both local and visitors' demands for worked ivory, which resulted in heavy poaching. Between 1992 and 1996 some 48 elephants were killed in Ha Tinh Province, seriously depleting the local population (Dawson and Do Tuoc, 1997), and poaching by ex-military personnel was common in Viet Nam and neighbouring countries. By the late 1990s Vietnamese ivory traders and carvers were looking for new supplies of ivory, and Russia and Angola became sources (Stiles, 2004b).



Daniel Stiles/TRAFFIC Southeast Asia

Ivory was commonly mixed with pig teeth and carved bone, perhaps in an attempt to dupe government inspectors

During the war in Viet Nam in the 1960s and early 1970s, the Soviet Union and north Viet Nam were allies. A legacy is Vietnamese businessmen with enterprises in Moscow and elsewhere in present-day Russia. They began exporting Russian mammoth ivory to Viet Nam in the late 1990s (ivory craftsman, pers. comm. to Daniel Stiles, 2002). Vietnamese have been working in Angola in south-western Africa since the undeclared war with South Africa ended in the early 1990s. Some workers brought tusks or cut ivory pieces with them when they returned home for visits (Martin and Stiles, 2002; Stiles, 2004b). That practice seems to have ceased with increased

vigilance by Vietnamese authorities, especially after a large African ivory seizure was made in 2004 (TRAFFIC, 2005). Informants in 2008 all said that the raw ivory used currently originated most often in Laos, with a few rare pieces coming from domestic elephants or Cambodia. Viet Nam has served recently only as a transit country for smuggled African ivory, though this could change if domestic ivory demand continues to rise.

Very little ivory has been declared as confiscated by the government. The ETIS report to CoP14 reports only seven ivory seizures between 1989 and 2007, and during these 18 years Viet Nam only reported to ETIS for five of the years (Milliken *et al.*, 2007). Seemingly independent from ETIS, TRAFFIC reported that in 1990, 250 to 300 kg of ivory were confiscated (Anon., 2002); in 1993, about 35 kg of ivory were confiscated; in 2000, the confiscation of 12 kg of ivory occurred. The single case of an ivory seizure reported to ETIS for 2004 is the case reported by TRAFFIC (2005) and Viet Nam News Agency (2006a and b), in which 276 tusks weighing 730 kg were seized in Hai Phong. The tusks originated in Tanzania and were hidden in a shipment of fish destined for China. Two Customs officers were censured in the case and the culprits are being prosecuted. A case in 2006 involved three people caught smuggling 26 tusks weighing 117.5 kg. They were in a taxi en route to Mong Cai on the border with China and intended to sell the ivory in China. They bought the tusks in Nghe An Province in central Viet Nam (Playfuls.com, 2006). In January 2008, four tusks were seized in the home of a wildlife smuggler in Ha Noi (TRAFFIC, 2008b).

Prices

Martin (1992) reported that in 1990–91 raw ivory varied in price from USD 100–200/kg depending on availability and the current rate of retail sales. A carver in Ha Noi told this researcher that he paid USD 100/kg for raw ivory in early 1995, but that the price rapidly increased that year, which prompted him to retire from ivory carving. In 2000, TRAFFIC (Anon., 2002) reported finding raw ivory of unspecified weight for sale in Ban Me Thuot for USD535/kg. In 2001 most good raw ivory cost USD300–500/kg, depending on size and quality (Martin and Stiles, 2002). Poorer quality ivory could be bought for less. In Ho Chi Minh City in 2001 this researcher was offered two poor quality tusks, one weighing about 4 kg and the other 3 kg, for a fixed price of USD 1 200. One tusk was mostly black and the other was brown and cracked, and even these tusks cost about USD 171/kg, higher than the price of good quality raw ivory in either Thailand or Myanmar at that time (Martin and Stiles, 2002). In Ha Noi a pair of mostly hollow 70 cm long mounted tusks, thus less desirable for carving, weighing about 3 kg in total was priced at USD 700, or USD 233/kg. Tusk tips from captive elephants commanded higher prices in 2001, with reports of up to USD500/kg (Martin and Stiles, 2002). Other ivory pieces sold by ethnic minorities in Tay Nguyen Plateau could be purchased at this time for as little as USD110–130/kg (Anon., 2002). In 2000 mammoth ivory was selling for USD300/kg (Anon., 2002).

The price of raw ivory dropped between 2001 and 2002, though the reasons are not clear. Shop vendors and craftsmen reported in 2002 in Ha Noi that demand was falling. Asian raw ivory had all but disappeared and a 5–10 kg tusk was reported as selling for USD350/kg, down from USD500/kg previously. This researcher was offered a pair of good quality tusks weighing 45 kg for USD400/kg and a low quality pair weighing 29 kg for USD8 000 (USD276/kg), both probably African. Since these were starting prices the final price would have been even lower. Another informant said that the average price was VND5 million/kg, equalling USD333/kg at that time. Almost all new pieces were now being made from Angolan elephant or Russian mammoth ivory (Stiles, 2004b). Good quality mammoth ivory had risen slightly to USD350/kg for cut blocks (Stiles, 2004b).

In 2008 African ivory was not found and raw Asian ivory pieces were selling for approximately USD770–USD1 200/kg, or even higher, a substantial rise from 2001/2002. Prices per kg for cut pieces and tusk tips of raw ivory are usually higher than for larger tusks now, as they are easier to transport and conceal from the authorities.

In HCMC a 520 g cut tusk solid section was priced at USD400 (USD769/kg) and a larger cut tusk section weighing 1.7 kg cost USD1 800 (USD1 059/kg). Two tusk tips weighing 150 g and 200 g respectively were priced at a per kg cost of USD1 653–1 863/kg. A shop owner in HCMC said that raw ivory cost USD1 000/kg, and he commented that it was very difficult to find now.

Near Ha Noi, an ivory craftsman had a small 150 g piece of ivory he said cost USD787/kg. In another village outside of Ha Noi, a middleman showed a large cut tusk section from the tip weighing about 3 kg priced at USD870/kg, and another 0.9 kg cut tusk section that included both hollow and solid tusk, costing USD807/kg. In the same locale two semi-worked hollow tusk sections were priced even higher, USD1 900–USD2 174/kg for pieces weighing 180–200 g. However, the middleman thought the pieces weighed 400 and 500 g, which would result in prices of USD855–USD870/kg, more in line with other prices found. A shop that was visited in 2001 and again in 2002 was selling in 2008 a pair of mounted low quality unpolished tusks weighing 4 kg for USD2 000 (USD500/kg). This man’s family used to own an ivory carving workshop, but they closed it and now were selling off stock at low prices. One ivory shop owner in Ha Noi involved in commissioning ivory items from buyers said that Lao ivory was very expensive now, USD1 500/kg.

The owner of an ivory and bone carving workshop near Hué showed a 250 g solid tusk piece and said it cost USD186 (USD745/kg). When asked the price of raw ivory in general, she said a 3-kg tusk would cost VND20 million a kg, or USD1 242/kg.

The price of mammoth ivory may also have risen, as only a poor quality 1 kg cut piece was found, priced at USD311/kg. Higher quality would presumably cost more.

Table 1 presents a summary of raw ivory prices in 2008.

Table 1.
Raw ivory prices in Viet Nam in 2008.

Location	Weight and price in USD/kg	
	<1 kg	1-3 kg
HCMC	769 - 1 863	1 059
Ha Noi	787 - 807	500-1 500
Hué	745	1 242

Ivory workshops and craftsmen

The ivory industry in northern Viet Nam originated in the early 20th century under French rule. The first ivory items seen in use were official seals during the Nguyen Dynasty (1883–1945) and French colonial rule, which ended in 1954. In the early 20th century French government officials and businessmen, based in Ha Noi, began to request wood carvers to make ivory objects. As wood carvers became more proficient in ivory, Chinese mandarins and businessmen began requesting traditional Chinese items of ivory: figurines of Guan Yin, the Lucky (or Laughing) Buddha, Long Life and others; chopsticks, cigarette holders, name seals, etc.

Today there are only a few craftsmen who can produce high quality figurines, carved hollow tusk sections (brush pots or lamps), and painted screens and other items, but the most commonly seen ivory pieces for sale are lower quality than can be found in China and Japan. Only one ivory workshop was found outside the Ha Noi area and that was near Hué. Informants in Ho Chi Minh City reported that there were ivory carvers in and around HCMC, but no one would provide an exact location. For example, an outlet selling ivory in An Dong



In HCMC and elsewhere ivory was often displayed near bekkos, both illegal items in Viet Nam

market in District 5 (Cholon) said they had their own workshop, but would not allow a visit. Likewise, an ivory speciality shop next to An Dong market said the same thing. This repeated the experiences of previous surveys (Martin, 1992; Anon., 2002; Martin and Stiles, 2002). There may also be craftsmen in Ban Me Thuot, according to informants, but the city was not visited.

The most important ivory working area in Viet Nam is in and around Ha Noi, especially in Ha Tay Province. A total of around 10 ivory craftsmen were found in Nhi Khe, Phu Khe and Du Du villages. One workshop was found in Ha Noi city, with at least one craftsman, but he declined to state whether he worked with anyone else. Initial information about a network of ivory craftsmen, middlemen and dealers was gathered, many of them family related, but more research would be needed to unravel the full history, interrelationships and workings of it. Parts of the network seem to go back at least three generations and there were signs that not all of the members cooperate with, or even know, one another. A number of shop owners and middlemen who deal worked ivory all use the same craftsmen.

One ivory workshop employing two craftsmen was visited in Nghe Can village about 10 km from Hué. This workshop produces many of the bone and ivory painted screens found in HCMC and Ha Noi. They also make small Buddha and other figurines. Most of the items produced here are made of buffalo bone, including miniature palaces with several buildings.

During a visit to the home workshop of a craftsman in Ha Noi, another employee was working on a computer that showed images of worked ivory on the screen. The craftsman likely displays the types of items he makes on the Internet and takes commissions to manufacture pieces in this way.

Retail outlets, number of items for sale and prices

A total of 669 outlets of various types were surveyed in eight localities in Viet Nam that attract large numbers of national and international potential ivory buyers. Of these, 73 (11%) had ivory for sale,

Table 2.
Number of ivory outlets and items, 2008

Place	Number of outlets surveyed	Number of outlets with ivory	Number of items
HCMC	251	49	1 776
Vung Tau	17	0	0
Phu Quoc	26	1	4
Ha Tien	33	4	113
Nha Trang	27	0	0
Huế	59	8	141
Ha Noi	227	10	407
Ha Long City	29	1	3
TOTAL	669	73	2 444

totalling 2 444 items (Table 2). The types of outlets where ivory was found for sale were: market souvenir stalls, antique shops souvenir shops, jewellery shops and luxury hotel shops.

Ho Chi Minh City

HCMC had by far the largest number of retail outlets seen in Viet Nam selling ivory, with 49, and the greatest amount of ivory, totalling 1 776 items. The largest number of 257 pieces was found in a shop on Duong Vuong Street next to the An Dong Market in District 5 and the smallest number was one piece in an antique shop on Le Cong Khieu Street and one piece in a stall in An Dong Market.

Table 3 presents a breakdown of where in HCMC the ivory was seen.

Table 3.
The number of outlets and ivory items in HCMC by location.

Location	Number of outlets	Number of items
Le Cong Khieu Street.	25	598
An Dong Market	7	526
Dong Khoi Street.	5	306
Ben Thanh Market	9	151
Le Loi Street	2	130
Le Thanh Ton Street.	1	65
TOTAL	49	1 776

Le Cong Khieu Street is a short street lined on both sides with about 50 antique shops. Approximately half of these contained ivory. Most of the ivory pieces appeared genuinely old, with the majority having been manufactured in Viet Nam. An old 18-cm high water pipe of silver and ivory was USD450 and a 48-cm

opium pipe was USD680. There were several Chinese pieces and rare items originating in Japan, Europe and Myanmar. Two small tusk tips and two cut tusk sections were also seen. There were also many items made from mammoth ivory, cow and water buffalo bone, and the teeth of bear, tiger and wild pig.

An Dong Market in the predominantly Chinese District 5 (Cholon) of HCMC sells a wide variety of consumer goods. The first floor has a large tourist curio section and seven of the outlets here sold ivory. Most of the items were jewellery, small figurines and Buddha or Guan Yin pendants, and name seals, cigarette holders and chopsticks. About half of the pieces were found in one ivory speciality shop next to the market on Duong Vuong Street. Prices in this shop were high, with a 0.5 cm baby bangle costing USD95, a carved 2-cm bangle priced at USD350 and a pair of chopsticks at USD200.

Dong Khoi Street is the main tourist shopping thoroughfare downtown in District 1. Only five shops out of about 40 surveyed were selling ivory. Most of the pieces were the usual small figurines, pendants and other jewellery items, name seals, etc. One shop had larger carved figurines and a 16-cm African bust (USD600). The lady owner was the sister of a woman who owned a shop visited in 2001 just off of Dong Khoi that sold a large amount of ivory and who had her own ivory workshop. She has since retired and that shop is closed, though the craftsmen can still make ivory items on commission. Another shop had a large number of ivory and bone painted screens displayed.

The Ben Thanh central market contains almost 100 stalls selling tourist souvenirs; only six had ivory for sale. Another three jewellery shops across the street in Place Ben Thanh were also selling ivory. Most of the pieces were small Buddha and Guan Yin pendants (USD10–40), jewellery and ivory carved into the shape of tigers' teeth or miniature tusks. There were also many bone and resin imitation ivory pieces and bear and pig teeth.

The Eden Mall on Le Loi Street had one jewellery shop selling 128 expensive ivory jewellery items, small figurines, name seals and cigarette holders. For example, 1-cm bangles were USD200, 2-cm bangles were USD400, and a large bead necklace was USD1 195. Another shop on Le Loi Street only had two ivory pieces.



Daniel Stiles/TRAFFIC Southeast Asia

The one shop selling ivory on Le Thanh Ton also sold a considerable amount of beko and operated a beko workshop. Most of the ivory pieces were jewellery, but there were also 12–18 cm figurines, 18–32 cm elephant bridges, carved tusks and a 10-cm leaning tower of Pisa.

Almost every street of District 1 was surveyed and no ivory was seen in dozens of other shops and markets.

The only ivory seen on Phu Quoc Island was four pieces said to be from the Philippines

Phu Quoc and Ha Tien

Phu Quoc Island near Cambodia is a tourist destination that attracts every year increasing numbers of Vietnamese and foreign tourists. It has plans for important tourist development. The only ivory found was four pieces in the airport departure lounge said by the vendor to come from the Philippines. A 0.7 cm baby bangle cost USD62, a ring was USD15.50 and two 2.5 cm thin plaques with the heads of Jesus and Mary on them were USD18.60 for the pair.

Ha Tien is a town on the coast near the Cambodian border. Vietnamese tourists come in large numbers to visit the nearby Mui Nai beach. No ivory was found in about 10 shops in the town, but four stalls on the beach were found selling ivory. These were all jewellery items and small Buddha and Guan Yin figurines. The vendors said all of the ivory came from HCMC. The prices were quite low, with 1-cm bangles priced at USD68–90 and 2–4 cm Buddha figurines USD15.50–37.



Daniel Stiles/TRAFFIC Southeast Asia

Crafts workshops in villages near Hué specialize in inlay work using ivory, shell and bone

Hué

This small city is the site of a former Vietnamese imperial capital that has left impressive buildings and royal tombs that attract large numbers of foreign tourists. Seven of the eight outlets selling ivory were found on Le Loi Street, a main tourist shopping road. No ivory was found in the dozens of tourist stalls that are associated with the tourist sites. The other outlet was a workshop showroom in Nghe Can village about 10 km outside Hué selling 38 ivory items, all small figurines, except for one painted screen. A 14-cm wide painted ivory screen was priced at USD55, while a similar one made of bone was USD10. On Le Loi Street

a 25-cm wide painted screen was USD300. Ivory was a minor item sold in the tourist shops, while worked bone was very common.

Ha Noi

The number of tourist souvenir shops, especially in the Old Quarter, has risen greatly since the 2000/2001 surveys carried out by TRAFFIC and Martin and Stiles. Nevertheless, only 10 shops were found selling ivory in 2008, five of them in the Old Quarter. Another three shops were in hotels and two were on Hang Khay Street near the Old Quarter. The most ivory in one shop was 94 pieces in an outlet on Hang Bong Street that has been selling ivory for many years. Two shops had only one piece each. One shop on Hang Khay Street belonging to a family that has been engaged in ivory and other wildlife product trade for many years was visited by the researcher in 2001, 2002 and 2008. The owner's father is an ivory craftsman. The ivory and other wildlife products in this shop have decreased greatly in quantity since 2001 as a result of government control efforts.



Painted plaques seen in several places in Viet Nam are manufactured in a village near Hué. They can be made of ivory or bone, and can be difficult to distinguish

As elsewhere in Viet Nam, most items were jewellery and small Buddha and Guan Yin figurines, but there were also some finely carved figurines and carved tusks and tusk sections. For example, a 22 cm high carved hollow tusk section made into a lamp was priced at USD5 000. Ha Noi specializes in round and square ivory compasses measuring 6–14 cm in diameter (USD300–1 000). The finest quality items in Viet Nam can be found in Ha Noi. There were other finished pieces found in the homes of ivory carvers, but these were not included in Table 2 as they were not openly for sale to the public.

Ha Long City

This small city was visited because it is a main tourist locale with many souvenir shops. Only one shop was found selling ivory, consisting of three small Buddha faces costing USD50 each.

Table 4 presents the asking retail prices of various items in HCMC, Ha Noi and Hué.

Table 4.
Price of retail ivory items in USD, 2008

Type	Size cm	HCMC	Ha Noi - Hué
<i>Jewellery</i>			
bangle	0.5	50-95	50
bangle	1	58-200	120-300
bangle	2	350-400	203-525
small bead necklace		250	165-200
large bead necklace		750-1 195	300
ring		10-50	30-45
pair earrings		100	50-80
pendant	3-4	25-35	35-45
	5-10	35-280	
<i>Figurines</i>			
	1-5	25-181	20-80
	6-10	70-500	37-900
set of 3	10	500	960
	11-15	1 500	600-1 300
	18-20	900	900
<i>Misc.</i>			
chopsticks, pair	16-18	40-200	70-120
cigarette holder	5-17	110-600	30-320
name seal	6-7	55-200	20-150
fan		500	400
opium pipe	48	680	
perfume bottle	6	60	
oval/round painted	5-7	85-150	55
screen			
4-panel painted screen	12	120	

Prices rounded off to the nearest USD. Exchange rate USD 1 = VND 16 100.

Buyers

Informants said that most of the buyers of worked ivory were visitors from China and Thailand, though local Vietnamese also bought ivory, particularly the smaller religious pendants and figurines. Chinese and

Thai buyers often commission high quality figurines through middlemen or shopowners that craftsmen subsequently manufacture. Since it can take up to two months to make a figurine, either these buyers are businessmen who travel regularly to Viet Nam, or the finished pieces are sent by courier or the post. Visiting Vietnamese-Americans were also said to be common purchasers of ivory pieces. European tourists also bought small amounts of ivory, especially jewellery items.

Trends in the ivory market in Viet Nam

Table 5 presents past and present data on indicators of the scale of the ivory market and demand for ivory to enable an assessment to be made of trends, i.e. whether ivory demand is growing, decreasing or remaining stable.

Table 5.
Past and present ivory market indicators for Viet Nam

Year	Raw ivory price in USD 1-3kg	GDP Inflation Index Price	No. of craftsmen	No. of retail outlets	Minimum no. of items
1990/1	100-200	138-276	63-83	>80	-
2001	350-500	383-547	>22	50	3 039
2008	500-1 242	500-1 242	>17	59	2 182

Source: Martin (1992); Martin and Stiles (2002)

Raw Price - Even taking inflation into account (see Table 5), the prices for raw ivory have been steadily rising since the CITES ivory trade ban in 1990. There has been a dramatic rise in price between 2001 and 2008, with the price approximately doubling. Viet Nam has the highest price known in the world currently for raw ivory. This is troubling as raw ivory price and the trend in price change can be a powerful indicator of demand. The high price also serves as an incentive for poachers to kill elephants.

Number of craftsmen - The number of ivory craftsmen active in 2008 is little changed from 2001, which suggests that the 2001 number of craftsmen can handle the increase in demand. This no doubt due to the fact that the craftsmen in 2001 were working ivory only part-time, spending more time working on wood and bone. The number given is a minimum number, there may be more.

Number of ivory outlets and items - The 2008 figures for number of retail outlets and minimum number of items are only for HCMC and Ha Noi, as these were the only cities surveyed in 2001 (Martin and Stiles, 2002). More outlets were found selling ivory in 2008, but the number of items seen had decreased by 28%. All of the increase in outlets was seen in HCMC (49 in 2008 compared to 37 in 2001). Ha Noi had three fewer outlets in 2008 than in 2001 (13 and 10 respectively), and two of those only had one item each. A survey in 2002 found only eight outlets in Ha Noi selling ivory (Stiles, 2004b), so little has changed in that respect to 2008. The number of items had decreased in HCMC from 2 262 to 1 776 and in Ha Noi from 777 to 407. In addition, the average size of ivory items had decreased. In 2008, there were many more <5 cm pendants and figurines than in 2001 and many fewer >15 cm figurines and carved tusks.

In spite of a reduction in displayed ivory, more worked ivory might be sold in 2008 than previously because of a change in marketing methods. Ivory is now being sold on the Internet, both through websites and by the use of e-mail. It is also more common now for buyers to order specific items from dealers or middlemen and collect the pieces without the ivory ever entering a shop. This was observed in several places in the Ha Noi area.

Retail prices

Table 6 presents the prices of some common types of worked ivory items in 2001 and 2008.

Given the approximate doubling in raw ivory prices between 2001 and 2008, it is not surprising to see that worked ivory prices have gone up commensurately. Prices for smaller pieces had gone up less than prices for larger items.

TRAFFIC (Anon., 2002) reported finding elephant products other than ivory for sale during its survey in 2000. Elephant molars, skin, feet, hair and meat were found for sale. No elephant products other than ivory were seen during this 2008 survey.

Table 6.
Prices of worked ivory items in 2001 and 2008 in USD

Item	Size in cm	2001 starting price	2008 starting price
JEWELLERY			
Bangle	1	70-150	58-300
Bangle	2	60-200	203-525
Necklace, large beads		75-250	300-1 195
Pendant, Buddha	3-4	25-30	25-45
Ring, plain		10-20	10-50
FIGURINES			
Buddha/Guan Yin	<5	15	225-181
	5-10	30-150	35-280
	11-20	200-800	600-1 500
MISCELLANEOUS			
Chopsticks, pair	15-20	36-95	40-200
Cigarette holder	8-10	35-70	30-110
Compass	5-7	150	300-500
	10-14	350-500	1 000
Lamp (carved hollow tusk)	40	500-2 000	5 000
Name seal	5-8	20-72	55-200
Painted plaque	5-14	20-35	55-150

Source: Martin and Stiles (2002) and this survey



Middlemen and craftsmen in villages near Ha Noi deal openly in illegal ivory. They supply shops and take orders on commission from local customers and from visiting Chinese and Thais

DISCUSSION AND CONCLUSIONS

Compliance with CITES

Viet Nam has enacted a series of directives and decrees that aim to structure and control the internal ivory market which complies with CITES *Res. Conf. 10.10 (Rev. CoP14)*. The control method consists of a complete prohibition on dealing in raw and worked ivory. However, there appears to be an unwritten understanding between government and shopowners that retail outlets that carried ivory before the ban in 1992 are allowed to sell off stock that existed at that time. This loophole is used by some shopowners to replace worked ivory stock that has been sold with recently made ivory items in contravention of Vietnamese law. Also, the government has not implemented the recommendation to “*establish a nationwide procedure, particularly in retail outlets, informing tourists and other non-nationals that they should not purchase ivory in cases where it is illegal for them to import it into their own home countries*”.

In addition, the fact that most of the new ivory used in manufacturing originates in Laos indicates that the Vietnamese authorities are not policing their borders adequately in respect of illegal wildlife trade.

Viet Nam has not fulfilled its obligation as a Party to CITES to submit annual reports on elephant product seizures to ETIS. The 1989-2007 Viet Nam ETIS record is highly erratic and incomplete (Milliken *et al.*, 2007).

The government has satisfied the CITES obligation of setting up a MIKE monitoring site, and it has provided all of the baseline information needed to begin the monitoring programme (CITES, 2007). Cat Tien National Park is the MIKE monitoring site.

The results of this survey have been sent for review to the Vietnamese CITES Management Authority. A follow up on their next plan of action based on the recommendations will be discussed with the authorities.

Trade in ivory

Sources and prices of raw ivory

Raw ivory price has increased greatly in Viet Nam since the CITES ivory trade ban in 1990. The maximum price for a 1–3 kg tusk was USD200/kg in 1990, USD500/kg in 2001 and over USD1 200/kg in 2008. This great rise in price indicates that supply cannot satisfy demand, and it increases incentive for poachers to kill elephants to satisfy that demand. The great rise in price seen in 2008 is due most likely to a combination of somewhat higher demand in conjunction with a restriction of supply from Africa. Evidence provided by seizures suggests that raw ivory more often is being directed to China, bypassing Vietnamese workshops.

Most raw ivory was obtained from Lao Asian elephants, with small amounts acquired from Vietnamese and Cambodian elephants. Mammoth ivory from Russia was also used by craftsmen, but less frequently than in 2001/2002. No African raw ivory was found in 2008.

Number of craftsmen

The number of craftsmen working ivory in 2008 was one-third to one-fourth the number who were working in 1990, indicating that the scale of the ivory market in Viet Nam has decreased considerably since the CITES international ivory trade ban. The number in 2008, at least 17, was about the same as in 2001, but craftsmen were working more ivory in 2008 than in 2001/2002.

Number of outlets and items

The number of retail outlets found selling ivory increased in HCMC and decreased in Ha Noi between 2001 and 2008, though still fewer than in 1990. Only small amounts of ivory were found for sale outside these two cities. The amount of ivory for sale was considerably less in both cities in 2008 compared to 2001, both in number and average size of items.



This superbly carved hollow tusk section in Hanoi, made into a lamp, was priced at USD 5 000. It had not sold for five years

Daniel Stiles/TRAFFIC Southeast Asia



Daniel Stiles/TRAFFIC Southeast Asia

a & b: These two photos show the same display case in Hanoi in 2001 and 2008. Most of the items displayed in 2008 were made of bone and wood, as the owner was not buying new ivory

Retail prices of worked ivory

The prices of worked ivory had gone up considerably in 2008 compared to 2001, particularly for the larger pieces.

Buyers

Most ivory buyers are visitors from China, Thailand and Vietnamese from the USA. Local Vietnamese buy the smaller religious items and Europeans more often buy jewellery. Chinese and Thais tend to purchase medium size figurines (10–20 cm), the former religious good luck personalities (Guan Yin, Long Life, Happy Buddha, etc.) and the latter figurines of the Thai king.

Ivory substitutes

Many pieces made of bone (buffalo, cow and elephant) were seen that were identical to ivory types, particularly pendants, small figurines and painted plaques/screens. Mammoth ivory was used in small quantities for larger figurines. There were also resin pieces seen in a few places. Prices for bone items are 80-90% cheaper than the same type and size ivory item. Mammoth worked ivory prices are the same as elephant worked ivory prices.

Overall assessment

The scale of the Viet Nam ivory market remains modest on a global scale. Although there were 28% fewer worked pieces seen for sale in HCMC and Ha Noi in 2008 than in 2001, the great increase in prices of raw and worked ivory, the larger number of outlets selling ivory, and the observed upsurge in activity of craftsmen working ivory between 2001 and 2008 all strongly suggest that demand for ivory is rising, though a restriction of supply between 2001 and 2008 also contributed to the price rise. Less ivory on the shelves of outlets may in fact be the result of increased sales coupled with decreased availability of raw material to enable replacement. A contributing factor to fewer pieces seen in shops could be the fact that more buyers order items directly from craftsmen through middlemen, or commission items on the Internet, so the ivory never enters a retail outlet.

RECOMMENDATIONS

International

- Viet Nam should fully implement the recommendations contained in CITES *Resolution Conf. 10.10 (Rev CoP14)* ‘Trade in Elephant Specimens’.
- Viet Nam’s CITES MA should dedicate staff to monitor and record all elephant specimen seizures, particularly ivory, and make timely and accurate reports to ETIS.
- Viet Nam should continue its cooperation with MIKE and ensure that adequate staff and funds are allocated to carry out the monitoring and reporting programme.
- The government should continue its participation in the ASEAN-WEN initiative and increase efforts to control the illicit trafficking of ivory and other wildlife products to and from other countries.

National

- Enact or amend legislative directives to stipulate clearly that the purchase, possession, trade, transport and offer for sale of raw and worked ivory is prohibited, regardless of the date of acquisition or manufacture.
- Viet Nam should clearly identify and assign the government authorities responsible for enforcing laws that result in border seizures and internal confiscations of illegal wildlife products, including ivory.
- The government authorities responsible for enforcing wildlife trade laws should be properly trained and motivated both through national training programmes and workshops, for example, the trainings conducted under ASEAN-WEN.
- Offenders of wildlife trade laws should be prosecuted and penalized according to the law.

- All ivory seen for sale in retail outlets should be confiscated by the government and destroyed. The government might consider donating the finer more artistic pieces to museums around the country with strict prohibitions about their commercial use, other than display.
- Further investigations should be made into the use of the Internet in Viet Nam in the marketing and trading of ivory.

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TRAFFIC, the wildlife trade monitoring network, works to ensure that trade in wild plants and animals is not a threat to the conservation of nature. It has offices covering most parts of the world and works in close co-operation with the Secretariat of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

For further information contact:

The Director
TRAFFIC Southeast Asia
Unit 9-3A, 3rd Floor
Jalan SS23/11, Taman SEA
Petaling Jaya, Selangor
Malaysia
Telephone: (603) 7880 3940
Fax: (603) 7882 0171
Email: tsea@po.jaring.my

The Executive Director
TRAFFIC International
219a Huntingdon Road
Cambridge CB3 0DL
United Kingdom
Telephone: (44) 1223 277427
Fax: (44) 1223 277237
Email: traffic@traffic.org

