

UPDATE ON THE IVORY INDUSTRY IN THAILAND, MYANMAR AND VIET NAM

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BACKGROUND

Martin and Stiles (2002) reported on the status and trends of ivory markets in eight South and Southeast Asian nations in late 2000-early 2001. In a review of that report, Milliken (2002) concluded that its message rang clear: "Whether in Asia or Africa, illegal and unregulated domestic ivory markets are the single most destructive element in elephant conservation today". Since that study was undertaken, further research into the ivory carving industry has been carried out in the three largest ivory markets of South and Southeast Asia - Thailand, Myanmar and Viet Nam¹. The findings of this research, sponsored by the National Geographic Society, are summarized below.

INTRODUCTION

The smugglers of raw and worked ivory who ship or carry illegal ivory around the world are extremely difficult to investigate, for obvious reasons, and the great number of retail outlets make this type of ivory trade indicator equally unsuitable for regular monitoring. Tracking down ivory workshops and retail outlets, moreover, involves an enormous amount of work and, combined with the amount of time needed to record the data, leaves less time than would be desirable to learn full details about ivory manufacturing. Ivory carving workshops are relatively few in number, however, and all raw ivory, whether legal or illegal, must pass eventually through a workshop to render it saleable. This makes them ideal monitoring sites. During the 2000/2001 survey of South and Southeast Asia, Phayuha Kiri (Thailand), Mandalay (Myanmar) and Hanoi (Viet Nam) were identified as the three most important ivory carving centres in the region (Martin and Stiles, 2002). In order to assess the status of and recent trends in the elephant ivory trade, further investigation of the industry was undertaken in these three countries during December 2002 to February 2003. The historical, cultural and artistic aspects of some of this research are reported on in Stiles (2002 and 2003).

Myanmar, Viet Nam and Thailand are all party to CITES.

OBJECTIVES AND METHODS

The research aimed:

1. to find out how many ivory carvers are active in Mandalay (Myanmar), Hanoi (Viet Nam) and Bangkok, Phayuha Kiri and Chiang Mai (Thailand).

2. to determine how much raw ivory is being used in carving; where it comes from; how it is obtained; the wholesale and retail prices according to the quality of the ivory and the carving; the rates of turnover; who the buyers are; and, where the ivory is going.
3. to look at changing patterns in the type of items being carved in response to a changing client base and to ascertain what type of items are sought and by whom.
4. to document the different types of ivory (i.e. which part of the tusk, African v. Asian, etc.) are used in the manufacture of various objects (e.g. figurines, name seals, beads, etc.); the sources of this ivory and the criteria used for pricing; the different tools and techniques used to carve the different motifs; the meaning of the carved symbols and subjects; the different styles or schools; and, the historical background of ivory use and of the ivory carving families.
5. to find out the attitudes of the carvers and shop owners towards elephant conservation.
6. to elucidate what strategies might work to stop carvers from working ivory, or at least to reduce ivory consumption.

Information was gathered via interviews and participant observation.

RESULTS

Knowledge of the history of ivory carving and use in a country provides important information on the cultural and artistic value of the craft. This is a pertinent factor in formulating ivory trade policy, thus a synopsis of the historical background of each country's ivory carving industry is presented. This information is presented in descending order of scale of the industry in those countries.

Thailand

History: The first users of Thai carved ivory were the royal family, specifically Rama V, starting in the late nineteenth century (Stiles, 2003). Items consisted of various types of containers, sword and knife handles, parts for musical instruments, official seals, chess pieces, jewellery, buttons, dolls and even small elephant howdahs (seats for riding on an elephant's back). In the

¹The current scale of India's ivory industry is unknown, but Menon and Kumar (1998) and TRAFFIC (Anon., 2003a) make clear that in the late 1990s up to 2001 the ivory trade was still active. Milliken et al. (2002) provided evidence that India is still an important actor in illegal international ivory movements. While these reports provide some idea of the scale of the trade in certain areas in India, an updated survey of the whole country using a quantitative methodology is needed to establish a comprehensive baseline status of the scale so that trends can be discerned in future.

early twentieth century the aristocracy and upper classes began patronizing the royal carvers as well, and combs and ivory handles for utensils became popular. Religious ivory sculpture was also important early on, mainly Buddha figurines and Buddhas carved on tusks. Ivory carving started up in the 1930s, near Nakhon Sawan, in central Thailand after an artistically gifted Buddhist monk was asked by his senior to carve Buddhas on the tusks of deceased temple elephants. Carved ivory use spread to other temples in the area and in 1937 the monk left monkhood, married and moved to Phayuha Kiri, where he trained others to carve ivory to meet an increasing demand for amulets and temple carvings. Thailand's commercial ivory carving centre developed from this base. Thais still use ivory amulets, which are considered to bestow protection on the wearer, but only uncarved, polished tusks are used to adorn shrines today. Since the 1970s, increasing tourism has stimulated the production of ivory trinkets and curios.

The legal position of the ivory trade: Technically, it is legal to purchase tusks or tusk tips that come from domesticated elephants and to work and sell the ivory. In practice, however, since mid-2002 the Thai Government has been taking stricter measures against ivory carvers. Revelations in Martin and Stiles (2002) and Stiles and Martin (2002) about the large-scale use of ivory illegally imported from Africa and Myanmar resulted in visits to the country by journalists and a CITES Mission in July 2002 to Phayuha Kiri. The report of the CITES Mission highlighted continuing concern about the ivory trade in Thailand and was presented to the twelfth meeting of the Conference of the Parties in October 2002. In December 2002, between 12 and 15 million baht (USD280 000-350 000) worth of ivory was confiscated in Phayuha Kiri from about a dozen retail shops and 30 workshops.

There is currently an "Elephant Law" being proposed by legislators that covers the responsibility of the mahout (the elephant-driver or -keeper) towards his elephants and their care, amongst other actions, and would ban all ivory working and sales.

Sources and prices of raw ivory: One informant in Phayuha Kiri said that "black Americans" brought in consignments of African tusks weighing a total of between 200 kg and 500 kg to sell in Bangkok, usually to a single middleman, who then transported the ivory to Phayuha Kiri to sell to carvers. The authors believe that the "black Americans" were almost certainly Africans, as nationals of African countries have been involved in ivory smuggling in several countries, and no Americans have in recent times been connected with ivory smuggling in Asia. Supporting this conclusion, 65 tusks (501 kg) from Africa (country undisclosed), addressed to a Malian, were seized at Bangkok's airport in July 2003 (Anon., 2003b). An informant in Bangkok said that perfect 5-10 kg tusks sell for USD500/kg, but that they were extremely rare. Prices for two- to five-kilogramme African ivory tusks ranged from USD140 to



- ^^ a master ivory carver in Mandalay, Myanmar, sketches the outline of a subject onto a tusk for an advanced apprentice to carve.
- ^ a workshop near Phayuha Kiri, Thailand, which produces knife handles and belt buckles made from ivory and horn.
- v one of several shops in Mandalay, Myanmar, that display hundreds of ivory carvings for sale to tourists.

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USD209/kg in Phayuha Kiri and USD280/kg for similarly sized Asian tusks. Prior to the crackdown in 2002 not more than 200 kg of raw ivory was being consumed a month in Phayuha Kiri and probably less than 20 kg a month was being processed elsewhere, mainly in a



workshop manufacturing ivory handles for guns and knives and belt buckles sold to gun shops in the USA. On occasion, tusks or raw ivory pieces originating in Myanmar or Lao PDR are brought to Phayuha Kiri by traders.

Numbers of carvers and workshops: Of the approximately 20 carvers working in Bangkok in 2001, only one or two were still active in 2003. While there had been close to 100 ivory carvers operating in Phayuha Kiri in 2002, none was working in the city in February 2003, according to two informants. Three ivory carvers in two workshops were found in rural settings outside Phayuha Kiri and one was found in Bang Sai, near Ayutthaya. There were no ivory carvers active in Chiang Mai.

Trend: Raw ivory prices for pieces of between two and five kilogrammes had risen from USD91-182/kg in 2001 to USD140-209/kg in early 2003, probably reflecting decreased supplies owing to increased seizures of illegal ivory. The number of active ivory carvers and workshops had drastically declined from 2001 because of the government crackdown. Worked ivory was still plentiful in Bangkok in 2003 and there was no apparent change seen from 2001, though only a sample survey was made in 2003. If production does not recover, stocks of worked ivory will presumably fall. Traders must think carving will pick up, however, as up to the end of July 2003 some 1000 kg of tusks had been seized during the year at Bangkok International Airport (Anon. 2003c). If the "Elephant Law" is passed, retailers will have to dispose of their stocks.

Mandalay, Myanmar

History: Ivory carving began in the north under King Mindon in the 1860s and under the British Raj in Rangoon (now Yangon) and other parts of the south at about the same time. The earliest users were the royal court and Buddhist monks in the north and British and Indian colonial administrators and merchants in the south. Descendants of first generation ivory craftsmen from the royal court and from Yangon carve today in Mandalay. Contemporary ivory sculptures of cultural value are mainly religious in nature: the Buddha and stories of Buddha's life (*Jataka*), for example. Of secondary importance to the people of Myanmar are carvings of historical figures (royalty, military heroes), naturalistic carvings of Myanmar life (cane ball players, dancers, fishermen, etc.) and game pieces. Everything else, including jewellery (excluding Buddha amulets and bead rosaries), tusks carved to form elephant trains, animals, Chinese figurines, name seals, chopsticks, cigarette holders, etc., were introduced for the tourist market, though some Chinese citizens of Myanmar buy Chinese subjects e.g. *Kwan Yin* (the Buddhist goddess of compassion), *Maitreya* (Happy or Laughing Buddha), and Daoist figures.

The legal position of the ivory trade: Domestic carving and trade are legal, but only the owners of domesticated elephants may sell tusks or pruned tusk tips to workshops. Possession of or trade in wild elephant ivory is illegal (Anon., 2002a). The government no longer gives support to the ivory industry and has stopped sponsoring ivory carving competitions.

Sources and prices of raw ivory: Most ivory is reported to originate within Myanmar, much of it poached. Tusks are also smuggled in from India, mainly by Chin tribesmen. During a period of two months, the author saw all new raw ivory at four workshops and examined the registration books at two of the largest workshops which recorded the provenance of their ivory. None was reported to come from Africa. Moreover, not a single vendor nor carver reported handling African tusks. The price for a 5-10 kg tusk had risen from 100 000 kyat/kg (USD141) in February 2001 to 195 000 kyat (USD173) in February 2002. Only local currency is used to purchase ivory, so the near doubling in price in one year reflects increasing scarcity, as market demand was declining slightly.

Number of carvers and workshops: While 45 ivory carvers had been reported via interviews to be working out of four main workshops in 2001, a detailed census in early 2002 revealed there to be 32. Six workshops (four main workshops and two smaller ones), as reported in Martin and Stiles (2002), is still an accurate number. Between 40-45 kg of raw ivory was being worked on average per month in Mandalay in early 2002, but quantities processed in earlier periods could not be estimated reliably.

Trend: Business had been declining because of necessary retail price increases due to raw ivory price rises, but was still relatively good. The number of retail outlets and items for sale had not changed significantly. A major ivory retailer, who also dealt in antiques, was planning to stop selling ivory and shift completely to antiques, as he saw no long-term future in ivory.

Hanoi, Viet Nam

History: The selling of carved ivory started up in Hanoi in the 1920s in response to requests by French colonial administrators who wanted religious sculptures they had seen in stone and wood to be carved in ivory. Chinese mandarins also began ordering Chinese subjects made of ivory. The first carvers came from Nhi Khe, a traditional woodcarving village in Th'u'ong Tin District, and as demand grew ivory carving spread to other villages and workshops in Hanoi. Ivory is not a traditional material in Vietnamese art and culture and virtually all buyers today are foreign visitors: Chinese, Americans and French were mentioned as the main buyers. Chinese subjects prevail and painted or filigreed screens and astrological compasses are specialties. There is also the usual assortment of jewellery items, chopsticks, name seals, etc.

The legal position of the ivory trade: A prohibition on the trade in products derived from protected species, which includes elephants, is laid down in several decrees (1989, 1992 and 1996) and the *Environmental Protection Law* of 1993 (Martin and Stiles, 2002). According to informants, enforcement of those laws governing ivory carving and sale had increased.

Sources and prices of raw ivory: Raw Asian ivory had all but disappeared from the market, but even so the price for a 5-10 kg tusk had dropped from USD500/kg in 2001 to USD350/kg in 2003, reflecting lowered demand. The main source of elephant ivory was Angola, with cut blocks of ivory being brought to Hanoi by Vietnamese working in Angola and returning via Moscow. Vietnamese also brought mammoth ivory from Russia, possibly as a means to disguise any elephant ivory they were importing, since trade in mammoth ivory is legal. It sold for USD350/kg, a slight increase on the price for mammoth ivory in 2002, which sold for USD300/kg (Anon., 2002b). In early 2002 insignificant quantities of raw ivory were being processed each month.

Number of carvers and workshops: The main ivory workshop in Hanoi was temporarily closed owing to raw ivory scarcity and low demand for worked pieces, according to the owner. Most carvers live and work in the Th'u'ong Tin District, 20-30 km south of Hanoi, in small, walled villages which sell crafts. Only one workshop run by a father and his son was found to be carving a little ivory (small amulets) at the time of the 2002 study. All other carvers had shifted to wood and bone carving. Ivory middlemen in the Th'u'ong Tin District and Hanoi had small stocks of raw ivory and many unfinished and finished worked ivory pieces, but they had no buyers.

Trend: The number of retail shops selling ivory had dropped from 13 in 2001 to eight in 2002, and the number of pieces displayed in many shops had also decreased. Many shopowners said they were phasing out selling ivory. The number of active ivory carvers had dropped from about 20 to only two.

CONCLUSIONS

In the three largest ivory markets of South and South-east Asia - Thailand, Myanmar and Viet Nam - research into the ivory carving industry in 2002 and 2003 indicated that ivory processing was stable in Mandalay (approximately 500 kg a year), falling in Hanoi (about 10 kg a year, though much higher previously) and had collapsed in Phayuha Kiri (previously around 2400 kg annually), though small quantities (approximately 240 kg a year) were being processed elsewhere in Thailand.

Most of the carvers in Myanmar and Thailand, particularly the older ones, have a high regard for the elephant and did not want their work to be the cause of any elephant mortality. Many prayed at Buddhist shrines for the future well-being of elephants. Their support for

elephant conservation is out of religious conviction rather than any considerations for the conservation of biodiversity. Vietnamese carvers did not seem to be as concerned about the fate of the elephant, though at one temple near Nhi Khe elephants are painted on the outer wall and ceremonies for elephants are held annually.

None of the ivory carvers interviewed wanted to switch from ivory to other materials because ivory provided the greatest income. The study of ivory carving history showed that there are two distinct categories of products: those that require great skill and are accordingly more highly priced, and those of low- to mediocre-quality consisting of mostly ornamental or utilitarian items. Only a few 'master carvers' are capable of producing the top quality items, though assistants can help in roughing out the design before the master carver takes over the fine finishing with hand tools [appears to contradict caption on page 40 - maybe both are true?]. These items usually have some cultural significance to the people of the producer country and are considered works of art by foreign buyers. They consist mainly of religious or traditional subjects. Carvings of lesser quality, which make up the great majority of processed ivory, comprise functional items such as name seals and chopsticks or tourist curios consisting of jewellery, animals, elephant train tusks, animals and figurines carved in profile made from the outer bark of the tusk, ersatz religious or traditional motifs and knick-knacks. These are made by less skilled craftsmen, often using electric tools. The utilitarian and tourist items could just as well be made from ivory substitutes such as bone, bone powder mixed with resin, jade or even plastic.

In spite of the CITES ban on the international trade in ivory, there remains a hard core, base-level market for ivory. It seems that there will always be willing buyers of worked ivory and that this demand will motivate the acquisition of raw ivory by whatever means are necessary, legal or illegal. Therefore, a strategy to conserve elephants through ivory trade control should include a pragmatic component to lower ivory demand. Limiting supply through anti-poaching, anti-trade measures needs to be continued, but it should be recognized that this approach has its downside in that it requires considerable resources and is difficult to sustain at an effective level.

RECOMMENDATIONS

- Recognizing that an elephant ivory market will always exist, CITES Parties should devise strategies and policies that will permit a sustainable international trade of elephant ivory while concomitantly including economic disincentives to poach.
- The most cost-effective place to control the ivory trade is with the ivory carvers. Their co-operation can result in a significant reduction in the amount of ivory being processed. Governments and conservation organizations should develop co-operative working relationships with ivory carvers.

- Only ivory pieces that have cultural and artistic value and which are of high quality should be considered for legal ivory manufacture. This would reduce the demand for raw ivory while satisfying some of the consumer demand for worked ivory. The majority of raw ivory is used to produce items that have no cultural or artistic value. Such items - most jewellery, utilitarian pieces and tourist curios - could easily be made from other materials. Governments should therefore work with the ivory industry to eliminate the use of elephant ivory in the manufacture of such objects.
- Governments need to formulate and enact legislation and procedures to put into place registration of master carvers and their assistants and a system to monitor ivory manufacturing sites.
- Governments should, if they have not already done so, enact legislation to conform with the recommendations laid out in CITES Resolution Conf. 10.10 (Rev. CoP 12) for the control and management of domestic ivory markets. These recommendations to CITES Parties cover, principally, the marking of tusks and cut ivory pieces; the control of internal ivory trade; assistance to elephant range States through improved law enforcement; surveys and monitoring of wild populations; and, quotas for and trade in raw ivory.
- CITES Parties should co-operate fully with reporting illegal seizures to the Elephant Trade Information System (ETIS), a CITES-approved system managed by TRAFFIC which is used to compile law enforcement data on seizures of elephant specimens with the aim of recording and analysing levels and trends in illegal trade.

Given the weak enforcement of wildlife trade laws (Reeve, 2002; Oldfield, 2003), including the inadequate regulation of the domestic markets in key ivory manufacturing and consumer countries, and the incomplete implementation of programmes to monitor the illegal killing of elephants and the seizure of ivory, the time is not right to re-open the international trade in ivory. There should be no relaxation of the 1990 CITES ivory trade ban unless adequate measures are achieved to conform with the recommendations set out under CITES Resolution 10.10 (Rev. CoP12).



^ SOME IVORY ITEMS FOUND IN HANOI ARE OF HIGH QUALITY, SUCH AS THIS INTRICATELY WORKED TUSK. THE MAJORITY, HOWEVER, COMPRISE TOURIST CURIOS AND TRINKETS OF POOR QUALITY.

Photographs: D. Stiles

v BEFORE THE TOURISM BOOM STARTED IN THE 1970s, THAI IVORY CARVING WAS OF A HIGH STANDARD PATRONIZED BY THE ARISTOCRACY OR THE BUDDHIST CHURCH.



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