

The African and Asian ivory markets in Europe: a survey of five countries

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Abstract

Before the 1989 CITES ivory trade ban Europe was one of the main destinations for African raw ivory. Vendors in Africa and Asia reported in recent market surveys that Europeans were important buyers of worked ivory. This ivory market survey was carried out to ascertain the current status of ivory markets in five important European countries: Germany, the United Kingdom, France, Spain and Italy, in order of 2004 ivory market scale. The German and UK ivory markets were relatively significant, while those of France, Spain and Italy were small. Only Germany and France still have legal active ivory craftsmen and ivory stockpiles. Most of the ivory items found were legally imported before 1989, or were legal antiques. Some East Asian and African worked items are still imported illegally on a minor scale, but the demand for tusks, whether legal or illegal, is small. These five European countries seem to be complying well with CITES regulations in contrast to most African and Asian countries.

Résumé

Introduction

This report is the fourth in a series of surveys that depicts the status and trends of the elephant ivory markets in various regions of the world. Previous surveys covered Africa (Martin and Stiles 2000; Stiles and Martin 2001), South and South East Asia (Martin and Stiles 2002; Stiles and Martin 2002) and East Asia (Martin and Stiles 2003; Stiles and Martin 2003). This report deals with five countries in Europe: Germany, the UK, France, Spain and Italy, in relative

order of market scale (Martin and Stiles 2005). These countries were selected for the size of their economies, and thus their buying power, and on informants' reports in Africa and Asia of the principal European buyers of worked ivory in their regions. The surveys were carried out between April and November 2004.

In conjunction with the October 1989 transference of the African elephant to Appendix I at the 7th Meeting of the Conference of the Parties of CITES, the European Union (EU) prohibited the commercial

imports of raw and worked ivory. The EU allows the import of ivory antiques, defined as items manufactured prior to 1 June 1947, and raw and worked ivory can be exported from EU countries subject to the destination country issuing CITES certificates authorizing the import. The domestic trade in raw and worked ivory is legal, subject to strict EU and national regulations based primarily on European Council Regulation 338/97 and European Commission Regulation 1808/2001. Each EU member state has enacted national legislation or made decrees to enable implementation of these and other EU regulations concerning the import and export of elephant ivory.

These ivory market monitoring surveys are made so that CITES Parties and governmental and non-governmental wildlife conservation bodies can assess the scale of various national ivory markets, and thus their potential effect on elephant populations. In this initial round of surveys the data obtained are compared with any existing data to assess what changes have taken place from previous years, thus suggesting trends in the ivory markets. It is hoped that future surveys using the same methodology will enable standardized monitoring and assessment of country and regional ivory markets as called for by CITES Resolution Conf. 10.10 (Rev. CoP12). The assumption is made that elephant killing is correlated with the market demand for worked ivory.

The CITES policy related to elephants most in need of evaluation is that of permitting renewed and limited international sales of ivory to Japan from three southern African nations in 1999 (Botswana, Namibia and Zimbabwe) and from three more (Botswana, Namibia and South Africa) after the Monitoring of Illegal Killing of Elephants (MIKE) system becomes operational, and certain other criteria are met. The data presented in these reports will be instrumental in achieving this objective. Any changes in the trade indicators of key countries can be compared with elephant killing as signalled by MIKE, and with ivory seizures as recorded by the Elephant Trade Information System (ETIS), administered by TRAFFIC, to ascertain whether significant correlations occur.

Results

Table 1 presents a summary of the status of ivory markets in 2004, and table 2 shows past and present ivory trade indicators in the European places surveyed.

Raw ivory sources and prices

GERMANY

Between 1952 and 1974 the Federal Republic of Germany imported an average of 25 tonnes of raw ivory a year. The domestic consumption averaged 24 tonnes a year during this period (Parker 1979). During the mid-1970s the quantity of tusks imported expanded considerably to 53 tonnes a year, with almost 78% originating in Kenya (Parker 1979).

From 1979 to 1987 the quantity of tusks imported declined sharply, averaging 19.8 tonnes a year. The main countries providing these tusks were South Africa, Sudan, Namibia, Kenya and Zimbabwe. The decline in imports was due to reduced local ivory consumption and the flood of imported, cheaper worked ivory from Hong Kong. In the late 1980s a great deal of waste ivory imported from the UK and Belgium was used. The price in Germany was DEM 30 (USD 17) to DEM 180 (USD 100) per kilogram (Grimm et al. 1989).

After the ban on imported tusks in 1989 users had two main sources of supply: illegal imports and old stock. According to informants, the quantity of tusks smuggled into the country was quite small. There is no figure for the quantity of old stock of ivory. At the Erbach Ivory Museum a museum officer stated that the museum alone had a stock of 18–20 tonnes.

One ivory carver in Erbach said he paid in 2000 a little less than DEM 200 (USD 91)/kg for raw ivory from a wholesaler in Michelstadt. In 2004 he was offered good-quality tusks for 150 euros/kg. Another Erbach carver said that the price of tusks in 2004 varied from 75 to 200 euros per kilogram. Some Berlin markets had several small, uncarved tusks being offered for retail sale; in the Strasse des 17.Juni flea market a salesman had a 1.5 kg tusk for 150 euros/kg.

UNITED KINGDOM

From 1970 to 1977 (the last year for which UK Customs statistics recorded ivory as a separate commodity) an average 20.3 tonnes of tusks was imported each year. From 1975 to 1977 only 3.8 tonnes a year in the UK was consumed (Parker 1979). From 1980 to 1987 an annual average of 21.8 tonnes was imported according to UK CITES annual reports, but only 5.2 tonnes stayed in the country.

In 1985, a major ivory company in the UK said that most of their tusks were from Tanzania and a 15-

Table 1. Ivory trade indicators for Europe in 2004

Place	Wholesale price/kg for tusks (USD)		Workshops (no.)	Craftsmen (no.)	Retail outlets (no.)	Minimum no. of items
	1–5 kg	10–20 kg				
<i>GERMANY</i>						
Michelstadt	92	244	1	1	4	8639
Erbach	92	244	7–10	7–10	6	6170
Berlin	–	–	0	0	128	906
Frankfurt am Main	–	–	0	0	50	729
<i>UNITED KINGDOM</i>						
London	269	270	0	0	776	8325
<i>FRANCE</i>						
Paris	55–64	108–132	4	10	63	1123
Dieppe	96–120	–	2	3	3	133
Nice	–	–	0	0	4	39
Marseilles	–	–	0	0	1	8
Bayonne	–	–	0	0	0	0
Biarritz	–	–	0	0	0	0
Auvergne	–	–	?	30–35	?	?
Elsewhere	–	–	?	3	?	?
<i>SPAIN</i>						
Barcelona	–	–	0	0	24	381
Madrid	–	–	0	0	23	240
<i>ITALY</i>						
Milan	–	–	0	0	31	240
Rome	–	–	0	0	19	126
Florence	–	–	0	0	11	95
Total	–	–	14–17	54–62	1143	27154

– not applicable

Table 2. Past and present ivory trade indicators for Europe

Place	Year	Wholesale price/kg for tusks (USD)		Wholesale price/kg for tusks in 2004 using GDP Inflation Index (USD)		Craftsmen (no.)	Retail outlets (no.)	Minimum no. of items
		5–10 kg	15–20 kg	5–10 kg	15–20 kg			
Germany	2000	91	–	98	–	–	–	–
	2004	92	244	92	244	8–10	185 ^a	16444 ^a
UK	1980	65	–	131	–	–	–	–
	1985	70	100	108	154	–	–	–
	1986	98	135	147	203	–	–	–
	1988	190	260	270	370	–	–	–
	2004	269	270	269	270	0 ^b	776 ^b	8325 ^b
France	1974	–	–	–	–	102	–	–
	1989	118	–	162	–	–	–	–
	1991	96	110	122	140	–	–	–
Spain	2004	108	132	108	132	46–51 ^c	71 ^d	1303 ^d
Spain	2004	–	–	–	–	0	47 ^e	621 ^e
Italy	2004	–	–	–	–	0	61 ^f	461 ^f

– not applicable or no data; ^a Berlin, Erbach, Frankfurt am Main, Michelstadt; ^b London; ^c Auvergne, Bayonne, Biarritz, Dieppe, Marseilles, Nice, Paris; ^d Bayonne, Biarritz, Dieppe, Marseilles, Nice, Paris and elsewhere in France; ^e Barcelona, Madrid; ^f Florence, Milan, Rome

kg tusk sold for about USD 100/kg (T. Friedlein, pers. comm. 1985). The market became flooded with tusks from dubious sources such as Burundi, Somalia and the Democratic Republic of Congo (DRC). In 1988 just before the CITES ban, tender prices at Kruger National Park were very high. A 15-kg tusk sold for USD 227/kg and a 24-kg tusk for USD 280/kg.

After the 1989 ban on ivory imports, smuggling took place, but in smaller amounts than previous legal imports. No data on illicit raw ivory entering the UK are available for most of 1990 to 2004 because no investigations were made.

In April–May 2004 we found in London two single tusks and two pairs of tusks in four different shops or stalls. One single tusk weighing 1.2 kg was priced initially at GBP 200 (USD 360). After bargaining, the price came down to GBP 180 (USD 269). One pair weighed 20 kg. It had come from Africa but had been sold recently in the UK at the Portobello Road Antiques Market. The price was USD 270/kg. Five other small tusks and tusk tips were found for sale in London. People wanting to craft ivory would not necessarily have to buy their raw material from antique markets as some tusks are available privately, but no price data were found on this. It is probable that a little raw ivory was left at the factories producing ivory products, but neither is there any information on that.

FRANCE

Between 1966 and 1977 France imported about 317 tonnes of raw ivory. In the late 1960s and early 1970s the annual imports totalled 5 to 9 tonnes, but in 1972 the quantity jumped to 63 tonnes, reaching a peak in 1975 of 83 tonnes. By 1977 ivory imports were down to 16 tonnes (Parker 1979). The great increase in ivory imports from 1972 to 1975 is because France became a major transit point for the re-export of African raw ivory. Domestic ivory consumption of raw ivory in France ranged from approximately 3.5 to 7 tonnes a year during this period. Average prices jumped from

about USD 7–9/kg from 1966 to 1971 to USD 24–40/kg from 1972 to 1977 (Parker 1979).

The ivory imports to France reported by CITES from 1979 to 1988 show that the main suppliers of raw ivory were, in order of importance, Congo-Brazzaville, Gabon, Tanzania and the Central African Republic. Some 141 tonnes of tusks and raw ivory pieces were imported, an average of 14 tonnes a year. These should be considered as minimum figures, as it is doubtful that all imports were reported to CITES.

France kept in the country only about 8 to 10 tonnes of the raw ivory it imported between 1979 and 1987, indicating an annual consumption rate of about 1 tonne. Sources familiar with the ivory industry believe that this slightly underestimates consumption during this period and that additional sources of raw ivory originated from private stockpiles and privately owned tusks obtained from auction houses (Francis Migeon, ivory carver, and Marco Ciambelli, Director of the Confederation of Craftsmen and Users of Natural Resources (COMURNAT), Paris, pers. comm. 2004).

Table 3 shows representative prices from 1975 to 1989.

At the time of the CITES ban a considerable amount of raw ivory was in private hands. Due to the collapse of the ivory market following the ban, there is currently more raw ivory on offer than there is demand (Migeon, pers. comm. 2004). Ivory lots are offered for sale occasionally at auction houses such as Hôtel Drouot in Paris and Hôtel de Ventes du Palais in Marseilles. Ivory specialist suppliers are another source of tusks, or more commonly, of semi-worked pieces of a particular size needed by a craftsman for a commissioned item. One such supplier is based in Michelstadt in Germany and another, in France, is located near Paris (Jean Colette, Dieppe, pers. comm. 2004, and Marco Ciambelli, pers. comm. 2005).

The average price of raw ivory actually declined between 1991 and 2004 in inflation-adjusted USD prices, supporting a conclusion that the demand for

Table 3. Raw ivory wholesale prices in France, 1975–1989

Year	Price/kg 10 kg tusk (USD)	Price/kg in 2004 GDP Inflation Index	Price/kg 20 kg tusk (USD)	Price/kg in 2004 GDP Inflation Index
1975	38	111	60	175
1980	66	133	84	170
1989	72	99	96	131

Source: Ivory purchasing records of Francis Migeon, Paris, 2004
Exchange rate: 6.56 French francs = 1.2 US dollar or 1 euro

ivory in France is weak (table 2). In 2004 smaller 5–7-kg tusks sold for USD 55–64/kg and larger 40–50-kg tusks sold for USD 180/kg in Paris. An ivory craftsman in Dieppe said that he paid about USD 96–120/kg for small tusks or cut raw ivory pieces obtained from various sources.

According to Maume and Denhez (2000), France had an official stockpile of 50 tonnes of ivory (not specified if raw or worked) in 2000, but since the ivory held in private hands is not known with any certainty, this figure should be regarded with caution.

SPAIN

Between 1969 and 1977 Spain imported about 106 tonnes of raw ivory. Imports ranged from 2.5 to 4 tonnes a year from 1969 to 1973, rising to about 8 tonnes in 1974, then jumping to 19 tonnes in 1975 and 33 tonnes in 1977. Average annual prices ranged from USD 6 to 19 in 1969 to 1973, then they jumped to USD 28 to 32.50 in 1974 to 1977. The re-export figures show almost nothing but are considered unreliable (Parker 1979). Annual ivory consumption was probably closer to the early import figures during this period, perhaps averaging around 4 tonnes. Traders either hoarded the surplus ivory, or secretly re-exported it. There is no information available on post-1977 imports and exports of ivory in Spain.

No informant could be found who knew anything about raw ivory sources and prices, past or present. Since 1990 a wide number of countries in Africa were sources of origin of seized raw ivory imports, particularly the Spanish-speaking Equatorial Guinea. One assumes that other raw ivory objects would have been successfully smuggled in, but no vendors admitted to knowing anything about it.

The Nature Protection Service (SEPRONA), an arm of the Guardia Civil, seized almost 2.9 tonnes of undocumented ivory in Madrid in July 2004 (Anon. 2004), but this ivory was made up of small pieces of carving waste left over from legal pre-1990 manufacture. The rest of the ivory found at the location, about 500 kg, had been legally acquired and registered (Centre for Technical Assistance and Inspection of Foreign Trade, Madrid, pers. comm. 2004).

ITALY

Between 1970 and 1977 Italy imported approximately 55 tonnes of raw ivory. Re-exports were negligible,

totalling 0.7 tonnes, indicating that annual domestic consumption was about 6.5 tonnes (Parker 1979). Price varied tremendously, depending on source and ivory quality, but averaged USD 8–11/kg annually from 1970 to 1972, when it jumped to about USD 24–28/kg between 1973 and 1977 (Parker 1979).

Grimm et al. (1989) reported that in 1986 Italy imported 1914 kg of worked ivory and 521 kg of raw ivory, and in 1987 the figures were 988 kg of worked and 354 kg of raw. Most of the imported raw ivory intended for commercial use went to ivory workshops in the areas around Naples, Genoa and Florence. If these figures are a true reflection of the demand for ivory in Italy, it seems that demand was quite low, with an average of about 400 kg being worked a year in Italy in the late 1980s. In 1988, nearly all legally imported ivory was by people bringing in one or two tusks for personal use (Grimm et al. 1989).

The valuation of new ivory used by Customs to calculate duty from 1986 to 1988 was ITL 300,000 per kg, or about USD 180–230, depending on the exchange rate for the lira during this period. The type of ivory is not specified (Grimm et al. 1989).

No information is available on sources and prices of raw ivory in Italy after the CITES ivory trade ban. No informant could be found who knew anything about current imports of raw ivory, if there are any. The fact that ETIS and the United Nations Environment Programme–Wildlife Conservation Monitoring Centre (UNEP–WCMC) CITES database have received no reports of ivory seizures from the Italian government since 1998 precludes acquiring information from these sources. No evidence of ivory working could be found in Italy during this survey.

Ivory workshops

GERMANY

Before the CITES ivory ban there were ivory crafting centres in Erbach, Michelstadt, Altötting and Bad König, and individual carvers worked elsewhere. Today, ivory carving is carried out only in Erbach and Michelstadt, both of which have long histories of the craft. The number of elephant ivory craftsmen in Germany has declined by more than 65% since the ivory ban, and total only 8 to 10 today. One works in Michelstadt and the rest are in Erbach, with 5 working in private workshops and 4 working for the government-owned German Ivory Museum. There are also several carvers who work only mammoth ivory.



Esmond Martin

The ivory jewellery in this Erbach shop is well carved, but discounts are offered because there are not many interested clients except during Christmas and summer holidays.

The elephant ivory carvers use a minimum of 300 kg a year.

A school for ivory carving was started in 1892 in Erbach. In 1960 the school moved to Michelstadt. After the ivory ban the number of students declined, but then rose slightly in 1992, averaging 23–24 a year since then. In 1990 the director could not get a licence to carve ivory so the school switched to mammoth. The students now carve only mammoth ivory and wood. People, however, bring ivory objects to the school for repairs (Helmut Jäger, director of the School for Wood and Ivory Handicraft, pers. comm. 2004). In 2004 there were 25 students: 5 males and 9 females learning how to carve mammoth tusks, and 11 students working on wood. To become a master requires five years at the school. In 2004 three people obtained this status.

Most previous students have failed to continue as mammoth ivory carvers, although the school does try to help them succeed as they see no future in it as an occupation, or as there is little market (Jäger, pers. comm. 2004). Some continue to work as art restorers or specialists in the dental prosthesis industry.

UNITED KINGDOM

In the 19th century ivory centres in Birmingham, London and Sheffield produced substantial quanti-

ties of brushes, cutlery, human figurines, jewellery, piano keys and walking-stick handles. There was a large decline in ivory manufacturing during the Depression and World War II, but factories in Sheffield continued to use ivory for cutlery handles, while factories in the London area maintained production of ivory brushes and, especially, ivory piano keys (Maugham 1931).

By the mid-1980s only two companies, in Cornwall and Yorkshire, were producing ivory keyboards. The company in Cornwall used 2000–2200 kg of tusks a year. It made each year 1200–1500 keyboards plus a few other items, such as musical instrument parts. The Yorkshire company used about 600 kg of

tusks a year from which it made 400–500 keyboards. Almost all the two companies' ivory keyboards were exported, especially to Germany (Friedlein, pers. comm. 1987; Luxmoore et al. 1989).

At least five Scottish firms used to make ferrules, mounts and mouthpieces for bagpipes from ivory. By the mid-1980s, the demand for both ivory piano keys and ivory bagpipe parts was in decline. Since 1990 the main firms formerly making piano keys and bagpipe parts have stopped using ivory. Thus ivory manufacturing has been greatly reduced compared with the 1980s.

Only illegal ivory carving takes place today. For example, the International Fund for Animal Welfare (IFAW) surveyed the ivory trade in the UK in late 2003 and early 2004 and documented several incidents of post-1990 use of raw ivory in their report (IFAW 2004). According to IFAW researchers, in 1996 the owner of a walking-stick shop was found to have bought two tusks for GBP 2000 (USD 3380) from a 'man in the street'. In another incident a year later, in a small industrial unit in Clerkenwell in London, police seized several tusks and an auctioneer's ivory gavel this workshop had recently crafted. The gavel was made to look old in order to sell it more easily from an outlet on Portobello Road (IFAW 2004).

Ivory is still also used in restoration work, using pieces remaining from before 1990.

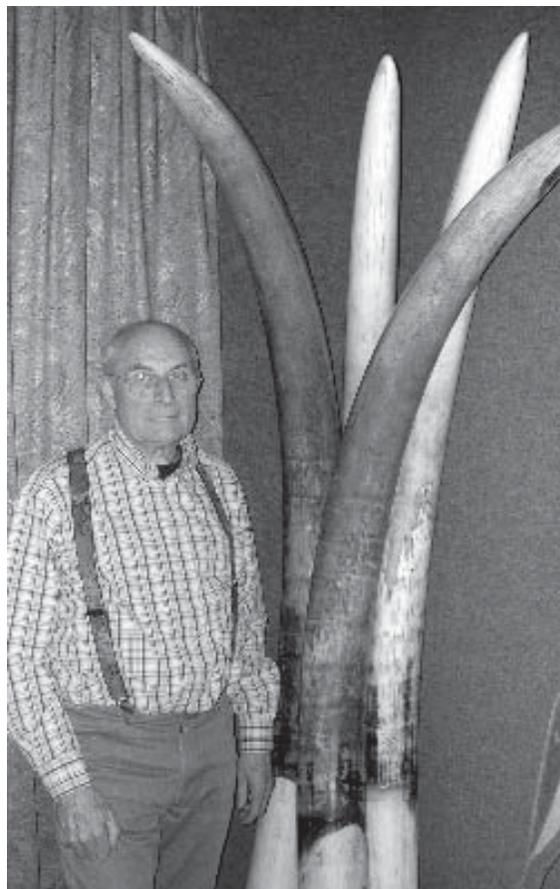
FRANCE

In 1974 a census of ivory craftsmen in France counted 45 active in Paris and the immediate surroundings, 30 in Auvergne, 7 in the Jura and 3 in Dieppe. Ivory companies in Paris and the Jura employed an additional 122 workers. There were also about 25 miniaturists and hundreds of art and furniture restorers scattered around France. The total quantity of raw ivory consumed was unknown, but each sculptor used on average 35–50 kg of ivory a year from 1960 to 1989. The restorers used less than a kg a year each.

In 1990, just after the CITES trade ban, there were 10 to 12 full-time and 10 to 12 part-time ivory craftsmen active in France. After the ban, the ivory jewellery factory in the Jura closed its doors due to the drop in sales and negative publicity associated with ivory, as did other ivory factories that manufactured billiard balls, buttons, piano keys, and other utilitarian items.

Today there are only four full-time sculptors left in Paris, three in Dieppe, one in the Hérault department, and 30–35 knife makers spread throughout France, who use ivory occasionally for handles. There are 10 to 12 part-time ivory craftsmen (sculptors, turners, inlayers and restorers) in France, some of whom also carve wood.

The number of professional ivory craftsmen in France has dropped from 102 in 1974 to approximately 48 in 2004, and salaried staff has declined from



Daniel Stiles

Francis Migeon stands with 40-kg plus tusks, a part of his personal stockpile.



Daniel Stiles

Francis Migeon is a fourth generation French ivory Maitre d'Art.

over 126 in 1974 to probably none in 2004.

Carvers in Paris craft a wide variety of objects: human figurines, small animals, bangles, polychrome eggs made from carving waste and abstract pieces made from odd bits of tusks. In Dieppe, carvers work entirely on commission, usually making *polletais* (rustic 19th century human figurines), religious figurines, animal figurines, busts, dice, jewellery and other objects. Each of these craftsmen uses 5–15 kg of raw ivory annually.

The consumption of raw ivory in France has declined from sev-

eral tonnes a year in the 1970s to roughly 350–400 kg in 2004 (Migeon, pers. comm. 2005).

SPAIN

There are no published reports about ivory carving in Spain from 1960 onwards. All informants, including ivory vendors and the WWF/Adena office in Madrid, claimed to know nothing about past or present ivory craftsmen. The general view was that there are none currently active in Spain (SEPRONA, pers. comm. 2004). The number of ivory product seizures since 1992 suggests that there may be ivory craftsmen active, but they understandably keep a very low profile. Over the 11 years from 1992 to 2003, 110 tusks, 80 raw ivory pieces and an additional 51 kg of raw ivory pieces were seized (John Caldwell, UNEP–WCMC, Cambridge, UK, pers. comm. 2004).

ITALY

Before 1990 there were a few ivory carvers located in the areas around Naples, Genoa and Florence, using on average about 400 kg a year in the late 1980s. No ivory workshops were found in the three cities surveyed in 2004. Vendors and tourist information offices knew of no ivory carving currently active. Grimm et al. (1989) noted that even as long ago as 1988 the cost of labour of ivory carving was too high to sustain the craft and that craftsmen were becoming importers and wholesalers of worked ivory. Since the ivory import-export business is no longer legal, except for ivory antiques, these people have presumably taken up other occupations.

Retail outlets and prices for worked ivory

GERMANY

The places surveyed in Germany in September 2004 had 188 outlets selling a minimum of 16,444 ivory items. Michelstadt had the largest number of items—8639, mostly jewellery, in just four shops, almost all having been made after 1970. Erbach followed

with 6170 ivory items, mostly made after 1989. But Berlin had few new ivory items—only 41 of 906. These were small items made in Africa and Asia, many of which had been recently smuggled into Germany. The other 865 items were mainly German and Asian antiques. Items in Frankfurt am Main's 50 retail outlets were 98% antiques, 63% of which was jewellery and 15% miniature paintings on ivory sheets. As in Berlin, most of the new ivory items in Frankfurt am Main were seen in flea markets.

UNITED KINGDOM

In April–May 2004, 776 shops and stalls in London were displaying for sale at least 8325 ivory items. Antique markets had the largest number of ivory items—7047 or 85% of the total. The market that had the most was the Portobello Road Antiques Market with 2973 items. The antique shops had the most expensive items; a howdah made almost entirely from ivory was priced at USD 531,000.

About 98% of the ivory items seen in London were antiques. The newly made Chinese and South-East Asian objects were pots with ivory lids, netsukes, necklaces and bangles; probably all had been smuggled into the UK. They were in Bermondsey and Portobello Road markets.

The most common ivory items seen for sale in London were jewellery (22%), human figurines (12%), netsukes (10%) and walking sticks with ivory handles



Esmond Martin

The shops and stalls on Portobello Road in London have the greatest variety and number of ivory items offered for sale in the UK.



Esmond Martin

Old magnifying glasses with ivory handles displayed at a street stall on Portbello Road are among the most popular ivory items bought by tourists.

(8%). Of these items, 46% had been made in the UK, 27% in Japan, 15% in China and 12% elsewhere.

FRANCE

In the six cities and towns surveyed in France, 71 outlets were found selling 1303 worked ivory items. The vast majority of these were in Paris (89%). Ivory items were found in exclusive boutiques specializing in antique art, shops that carried mainly East Asian objects carved not more than 20 or 30 years ago, second-hand shops, and gift or handicraft shops. Ivory is moderately concentrated in specific areas in Paris: the St Ouen flea market (21 outlets, 348 items), the Louvre des Antiquaires antiques building (18 outlets, 488 items), the Village Suisse shopping centre (11 outlets, 199 items), the Village St Paul handicrafts area (6 outlets, 37 items) and St Germain des Prés (3 outlets, 32 items). The exclusive Carré Rive Gauche art and antiques quarter had at least 3 outlets with 15

expensive antique ivories displayed in windows, but certainly others were kept behind the locked street doors. One Chinese-owned shop was selling over 1000 mammoth ivory items.

The seaside town of Dieppe in Normandy has undergone a great deterioration of its booming ivory industry, which began in the 14th century and peaked in the 19th century. Today there are only 3 outlets selling 133 ivory items. The main outlet was a carver's showroom, and the other 2 were second-hand shops selling just a few miscellaneous worked ivory pieces.

The Riviera city of Nice had 4 shops selling 39 real ivory items, but one outlet specializing in East Asian ivory was selling a number of fake ivory items made from resin. Nearby, the city of Marseilles had only one shop with 8 ivory items.

No ivory was sold in the south-eastern Atlantic coast tourist towns of Bayonne and Biarritz.

The most common type of ivory item seen by far was the human figurine, followed by the imported netsuke and then jewellery items. Utensil handles, cane- and walking-stick handles, animal figurines, boxes and paperknives were also seen in some numbers. Over 50% of the worked ivory seen in France was imported from China and Japan, and only 41 items (3%) were from Africa.

Many vendors were asked the age of the ivory items. They all replied either that the item was an antique, or that it had been imported before 1976, or that it had been manufactured from legal raw ivory. One would have to see the EC Regulation 338/97 certificate for those pieces said to have been imported before 1976, but for antiques no official documentation is required, just evidence of the age. It is therefore possible to sell worked ivory imported illegally since 1989, or manufactured from raw ivory smuggled into France after that date and present it as an antique. Some of the items from Asia in particular could have been recent illegal imports.

The most expensive item seen was a 1.1-m-tall Japanese painted geisha in the Louvre des Antiquaires priced at 250,000 euros (USD 300,000). The least expensive item seen was a plain ring at USD 59.

SPAIN

In Madrid and Barcelona, 47 outlets selling 621 ivory items were found. A quick survey was also made in San Sebastian on the northern Basque coast. San Sebastian attracts thousands of visitors each year and



Daniel Stiles

This Indian temple was for sale in a Madrid antique shop.

the city has many gift and souvenir shops, but of 26 visited, none contained ivory.

Barcelona surprisingly had more ivory for sale than Madrid, with 24 outlets displaying 381 items, while Madrid had 23 outlets selling 240 pieces.

Almost all of Barcelona's ivory was found in the Boulevard des Antiquaris, a multistoreyed antiques market containing over 40 shops; 19 of these carried 362 ivory items. Five ivory items were seen in 4 stalls at the Ronda Litoral quayside market. One stall was selling a number of East Asian bone, resin and mammoth ivory items as elephant ivory. Only one other antiques boutique in the Eixample area was found selling ivory, mainly Japanese items.

In Madrid, ivory was found scattered in various parts of the city. Eleven outlets were found with 128 items in 3 antique galleries on Ribera de Curtidores Street, where the Sunday El Rastro market is held. A single shop selling 3 ivory items was also found on this street. The Puerta de Toledo shopping centre had 3 shops selling 13 ivory items. Four shops displaying 50 ivory pieces were visited in the Salamanca quarter, and a further 4 outlets were found with 46 items in the touristy Gran Via-Plaza Mayor area of central Madrid.

Most of the items seen were human figurines; next were netsukes and jewellery was a distant third. Second-hand utilitarian items such as ivory pens, paint spatulas, knitting hooks and utensil handles were also fairly numerous. About 40% of the items were from East Asia and only 8 (1%) were African.

In reply to the question of the age of ivory items, all vendors asked responded that the ivory they were selling was imported before 1989.

The most expensive item for which the price was obtained was a 1.1-m Japanese carved and painted tusk priced at USD 59,998 in a shop in the Boulevard des Antiquaris. The least expensive items found were paperknives at USD 100 and 107.

ITALY

In the four cities visited, 61 outlets were found displaying 461 worked ivory items for sale. These fig-



Daniel Stiles

East Asian ivories were for sale in Milan's Central Railway Station.

ures are somewhat misleading, however, as they include ivory seen for sale at the 19th Milan International Antiquarian Exposition, at which antique galleries from other European countries exhibited. If this exposition is excluded, 42 ivory outlets were found with 305 ivory items. In any case, commercial ivory is quite rare in Italy.

A total of 31 outlets selling 240 ivory items was found in Milan, if the International Antiquarian Exposition is included. Of the non-exposition outlets, only 12 were found selling 84 ivory items. The three antique markets contained 29 of the outlets and displayed 217 ivory objects. The Lido Antique Fair had 10 stalls with 60 ivory pieces, and Porta Ticinese, the big weekend market, had only one ivory item. A shop in the Central Railway Station carried 21 ivory items, mainly large pieces from East Asia, and one other gift shop was found selling 2 netsukes. The shop also carried several Japanese resin items mislabelled as ivory.

A total of 19 outlets selling 126 ivory items was found in Rome. All but one of these outlets consisted of antique or gift shops located in the central tourist area around the Spanish Steps and the Pantheon.

A total of 11 shops selling 95 ivory items was seen in Florence. The outlets were found on the Via dei Fossi, the Ponte Vecchio and across from the Pitti Palace.

No ivory was found in a brief survey of Naples.

Human figurines were the most common type of item, followed by netsukes and utensil handles, then walking-stick pommels. At least 23% of the items were East Asian and almost none (3 items) was seen from Africa.

As elsewhere, vendors when asked said that their ivory was pre-1989 in age.

Table 4 compares retail prices of selected items in the five countries.

Discussion

Law-enforcement efforts in Europe

Compared with Africa and most of Asia, western Europe's enforcement of regulations related to ivory is extremely effective. The UK probably has the weakest record, but recent publicity criticizing British authorities' efforts to control illegal ivory trading has

Table 4. Retail asking prices for ivory items in USD in Europe in 2004

Item	Germany	UK	France	Spain	Italy
<i>Animal figurine</i>					
2–4 cm	61–116	22–1665	–	–	192–300
5–10 cm	177–371	100–468	830–1199	5994	480–960
<i>Bangle</i>					
1 cm	22–305	18–167	89–142	137	107–210
2–4 cm	116–488	36–360	192–360	505	480
<i>Brooch</i>					
4–6 cm	35–1366	63–216	264–480	240–490	159–360
<i>Necklace</i>					
Small beads	24–98	27–90	195–227	–	144–480
Large beads	116–354	180–216	360–650	600	360–1320
<i>Pendant</i>	5–104	81–2430	539	–	–
<i>Human figurine</i>					
5 cm	69–439	32–900	384–600	360–2400	264–600
11–20 cm	98–5760	594–6300	2659–6853	302–17760	600–2100
<i>Netsuke</i>					
4–6 cm	732	315–14,400	300–598	462–539	240–600
<i>Tusk, carved</i>					
10–20 cm	–	54	200–450	–	–
21–30 cm	366–1208	216–1260	840–875	–	–
<i>Cigarette holder</i>					
10 cm	–	–	107–119	150–175	120–384
<i>Paperknife</i>					
10–20 cm	49–482	50–477	216–240	100–143	144–1140

— not applicable or no data

spurred the Department for Environment, Food and Rural Affairs (DEFRA) and the Customs Department to be more vigilant (IFAW 2004; Pendry 2005). The IFAW (2004) report was not entirely accurate. While it is true that most of the worked ivory sold in London is undocumented, our survey found that the great majority (~98%) of the items seen were manufactured before the 1989 EU international ivory trade ban, and thus should be legal if they were also imported before 1989. Those items acquired before 1 June 1947 do not require government documents for commercial sale, but they do need proof of age. This EU loophole certainly opens the door to potential abuse. It is not true, as reported by IFAW that 'once inside the European Union (EU) single market, ivory can move freely'. To move for commercial purposes between countries in the EU, ivory items carved after 1 June 1947 require an exemption under Article 8.3 of European Council Regulation 338/97 and a sale certificate under Article 20.3 of European Commission Regulation 1808/2001. Nonetheless, IFAW was quite correct in pointing out that it is easy to obtain an assessment for certification purposes that an ivory item is an antique.

Asian objects are another potential source of illegal worked ivory imports and sales. Many East Asian so-called antique objects were seen in France, Italy and Spain that looked fresh, and the prices did not correspond with those for true antiques. In France, Asian items, old and new, made up over 50% of the total number seen, in Spain over 40% were Asian, and in Italy over 20%. It is known that China smuggles out worked ivory to European destinations (Martin and Stiles 2003), thus it is likely that a certain proportion of the East Asian items seen in Europe is being sold illegally. Internet sales facilitate the marketing of this illegal ivory.

Germany had the strictest ivory trade control, followed by France, Spain, Italy and the UK, in that order. Since Spaniards and Italians were often named as buyers of ivory in Africa and Asia, it was surprising how little ivory was seen for sale in these countries. This could be due, at least in part, to good law enforcement.

The sources and movement of tusks in Europe

Tusks and raw ivory pieces are occasionally smuggled into Europe, as Customs and press reports attest

(Newman et al. 2004), but the number of incidents and quantities are not significant. Given the dearth of active ivory craftsmen and the weakness of the ivory markets in Europe, it is surprising that any raw ivory is smuggled in. The auction prices for tusks at the Hôtel Drouot in Paris, for example, are so low that smuggling in tusks from Africa would not seem economic. There does not seem to be any noteworthy demand for tusks in the UK, Spain and Italy, though Belgian Customs reported a seizure of 10 tusks from the DRC bound for Barcelona in June 2004 (Newman et al. 2004). The highly publicized seizure of almost 3 tonnes of raw and worked ivory in Madrid in 2004 turned out to be mostly pre-1990 manufacturing waste. None of it was imported after the CITES ban (SEPRONA and Centre for Technical Assistance and Inspection of Foreign Trade, Madrid, pers. comm. 2004).

The active ivory craftsmen observed in Germany and France all have their own registered, legal stocks of raw ivory and do not need to import raw ivory from outside the EU.

Movement of worked ivory in Europe

The most common type of movement of worked ivory within Europe is of ivory antiques being put on display at international trade fairs. Ivory antiques also move between countries from dealers to dealers and to private buyers. There are associations of antique dealers, and there are Web sites that facilitate the trade in antique ivory works. The Humane Society of the United States (2002) and IFAW (2004) have both signalled the importance of western European countries as a source of worked ivory for the USA, purportedly all antiques.

There does not seem to be significant movement of recently carved ivory objects within Europe. Most of the buyers of ivory worked in Germany are Germans, and recent ivory worked in Paris and Dieppe is bought mainly by the French. Americans are the second most numerous buyers of worked ivory in these countries. German and French craftsmen do not export their ivories, nor do they sell on the Internet.

It is illegal to import post-1989 worked ivory into Europe, but some East Asian items are probably smuggled in as antiques or as mammoth ivory. There were extremely few African ivory items seen for sale, thus most of the ivory objects seen or heard about in Africa destined for Europe (Martin and Stiles 2000) must have been for private buyers, not for resale.

The UK is by far the main European exporter of legal worked ivory to the USA, and it is the principal European importer of legal ivory from the USA. All of the items in these shipments were presumably antiques. Small numbers of trophy tusks also move legally between Europe and the USA (Williamson 2004).

Effects of the CITES 1999 auctions and views on the reopening of trade

Vendors and craftsmen asked did not think that the 1999 sales of ivory from southern Africa to Japan had any effect on ivory demand in Europe. Most Europeans are aware of the CITES ivory trade ban and of the connection between ivory sales and elephant poaching. This awareness has lowered demand for ivory in Europe and keeps the amount of ivory being worked and sold at low levels.

Ivory vendors and craftsmen in France were in favour of the future ivory sales from Botswana, Namibia and South Africa to another country or countries, and thought that controlled reopening of international trade in ivory would reduce the need for elephant poaching by making available legal ivory. They also thought that reopening trade would be good for the future of their business by reducing the stigma associated with buying ivory. Ivory working in France is considered as being part of the *patrimoine*, or cultural heritage, and the government and crafts associations want to see the art perpetuated. Most vendors in Spain and Italy were non-committal on renewed international ivory sales, though two thought that the ban should remain to save the elephants, and three wanted to see the ban lifted. German and UK vendors had little to say on the subject as they did not think it had any effect on a business that was steadily declining.

Conclusions

The ivory markets of the five countries surveyed pose no imminent threat to elephant populations. Essentially all of the ivory processed in Germany and France today originates from legal, registered stockpiles, and any illegal ivory working that may occur in the UK, Spain and Italy would use trivial amounts. Consumer demand for ivory has dropped significantly from 1989, which has reduced ivory consumption from 30–40 tonnes a year in the five countries during the 1970s

and 1980s to less than one tonne annually in the early 2000s. Reduced ivory demand and restricted supply have resulted in the drop of ivory craftsmen and employed staff from the hundreds in the 1980s to about 60 in 2004.

There is probably a small illicit trade in imported East Asian carved ivory items, but quantities of worked ivory for sale from Africa and South and South-East Asia are insignificant.

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