

# Ivory Markets of Europe

Esmond Martin and Daniel Stiles



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**Save the Elephants**  
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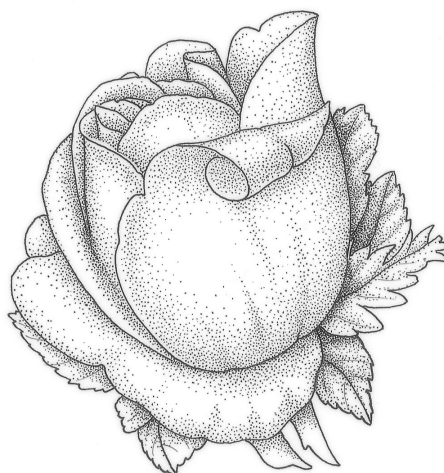


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A survey in France, Germany, Italy, Spain and the UK

Esmond Martin and Daniel Stiles

Drawings by Andrew Kamiti



An Erbach ivory rose

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# EXECUTIVE SUMMARY

The European Union (EU) in 1989 and the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 1990 prohibited 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.

This monograph reports on a survey of the ivory trade in five European countries chosen for their assumed large ivory markets: Germany, United Kingdom, France, Spain and Italy. The purpose of the survey was to establish a set of baseline indicators in the selected countries, such as the prices of raw tusks, numbers of ivory craftsmen and workshops, numbers of shops selling ivory items, and the retail prices of ivory items. The age of ivory items and the nationalities of the customers were also looked into to add qualitative information. Using these data, conservationists will be able to monitor and evaluate future changes in the ivory trade. The target users of this report are national government officers, non-government organizations (NGOs) involved in wildlife conservation, CITES officials, the media, and researchers. The information in this monograph assesses the effectiveness of policies, laws, and enforcement activities related to ivory trading, both nationally and internationally.

The investigators, Martin and Stiles, carried out fieldwork in Europe in April, May, September and November 2004. This survey was sponsored by Save the Elephants and Care for the Wild International. The principal findings were:

- Over 27,000 ivory items were seen for retail sale in 1,143 shops in 14 cities and towns. Germany and the UK had the largest numbers of ivory items, with 16,444 and 8,325 respectively, followed by France with 1,303, Spain with 621 and Italy with 461.
- The retail ivory markets of Germany and the UK were larger in scale than expected, and exceeded those found in countries such as China, Japan, Cameroon and Nigeria, all of which are viewed as active ivory market countries. In addition, the UK alone had more outlets selling ivory than any of the entire regions previously surveyed by the investigators (Africa, South and South East Asia, East Asia), and the number of outlets in Germany was second only to Thailand.
- The average number of worked ivory items per town/city in Europe was approximately one-third the number of those seen in Africa and Asia.
- The great majority of worked ivory seen for sale in Europe was either manufactured prior to 1989 or was made more recently from raw ivory imported prior to 1989, making it in principle legal, though much of the worked ivory lacks proper documentation.
- Small amounts of raw and worked ivory are smuggled from Africa into Europe, and it is probable that some of the fairly abundant East Asian worked ivory seen is also imported illegally.
- Official seizures of ivory have decreased sharply from the early 1990s for France and the UK, but they have remained stable in Germany and Spain. Data for Italy are lacking.
- There are few controls on the sale of worked ivory. Ivory items are commonly sold as antiques or as legal, recently-made pieces with only occasional verification by the authorities.
- Germany and France were the only countries with raw ivory stockpiles. These are held mainly by craftsmen and museums, and the ivory is registered with the governments. Additional unregistered ivory is held by individuals as a legacy of the colonial period. The total raw ivory stockpile is not known for either country.
- Raw tusks sold wholesale in Germany and France for USD 92/kg and USD 108/kg respectively for 5-10 kg tusks, and for USD 244/kg and USD 132/kg respectively for 15-20 kg tusks. These prices are lower than for comparable tusks in most of Asia.
- In France, the only country with past and present wholesale price data, the price of tusks decreased significantly from 1989 to 2004, strongly suggesting that demand for tusks declined over this time. In the UK, the 1988 wholesale price for 5-10 kg tusks was in inflation-adjusted terms the same as the retail price in 2004, also suggesting a decline in value of wholesale raw ivory, thus a drop in demand.
- France and Germany were the only countries with active ivory craftsmen. France had 46 to 51 artisans (not counting antique restorers) using ivory, and Germany had 8 to 10 ivory carvers.
- In France the number of ivory craftsmen more than halved from 1974 to 2004, while the number in Germany decreased by over three-quarters from 1981 to 2004. Italy had a small number of ivory

craftsmen prior to 1989, but there are none nowadays. The UK and Spain have no legal ivory craftsmen working today.

- Germany consumes more than 300 kg and France 350-400 kg of raw ivory a year. The UK, Spain and Italy use virtually no raw ivory. This signals a vast decline from the several tonnes a year used in the 1970s and 1980s.
- In France most ivory is used to make figurines, knife handles and jewellery; in Germany, figurines and jewellery predominate.
- Presently, controls on the domestic ivory carving business, especially on stocks of tusks, satisfy CITES' requirements in Germany and France.
- The main buyers of retail ivory items in the countries surveyed were nationals of those countries, except in the UK where Americans were the most numerous and Britons were second. The second most numerous customers in each country, other than the UK, were Americans. East Asians also purchased worked ivory in Europe in small quantities.
- The main elephant ivory substitute in shops in Germany and France was mammoth ivory, which was mostly imported from Russia. The carvers in Germany were the only craftsmen to work mammoth ivory, and paid middlemen USD 122-427/kg for it. In France, worked mammoth ivory was imported from China. Mammoth ivory items were rare or absent in the UK, Spain and Italy. In the European Latin countries semi-precious stones, plastic, resins and plaster were common ivory substitutes.
- Vendors in Europe did not believe that the 1999 CITES ivory auctions in southern Africa for Japanese buyers had any influence on ivory market activity. Nor did they believe that the CITES approval in 2002 for a future such sale would have any market effect.
- The ivory artisans and sellers in Germany believed that the demand for new ivory items will continue to decline and that there is no long-term future for ivory carving. Those in France thought that the craft could continue into the foreseeable future at a low scale, and they were actively promoting it. Vendors in the UK, Spain and Italy thought that the antique ivory market would continue, but that there was no future for new ivory.
- European ivory dealers believed that the bans in their countries of imports of raw ivory would not be lifted in the near future.



# INTRODUCTION

This report is the fourth in a series of surveys that depict the status and trends of the elephant ivory markets in a particular region of the world. Previous surveys covered Africa (Martin and Stiles 2000), South and South East Asia (Martin and Stiles 2002) and East Asia (Martin and Stiles 2003). This report deals with five countries in Europe: Germany, the UK, France, Spain and Italy, in relative order of market scale. These countries were selected on the basis of the size of their economies, and thus 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, and the work was sponsored by Save the Elephants and Care for the Wild International.

By a vote of 76 to 11, the Seventh Meeting of the Conference of the Parties (CoP) to CITES held in October 1989 transferred the African elephant to Appendix I. This meant that all international commercial trade in elephant products for CITES Parties was banned from 18 January 1990, except for a few temporary exemptions (TRAFFIC 1990). The Asian elephant had already been listed there since 1975. The addition of the African elephant meant that, with a few exceptions, no elephant ivory could be traded legally by CITES members from January 1990. The EU in 1989 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 related EU regulations concerning the import and export of elephant ivory. Details are presented in the country chapters.

The purpose of these ivory market monitoring surveys is 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 impact on elephant populations. In this initial round of surveys the data obtained are compared to 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 utilizing the same methodology will enable the 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. An increase in ivory sales will indicate a corresponding rise in elephant deaths to supply the ivory needed to satisfy demand, though releases of stored raw and worked ivory stockpiles must be taken into consideration. This factor has proved to be particularly important in Europe.

The object of the surveys is to establish a set of baseline indicators of the ivory trade, so that future monitoring and assessment of the effectiveness of policies, laws and enforcement activities related to the internal and international trade in ivory can be carried out. 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 (Reeve et al. 2003; Sakamoto 2004). 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.



European ivory cups, c. 1530



# METHODOLOGY

The word ivory in this report is always elephant ivory unless specified otherwise. 'New or recently-made ivory items' refers to items manufactured after the EU ivory trade ban, which came into effect in 1989. This ban was followed by the CITES 1990 ban. 'Old worked ivory' are items manufactured before 1989. Even 'old' ivory in the EU, however, is illegal if it were imported after 1989 without proper documentation. Martin carried out survey work in the UK and Germany. He visited London in April-May 2004 and then Erbach, Michelstadt, Frankfurt am Main and Berlin in September 2004. Martin was assisted in Germany by David Malecki who visited Altötting in October 2004 and helped with translations and gathering data in other parts of Germany. Stiles worked in France, Spain and then Italy. He surveyed Paris, Bayonne, Biarritz, Marseille and Nice in April-May 2004, with a follow-up visit for a week in early November 2004 to Paris and Dieppe. Stiles surveyed Madrid and Barcelona followed by Milan, Florence and Rome in May 2004. These cities and towns were selected either because they were thought to be places where ivory would be sold (such as business and/or tourist centres), or because they were known ivory working centres.

The investigators collected data on the same indicators as in previous surveys: the prices of tusks and of raw ivory pieces, the numbers of ivory workshops and craftsmen, the numbers of retail outlets selling ivory items, the numbers of ivory objects seen for retail sale, and their prices. Ivory not displayed openly was not counted, unless the vendor brought it out to show. Details of the methodology used in collecting and analysing price data can be found in Martin and Stiles (2003).

The country chapters are presented in the order based on ivory market scale, with Germany being the largest and Italy the smallest. The towns and cities described are also presented in order of importance for ivory.

In each town and city the investigators visited all the major flea markets, antique markets, main shopping streets for antiques and crafts, department stores and luxury hotel gift shops. This report describes the ivory for sale in first the markets and then the shops in order of ivory items counted. Items are normally listed in alphabetical order if no order of importance is being given. Ivory vendors were asked from where and when they obtained their ivory and if they knew of any current ivory manufacture in their country.

This is the first systematic, quantitative study of European ivory markets, thus there were few data available with which to assess trends.



European ivory casket panels, Middle Ages

# RESULTS

## GERMANY



### The legal position of the ivory trade in Germany

CITES entered into effect in the Federal Republic of Germany on 20 June 1976. When the CITES ivory ban came into effect in 1990 the German government decided, with legal support from the Bundesnaturschutzgesetz (Federal Nature Conservation Act) of 1987, to give the retail outlets (except for small shops and small traders) three years from 1990 to dispose of their legal supplies of ivory items. Thus from 1994 there was an internal trade ban on ivory goods in the larger shops in Germany. This domestic trade ban continued until 1997 when new legislation by the European Union (Article 8 of Council Regulation 338/1997) countermanded the German law. This new EU legislation allowed internal sales of ivory objects within the EU's countries, provided certain conditions were met, such as proof that the objects were legally acquired (Gerhard Emonds, formerly Deputy Director General, Directorate, N1, Nature Conservation, Federal Ministry for the Environment, Nature Conservation and Nuclear Safety, Germany, pers. comm. September 2004, and Emonds and Emonds 1997).

Germany's internal trade controls on ivory workshops and retail shops are some of the strictest in Europe. For example, the owners of workshops have to be able to prove where they obtained their tusks, keep an updated inventory of their stocks of tusks, and require a document in order to deal in ivory. Tusks that were imported before the EU 1989 ivory ban are legal with proper documentation but otherwise tusks are illegal. A vendor selling an ivory object made before 1 June 1947, which the EU calls an antique, does not require a licence, but a shopkeeper does need a special licence otherwise to sell ivory items – and all endangered wildlife products. This shopkeeper must also record each ivory item's weight, and the owner's name. When the vendor sells the object, he must record the customer's name with the description of the piece. In addition to the usual financial data required for tax purposes, the vendor is required to give these details and sometimes a photograph of his ivory items. These cumbersome records must be shown to the wildlife inspectors when asked.

Ivory workshops in Erbach and Michelstadt (the only known ones) which also have their own retail outlets are all checked four times a year by government officials from Darmstadt (Klemens Steiof, Department of Species Conservation, Ministry of Urban Development, Berlin, pers. comm. September 2004). Elsewhere in Germany, officials also check shops selling ivory items, but as there are so many of these, they are examined less frequently due to the shortage of inspectors. For instance, in the Charlottenburg and Wilmersdorf district, a major shopping area in Berlin, there are only two people to inspect about 6,000 retail outlets, and this they can do for only about a quarter of their time. In the Mitte district of Berlin, there is only one part-time inspector.

The inspectors in Berlin find that most of the expensive shops selling ivory items do have the proper licences, but the general retail outlets often do not. Foreign retailers in Berlin often do not apply for licences because they are either ignorant of the law or do not wish to comply. Sometimes police will accompany the inspectors when checking shops. If they find the shop has no licence to sell ivory, they may confiscate the items. If the offence is serious, the outlet owner will be taken to court and fined if found guilty.

Sometimes offenders tell the inspectors that the items are mammoth ivory, but many inspectors believe they can identify mammoth ivory 99% of the time. The behaviour of shopkeepers caught dealing in illegal ivory may vary with nationality. According to inspectors interviewed in Berlin, Arabs and Turks sometimes become aggressive while retailers from South East Asia are usually polite; Germans can demand to see the inspectors' identification and sometimes threaten the inspectors, saying that their shops are private property and then order the inspectors out! (Arnold Kramer, inspector in Charlottenburg and Wilmersdorf district, Berlin, pers. comm. September 2004).

Concerning international trade, raw ivory and worked pieces are still smuggled into Germany. ETIS recorded 572 seizures of elephant products entering or leaving Germany from 1989 to 2003 (Milliken et al. 2004) (see Table 1). According to German Customs statistics, 13 tusks and 118 'carvings and pieces' were confiscated in 2002 while in 2003 16 tusks and 278 carved items were seized by Customs officers. The main entry points for ivory are probably airports. In 2003 thousands of wildlife products were seized, including the ivory mentioned above. Most products were confiscated at Frankfurt am Main airport, the main international airport for Germany (35%), Munich airport (15%), Hanover (7%) and Leipzig (7%), according to the Bundesamt für Naturschutz (Federal Agency for Nature Conservation, BfN).

Table 1  
Number of illegal elephant product seizures made in Germany recorded by ETIS, 1989-2003

1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	Total
0	0	98	115	47	1	-	41	51	47	45	43	22	31	31	572

Source: Milliken et al. 2004

The inspectors in Berlin find smuggled ivory items in passengers' luggage. These are mostly small pieces of worked ivory brought in by Africans from Africa. There seems to be some coordination in this illicit trade between the traders in Africa (through mobile phone calls) with vendors, originating from the same African countries, working in Berlin. Most of these vendors do not have licences to sell ivory items. The inspectors believe that the amount of ivory items being smuggled into Berlin and the rest of Germany has been declining since the EU and CITES ivory bans, largely due to strict policing and the off-putting paperwork required for legal imports. ETIS also showed that the confiscation of ivory items in Germany peaked in 1992 at 115 items and decreased to 31 in 2002 and 31 in 2003 (Milliken et al. 2004). There has, however, been an increase in illegal imports of live and dead reptiles and there is also a steady supply of coral and birds, but these activities are not directly related to the ivory trade.

## Introduction

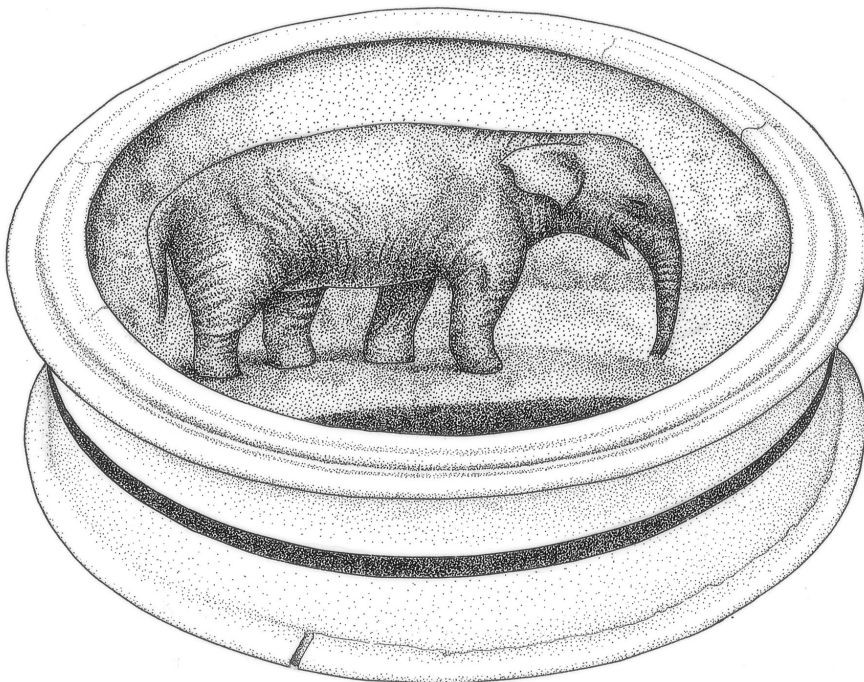
Fieldwork was carried out in Germany from 1 to 18 September and in mid-October 2004. The following cities and towns were visited: Erbach (8,000 inhabitants), Michelstadt (17,000), Frankfurt am Main (800,000), Berlin (3,700,000), and Altötting (12,500), in that order.

## History

Extremely fine ivory carving in Germany dates back to at least the 10th century. During the reign of Otto I (936-973) a new style of carving developed with stunted square human figures and capped hairstyles (St Aubyn 1987). Some of this work occurred in Cologne; this city was the centre for ivory craftsmen from the 11th to 16th centuries (Barnet 1987). Some of the early ivory carvings, which are almost all religious, can be seen in various museums including the Liebieghaus-Museum alter Plastik in Frankfurt am Main, which displays a late 10th-century diptych of Doubting Thomas and Moses made in Trier in south-western Germany.

High quality ivory carving continued to flourish in Germany in the Gothic period, especially in the middle Rhine Valley, but Paris was the main European centre during this time (Koechlin 1924). During the Renaissance and post Renaissance periods, ivory carving became very popular in Germany. Great princes and electors, such as the Fuggers, Ferdinand and Maximilian II of Bavaria, Augustus the Pious Elector of Saxony, and Maximilian Elector of Bavaria were patrons of ivory carving (Maskell 1905). One authority on ivory, Charles Woodhouse (1976), believes that during the 17th and 18th centuries professionals and amateurs in Germany produced more ivory carvings than in any other European country. The main centres of production were then Augsburg, Munich and Nuremberg, with smaller ones in Berlin, Braunschweig, Bremen, Cologne, Danzig, Dresden, Düsseldorf, Geislingen, Gmünd, Kassel, Stuttgart, Ulm and Würzburg (Maskell 1905 and Elfenbeinschnitzerei 1937/8). The craftsmen produced a variety of objects aided by the innovation of the lathe in the 16th century: altar pieces, coin cabinets, crucifixes, medallions, portrait busts, statues, swords and tankards, along with 'trick pieces' such as balls within balls, minute carvings and moveable objects.

During the 18th century, aristocrats (the main patrons of ivory carvings) became more interested in porcelain in Germany. As ivory became less fashionable, production declined, until Count Franz I of Erbach-Erbach (1754-1823) revived the industry towards the end of the century (Randall 1985).



Snuff box made by Count Franz I of Erbach-Erbach in 1783

In the mid-1700s, the town of Erbach in the Odenwald region, 60 km south of Frankfurt am Main, was poor and had few jobs for its inhabitants. In 1775 Count Franz I took over the town's government. He was well educated, having studied in Lausanne and at Strasbourg University and having travelled in western Europe for six years. Earlier in 1773 he visited Vienna and saw ivory being carved and then decided to learn the skill himself (Heinzmann 1994). On his return home in 1775 he decided to introduce ivory carving to his subjects. He brought raw ivory into Erbach to expand the work of the horn carvers and turners (workers on lathes). The Count also invited an ivory carver from Michelstadt, a few kilometres north of Erbach, to improve his own skills as a turner. By 1783 seven Erbach ivory carvers assembled before Count Franz I to receive the charter of a new guild for ivory workers, and the Count became its first president. At the beginning the guild had eight master craftsmen, two skilled workers (journeymen) and two apprentices (Randall 1985; St Aubyn 1987; Titze 1977).

The Count was a master carver in ivory, whose preference was to produce Neoclassical-style objects that were severe and simple. The Deutsches Elfenbeinmuseum Erbach displays a plain, round box and an amphora (a vase) that he made (Hegemann 1979; Dinger no date). Franz I brought an artist called Christian Kehrer to Erbach, and he introduced a brooch with a delicately carved stag moving through a forest that became a hallmark of Erbach craftsmanship. Kehrer's son, Eduard, established a Sunday art school for carvers, a precursor to the ivory school founded in 1892 (St Aubyn 1987; Elfenbeinschnitzerei 1937/8).

By the time Franz I died, the craftsmen were producing many ivory tobacco boxes and fork handles. As ivory was so expensive, the fork handles were often combined with wood and horn. By 1850 the ivory craftsmen also made horn-shaped containers for gunpowder and pipes. They carved few human figurines because the great skill needed for this was lacking then (Elfenbeinschnitzerei 1937/8).

About 1860 an ivory craftsman from Erbach, Johann Michel, travelled around Germany and France and saw the use of flowers in the fashion industry in Hamburg and Dieppe. He returned home and introduced the Erbach rose to the carvers. It became internationally famous. It is often worn as a brooch, and it is still being produced there today from ivory.

Also in the 1860s a Michelstadt ivory carver, Friedrich Hartmann, introduced the making of human figurines to Erbach. He had been trained at an art academy in Munich (Elfenbeinschnitzerei 1937/8).

Throughout Europe, the 1860s saw flowers becoming a way of expressing secret love. Ivory was also considered romantic. Combining these, the Erbach carvers produced in ivory women's hands holding lily of the valley, lilacs or chrysanthemums, all symbolizing love. Philipp Willmann was the first to carve them and they became extremely fashionable. From the 1870s until 1884 more ivory craftsmen had to come from Geislingen and other places in Germany to Erbach to meet the increasing demand for these hand-held flowers and the Erbach rose. The 1870s and early 1880s became the peak period for ivory carving in Erbach with about 200 craftsmen (Elfenbeinschnitzerei 1937/8; Somborn 1899; St Aubyn 1987).

Before the 1860s ivory assistants received a weekly wage of 5-8 guilders (USD 2.10-3.30 at the time) with free accommodation and food. By the 1870s they were paid for what they produced. An assistant received 6-14 marks (USD 1.50-3.40) for a rose, and if he worked full time in ivory only, he could earn up to 70 marks (USD 17) a week, in those days (Somborn 1899). After 1884 the fashion for Erbach's expensive ivory carvings declined sharply, and by 1886 most of the assistants had been discharged by their masters. Some of these assistants continued to work in ivory, but produced less intricate, cheaper items. Total production thus remained the same. By 1896 the number of craftsmen in Erbach declined to 85 of whom 10 were masters. Their consumption of tusks that year was 1,151 kg. Most of these tusks, having originated in Africa in the mid-1890s, came from dealers in Hamburg, Frankfurt am Main and Berlin. An Erbach trader paid on average 10 marks a kg. It was mostly tourists, especially Germans, who came to buy ivory carvings, but they came only in two seasons, the summer and Christmas, to this small town (2,788 people in 1890). They also would visit Michelstadt (with 3,068 people in 1890) that remained a small ivory carving centre. In neither town, however, were the carvers prosperous, as ivory sales had declined by then. According to a survey in the 1890s, only the richest craftsmen could afford to eat meat on special occasions. The other ivory craftsmen had a standard of living similar to subsistence farmers (Somborn 1899).

From 1900 to World War I the production of cheaper ivory objects in Erbach almost stopped. Only expensive items such as cups, human figurines and tankards sold. The most famous master carver at that time was Otto Glenz (1865-1948) who revitalized the Erbach style of animal carvings and produced some of the finest ivory human figurines in Germany.

From 1919 to 1923, when Germany suffered massive inflation, demand for ivory objects suddenly increased, partly because gold and silver were so expensive. A repeat of the 1870s fashion for flowers occurred, resulting in almost one person per house in Erbach crafting ivory. Many tourists came to buy ivory jewellery. Businessmen in the area even obtained bones from South America to increase flower carvings. When the German

currency stabilized in 1923, the ivory business in Erbach fell back, but recovered in 1928 and 1929 when foreigners bought about 90% of the items sold. Most were Swiss, but Spaniards and South Americans bought religious objects, and cheaper objects went to North Americans. Indians bought Buddhas, and Erbach businessmen even sent small African animal figurines to traders in Africa (Elfenbeinschnitzerei 1937/8).

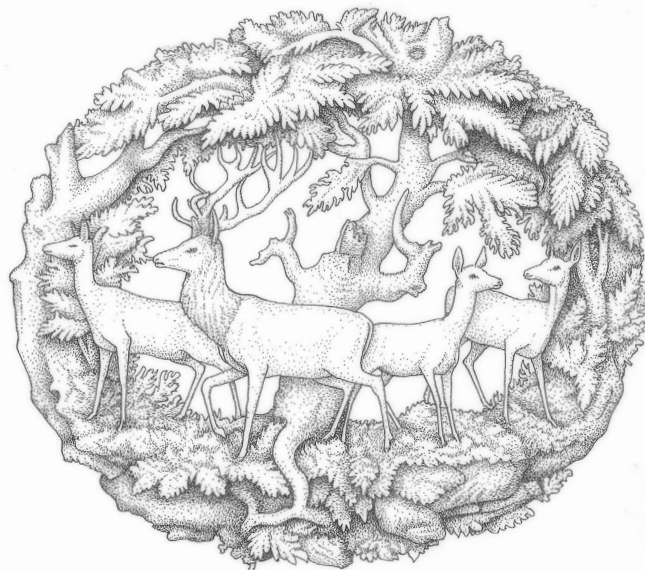
The boom in alpinism and mountaineering that started at the turn of the 19th to 20th centuries triggered a rush of enthusiasts to obtain carvings of the edelweiss flower as an eternal memory. This flower had been the logo of the Deutscher und Österreichischer Alpenverein DuOeAV (German and Austrian Alpine Association) since 1869; this drove the ivory carvers to produce the edelweiss for the new demand. This mountain flower continued to be the logo of the split German and Austrian alpine associations after 1945 (Museum Deutscher Alpenveirin, to TEUR-Germany, pers. comm. May 2005).

In 1930 the Erbach craftsmen faced a catastrophe when North Americans stopped importing German ivory items and the Japanese began producing cheaper items. In 1934 and 1935, according to the publication *Elfenbeinschnitzerei* (1937/8), the German government saved the Erbach ivory carving industry by ordering a special type of brooch that incorporated the edelweiss motif. It was also a symbol of the Nazi social organization called the Winterhilfswerk that helped poor people with food and clothes. In 1935 other ivory items were also made: animal figurines (deer, dogs, elephants and wolves), bracelets, ear-rings, traditional Germanic gods, human figurines, leaves, necklaces, pendants, roses, and tankards (*Elfenbeinschnitzerei* 1937/8). Most of these items are still being made today in Erbach.

World War II and the subsequent division of the country into the German Democratic Republic in the east and the Federal Republic of Germany in the west severely disrupted the German ivory industry. Between 1952 and 1974 the Federal Republic of Germany imported an average of 25 tonnes a year with traders in the Netherlands supplying most, followed by the Democratic Republic of Congo (DRC), Kenya/Uganda and the UK. Almost all these tusks were kept in the country for the domestic ivory industry. Ian Parker estimated that during those 22 years, the domestic consumption averaged 24 tonnes per year (Parker 1979).

During the mid-1970s the quantity of tusks imported expanded considerably with almost 78% originating in Kenya. The amount of ivory retained internally almost doubled (compared with the 1952-1974 period) to 53 tonnes a year due to the craftsmen's increased use of ivory and stockpiling (Parker 1979).

From 1979 to 1987 the quantity of tusks imported declined sharply, averaging only 19.76 tonnes per annum. The main countries providing these tusks were South Africa, followed by Sudan, Namibia, Kenya and Zimbabwe. One reason for the decline in imports and the reduced local ivory consumption was the flood of imported, cheaper worked ivory from Hong Kong. The result was that the number of ivory craftsmen in Erbach declined from 45 in 1981 to 20 in 1988. In Erbach the carvers in the late 1980s used a lot of waste-ivory imported from the UK and Belgium. The price in Germany for this ivory waste was 30 DM (USD 17) to 180 DM (USD 100)/kg (Grimm et al. 1989).



A German ivory brooch carved in 1830

## Sources and prices of raw ivory in Germany from 1990 to 2004

After the German government banned imports of tusks in 1989 users had two main sources of supply. One was illegal imports of new stock. According to government officers and other people knowledgeable on the German ivory trade, the quantity of tusks smuggled into the country was probably quite small from 1990 to 2004. The other source of tusks was the old stocks already in Germany. There is no collated figure for the quantity of old stocks of ivory since the ivory bans. Craftsmen are reluctant to divulge such information on their stocks, presumably because of tax and/or commercial reasons. At the Erbach Ivory Museum, where several ivory carvers work on the premises, a museum officer stated that the museum alone had a stock of 18-20 tonnes. This is a large quantity considering that one prominent ivory carver, Ernst Horn (who is also the Deputy President of the Deutscher Elfenbeinverband – the German Ivory Association) believes that all the eight carvers in Erbach consume only 300 kg a year. So this stock alone would take at least 60 years to consume at the present rate.

Craftsmen are also reluctant to divulge the prices they pay for tusks nowadays. The craftsmen correctly claim that ivory carving is declining in Germany, due to lack of demand and thus they were rarely buying tusks. One ivory carver in Erbach said he paid in 2000 a little less than 200 DM (USD 91) a kg for raw ivory from a wholesaler in Michelstadt. In 2004 he was offered good quality tusks for €150/kg, but he did not need them; he believes the trader will have difficulties selling his tusks due to lack of demand, unless the price is very low. Another Erbach carver said that the price of tusks in 2004 varied from €75-200/kg depending on quality and the personal relationship with the dealer.

Some Berlin markets had several small, uncarved tusks that craftsmen would be unlikely to buy as they were being offered for retail sale. In the famous weekend flea market called Strasse des 17. Juni, a salesman had a 1.5 kg tusk for €150/kg. Overall, the markets and shops in the German towns and cities surveyed had very few raw tusks on display for sale.

## Ivory workshops in Germany

The number of ivory craftsmen in Germany has declined by two-thirds since the ivory bans. Two companies, one in Altötting and the other in Bad König, have phased out ivory as a raw material and have replaced it with mammoth tusks. Nobody is crafting elephant ivory in these two companies nowadays. A few independent ivory carvers gave up the work in the 1990s, including a prominent carver in Berlin. Ivory is still being carved in reduced quantities in Erbach and Michelstadt.

## **Erbach**

Erbach, an attractive small town with traditional architecture and gardens, has the most ivory carvers in Germany today. Their number has declined, however, from 45 in 1981 to 7-10 in 2004 (see Table 2). Although there is little information following World War II, the industry probably remained stable from the early 1950s to the early 1980s.

Table 2

Number of craftsmen working in ivory in Erbach from the 1870s to 2004

Year	Number	Source
1870s	200	Somborn 1899
1896	85	Somborn 1899
1954	40-50	Horn, pers comm. 2004
1981	45	Grimm et al. 1989
1988	20	Grimm et al. 1989
1989	20-25	Horn, pers. comm. 2004
1999	7-8	Horn, pers. comm. 2004
2004	7-8	Horn, pers. comm. 2004
2004	10	Barbara Simon (ivory carver and science officer, German Ivory Museum), pers. comm. September 2004

The ivory carvers may be divided into two groups: about five carving for their own or one another's five ivory specialty shops in Erbach, and four working for the government-owned German Ivory Museum in Erbach. The artisans only craft tusks from elephants and mammoths, and although it is believed that Erbach artisans consume perhaps 300 kg of raw ivory a year, the figure for mammoth ivory is not known. They use both electrically powered tools, especially dentist tools, and hand tools.

Those producing items for their shops carve soft and hard tusks from Africa and say that the hard forest elephant tusks are more difficult to carve and they crack more often. One carver makes animal figurines, flower ornaments, pendants and other jewellery. He makes smaller items than in 1990 as nowadays people prefer cheaper and smaller objects. He crafts full time, 90% spent on ivory and 10% on mammoth tusks. His net earnings, after all expenses except income tax, are about €2,000 a month. Some of these carvers/shopkeepers also buy ivory items for their shops, especially machine-made necklaces from Bad König.

At the German Ivory Museum are four carvers, two women (Petra Bergoint is a master) and two men (one of whom is 84 years old). Two craft half days and two craft at the weekends. The younger ones, who were recently taught how to carve, use mammoth tusks, while the older ones work in ivory. They make mostly animal and human figurines, and jewellery. They sell their carvings at the museum shop and elsewhere in Erbach (Simon and Bergoint, pers. comm. September 2004).

## **Michelstadt**

Michelstadt is another old, small town in the Odenwald, whose inhabitants continue to uphold many traditional ceremonies. Its economy is largely based on German tourism. In 2004 there was one craftsman working in ivory and three in mammoth. The ivory carver, Ulrich Seidenberg, owns a private ivory museum and a shop selling ivory items he has made, and ornaments from other countries.

Seidenberg was born in 1926 in Königsberg, East Prussia. After World War II in 1946 he moved to Erbach to attend The School for Wood and Ivory Handicraft for three years. In 1949 he set up his own ivory business, becoming a master craftsman in 1953. In 1967 he moved to Michelstadt and set up an ivory art shop. Later, in 1976, he founded his large museum, the only private one in Germany displaying solely ivory. Since 1949 Seidenberg has carved hundreds of ivory objects, specializing in animals, humans, and copulating couples. In 2004 he was still carving ivory, but in the mornings only, and he looks after his shop in the afternoons with his wife. He is the best known ivory carver in Germany today. Due to the decline in demand for ivory items in Germany, Seidenberg complained he could no longer make money out of carving, but carried on the craft because he enjoyed it (Seidenberg 1987 and Seidenberg, pers. comm. September 2004).

He has considered the possibility of carving mammoth tusks and the Russian ambassador has visited him to offer these tusks. He considered them too brittle, almost fossilized, and therefore difficult to carve. He believes that there is 'no substitute for elephant ivory' (Seidenberg, pers. comm. September 2004).

## **The School for Wood and Ivory Handicraft, Michelstadt**

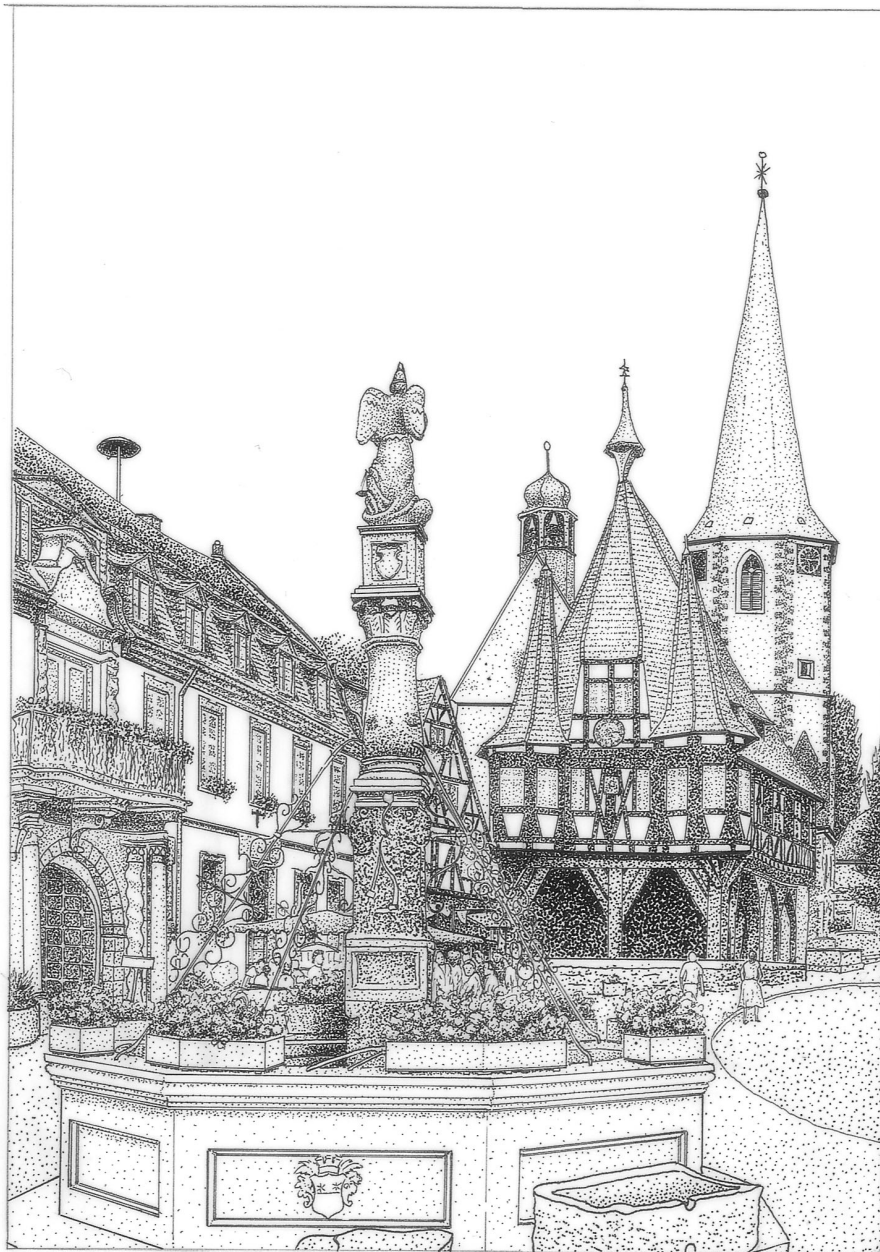
A school for ivory carving was started in 1892 in Erbach and was called Grossherzogliche Fachschule für Elfenbeinschnitzerei und verwandte Gewerbe in Erbach i.O. (Greiner 1992). It was originally funded by the town of Erbach, the former county of Hessen, and the Counts of Erbach-Erbach and Watenberg-Roth. By 1896 there were 11 students in the summer months and 30 in the winter, because in the summer and autumn the students needed to help their families harvest (Somborn 1899). In 1957 the school was renamed Berufsfachschule für das Holz- und Elfenbeinbearbeitende Handwerk, which translated as The School for Wood and Ivory Handicraft. In 1960 the school moved to Michelstadt.

After the ivory bans, the number of students declined, but then rose slightly in 1992, averaging 23-24 a year. Before 1990 students were not taught to carve mammoth ivory, but that year the director could not get a licence for the school to carve ivory so the school switched to mammoth. This has remained the case. The students now carve only mammoth ivory and wood. People, however, do bring ivory objects to the school for repairs (Helmut Jäger, director of The School for Wood and Ivory Handicraft, pers. comm. September 2004). There have been no full or part-time ivory carvers working at this school since 1990, only occasional repairers. In 1992 the school moved to a new building next to the old one on the outskirts of the town. The state of Hessen still helps with funding by paying the salaries, while the region of Odenwald contributes to other expenses. The students do not pay fees, but they must show great artistic talent to be accepted. In 2004 there were 25 students: 5 males and 9 females learning how to carve mammoth tusks, and 11 students working on wood (mostly linden wood). All the mammoth ivory students were Germans, mostly from the region. In the 1990s there was one from



Switzerland and another from Denmark who has become famous with her work in mammoth and bone. There are two full-time teachers in the school and five specialists who teach part time. The courses are taught five days a week in term time for three years, after which there is an exam to become a journeyman. To become a master, another two years at the school is required. In 2004 three people obtained this status. Many of the students learn other skills elsewhere as well, such as gold work or painting, to improve their techniques.

The director believes that this school, unique in Germany, will continue to attract students because of the long tradition of carving in the region. A major problem, however, is that once the students qualify, unless they find customers for their products, their planned livelihood may have to become a hobby. Most previous students have failed to continue as mammoth ivory carvers, although the school does try to help them succeed (Jäger, pers. comm. September 2004). Some continue to work as art restorers or specialists in the (human) dental prosthesis industry (Roland Melisch, TEUR-Germany, pers. comm. May 2005).



Michelstadt

## Altötting and Bad König – Past ivory workshops

Although ivory workshops existed long ago all over Germany, only two places, other than Erbach and Michelstadt, were thought perhaps still to have workers using ivory today. The German Ivory Association (Deutscher Elfenbeinverband), various government departments dealing in endangered wildlife, and wildlife conservation organizations in Germany believed that Altötting and Bad König could still have some ivory carvers, so these towns were investigated for this study.

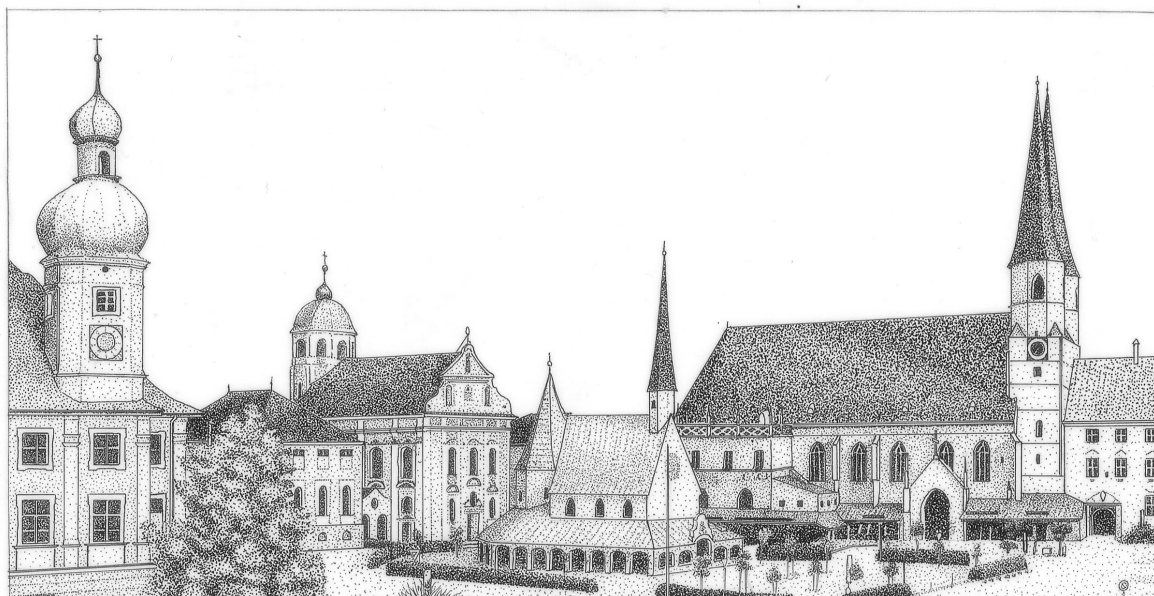
Altötting is a small, old town with 12,500 people, 90 km east of Munich. It has been a noted religious centre for over 500 years for pilgrimage for the veneration of the Virgin Mary. In the past, wealthy pilgrims gave the Roman Catholic religious leaders in the town ivory objects, such as book covers and statues of Jesus Christ, which are now in the town's Treasury on display. There was no ivory carving industry in Altötting found presently, however. The last company to deal in ivory was the Haffke which made paintings on slices of ivory and produced ivory frames for them.

The Haffke company is a family concern founded by a man from Königsberg who set up an ivory workshop in Dresden in 1909. He employed artists to paint on ivory slices, and other craftsmen to make ivory jewellery boxes. He often designed the items himself. During World War II Dresden was almost destroyed so the company moved to Munich and re-opened in 1949. The company moved to Altötting in 1966 as the site for the workshop was much cheaper (Peter Armbruster, Chairman, Haffke Kunsthandwerk, pers. comm. October 2004).

By 1994 Haffke phased out ivory and replaced it that year with mammoth ivory, as the customers (mostly wholesalers) did not want to buy any more ivory items following the ivory bans, preferring mammoth. Armbruster has been buying mammoth tusks in Moscow and St Petersburg. In October 2004 he had a stock of 50 kg which he thinks will last about five years. In 2004, Haffke was employing ivory artists to paint on fine slices of mammoth tusks, and turners to produce mammoth ivory frames for some of these pictures. The total number of these workers varies from 15-20. The paintings are mostly based on European art styles from the 17th to 19th centuries, such as portraits, landscapes and seascapes, but also village and farmyard scenes, as well as kittens and flowers.

The company produces 'several thousand paintings a year' on mammoth ivory, according to Armbruster, and a hundred styles of frames. The quality of these paintings remains the same as in the past. In order to stay profitable, this family business (the Chairman is the husband of the founder's granddaughter) also produces expensive bronze photograph frames. Haffke sells its products wholesale to several places in Germany, including Frankfurt am Main and Berlin, especially to porcelain shops and furniture shops, and to at least one department store that the investigator visited. The company also exports to European countries, the USA and East Asia (Armbruster, pers. comm. October 2004).

There are no shops in Altötting selling ivory items, old or new. Instead the pilgrims, who are the town's main source of income, buy tourist souvenirs such as candles and portraits of the saints – but not on mammoth ivory.



Altötting

Bad König is situated about 5 km north of Michelstadt with a population of 9,500. In 1922, a company called Blumenschein-Elfenbein, Naturbernstein, Edelstein was set up by the present owner's grandfather. In the 1980s the company made jewellery, especially beaded necklaces from ivory, for shops in Michelstadt and Erbach. With ivory being banned in 1989, the company then stopped using ivory and switched to mammoth tusks (Otto Blumenschein, master carver for this company: Blumenschein-Elfenbein, Naturbernstein, Edelstein, pers. comm. November 2004).

### **Retail outlets and prices for worked ivory in Germany**

Before the ivory bans, many more retail outlets in Germany sold ivory items, but there were no surveys of any towns or cities giving precise figures. There have been no ivory studies since the bans either, until this one. This survey found 188 retail outlets in the four towns and cities visited, with 16,444 ivory items, mostly made in Germany (see Table 3). The two cities surveyed (Berlin, because it is the biggest city in Germany, and Frankfurt am Main, being the banking centre, a centre for international fairs, and very close to the two towns famous in Germany for ivory carving) held a total of 1,635 ivory items. The very small ivory carving towns of Michelstadt and Erbach (see Table 4) had the rest, 90% of the total, and most of that made after the 1989/1990 ivory bans. Thus, the majority of the ivory items counted in Germany were made recently. However, no new German-made ivory items were on sale in Berlin; but there were 41 new foreign-made pieces seen. Frankfurt am Main had 15 new ivory items of which some elephant figurines could have been made in Germany.

Table 3

Number of ivory items seen for retail sale in Germany, September 2004

City/town	New or old	No. of items
Michelstadt	mostly new	8,639
Erbach	mostly new	6,170
Berlin	mostly old	906
Frankfurt am Main	mostly old	729
Total		16,444

Table 4

Types of retail outlets selling ivory items in Germany, September 2004

City/town	No. of outlets	No. of ivory items
<u>Berlin</u>		
Outlets in 3 antique markets	73	388
Antique shops	50	507
Gift shops	3	6
Jewellery shops	2	5
Total	128	906
<u>Frankfurt am Main</u>		
Outlets in 2 antique markets	42	538
Antique shops	7	118
Porcelain shops	1	73
Total	50	729
<u>Erbach</u>		
Gift/souvenir shops	6	6,170
<u>Michelstadt</u>		
Gift/souvenir shops	4	8,639
Total	188	16,444

## Michelstadt

There were four shops selling ivory articles in Michelstadt in September 2004. They offered a total of 8,639 objects, more than any other place in Germany. By far the greatest number was found in just one shop. This had at least 5,909 items, excluding small left-over off-cuts that were also for sale (see Table 5). The waste material consisted of raw pieces of ivory of about 3 cm that were not counted as they have no real value. Most of the shop's items were made after the 1970s, but exact dates were not known. Many of the German ivory items were made in Erbach or Bad König (the beaded necklaces) in the 1980s and 1990s. Erbach still produces ivory items for this shop, while some of the finer pieces are carved by the shop owner. The cheapest items he had on display were 0.3-cm animals crudely carved and priced at €1. Most customers are Germans but a few Americans buy his ivory as well.

Table 5

Ivory items for retail sale in the largest shop in Michelstadt, September 2004

Item	No. of items	Where made	Date made
Bangle	1,755	nearly all India	1980s and earlier
Necklace	1,210	India and Germany (Bad König)	1970s onwards
Figurine	850	Asia	1980s onwards
Brooch	808	Germany, Hong Kong, Thailand	1970s onwards
Ear-rings, pair	150	?	mostly new
Bracelet	105	Thailand, India, China	1980s onwards
Misc.	1,031	many countries	1970s onwards
Total	5,909		

The other three retail shops offered for sale 2,729 ivory articles. Two of them, with 1,483 ivory items combined, were selling almost all items made after 1980 to the present, consisting mostly of necklaces made in Bad König and small animals carved in Erbach. The remaining shop with 1,246 items had a variety of old and new ivory pieces. There were the usual ivory beaded necklaces made in Bad König at least until 1990. There were animals, especially elephants, carved in Erbach in the last several years of about 2-3 cm. There was a collection of antique Chinese pieces such as a 2-cm sumo wrestler for €500, a 20-cm elephant for €4,800, a 30-cm cup for €6,950 and a sculpture of a naked woman with her children for €7,500.

## Retail prices in Michelstadt

Table 6 shows the retail prices for ivory items seen in Michelstadt.

Table 6

Retail prices for ivory items seen in Michelstadt, September 2004

Item	Size in cm	Price in USD
<b>JEWELLERY</b>		
Arm bangle	8	232
Necklace	30	34-72
<b>FIGURINES</b>		
Animal	2 (crudely carved)	1
Bear	3	168
Deer	3	134
Dog	1	17
	3	122
Elephant	3	95
Horse	2	60
Lion	2	45

Table 6 continued

Item	Size in cm	Price in USD
MISC.		
Chest	15	604
Chess set	40 x 40	2,379
Chopsticks, pair	20	153
Leaf	4	26-32
Loom	10	488
Rose	1	11-26
	3	220

(All items were made in Germany except the chopsticks (unknown origin) and chess set possibly from Greece.)  
Exchange rate: €1 = USD 1.22

## **Erbach**

There are six retail outlets in Erbach, including the museum shop, displaying for sale 6,170 ivory items. The museum shop had 396 items. At least 90% of Erbach's retail items were made from the 1980s onwards. The most popular and plentiful items were necklaces, but there were also sculptures, many made from the 1990s onwards. Also there were animals, bracelets, ear-rings, letters of the alphabet, rings and roses. There were a few unusual pieces such as two African heads, and two African carved tusks weighing about 15 kg each for €3,500 each.

### **Retail prices in Erbach**

Table 7 shows the retail prices for ivory items seen in Erbach.

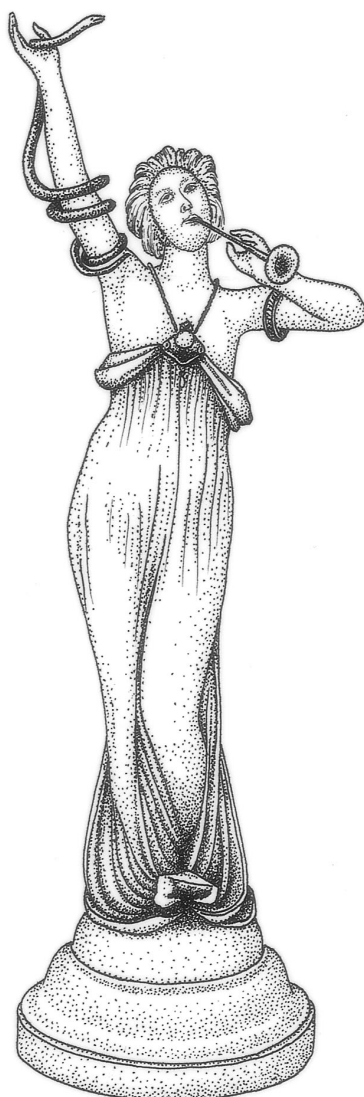
Table 7

Retail prices for ivory items seen in Erbach, September 2004

Item	Size in cm	Price in USD
JEWELLERY		
Arm bangle	8	29-163
Bracelet	35 (35 beads)	150
	35 (70 beads)	76
	35 (100 beads)	41
Ear-rings, pair	1	20
Necklace	30	17-120
Ring	1	90-116
FIGURINES		
Eagle	15	1,196
Elephant	2	55-84
Mouse	1	5
Rabbit	2	29
MISC.		
Rose	1	14
	3	51 or 71
Edelweiss	4	99
Dice	various	16-49
Alphabet letter	2	10-18
Mercedes	20	244

(All items were made in Germany.)  
Exchange rate: €1 = USD 1.22

Germans buy at least 75% of the ivory articles sold with the rest going to the occasional American, other European or Japanese customer. The Americans used to be larger buyers, but an American military base near by closed down, depriving the ivory shops of potential buyers. The ivory business has definitely declined in Erbach since the mid-1990s, so some shops have diversified into mammoth ivory items. One main shop in Erbach closed down in early 2005 because the son of the owner sees no future in the business, although he is a trained ivory craftsman.



A typical 1900 Erbach ivory figurine

## **Berlin**

Despite Berlin being the largest city in Germany and also a centre of the antique business, only 906 ivory items were found for sale, very few compared with Michelstadt and Erbach. More than 90% of the items were made before 1990 with the majority over 50 years old (see Table 3). The survey covered most parts of Berlin and all the main shopping areas including those specializing in antiques. The ivory items were seen on display in 128 outlets. There were 507 items (55%) found in the 50 antique shops visited, and these were nearly all antique pieces.

## Antique markets in Berlin

Berlin has three antique and flea markets with 73 shops and stalls selling 388 ivory objects (see Table 8). The Berlin Antique and Flea Market located under the S-Bahnbogen am Bahnhof (station) on Friedrichstrasse had the most. Of 34 shops, 21 offered 192 ivory items, most of which were old jewellery and animal and human figurines, made in Erbach and other places in Germany. The second largest, the Strasse des 17. Juni Flea Market had 391 stalls of which 44 sold 182 items. This market was divided into two parts. There was a modern arts and crafts section with 138 stalls, but none with ivory, demonstrating that contemporary artisans do not use it. The other section, with 253 stalls, was for antiques and older items, but there were also a few new items, including ivory. In fact this market had the most new ivory items of anywhere in Berlin: 41 (see Table 9). Of these, 22 items (mostly jewellery) were made in Asia and 19 (mostly dinner knife stands and cutlery) from Africa. The third market is called Kunst und Nostalgie (Art and Nostalgia) on Museum Island. This market is known for its communist relics, such as Stalin pins, medals and post cards from the former German Democratic Republic. It had 65 stalls, eight of which had 14 ivory items made in Germany in the years preceding the ivory bans. Ten were jewellery; there were two edelweisses and two Erbach roses.

Table 8

Number of retail outlets and ivory items in the main antique markets in Berlin, September 2004

Name	No. of outlets	No. with ivory	% with ivory	No. of items
Strasse des 17. Juni Flea Market	391	44	11	182
Berlin Antique and Flea Market	34	21	62	192
Art and Nostalgia Market	65	8	12	14
Total	490	73	15	388

Table 9

New (post 1989) ivory items seen for retail sale in Berlin, September 2004

Item	Size in cm	No. of items	Where made
Knife holder	7.5	13	Africa
Bangle		9	Asia
Figurine		5	China
Set of spoons and knives		4	Africa
Paper-knife	5 and 12	4	Africa, Thailand
Pendant	1.5	3	Asia
Necklace with elephant		1	Asia
Human figurine	20	1	China
Elephant figurine	3	1	Asia
Total		41	

(The number of new items on display at Strasse des 17. Juni Flea Market was 33 or 80% of the total for Berlin.)

## Shops in Berlin

Most of the antique shops are in the west of the city as the eastern part was under communism from 1945 to 1989. There were very few expensive antiques. The highest-priced object at €58,000 was a large wooden chest of drawers partly inlaid with ivory, 240 x 220 cm, made in Braunschweig in 1740. The antique shops selling furniture offered only German-made furniture that was not expensive. Business was slow due to the recession in Berlin and because the residents are not as rich as those in Hamburg or Munich. Most of these shops open only in the afternoons for the scant number of customers.

There were three gift shops selling six ivory articles. Three were undateable African bangles for €18 each, one old bracelet, a new Chinese-carved figurine, and a 15-cm tusk with seven elephants on it carved by a German in the early 20th century.

Only two jewellery shops out of many visited had ivory, 10 items altogether. One shop was in the fashionable street called Kurfürstendamm. It displayed five expensive pieces made in Germany: jewellery and miniature portraits produced some time ago. The other shops offered old jewellery made in Germany and elsewhere in Europe.

By estimating the age of many of the ivory items seen in all the outlets in Berlin, 49% of the older items were jewellery, especially necklaces, pendants, bangles and ear-rings (see Table 10). There were not many new items made after 1989 seen in the Berlin outlets, only 41 (see Table 9). About 54% of the 41 items were made in Asia and 46% were from Africa. Dinner knife stands from West Africa and bangles from Asia were the most numerous. There were no new items made in Erbach, or elsewhere in Germany, seen for retail sale in Berlin. It appears that the craftsmen in Erbach do not sell their items to Berlin, perhaps as they are conservative, preferring to sell them locally in the Odenwald region.

Table 10  
Old ivory items seen for retail sale in Berlin, September 2004

Item	Percentage of total
Necklace	17
Miniature painting	10
Pendant	7
Bangle	6
Ear-rings, pair	6
Brooch	5
Human figurine/sculpture	5
Erbach rose	3
Walking stick	3
Netsuke	3
Tea/coffee pot	2
Paper-knife	2
Ring	2
Misc.	29
Total	100

Of the total number of ivory items seen in Berlin, most were made in Germany followed by China and then Japan, while very few were from elsewhere in Europe (see Table 11).

Table 11  
Country of known origin for ivory items surveyed for retail sale in Berlin, September 2004

Country/region	Percentage
Germany	60
China	12
Japan	11
Africa	7
South East Asia	4
UK	1
France	1
Austria	1
Italy	1
Others	2
Total	100



## Retail prices in Berlin

Table 12 shows the retail prices for ivory items seen in Berlin.

Table 12

Retail prices for ivory items seen in Berlin, September 2004

Item	Size in cm	Price in USD
<b>JEWELLERY</b>		
Bangle	2-5	22-116
Bracelet		83-93
Brooch	5	35-55
Ear-rings, pair	3	24-122
Necklace		43-387
Pendant	4	5-104
<b>FIGURINES</b>		
Animal	5	61-116
	8	98
	10	177-371
Human	5	390-439
	9	244-396
<b>TUSKS</b>		
Polished, 1.5 kg		275-281
Carved, 2kg		732
	18	1,208
	98	7,808
<b>MISC.</b>		
Cameo	5	177
Chess set		2,928
Erbach hand	5	83
Erbach rose	5	146-183
Knife	20	67
Knife holder	8	18
Miniature painting	7	92-4,148
	10	1,098-1,598
Napkin ring	3	116
Paper-knife	10	46-1,031
Spoon	20	67
Teapot	15	750-3,282
Walking stick	100	153-3,477

Exchange rate: €1 = USD 1.22

## Frankfurt am Main

There were 729 ivory items counted in 50 outlets. These included 15 new items (2%), 12 of which were elephant figurines, some carved in Egypt (see Table 13). The other items in the city, 98%, were made prior to the ivory bans. Of these 98%, 63% was jewellery and 15% miniature paintings (see Table 14). All the main areas where ivory was likely to be seen for sale were visited. Most of the ivory, 74%, was seen in the city's two antique/flea markets.

Table 13

New (post 1989) ivory items seen for retail sale in Frankfurt am Main, September 2004

Item	No. of items	Size in cm	Where made	Price in USD
Elephant figurine	9	7	?	159
	3	4	Egypt	12
African head	1	12	Africa	146
Camel	1	7.5	Egypt	122
Necklace	1	small	?	43
Total no. of items	15			

Exchange rate: €1 = USD 1.22

Table 14

Old ivory items seen for retail sale in Frankfurt am Main, September 2004

Item	Percentage
Jewellery	63
Miniature painting	15
Human figurine	3
Napkin ring	3
Misc. (order in quantity – mask, flower, cup, paper-knife, Erbach rose, animal figurine, fan, African head, scent bottle, crochet hook, spoon, fork, plaque, edelweiss, button, knife & fork set)	16
Total	100

### **Antique markets in Frankfurt am Main**

The Antikmarkt had the most ivory. It is in the Hessen Centre and opens one Sunday a month. When visited, 35 of 151 stalls were displaying 283 ivory items for sale. Almost all had been made before 1989 and about two-thirds consisted of jewellery. There were 35 old African-made objects: 25 bangles (€250-400), 9 masks (€80-575) and a necklace, most from West Africa and the DRC. Other unusual items were US-made jewellery, including a 6-cm circular pendant for €720. Nearly all the stall-owners and customers were German.

The Flohmarkt on the Schaumainkai Street is open every Saturday. It had about 400 stalls with 5 selling 255 ivory items, mostly older objects. Almost all (220 of them) were tiny Indian-made rings for €5 each. Next most numerous were 10 Erbach-made bookmarks followed by beaded necklaces. Egyptian-made, crudely carved 4-cm elephant figurines were for sale for €10. Such items are rarely seen out of Egypt. Four of the stalls selling ivory were owned by Germans and the one with the elephant figurines by an Egyptian. German stall-owners predominated but others were Africans, Indians, Poles, Russians and Turks.

### **Shops in Frankfurt am Main**

In the city there were seven antique shops that had 118 old ivory items. These shops were mostly around the St Bartholomäus Cathedral or near the Frankfurter Hof Hotel and the main railway station. The antique items were inexpensive, with the highest price being a 5-cm brooch made in Erbach around 1890 for €1,120.

There was also a porcelain shop that offered 300 miniature paintings of many subjects, the most on thin mammoth tusk slices, but about 73 on ivory. Each had a label on the frame identifying the raw material. All had been painted and framed in Altötting by the Haffke company. Prices ranged from €47-314 according to the quality of the painting. Some of the portraits were of high quality while many birds were rather poorly painted. Most customers were Germans.

### **Retail prices in Frankfurt am Main**

Table 15 shows the retail prices for ivory items seen in Frankfurt am Main.

Table 15

Retail prices for ivory items seen in Frankfurt am Main, September 2004

Item	Size in cm	Price in USD
<b>JEWELLERY</b>		
Bangle	2-3	31-488
Bracelet	3	95-122
Brooch	5	81-1,367
Ear-rings, pair	2	61-98
Necklace, small beads		24-43
large beads		73-354
Ring	1	6
<b>FIGURINES</b>		
Animal	4	12
	8	159-830
Human	13	146-610
	15	342-427
<b>TUSKS</b>		
Polished	8	98
<b>MISC.</b>		
Cigarette box	12	293
Cigarette holder	10	12
Erbach flower	7	43-183
Erbach rose	5	24-43
Mask, African	5	110-220
	10	98-701
Miniature painting	5-8	57-383
Napkin ring	1	55
Paper-knife	10	49-482

Exchange rate: €1 = USD 1.22

### **The use of ivory substitutes in Germany**

Until 1989 ivory craftsmen in Germany worked almost exclusively in ivory as they considered other substances inferior. With the EU and CITES ivory bans of 1989 and 1990, some of the carvers began to use mammoth tusks either full or part time. They learned fairly quickly how to use mammoth, employing the same tools as for ivory, but complained about the bad smell and the tendency for the tusks to crack. The School for Wood and Ivory Handicraft (in Michelstadt) started to use mammoth tusks in 1990, paying 170 DM (USD 108) a kg for low quality tusks, and up to 500-600 DM (USD 316-380) a kg for high quality. In 2004 the school bought these tusks from traders in Giessen in Hessen who offered five grades. The lowest quality (small pieces that were heavily cracked) was €100/kg; the next was €150, then €200, then €250, and the top grade – the most similar to elephant ivory – was €350/kg. The school buys only a little, as it uses only 5-8 kg each year (Jäger, pers. comm. September 2004).

The jewellery company in Bad König changed almost completely from ivory to mammoth for its bead-making in 1989, as did some of the ivory craftsmen in Erbach. In 2004 a principal craftsman obtained raw material from Russians who came to Erbach specifically to sell it. He paid €150-200/kg for good quality mammoth tusks. The Haffke company in Altötting switched to mammoth in 1994. In September 2004 the place in Germany with the most mammoth ivory items for retail sale was Erbach with 1,254 objects (see Table 16). Of these the most numerous were jewellery and animal figurines; prices were similar to those for ivory (see Table 17). Shops in Michelstadt had many of the same mammoth ivory items as seen in Erbach, but about half the amount.

Table 16

Number of mammoth ivory items seen for retail sale in Germany, September 2004

City/town	No. of items	New (post 1989) or old
Erbach	1,254	new
Michelstadt	614	new
Frankfurt am Main	233	new
Berlin	99	new
Total	2,200	



A German carving apprentice with his traditional travelling jacket with mammoth ivory buttons

Table 17

Retail prices for new (post 1989) mammoth ivory items seen in Erbach, September 2004

Item	Size in cm	Price in USD
<b>JEWELLERY</b>		
Ear-rings, pair	1-2	15-73
Pendant (flower)	1-3	20-40
Ring	1.5	20
<b>FIGURINES</b>		
Animal	2	22-105
	5	120
	10	120
Other	4	31-43
<b>MISC.</b>		
Chess set	40 x 40	2,342
Dice	2	34
Knife	12	39
Thimble	1.5	43

Exchange rate: €1 = USD 1.22

Berlin and Frankfurt am Main had far fewer mammoth ivory items for sale than Erbach. Most were the miniature paintings from Altötting that were available in a few shops, such as the porcelain shops and Berlin's biggest department store called KaDeWe – where there were 25 pictures on mammoth ivory slices.

### **Vendors' views on ivory market trends and the future**

Vendors said that most ivory craftsmen are old and their children show little interest in following their fathers' profession, unlike in past generations, because they see no economic future in it. The ivory business, including the number of artisans, has been declining since the ivory bans. This is partly because ivory is less fashionable and because some equate obtaining tusks as 'a bloody and unsavoury enterprise', based on illegal killings of elephants in Africa, and partly because the German economy has not been performing well. Gross domestic product grew only 1.4% in 2004 (Anon. 2004a). In Berlin, unemployment was 15% in 2004 and this has increased people's reluctance to spend money on luxury goods, including ivory. During this survey, the investigator did not see a single item made of ivory being sold in Berlin or Frankfurt am Main, but did see several transactions in Erbach and Michelstadt, involving German buyers. The craftsmen/shop owners in Erbach and Michelstadt are partly to blame for the lack of post-1989 German-made ivory items in Berlin and Frankfurt am Main which helps contribute to the decline in sales. They are unused to marketing their products and have hardly distributed any outside the Odenwald. This contrasts with the Bavarian company (Haffke) which sold wholesale its miniatures on ivory throughout Germany and now do the same with paintings on mammoth ivory.

Most perilous for the future of the ivory industry is the future of the ivory specialty shops in Erbach and Michelstadt. While a few young people are happy to learn to craft ivory, they do not want to take over running their family's shops as they don't want to invest more capital in a trade that has a precarious future. Whether a market for mammoth tusk objects will emerge in Germany needs to be evaluated, the vendors said. They believe correctly that at the moment most Germans know nothing about mammoth ivory items. In the longer term vendors think if the promotion of mammoth ivory items is successful, German craftsmen, who number from 8 to 11 today, could perhaps earn a reasonable income from mammoth ivory carved for domestic and overseas markets, and supplemented by working on old ivory supplies.

# UNITED KINGDOM



## The legal position of the ivory trade in the UK

CITES entered into effect in the UK on 31 October 1976. The UK's Department for Environment Food and Rural Affairs (DEFRA) is responsible for controls on wildlife within the country. Britain's rules on the sale of ivory reflect the EU's CITES regulations, namely Council Regulation 338/1997 and Commission Regulation 1808/2001. According to the EU, ivory is an Annex A species, meaning that all commercial trade within member states is prohibited unless an ivory item qualifies for an exemption under Article 8.3 of Council Regulation 338/1997, and a sale certificate has been granted under Article 20.3 of Commission Regulation 1808/2001 (Robert Ford of DEFRA, pers. comm. April 2004). A further exemption under Article 32.c of Regulation 1808/2001 removes the need to obtain a sale certificate for antique (worked) items acquired before 1 June 1947, but the vendor would be expected to show that they were bought before that date. However, according to the Global Wildlife Division of DEFRA, the vendor would need to show that the specimen met the definition of a worked specimen in Article 2.w of EC Council Regulation 338/97, that it was acquired more than 50 years previously and was already then worked and required no further working; it could have been bought

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many times since that date (Sally Davis, CITES Policy Advisor, DEFRA, pers. comm. May 2005). DEFRA advises dealers in the UK to provide a provenance for ivory items wherever possible. If the dealer cannot do this, he can get an ivory expert to age the item and state its origin. If this fails, the dealer can ask DEFRA for a sale certificate called an Article 10 (Ford, pers. comm. April 2004). DEFRA also issues these sale certificates for ‘specimens’ of carved ivory acquired by dealers prior to 18 January 1990 – before the CITES ivory ban – provided that there is evidence to confirm the date, such as a letter from a family member, or an affidavit as to its age (Ford, pers. comm. April 2004).

DEFRA normally issues neither a sale certificate nor an import permit for any commercial trade in unworked ivory no matter how old.

Since January 1990, only ivory carved and bought in Zimbabwe as a personal possession (not for resale), can be imported legally and this requires an export certificate from Zimbabwe to the UK.

From 1999 to 2002 the government seized many ivory items (see Table 18), but, compared with countries such as China and Thailand, the total weight sequestered was extremely small. Ivory jewellery was the largest class and this was brought in mainly from Nigeria, Kenya, Côte d’Ivoire, Mali and Russia. Thai traders have tried to export elephant skin products from Thailand to the UK, such as wallets, money belts and bags; the government seized 32 such items from 2000 to 2002.

Table 18  
Official seizures of elephant products in the UK, 1999-2002

Year	Type of product	Quantity	Arriving from	Origin
1999	Ivory necklace	1	-	-
	Tusk	1	France	-
	Ivory bracelet	1	-	-
	Ivory bracelet	1	Zimbabwe	-
	Whalebone statue with ivory inserts	1	USA	-
	Ivory bead necklace	1	UK	-
	Ivory necklace, 112 g	1	Nigeria	-
	Carved tusks	2	Belgium	-
	Tusk	1	-	-
	Tusk	1	-	-
	Elephant skin handbag	1	Botswana	-
	Ivory paper-knife	1	Austria	-
	Tusks	3	India	India
	Elephant skin wallet	1	-	-
	Elephant skin wallet	2	-	Thailand
	Elephant skin belt	1	South Africa	-
	Ivory ornament	1	Colombia	-
	Wooden animal figurines with ivory parts	2	Jamaica	-
	2000	42 packs of raw ivory	78 kg	-
7 ivory pieces		0.010 kg	-	Kenya
Carved tusk		1.5 kg	-	Congo
Ivory figurine		0.407 kg	-	Congo
Elephant skin wallet		1	-	Philippines
Carved ivory		0.022 kg	-	Zambia
Elephant skin wallet		1	-	Pakistan
Elephant skin wallet		3	-	Thailand
Elephant skin wallet		22	-	Thailand
Miniature ivory plaque		1	-	USA
Ebony and ivory ruler		1	-	UK
Ivory mounted ruler		1	-	UK
Ivory 2 ft folding ruler		1	-	UK
Ivory 6 inch ruler		5	-	UK
Carved ivory		2.975 kg	-	India



Table 18 continued

Year	Type of product	Quantity	Arriving from	Origin
2001	Carved ivory	2.902 kg	-	India
	Carved ivory	2.933 kg	-	India
	Ivory bangle	1	-	Dubai
	Ivory pieces	3	-	-
	Ivory	26.6 kg	Kenya	-
	Elephant skin money belt	1	Thailand	-
	Tusk	1	UK	-
	Ivory items	3	UK	-
	Ivory carvings	2	USA	-
	Set of ivory piano keys	1	UK	-
	Raw ivory	44.5 kg	Kenya	-
	Elephant hair bracelet	1	USA	-
	Ivory and wood chairs	4	Switzerland	-
	Pianos with ivory keys	6	UK	-
	Ivory jewellery	8	Indonesia	-
	Ivory ornaments	3	Pakistan	-
	Tusk	1	Mozambique	-
	Elephant skin belt	1	Thailand	-
	Ivory necklace	1	France	-
	Set of ivory piano keys	1	UK	-
	Krishna ivory figurine	1	USA	-
	Ivory carvings	5 kg	Uganda	-
	13th c. ivory sculpture	1	Switzerland	-
	Ivory ornaments	9	Sudan	-
	Ivory bust of woman	1	Mali	-
	Ivory elephant figurine	1	Mali	-
	Ivory necklaces	3	Mali	-
	Ivory bangles	5	Mali	-
	Ivory items	4	Nigeria	-
	Clarinet with ivory	1	UK	-
	Ivory violin bows	7	Argentina	-
	Ivory fragments	9	Argentina	-
Carved tusks	2	Thailand	-	
Ivory jewellery	12	Kenya	-	
Ivory pendant	1	Kenya	-	
Ivory bangle	1	Kenya	-	
Ivory nose jewellery	4	Kenya	-	
Ivory	32	Russia	-	
Ivory chess pieces	3 sets	Russia	-	
Carved tusk	1	New Zealand	-	
2002	Ivory figurines	4	-	Angola
Tusk	1	-	-	Australia
Tusk, 2 ivory hammers	3	-	-	Australia
Ivory sculpture	1	-	-	Dubai
Ivory carving	1	-	-	Egypt
Ivory ear-rings	2	-	-	Malaysia
Ivory pieces	38	-	-	Nigeria
Ivory paper-knife	1	-	-	-
Ivory pens	2	-	-	Pakistan
Elephant skin wallets	2	-	-	Pakistan
Piano with ivory keys	1	-	-	Peru
Ivory jewellery	4	-	-	S. Africa
Ivory elephant figurines	6	-	-	Tanzania
Elephant skin handbags	2	-	-	Thailand

Table 18 continued

Year	Type of product	Quantity	Arriving from	Origin
	Picture album with ivory	1	-	Thailand
	Ivory rings	3	-	Uganda
	19th c. Chinese magnifying glass with ivory handle	1	-	UK
	Pianos with ivory keys	2	-	UK
	Pianos with ivory keys	18	-	UK
	Tusk	1	-	UK
	Piano with ivory keys	1	-	UK
	Ivory model of human eye	1	-	USA
	Elephant hair bracelet	1	-	USA
	Ivory figurine	1	-	USA
	Ivory items	2	-	USA
	Ivory corkscrew	1	-	Zimbabwe
	Tusk piece	1	-	Zimbabwe

- = no data

Source: UK Customs and Excise Department statistics, provided by Adrian Thrift, Wildlife Licensing and Registration Service, Global Wildlife Division, DEFRA, in a letter of 24 May 2004

ETIS recorded 470 elephant product seizures from 1990 to 2003 (see Table 19) with a very marked decline from the early 1990s (144 on average per year for 1990 and 1991) to the early 2000s (29 on average per year for 2002 and 2003) (Milliken et al. 2004).

Table 19

Number of illegal elephant product seizures made in the UK recorded by ETIS, 1990-2003

1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	Total
170	118	44	26	1	4	5	1	1	-	10	32	26	32	470

Source: Milliken et al. 2004

## **Introduction**

Fieldwork was carried out in the UK in London (7 million people) from 25 April to 4 May and again from 14 to 28 May 2004. London was chosen because it is by far the largest market with the most retail outlets. More than 2,000 shops and stalls were visited and 776 stocked ivory.

## **History**

It is not known when ivory trading started in the UK. Recent archaeological work in England has uncovered many ivory rings, perhaps for bag handles, in cremation and burial areas dating from the 5th to the 7th century (Hills 2001). Curiously, the tusks may have come from Axum in Ethiopia during its period of great prosperity from the 3rd to the 7th century when that Christian Kingdom had close ties to the Mediterranean world (Hills 2001; Phillipson 2003). It is not known where the rings were made, but probably in the UK.

Ivory carving of any significance started in Britain around the 10th century. The main centres for carving were Bury St Edmunds, Canterbury, St Albans and Winchester (Randall 1985; Woodhouse 1976). Items included crucifixes and nativity panels (St Aubyn 1987). During the Gothic period, from the 12th to the 16th centuries, the amount of ivory carved increased with artisans continuing to make mostly religious objects for the church (Maskell 1905). Some of the finest ivory objects ever produced in the UK are from this time. The

Reformation and the destruction of many monasteries in the 16th century ended this period of artistic ivory sculpting (St Aubyn 1987).

The 17th and 18th centuries saw a significant change in the types of ivory items produced in Britain with boxes, caskets, cutlery, human figurines, portrait medals, and tea caddies becoming more common. Prominent carvers of portrait medals were Huguenots. Chess sets, firearms, furniture, scientific instruments and snuff boxes were among objects imported from other parts of Europe, especially France, Germany and Italy.

The production of ivory objects in the UK reached an all-time peak between 1800 and World War I. The main reasons were first, a large middle class developed who could afford ivory items (Martin 2001); second, ivory became more fashionable; while third, with the advent of modern firearms and the penetration of much of Africa by Arab and European hunters and traders, huge quantities of tusks became available worldwide. Raw ivory imports into the UK quadrupled from an average of 112 tonnes a year from 1814 to 1820 to 496 tonnes annually from 1910 to 1914 (Martin 2001), although some of this was re-exported.

Ivory centres in Birmingham, London and Sheffield produced substantial quantities of brush and cutlery handles, human figurines, jewellery, piano keys and walking stick handles. Many of these items were for utilitarian use and by the end of the 19th century were mass-produced using machines, not traditional hand tools as before. Nevertheless, the UK continued to make some fine ivory carvings.

After World War I and during the 1930s depression, ivory demand and output fell. Alternative cheaper materials increased in use, such as bones, bonzoline, celluloid, ivorine, ivorite and tagua palm nuts. Factories in Sheffield continued to use hard ivory for cutlery handles, while factories in the London area maintained production of ivory brushes and, especially, ivory piano keys (Maugham 1931).

The import, production and sale of ivory in the UK fell further during and following World War II. In the 1960s, the UK was importing relatively small quantities of ivory compared to the boom years: 18,681 kg per year, according to UK Customs figures. This is less than 4% of the 1910-1914 annual average (Parker 1979). As in the past, some of these tusks were re-exported, further reducing UK consumption.

From 1970 to 1977 (the last year for which UK Customs statistics recorded ivory as a separate commodity) an average 20,280 kg of tusks was imported each year. From 1975 to 1977 only 3,777 kg a year stayed in the UK and was consumed (Parker 1979).

The largest importer of tusks into Britain from at least the mid-1970s until the UK ivory import ban in 1989 was F. Friedlein and Company. In the late 1970s, the company sold most of its tusks to three firms in the UK that employed six craftsmen making piano keys. These firms bought a total of about 6 tonnes of ivory a year (Thom Friedlein, pers. comm. 1980).

From 1980 to 1987 an annual average of 21,828 kg was imported according to UK CITES annual reports, but only 5,182 kg stayed in the country. F. Friedlein and Co. told TRAFFIC International that its annual average ivory imports from 1983 to 1987 were 12,354 kg or 77% of the UK's total. For each year from 1984 to 1987, the company re-exported an average of 7,569 kg or 63% of its imports. This left only 4,515 kg of ivory available for sale for each of those years in the UK (Luxmoore et al. 1989).

When Esmond Martin first visited F. Friedlein and Co. in Ilford, Essex, in 1980, he saw large quantities of tusks in the storeroom with the heaviest weighing 67.1 kg. In 1980 the company sold its tusks at an average USD 65 a kg. Friedlein's most experienced employee would occasionally cut some of the tusks to sell specific pieces to companies. The company also stocked sea shells (mostly from Dar es Salaam), and worked rhino horn (from eastern Africa). This company was by far the biggest supplier of ivory to UK users from the 1970s to the late 1980s.

In the mid-1980s about 75% of the company's tusks were sold to piano key manufacturers, 10% for bagpipe mounts and 15% for making various items such as pepper mills, jewellery, handles, and for antique restoration (Luxmoore et al. 1989). It sold the largest tusks (15 kg and above), which were all from savannah elephants, for piano keys. In 1985, most of these tusks were from Tanzania and the company sold a 15-kg tusk for about USD 100 a kg. (Friedlein, pers. comm. 1985).

From 1986 onwards, F. Friedlein and Co. found it increasingly difficult to import legal ivory. The firm did buy some legally from Kruger National Park in South Africa and from Zambia, but other former source countries became harder to deal with and the CITES bureaucracy became overly time consuming. The market became flooded with tusks from dubious sources such as Burundi, Somalia and the DRC. Another problem was the sharp increase in tusk price. Tender prices at Kruger National Park on 25 May 1988 were very high, especially for the large pieces needed for piano keys. A 15-kg tusk sold for USD 227 a kg and a 24-kg tusk for USD 280 a kg. The company refused to buy this ivory to the further detriment of the UK's piano key makers who were also suffering increased competition from Japan (Friedlein, pers. comm. 1987 and 1988).

By the mid-1980s only two companies were producing ivory keyboards: in Cornwall and Yorkshire. The company in Cornwall used 2,000-2,200 kg of tusks a year, with an average weight of 20 kg. It made each

year 1,200-1,500 keyboards plus a few other items, such as other musical instrument parts. About 30% of the tusks ended as waste. The Yorkshire company used about 600 kg of tusks a year from which it made 400-500 keyboards. It made a total of about 40,000 keyboards a year, but only about 1% used ivory. The price of ivory keyboards was £700 (USD 1,253) compared with £100 (USD 179) for plastic ones. Almost all the two companies' ivory keyboards were exported, especially to Germany (Friedlein, pers. comm. 1987; Luxmoore et al. 1989). These firms in the mid-1980s would have produced more keyboards, but were limited by a shortage of soft large tusks (Friedlein, pers. comm. 1987).

At least five Scottish firms used to make ferrules, mounts, and mouth pieces for bagpipes from ivory. In the 1970s they bought whole tusks, but in the 1980s Friedlein sold them ivory discs. The price for a set of these bagpipes was £1,100-1,800 (USD 1,969-3,220) in the mid-1980s, while bagpipes with plastic parts were about £550 (USD 985). By the mid-1980s, the demand for both ivory piano keys and ivory bagpipe parts was in decline. Prices had risen hugely and the British armed forces had stopped buying them. A 5-cm ivory disc doubled in price in 1988 from £14-28 (USD 25-50) adding £400 (USD 716) to the cost of a set of bagpipes. While piano keys made of ivory are considered by pianists as superior to plastic, apparently bagpipe players find no difference (Luxmoore et al. 1989).

### **Sources and prices of raw ivory in the UK from 1990 to 2004**

After 1989 and the ban on imports, the only source of raw ivory was illegal imports and the small stock already in the UK. Smuggling did take place, but brought in far smaller amounts than had legal importation. No data on illicit raw ivory entering the UK are available for nearly the whole period from 1990 to 2004 because no investigations were made. In April/May 2004 the investigator found a few tusks for sale in London. There were two single tusks and two pairs of tusks in four shops or stalls. Only two vendors would provide any weights and these were for one of the single tusks and a pair. The single one was probably more than 20 years old and was in the Bermondsey Antiques Market. It weighed 1.204 kg and was initially priced at £200 (USD 360). After hard bargaining, the price came down to £180 and the seller responded angrily that 'for a cheaper tusk, buy a plastic one'. Thus, the final price per kg worked out as USD 269. The pair weighed 20 kg and came from Africa, but had been sold recently in the UK at the Portobello Road Antiques Market. They were mounted on a stand that had a plaque dated 1920. The price was almost the same for the tusk at USD 270 a kg. The other tusks were one 20-cm long from Nigeria in the Portobello Road Antiques Market, and a pair 22.5-cm long on a silver base in a shop in Church Street NW8. There were also two tusk tips for sale in another shop in the Portobello Road Antiques Market; they were probably too small to be sold for carving.

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.

### **Ivory workshops in the UK**

The main firms formerly making piano keys and bagpipe parts have stopped using ivory. Nevertheless, according to the police, a few individuals have been caught on rare occasions carving ivory items in London and one or two other places. Thus ivory manufacturing has been greatly reduced compared with the 1980s.

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, *Elephants on the High Street* (IFAW 2004). According to IFAW researchers, who got the information from the Bedfordshire police, in 1996 the owner of a walking stick shop was found to have bought two tusks for £2,000 (USD 3,380) from a 'man in the street'. He took the raw ivory to a woman who carved it into walking stick handles for him to sell in his shop in the Portobello Road. He was arrested and admitted buying the tusks. He was fined £250 (USD 423) by a magistrate's court.

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 industrial unit 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 used in repair work. A salesman in an antique shop in central London showed the investigator a large 19th-century Indian-carved ivory item. Within the past year or so, this had been repaired by gluing a 1.5-cm cube of ivory into a gap. The antique shop employs three master craftsmen to repair antiques, normally wooden pieces, but occasionally ivory as well.

## Retail outlets and prices for worked ivory in London

In April/May 2004, 776 shops and stalls were displaying for sale at least 8,325 ivory items (see Table 20). Only those items that were definitely ivory were recorded. There may in fact have been several hundred more ivory items than stated here because some cutlery handles and knobs could not be confirmed due to lack of time.

Table 20

Number of retail outlets seen with ivory items in London, April/May 2004

Type/location	Number of outlets	Number of items
Antique markets (Tables 21/22)	712	7,047
Antique shops		
Kensington Church St.	16	792
Piccadilly, New/Old Bond Sts.	12	133
Church St. NW8	5	104
Bruton, Mount, South Audley Sts.	11	82
Pimlico Road	6	30
St James's, King, Duke Sts. area	6	25
Misc.	8	112
Total	776	8,325

By far the greatest number of outlets and ivory items were in London's 17 main antique markets (see Table 21). They had at least 7,047 ivory items, 85% of the total for London (see Tables 20 and 22). The market with most ivory items on display was the Portobello Road Antiques Market where 328 of the 832 shops and stalls offered a total of 2,973 objects. The antique markets with large proportions of outlets selling ivory items (although in smaller quantities) were the K.M. Antiques Fairs, sometimes held in the Rembrandt Hotel in South Kensington (32 of 38), and the Fleurdelys, sometimes held in the Thistle Hotel in Kensington (11 of 13). The Apple Market in Covent Garden (3 of 44) and the St James's Church Antiques Market in Piccadilly (2 of 21) had the smallest proportions of outlets selling ivory.

Table 21

Number of retail outlets in the main antique markets with ivory items seen in London, April/May 2004

Name of market	No. of outlets	No. with ivory	% with ivory
Portobello Road Antiques Market	832	328	39
Royal Horticultural Hall Antiques Fair	139	94	68
Camden Passage Antiques Market	136	62	46
Bermondsey Antiques Market	223	60	27
K.M. Antiques Fairs	38	32	84
Antiquarius	69	23	33
Grays Antique Market	80	20	25
Spitalfields	62	19	31
Covent Garden Market			12
a) Apple Market	44	3	
b) Jubilee Market Hall	112	15	
Alfies Antique Market	118	16	14
Grays Mews Market	61	12	20
Fleurdelys	13	11	85
Hampstead Antique & Craft Emporium	18	6	33
Bourbon-Hanby Antiques Centre	17	3	18
Bond Street Antiques Centre	19	3	16
The Kensington Antiques Centre	13	3	23
St James's Church Antiques Market	21	2	10
Total	2,015	712	35

Table 22

Number of ivory items surveyed in London's main antique markets, April/May 2004

Name of market	Number of items
Portobello Road Antiques Market	2,973
Royal Horticultural Hall Antiques Fair	739
Antiquarius	711
Camden Passage Antiques Market	653
Bermondsey Antiques Market	552
Grays Antique Market	367
Alfies Antique Market	263
K.M. Antiques Fairs	224
Spitalfields Market	144
Bourbon-Hanby Antiques Centre	115
Grays Mews Market	89
Bond Street Antiques Centre	74
Covent Garden Market	56
Hampstead Antique and Craft Emporium	38
Fleurdelys	35
The Kensington Antiques Centre	12
St James's Church Antiques Market	2
Total	7,047



Victorian ivory thimbles and cases

Of the 8,325 ivory objects seen for sale, 4,701 (56%) were identified items and are catalogued by type in this survey (see Table 23). The most numerous were jewellery items (22%), human figurines (12%), netsukes (10%), walking sticks (8%), and magnifying glasses (5%). An analysis was done of their origins. Not surprisingly, almost half (46%) were crafted in the UK, followed by Japan (27%), China (15%), France (4%), India (4%) and Africa (2%) (see Table 24). In order of diminishing number, British-made items were walking sticks (usually with just ivory handles), magnifying glasses, cutlery sets, knives and paper-knives; from Japan, netsukes and figurines; from China, figurines; from India, bangles and figurines; from France, jewellery and walking sticks; and from Africa, busts (see Table 25).

Table 23  
Ivory items seen for retail sale in London, April/May 2004

Item	Percentage of total
Jewellery	22
(Bangle	4)
(Brooch	3)
(Necklace	3)
(Ear-rings, pair	1)
(Pendant	1)
(Misc. jewellery	10)
Human figurine	12
Netsuke	10
Walking stick	8
Magnifying glass	5
Animal figurine	4
Cutlery set	3
Fork	3
Knife	3
Box	2
Chess set	2
Fan	2
Handle and lid knob on tea or coffee pot	2
Paper-knife	2
Brush	1
Napkin ring	1
Spoon	1
Misc.	17
Total	100

Table 24  
Country of origin for ivory items seen for retail sale in London, April/May 2004

Country	Percentage
UK	46
Japan	27
China	15
India	4
France	4
African countries mostly in West Africa	2
Other (Burma, Cambodia, Germany, Hong Kong, Italy, Portugal, Russia, Spain, Sri Lanka, Thailand)	2
Total	100

Table 25

Types of antique ivory items made in various countries seen for sale in London, April/May 2004

Country	Item (in order of quantity)
UK	Walking stick Magnifying glass Cutlery set Knife Paper-knife Fork Brush Glove stretcher Spoon Corkscrew
Japan	Netsuke Human figurine Animal figurine
China	Human figurine Animal figurine Cantonese magic ball Bangle
India	Bangle Human figurine Animal figurine Box
France	Jewellery Walking stick Fan
African countries	Bust Arm bangle Tusk Bangle Animal figurine
Germany	Brooch Rose pendant Walking stick
Italy	Human figurine Spice box Walking stick

Each of the 8,325 ivory items seen was examined for age of manufacture. Very few were recently-made/new items, defined as articles made after the EU and international ivory trade bans (CITES) in 1989 and 1990. Of the 4,701 items catalogued by type, only 166 (3.5%) were newly made (see Table 26). Not one of the remaining 3,624 pieces was considered to be recent. It is possible that a very small number were in fact made after the ban, but their style and condition suggested they were almost all genuinely old. Thus, of all the items surveyed, a reasonable estimate would be that about 2% were recently made.



Table 26

New (post 1989) ivory items seen in London, April/May 2004

Item	No. of items	Size in cm	Where made	Price in USD
Pot with lid	44	7.5-12.5	-	-
Netsuke	37	5	China	36-108
Necklace	32		Thailand, Hong Kong, China	43-108
Bangle	15		Thailand, Hong Kong, China	88-108
Misc. jewellery	7		Hong Kong, Thailand	-
Paper-knife	7		China, Hong Kong	-
Bracelet	2		West Africa	-
Brooch	2		China, Hong Kong	-
Bust	2	18	West Africa	900
Elephant figurine	2		-	-
Cabbage	1		China	990
Figurine	1		-	-
Human figurine	1	5	China	54
Ring	1		China	9
Snuff bottle	1		Hong Kong	157
Spoon & fork	1	30	Hong Kong	157
Misc.	10		-	-
Total no. of items	166			

(These items were found mostly in the Bermondsey Antiques Market and the Portobello Road Antiques Market.)

Exchange rate: £1 = USD 1.8

### **Antique markets in London**

All 17 major antique markets in London were surveyed (see Table 21). Eight markets offered more than 90% of the total ivory items seen and are listed below in order of numbers of items. The antique markets sell mostly the more common, less expensive objects and nearly all were antique or fairly old ivory. There were 166 recently-made ivory items seen in London, 164 of which were found in the antique markets and of these 158 were in the eight main markets.

#### Portobello Road Antiques Market

This is the largest regularly held market in the UK and stocks more than 40% of the total ivory items seen for sale in the city. Most outlets are stalls on the roadside or within buildings along the road and side streets. Stalls open only on Saturdays from around 7 a.m. until lunch time; the few antique shops on Portobello Road open from Monday to Saturday from around 9.30 a.m. to 5.30 p.m. The shops' stock tends to be higher priced than that of the stalls.

Most items on sale come from auctions, other vendors, fairs and markets all over England, and from people who bring ivory to sell. The vendors import very little from China, Hong Kong, India or Japan, the main sources of foreign-made items in London.

The market is a major tourist attraction and on Saturday mornings even the side streets are packed with potential buyers and tourists from all over the world. Undoubtedly, the turnover in ivory is the highest for any antique market in Britain. Portobello Road displays 42% of the total ivory items found in London's 17 markets and offers for sale four times more ivory objects (2,973) than its closest competitor (see Table 22). Over three Saturdays, all the shops and stalls that were open were surveyed. Out of 832, 328 offered ivory. The stock ranged from one to 148 items per shop, with the average being nine items. The most numerous was jewellery, followed by figurines, cutlery, netsukes and magnifying glasses. The main customers for ivory are Americans and then British. These are followed by other Europeans mainly French, German, Italian and Spanish. A few buyers come from eastern Asia. Different nationalities show preferences for certain items. Americans like furniture with ivory inlay while Britons buy backscratchers, brushes, cutlery, figurines and walking sticks. This market does not sell the most expensive items in London, however.

About half the ivory items were made in the UK, followed by Japan, then China. Despite the fact that African countries have some of the largest and oldest ivory carving industries in the world, there were very few African items. The dealers explained that they do not like African ivory items as the often crude carving does not appeal to customers and because, being less familiar with the products, they cannot tell if carvings are new or antique. Most vendors were helpful in their answers. Only one asked the investigator for whom he was working and whether he was the author of the recent IFAW ivory report. He angrily said that a photo in that report of a seemingly recently-made ivory item was in fact of a known antique.

Of the 166 recently-made ivory items seen in the survey (see Table 26), 114 or 69% were for sale in Portobello Road. The rest were found mostly in the other 16 antique markets. Of the 114 items in this market, 44 were small pots with lids, and 35 were Chinese-made netsukes. The netsukes were offered for sale by a Chinese at an outdoor stall who admitted that they were all new: some were erotic. The smallest ones (2.5 cm) were only £20 (USD 36) while the larger ones (6 cm) were £60 (USD 108). The vendor stopped the investigator from photographing them. This was unusual as there are many tourists taking photographs, which implies the vendor knew that he should not be selling recently-made ivory items. The next most numerous recently-made items found along the Portobello Road were jewellery, bangles, necklaces and brooches made in eastern Asia.

#### Royal Horticultural Hall Antiques Fair

The next most important antique market for ivory goods, with 739 objects, was the Royal Horticultural Hall Antiques Fair which is held once a month on a Sunday in Lindley Hall, Vincent Square, Victoria. The usual ivory items, such as cutlery with ivory handles, figurines and jewellery were found in 94 of the 139 stalls: a very high proportion for a large market. There were far fewer visitors than in Portobello Road, the number not helped by an entrance fee being charged. The manager queried the investigator and especially his wife as to what they were doing. Some vendors had expressed concern, perhaps either because they sometimes sold illegal ivory or because they had been misquoted by IFAW.

#### Antiquarius

Bennie Gray (of Grays Antique Market fame), founded the Antiquarius market on the King's Road in Chelsea in 1970. It is of medium size with 23 out of 69 stalls offering among them 711 ivory items. One stall specializes in ivory items, the only such outlet in London found in this survey. It had about 400 ivory objects, the largest number of any single outlet seen in London. Of these, many were good quality items such as backscratchers, chess sets, netsukes, figurines and walking sticks. None were from Africa. According to the vendor African products are of lower quality than pieces made in Asia and Europe. The majority of buyers are Americans, Britons and Italians in that order.

#### Camden Passage Antiques Market

This market consists of tables outdoors in three open areas and stalls inside several buildings on both sides of Camden Passage in Islington in North London. The antique market started in 1960 and has been expanding since then. It is especially busy on Wednesdays and Saturdays when many dealers bring antiques to display on the outside tables. A great variety of ivory items were on offer ranging from relatively cheap small magnifying glasses at £15 (USD 27), to an expensive elephant with a crystal ball on its back at £18,500 (USD 33,300). In total, on a busy Wednesday, the investigator recorded 653 ivory objects.

#### Bermondsey Antiques Market

This is on Long Lane and Bermondsey Street in south-east London. Unlike the other main antique markets, it is primarily for wholesale buyers. The market has 223 outlets, 182 outside and 41 inside. The outside part opens at 5 a.m., so that dealers coming into London can avoid heavy traffic, and starts closing at 10.30 a.m. with all stalls shut by 1 p.m. The inside part stays open later. There were 552 ivory objects counted. The most common ivory items were British-made cutlery, jewellery, brushes and magnifying glasses. The higher quality objects are found inside. Most customers are British tradesmen.

#### Grays Antique Market

A doorman with a top hat stands at the doorway to this unusual market in a Grade 2 listed Edwardian building. Near New Bond Street and founded by Bennie Gray in 1977, it contains 80 stalls. Twenty of these were displaying 367 ivory items. Opening hours are similar to other shops in the area and are designed to suit wealthier foreign and local visitors. Sales are to wholesale and retail buyers about equally (Anon. c. 2003).

What also makes this market different is the high quality and diversity of the merchandise. Amongst the items was an English purse carved with ivory flowers dating to 1820 for £300 (USD 540); a Japanese-made 15-cm rhino figurine carved in the 1920s for £1,200 (USD 2,160); a 10-cm rabbit also from Japan in the 1860s

for £1,500 (USD 2,700); a Spanish 18th-century 22-cm figurine of Jesus Christ for £3,800 (USD 6,840); and an 18th-century Japanese netsuke of a Dutchman for £4,000 (USD 7,200). Most buyers here are Americans followed by Europeans including British.

#### Alfies Antique Market

Founded by Bennie Gray in 1976, this market is in Church Street in Marylebone. It opens from 10 a.m. to 6 p.m., Tuesday to Saturday. There are 118 retail outlets occupying a three-storey building, but only 16 had ivory totalling 263 items. Unlike Grays Antique Market some stalls offered modern items as well as antiques, such as dresses and lamps. The antiques were fewer and less valuable than in most of the markets. The same applied to the ivory, with only common pieces such as cutlery, jewellery and Chinese figurines available.

#### K.M. Antiques Fairs

This fair occurs on certain Sundays in different London hotels. On 2 May 2004 it was held at the Rembrandt Hotel in South Kensington. There were only 38 stalls, but 32 sold old ivory objects amongst other antiques. There were 224 ivory items in total. Quality was good, but there were few unusual pieces. As at the monthly market, the Royal Horticultural Hall Antiques Fair, some of the vendors rather aggressively questioned the investigator's work. Doubtless they knew of the IFAW ivory report, and possibly they sometimes sell new ivory.

#### The smaller London markets

The remaining nine markets surveyed in London had less than 150 ivory items each (see Table 22). Most objects were the usual antiques made in Britain, Japan and China. A few unusual pieces were seen: balls from a Tibetan necklace for £100 each (USD 180), a European-made baby's rattle for £130 (USD 234) and a 10-cm Victorian needle case shaped like a closed parasol for £100 (USD 180).

Generally, establishments with few ivory items had low quality stock. Better calibre ivory objects, whether old or new, were found in the more expensive antique markets.

### **Antique shops in London**

A hundred antique shops in central London were visited. Those selling the largest number of ivory items were in two general areas. Around Kensington Church Street, 792 ivory objects were seen in 16 antique shops; in the Mayfair-St James's area, 29 shops had 240 items. Antique shops sell the most expensive, rarest and most unusual ivory items, but no new ivory items were seen. Most are members of several associations that regulate sales of antiques. As in the markets, most buyers are American, then British and other Europeans. In the very expensive shops Americans buy as much as three-quarters of the higher quality antiques.

#### Kensington Church Street

A shop specializing in walking sticks from all over the world had the largest number of ivory items: almost all were ivory-handled walking sticks. Most were British-made, but some came from France (Dieppe), Germany, Italy, Japan and China. During the 19th and early 20th centuries, walking sticks were very much in fashion, especially for men. The peak period for their manufacture was from 1860 to 1914 when there were 60 workshops making walking sticks in Britain alone. World War I ended their popularity. During the heyday of walking sticks women also used them; the handles were smaller and sometimes jewelled. Sometimes handles were made in the Orient and exported wholesale to Britain where they were fitted to sticks. The majority of walking sticks for sale in this large shop had handles of wood, stone, porcelain and then other materials, but there were at least 261 made from ivory. The earliest ivory ones dated back to the 17th century. Prices varied from £160 to £4,000 (USD 288-7,200). The manager is experienced in selling to foreigners and can get a CITES permit for a customer within nine or ten days. In the markets, vendors normally do not bother with CITES permits. The main buyers are Americans followed by Europeans.

The shop with the second largest number of ivory objects, 181, specializes in Japanese and Chinese netsukes and figurines. The owner orders them from all over the world. The third ranking shop also specializes in Oriental antiques and had 158 ivory items.

Other shops offer Indian ivory antiques, such as a 90-cm square games table made in Mysore in the early 20th century and priced at £5,500 (USD 9,900); a 40-cm writing box made around 1820 in Visakhapatnam (formerly Vizagapatam) in Andhra Pradesh for £3,600 (USD 6,480); and a Bombay-made scroll box from the 19th century (35-cm long and 20-cm wide) for £1,900 (USD 3,420).

### Piccadilly-Mayfair-St James's area

Antique shops are mostly found in Mayfair's Bruton, Mount and South Audley Streets, Piccadilly, New and Old Bond Street, and in St James's Duke and King Streets. The *crème de la crème* of antiques, including ivory, is found here in some of the most famous shops in the world. The most expensive object was a George III (c.1755) mahogany library table, with many drawers each with an inlaid ivory letter of the alphabet, priced at £960,000 (USD 1,728,000). But the most expensive item made almost entirely of ivory, was an elaborately carved howdah (220-cm high and 220-cm long) with a double dome ivory canopy probably made in Murshidabad in West Bengal around 1830 and priced at £295,000 (USD 531,000).

There was a greater number of antique masterpieces made out of ivory in this exclusive shopping area than elsewhere in London. Some of the finest, as with Kensington Church Street, were made in India, Japan, and then Britain. There was a late 18th-century 21-cm high and 53-cm long cosmetics box with carved scenes of buildings made in Visakhapatnam and priced at £15,000 (USD 27,000). There was a pair of 34-cm barges with oarsmen carved in northern India in the mid-19th century for £6,500 (USD 11,700). There were some extremely fine Japanese ivory carvings. For instance, an ornate 19th-century elephant statue (26-cm long) inlaid with mother-of-pearl and semiprecious stones, held on its back a meditation crystal ball within a lotus flower and was selling for £48,000 (USD 86,400). A netsuke of two elegantly carved maize cobs was priced at £8,000 (USD 14,400). High quality British craftsmanship was also represented. A thermometer surrounded by three tiers of decorative ivory cupolas, 30-cm high and made in 1840, was priced at £7,500 (USD 13,500). An unusual full-size spinning wheel, nearly all ivory, 107-cm high and 45-cm long and made between 1824 and 1832, was on sale for £22,000 (USD 39,600).

### Other locations

Surprisingly, department stores, even in their antique sections, had no ivory items or items with ivory parts, except for Harrods in Knightsbridge. It seems department stores generally have a policy against selling ivory, even antiques. Harrods offered 11 ivory antiques including four fans averaging £1,200 (USD 2,160) and two 19th-century tea sets with ivory parts averaging £750 (USD 1,350).

In west London on Chiswick High Road is a building with three storeys of furniture and one antique shop selling 58 ivory items, all old. The owner had a few unusual items, including an English ladle for £225 (USD 405), a crochet hook container at £135 (USD 143) and a pickle-fork for £165 (USD 297).

There were no ivory items, old or new for sale in China Town in Soho, despite Hong Kong Chinese importing a variety of goods from Asia into Soho. Nor did the investigator see any ivory pieces in Soho during a 1986 survey.

## **Retail prices in London**

Retail prices for an ivory item vary widely depending on age, country of origin, condition, craftsmanship, rarity and demand (see Table 27). Prices also vary depending on the type and location of the retail outlet. In addition, the superior items are located in the most expensive areas, with less valuable pieces elsewhere. Two boxes illustrate this. One in an Indian shop near Victoria Station, from Kashmir and perhaps 50 years old in mediocre condition with no carving, was marked £90 (USD 162). The other, on sale in Jermyn Street, one of London's most exclusive streets, was 17th-century Indian in excellent condition with magnificent carvings and a price-tag of £30,000 (USD 54,000).

Table 27

Retail prices for ivory items made before 1989 seen in London, April/May 2004

Item	Size in cm	Price range in USD	Average price in USD
<b>JEWELLERY</b>			
Bangle	0.3-10	18-360	85
Cross	8-23	108-1,575	608
Necklace	10	27-21	668
<b>FIGURINES</b>			
Animal, various	9-20	970	623
Human	7-10	20-1,782	382
	15	81-6,300	2,682
	20-25	621-27,500	4,048
Netsuke	5	162-14,400	3,314

Table 27 continued

Item	Size in cm	Price range in USD	Average price in USD
MISC.			
Aide memoire case	10	504-1,791	986
Box	various	162-54,000	6,604
Brush	15-25	16-576	108
Chess set	4-13	270-18,000	5,038
Fan	25	342-2,970	1,363
Fork	13-45	22-324	146
Gavel	10-22	216-2,610	1,253
Glove stretcher	13-16	18-11	745
Magnifying glass	various	27-5,040	378
Needle holder	10 x 7.5	99-891	392
Paper-knife	10-49	27-2,520	398
Walking stick	80-106	122-11,700	2,578
Ruler	8-15	43-603	284

Exchange rate: £1 = USD 1.8

The price range in London of ivory items/items with ivory parts is perhaps the greatest in the world, going from £5 (USD 9) for a ring to £960,000 (USD 1,782,000) for a table. This is because of the high priced antiques that are to be found there. More than 95% of the ivory items for sale in London are antiques, while in Africa and Asia it is the other way round.

### **The use of ivory substitutes in London**

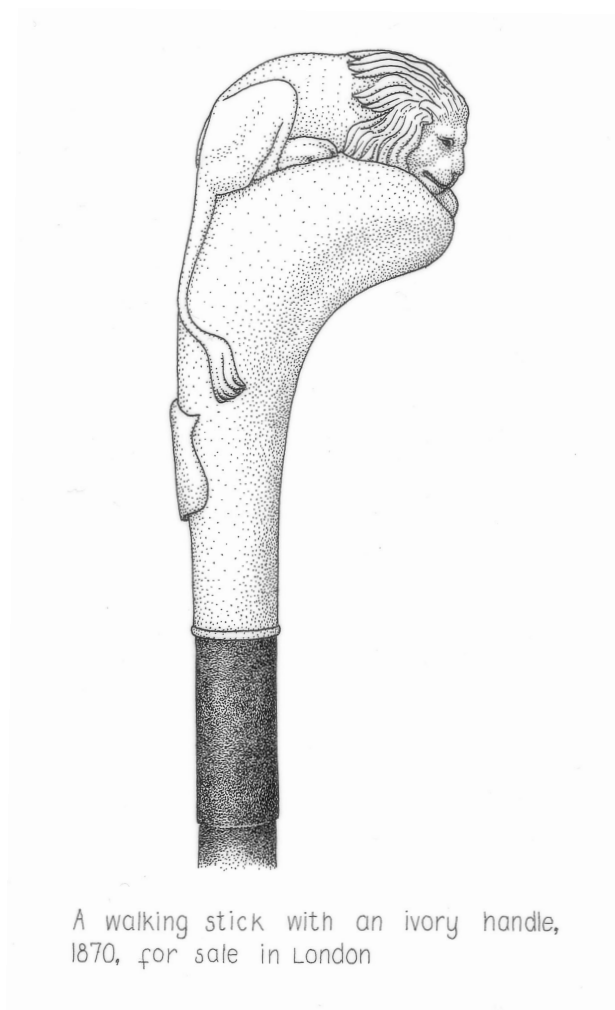
London vendors selling ivory items usually identified the material correctly. However they had difficulty, especially with cutlery and magnifying glass handles, in identifying the different types of ivory substitutes. These can be other natural substances: antlers; bones – especially from domestic animals; teeth from hippos and sperm whales; tusks from mammoths, narwhals and walruses; and various vegetable nuts. Man-made materials are also used, especially bonzoline, celluloid, galolith, ivorine and ivorite (Espinoza and Mann 1991; Kunz 1916; and Shell 1983). The vendors do recognize fish bone and resin.

A surprising finding from this survey was the near absence of mammoth ivory carvings in shops despite requiring no CITES permit to import and export as the ivory is from an extinct species. Beginning in the early 1990s large quantities of mammoth tusks were imported into Hong Kong and then re-exported to factories in China for carving into many items (Martin and Stiles 2003). These were for retail sale in southern China, and there were more than 12,000 on display in Hong Kong in 2002 (Martin and Stiles 2003). British visitors to Hong Kong buy mammoth ivory items but obviously keep them as personal possessions rather than reselling them in London. Hong Kong dealers said mammoth ivory items were also exported wholesale from Hong Kong and in large quantities. But in London, very few were seen. Most were in one shop in Piccadilly. In the window were eight newly-carved netsukes (5 cm) of dogs and Chinese people, mostly stained brown, for £95 to £252 (USD 171-454). Staining is typical for worked mammoth ivory in order to hide the dark lines common in these tusks. Although these netsukes had dark lines and they were labelled as mammoth ivory, the vendor said the netsukes were in fact made from new elephant ivory, but were labelled mammoth as this is legal – perhaps the vendor believed that the investigator wanted to buy new elephant ivory, so gave this incorrect description. There was one new elephant ivory netsuke made in China for sale in this shop, however, and this the vendor correctly identified. Other small carvings made recently in China from fish bone and ox bone were again named correctly.

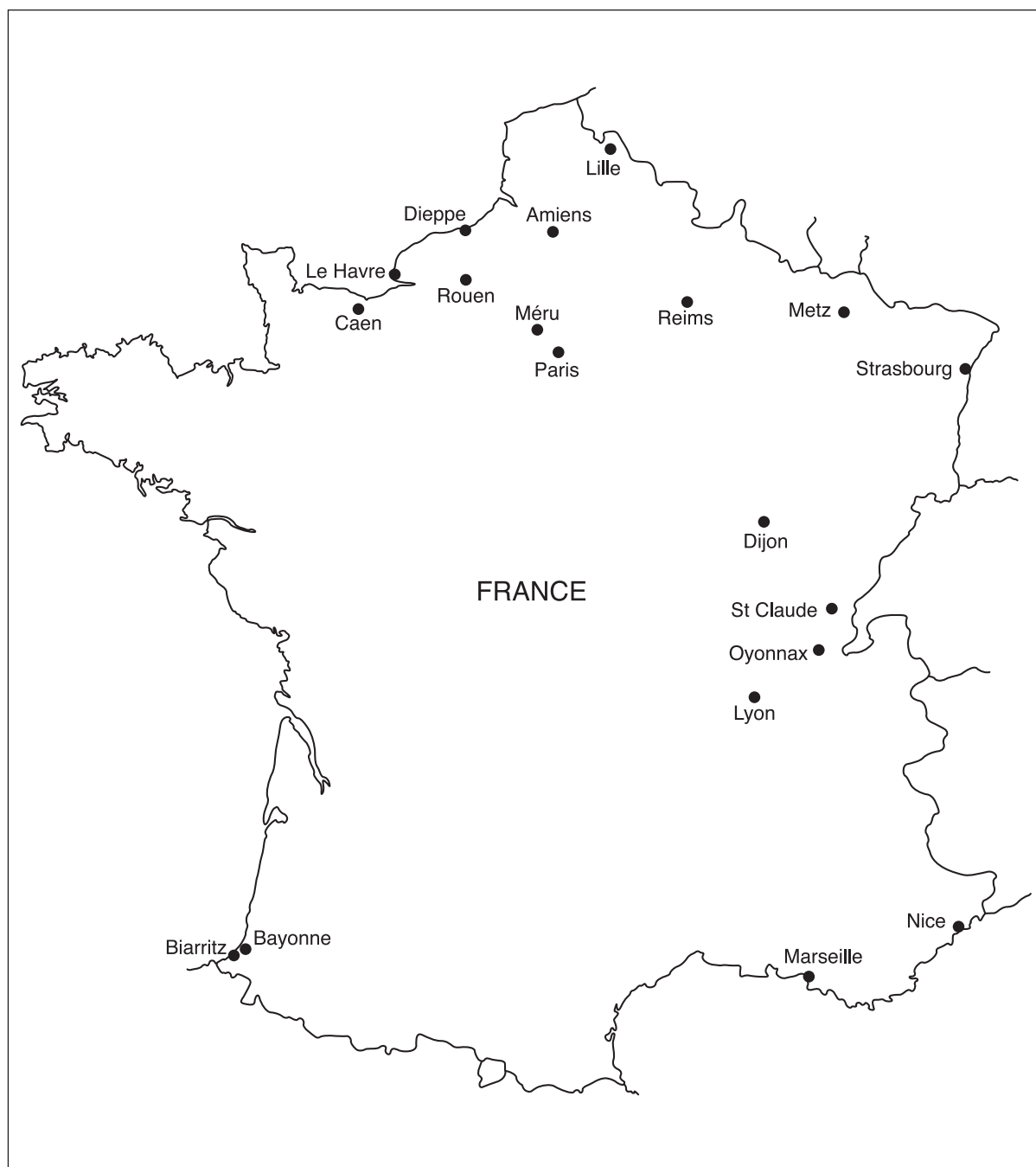
## Vendors' views on ivory market trends and the future

The main concern for ivory vendors in London was the decreased number of visitors from the USA from 2003 to early 2004, which reduced sales. This was mostly due to the terrorist attack in New York City in 2001. Also, Americans have been buying fewer ivory items since the CITES ban due to the international campaign against the ivory trade and the time required to obtain a CITES permit. Most vendors supply the forms for customers to export antique ivory items only if asked. Americans generally know that permits are needed, but vendors prefer to persuade them to do without a permit, and simply to carry the ivory out of the country in their luggage. There is evidence that the sale of all antiques in the UK declined in 2003. In the annual survey carried out by the London and Provincial Antiques Dealers Association (LAPADA), 55% of the respondents said that their turnover had fallen by an average of 10% from 2002 to 2003. They also noted that crime (shop break-ins) doubled in 2003 with most dealers reporting thefts. The result is that more antique dealers are working from home or by appointment only (Anon. 2004b).

The British Antique Dealers Association is also concerned that incorrect and negative publicity has damaged sales of antique ivory objects. It believes that the IFAW report, *Elephants on the High Street*, was 'unrepresentative and the recommendation unworkable' (Anon. 2004c). Several dealers said that the report was inaccurate and that they should have been consulted before publication. In total, the investigator questioned 776 vendors with ivory items (more than 95% antiques) and nobody brought up the subject of the legal ivory auctions that took place in southern Africa in 1999 and what effect these and future possible auctions might have. The lack of strong views on the subject suggests London vendors do not deal in raw ivory. Their most common complaint, rather, was the excessive DEFRA and CITES form-filling required for sales and exports of ivory items; most dealers do not bother with the paperwork.



# FRANCE



## **The legal position of the ivory trade in France**

CITES entered into effect in France on 9 August 1978. As in the other 24 countries of the EU, the Convention is applied through European Council (EC) Regulation 338/97 of 9 December 1996 (Official Journal of the European Community no. 061 of 3 March 1997). The modalities of applying this regulation are spelled out in several European Commission regulations (such as European Commission Regulation 1808/2001). The

Interministerial Decree of 30 June 1998 constitutes the national regulatory base in France for implementing CITES and EC Regulation 338/97 and the related European Commission regulations.

Commerce in ivory is legal in France, but is strictly controlled. Under EC Regulation 338/97, when a private individual or professional wishes to sell an ivory specimen, he must present to the relevant authorities the documents that demonstrate the legal origin and age of the specimen and obtain a certificate authorizing the sale. This could be a CITES re-export certificate, if the specimen is to be shipped outside the EU, or an intracommunity certificate (under Article 8.3 of EC Regulation 338/97) if the specimen is destined to a buyer resident in the EU. However, the sale in the EU of worked ivory objects dating to before 1 June 1947 does not require certificates. The ivory owner must provide some form of proof to demonstrate to the authorities that a specimen in question precedes this date in age.

Article 4 of the Interministerial Decree of 30 June 1998 specifies the conditions that are relevant to professional ivory craftsmen and restorers. These provisions were adopted because these professionals transform ivory, and are in accordance with provisions found in CITES Resolution Conf. 10.10 (CoP12) concerning the control of internal ivory trade. Each authorization is personal and non-transferable. Article 4 refers to the provisions found in the Interministerial Decree of 28 May 1997, which states that the Prefect of the department (similar to a state or county) in which the professional ivory worker lives grants the authorization for ivory possession and use. No person convicted of a previous CITES violation may be issued with such an authorization. The permit is valid for five years and can be renewed. A craftsman or restorer who holds an authorization can use only pre-Convention (pre-26 February 1976) ivory. This ivory is part of the pre-Convention stocks declared before 1 June 1999, or is bought from individuals who are selling family possessions, either directly or through other categories of professionals (such as auctioneers). Raw ivory obtained by a craftsman or restorer between 1976 and 1989 is 'frozen'; it cannot be used for commercial purposes. Such ivory held by a private individual can be sold to another individual (such as a collector) or to an antique dealer, but a certificate under Article 8.3 must be obtained. Craftsmen and restorers do not have access to this ivory for crafting, as it post-dates the CITES Convention in age.

A professional who buys or sells ivory specimens (usually tusks or raw ivory pieces) must immediately record the transaction in his ivory stockpile register, which is available for inspection by the authorities. When a craftsman creates an ivory object, he must mark each piece with a stamp or other ownership sign.

The 30 June 1998 decree links EC Regulation 338/97 with the French Environment Code. The Article L. 415-1 of this Code establishes the authorities who are charged with enforcing the EU CITES provisions. The principal enforcement authorities are Customs officers, who number 19,000, who control imports of wild fauna and flora specimens from 58 offices at the national borders, and also anywhere within French territory, and the 1,800 officers of the National Office for Game and Wildlife.

Some 260 agents within departmental brigades of the latter office are trained to enforce CITES regulations, and 6-10 agents work in a national Washington Convention Brigade. The Washington Convention Brigade has two main objectives: to enforce the EU regulations on CITES as well as national wildlife laws directly or with assistance from other services such as the Police or Customs throughout the territory of France, and to train National Office for Game and Wildlife staff, as well as Customs officers and others. In addition, agents of the National Office of Forests, the Higher Council for Fisheries, the Directorates of Veterinary Services and officers of the judiciary police have the authority to enforce CITES regulations. A recently created (2004) Office Central de Lutte contre les Atteintes à l'Environnement et à la Santé Publique (Central Office to fight against Environmental and Public Health Offences) is also in charge of CITES controls.

Under Article L. 412-1 of the Environment Code, it is illegal to import, export, re-export, transport, utilize or sell a CITES listed specimen without the required certificate. The penalty for doing so without authorization is up to six months in prison and a €9,000 fine (Article L. 415-3). Article 415-5 further permits the seizure of the CITES specimens and any equipment or vehicles used in committing the infraction, plus charging the guilty party with any expenses incurred by the authorities in transporting and storing the seized specimens.

In parallel with these provisions of the Environment Code, violations of CITES and EU regulations also fall under Customs laws and regulations. The Decree of 11 December 2001 concerning the implementation of Article 215 of the Customs Code (Official Journal of the French Republic of 26 December 2001) authorizes Customs officers to presume an accused guilty of a violation in certain cases. These are cases that involve wild species listed in EC appendices, along with other prohibited items (such as drugs and arms). The accused must prove his innocence by demonstrating that the CITES specimens were obtained in conformance with existing regulations. If the accused cannot do so, he is subject to penalties as outlined in Article 414 of the Customs Code: up to three years in prison, a fine up to twice the value of the specimen, confiscation of the specimen and seizure of any mode of transport used in committing the offence. However, if the ivory is clearly owned for personal use and the quantity is 'reasonable', Customs officers may decide not to consider the owner guilty of an infraction if there is no evidence to the contrary.



The Ministry of Ecology and Sustainable Development is the CITES National Management Authority in France. It is charged with carrying out national policy related to CITES and implementing EU CITES regulations, and communicating with the CITES Secretariat, the European Commission and CITES Parties. Since 2001 the Regional Directorates of Environment are the CITES Regional Management Authorities, responsible for issuing permits and certificates. The National Museum of Natural History in Paris is the Scientific Authority for CITES.

Concerning ivory seizures, between 1979 and 1989 about 1,300 kg of ivory were seized by Customs at the main Parisian airports at Orly and Roissy. This ivory was auctioned (Le Serrec 1989). Table 28 presents the CITES CoP13 ETIS report figures for the number of seizures reported by France from 1989 to 2003 (Milliken et al. 2004). The Born Free Foundation indicated that there were 168 ivory seizures made in 2000, a year when France did not report to ETIS (Anon. 2002), but ETIS is yet to verify the seizures. ETIS concluded that overall most French seizures were low volume 'personal effects' confiscations and that France had a high level of law enforcement in regard to ivory imports.

Table 28

Number of illegal elephant product seizures made in France recorded by ETIS, 1989-2003

1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	Total
2	85	79	116	91	-	1	-	1	1	25	-	82	51	27	-	561

Source: Milliken et al. 2004

Table 29 shows the weight of the ivory seized in France between 1989 and the end of 2003, totalling almost 11 tonnes. It is interesting to note that since 1999 there has been a significant reduction in the amount of seized ivory.

Table 29

Weight of ivory seizures as reported by French Customs, 1989-2003

Year	Ivory (kg)
1989	688
1990	1,029
1991	966
1992	1,417
1993	683
1994	656
1995	711
1996	776
1997	725
1998	1,603
1999	1,017
2000	370.5
2001	350
2002	128
2003	163
Total	10,641

Source: Stéphane Ringuet, TRAFFIC-Europe, Paris, and Marco Ciambelli, Confédération des Métiers et des Utilisateurs des Ressources de la Nature (COMURNAT, Confederation of Craftsmen and Users of Natural Resources)

Table 30 shows a more detailed breakdown of seizures made from late 2002 to late 2003, reported by French Customs, giving a more precise picture of the type of illegal ivory imports that are being attempted.

Table 30

Ivory seizures in France from late 2002 to late 2003

Date of seizure	Where seized	Type of seizure	Country of origin	Destination	Species	Ivory type	Weight in kg	No. of pieces	Value €	Type of transport
18/9/03	Le Havre	importation	?	France	?	worked	0.05	1	0	sea
18/9/03	Roissy	importation	Benin	Germany	African	worked	0.76	5	16	air
13/9/03	Orly	importation	Senegal	France	African	worked	1.0	17	213	air
06/9/03	Lille	possession	France	France	?	worked	1.0	11	213	-
02/9/03	Le Havre	importation	Senegal	France	African	worked	1.0	4	213	sea
20/8/03	Roissy	importation	Congo	France	African	worked	0.64	2	211	air
19/8/03	Marseille	importation	Djibouti	France	African	worked	0.05	1	0	-
31/7/03	Chambery	possession	Rwanda	Italy	African	worked	1.0	2	213	-
03/7/03	-	importation	Ivory Coast	France	African	worked	14	36	3,750	-
14/6/03	Le Havre	importation	?	Ukraine	?	worked	0.4	2	200	-
06/6/03	Roissy	importation	Gabon	China	African	worked	4.0	1	1,280	air
04.6/03	Roissy	importation	Angola	France	African	worked	0.14	3	45	air
04/6/03	Roissy	importation	Angola	France	African	worked	0.56	1	184	air
20/5/03	Roissy	possession	Guinea	China	African	worked	2.0	17	660	air
18/5/03	Roissy	importation	CAR	France	African	worked	2.1	30	681	air
07/5/03	Roissy	possession	Benin	China	African	worked	1.3	11	429	air
06/5/03	Lyon	importation	Ivory Coast	France	African	worked	1.1	1	213	-
04/4/03	Le Havre	importation	Madagascar	France	African	worked	0.05	1	115	sea
02/4/03	Roissy	importation	Senegal	France	African	worked	3.2	3	690	air
26/2/03	Paris	possession	India	France	Asian	worked	?	1	70,000	-
17/2/03	Roissy	possession	Guinea	China	African	worked	1.2	23	540	air
16/2/03	Strasbourg	importation	Turkey	France	Asian	worked	0.7	1	380	-
06/2/03	Caen	possession	?	France	?	worked	0.05	1	290	-
24/1/03	Rouen	possession	?	France	?	raw	1.9	1	400	sea
23/1/03	Rouen	possession	?	France	?	raw	4.5	2	958	sea
20/12/02	Roissy	importation	Cameroon	France	African	worked	0.94	7	316	air
15/12/02	Roissy	possession	Nigeria	China	African	worked	0.7	8	229	air
15/12/02	Roissy	possession	Nigeria	China	African	worked	0.48	23	157	air
13/12/02	Nice	importation	Thailand	France	Asian	worked	0.01	2	20	air
12/12/02	Paris	possession	Senegal	France	African	raw & worked	6.5	4	1,149	air
22/11/02	Roissy	possession	Nigeria	China	African	worked	0.34	8	112	air
22/11/02	Roissy	possession	?	France	?	worked	0.12	4	38	air
21/11/02	Roissy	possession	Senegal	China	African	semi-worked	0.6	21	185	air
19/11/02	Orly	possession	?	France	?	worked	2.0	10	410	air
07/11/02	Nice	possession	Switzerland	-	?	semi-worked	0.34	12	3,282	air
07/11/02	Roissy	possession	Benin	China	African	worked	0.3	6	66	air
06/11/02	Caen	possession	Congo	Greece	African	semi-worked	3	38	639	-
21/10/02	Roissy	possession	Guinea	China	African	worked	0.05	2	16	air
21/10/02	Le Havre	importation	Chad	France	African	worked	1.0	68	213	sea
05/10/02	Roissy	possession	Benin	China	African	worked	0.75	46	246	air
03/10/02	Roissy	importation	Benin	China	African	worked	0.61	23	130	air

Source: General Directorate of Customs and Indirect Taxes

The most common sources for the smuggled ivory from 2002 to 2003 were Senegal and Benin followed by Guinea and Nigeria. France was by far the most common destination for the ivory, though in 11 instances out of the 41 seizures it was in transit from Africa to China. No ivory for direct export was seized. These 41 seizures total 64.4 kg and 460 items, an average of 1.47 kg per seizure and 140 g per item, indicating that even very small amounts of ivory are found by French Customs. Ivory seized by Customs or other government agencies today is sometimes destroyed, but it is usually stockpiled (Ciambelli, pers. comm. November 2004), or is used in CITES enforcement training, or it could be given to a public organization for non-commercial purposes (Ringuet, pers. comm. April 2004).

## **Introduction**

Fieldwork was carried out in Paris (9.7 million inhabitants) from 17 to 25 April and 2 and 6 November, Bayonne (45,000) and Biarritz (30,000) from 26 to 28 April, Marseille (1.3 million) from 12 to 14 May, Nice (350,000) from 15 to 16 May, and Dieppe (40,000) from 3 to 5 November 2004.

## **History**

Some of the earliest worked ivory in the world is found in France in the form of human figurines and spear points dating to the Aurignacian period around 30,000 years ago, carved from mammoth ivory. The use of ivory for aesthetic (human and animal figurines, geometric designs on plaques) and utilitarian (awls, harpoon heads, needles) objects persisted to approximately 12,000 years ago, when the mammoth became extinct in western Europe at the beginning of the Holocene.

The Romans introduced the first worked elephant ivory in France in the 2nd century BC in the form of items such as cosmetic cream containers, hair-pins, knife hilts and needles. The items were most likely carved in Italy and exported to Roman settlements elsewhere. The main source of ivory was North Africa up to the 4th century AD, when the elephant was extirpated from the region (Cutler 1985). With the collapse of the Roman Empire in the 5th century AD, ivory became a rare commodity in Europe, though it continued to be worked in Constantinople under the Byzantine church.

There was a dearth of ivory in Europe up to the 9th century due to the occupation of most Mediterranean lands by hostile Muslim regimes, which cut Europe off from African and Asian trade products. As relations improved, trade made ivory available, and ivory carving experienced a revival in the Carolingian period beginning in the early 9th century, with carved plaques of religious subjects being popular. The binding of a psalter in Charlemagne's palace was made of ivory dating back to the late 8th century, and a carved ivory plaque used as a book cover dates to between 860 and 870. Raw ivory was still not plentiful, however, as careful examination of Carolingian pieces showed that some were made on earlier Roman carvings that had first been shaved clean. In the 9th and 10th centuries Reims and Metz were the most important ivory carving centres (St Aubyn 1987).

From the 9th century a 3,000 km-long string of trading settlements developed on the East African coast controlled by an Afro-Arab Muslim community called the Swahili, which supplied the Muslim world and Asia with African raw materials. Up to the 10th century Middle Eastern trade was directed primarily towards Asia. Important trade items consisted of ivory, slaves and timber. With the fall of the T'ang Dynasty and closure of China to trade in the early 10th century, Arab traders turned their eyes increasingly towards the Mediterranean. The rise of the Fatimid Caliphate, based in Egypt, led to development of this trade, along with a cultural and scientific renaissance (Horton 1987). Ivory was a sought-after commodity in the Muslim world for the manufacture of various types of boxes, handles for daggers and swords, and plaques carved with religious or ceremonial inscriptions. By the 11th century more raw ivory began making its way into Europe, and the early Crusades of the 11th and 12th centuries introduced Islamic carved ivory objects into France. By the middle of the 13th century Paris emerged as the centre of European ivory carving under the patronage of King Louis IX, under whom Gothic style ivory sculpture bloomed, supplied initially by East African tusks (Barnet 1997).

Craftsmen were organized into professional guilds in France during the Middle Ages, but there was no specific guild for ivory carvers. Craftsmen were identified by what they manufactured rather than by the raw material they used (Depping 1837). Members of different guilds each produced buttons, combs, dice, handles for knives, mirror cases and sets of wax-filled writing tablets. In 1407 there is a description of the Rue de la Tableterie where carved ivory plaques and combs were made (Kunz 1916). The most memorable ivory objects of the Gothic Age (about 1250-1525) are religious: the crucifixion, New Testament stories carved on diptychs and triptychs, saints, and the Virgin and Child. Many of these were copies of similar stone sculptures seen on the

Gothic cathedrals of western Europe. Wealthier people purchased and used miniature versions of these objects for devotional purposes (Barnet 1997). The few objects that survive in private hands and go on the market today fetch many thousands of dollars.

The religious Gothic style of ivory carving spread to other parts of Europe in the 13th and 14th centuries, and other ivory carving centres emerged. By the 14th century a profession, though not a guild, called *ivoirier* existed in Paris, which referred to a craftsman who specialized in ivory carving. In the first quarter of the 14th century ivories for secular use appeared in profusion. Sculptural themes were drawn partly from daily life and included courting, hawking, hunting, jousting and music making. A new subject matter emerged from romance literature and included Arthurian tales, the bestiary, and stories from the ancient Greek world (Randall 1997). Many of these secular themes were carved on elaborate boxes and caskets owned by the European nobility. An ivory carving centre in northern France, situated probably at Amiens, emerged in the 14th century and another was founded in Dijon in Burgundy in the late 14th and early 15th centuries (Barnet 1997).

The Gothic style came to an end in the early 16th century with 'death head' memento mori sculptures of human busts with skulls on one side, sometimes embellished with symbols of death such as lizards or worms. These small objects might be fashioned into figurines for display, be attached to rosaries, or be worn as pendants. They acted to remind the faithful that humans are mortal and that they had best plan for the afterlife. The French began collecting ivory antiquities in the 17th century and there has been an active market for them ever since.

Dieppe emerged as an ivory carving centre in the 17th and 18th centuries, though some crafting probably began earlier as the port was involved in ivory imports from West Africa as early as 1384, according to the historian Villant de Bellefond, and by 1531 it was the major French port importing ivory from West Africa (Maume and Denhez 2000). Trade in ivory increased with the foundation of the *Compagnie du Senegal* in 1628. In 1731 there were 12 ivory artisans and 250 assistants in Dieppe.

Dieppe workshops produced many types of objects, such as statuettes, both religious and secular, snuffboxes, tobacco graters, ship models, sun-dials and a variety of knick-knacks (Johnston 1985; Barnet 1997). In the late 17th century Ambroise Millet counted 61 people involved in producing various types of ivory objects (Johnston 1985). Dieppe ivory carving experienced a revival in the early 19th century with the increasing arrival of English tourists, and even Napoleon bought ivory there. The French decorative art known as *ébénisterie* (marquetry), which includes the adornment of furniture or caskets with carved ivory plaques, also became popular in the 17th century (Kunz 1916), as did portrait medallions in the 17th and 18th centuries (St Aubyn 1987).

There were more ivory craftsmen in France in the early 19th century than in any other European country, Paris and Dieppe being the most important centres, with minor industries in St Claude, Méru and Yonnax (St Aubyn 1987). Ivory craftsmen produced religious items as previously, but ivory was so abundant now due to trading posts in Africa that they also manufactured billiard balls, buttons, combs, fans, game pieces, piano keys, utensil handles and so on. From Napoleon's time to 1870 there was a close connection between Dieppe carvers and royalty, and between 1821 and 1873 master carvers rose from six to 18 in number, each with many assistants. Dieppe ivory quality and popularity waned beginning in the 1870s, and by the end of the century only eight carvers remained active.

In Paris from the mid-19th century, ivory craftsmen worked in collaboration with goldsmiths and silversmiths and rock sculptors to produce elaborate statuettes in architectural settings, and jewellery, which developed into the famous Art Deco jasper and/or bronze and ivory statuettes in the early 20th century. In the 19th century the town of Saint-Claude in the Jura was famous for its manufacture of ivory knick-knacks at the Gobelins workshop (Johnston 1985), which carried on into the 20th century, ending only after the 1990 CITES ivory trade ban.

### **Raw ivory imports**

Between 1966 and 1977 France imported about 317 tonnes of raw ivory, with the DRC and the Central African Republic (CAR) being the main sources, followed by Congo-Brazzaville, Cameroon and Gabon. 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 is explained by the fact that France became a major transit point for the re-export of African raw ivory, mainly to Belgium, Japan, West Germany and Hong Kong, in that order. The domestic 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).

From 1966 to 1977 France imported a staggering 660 tonnes of worked ivory, mainly from Hong Kong (476 tonnes), China (108 tonnes), Japan (25 tonnes), West Germany (16 tonnes) and India (13 tonnes). The

prices reported to Customs are unreliable, as exporters lowered the declared value to reduce taxes for customers (Parker 1979). Over 32 tonnes of worked ivory were exported, but presumably only part of this was locally produced. At least 600 tonnes of imported worked ivory presumably stayed in France, based on import and export statistics. Small amounts of partially worked ivory were also imported during this period, totalling about 1 tonne, but over 3 tonnes were exported (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 CAR (see Table 31). 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. A major importer was France-Croco, a firm with connections to the Hong Kong Poon family that has been implicated in ivory smuggling since the 1990 ban (EIA 2000, 2002). France-Croco was incriminated in illegal raw ivory imports from Zaïre (the DRC) and Gabon in the 1980s, and it acted with a Belgian company in transiting African ivory to Hong Kong and Japan (Le Serrec 1989). It and other important raw ivory importing companies apparently no longer operate. All the addresses in Paris of ivory companies reported in the ITRG report (Le Serrec 1989) were visited for this survey, and the only one found still in business was Hong Kong-France. This firm, owned by the Poon family, has today the largest outlet in France selling carved mammoth ivory, though no elephant ivory was seen in the shop in 2004. The France-Croco former office in Paris was closed during visits in April and November 2004, but a small sign on the steel shutter read Inter Reptiles, with a France Croco e-mail address. Enquiries about ivory were made by e-mail, but no replies were received.

Table 31  
Principal suppliers of raw ivory to France, 1979-1988

Year	Country	Weight, kg	Total weight imported, kg
1979	Congo	40,891	52,807
	Gabon	1,290	
1980	Congo	24,474	33,792
1981	Hong Kong	1,829	8,380
	Gabon	1,062	
1982	CAR	2,360	5,555
	Tanzania	949	
1983	CAR	1,704	5,664
	UK	1,221	
1984	Tanzania	1,148	3,434
	Cameroon	877	
1985	Congo	14,393	17,572
	Tanzania	1,408	
	Cameroon	947	
1986	Congo	2,368	4,123
	Tanzania	1,016	
1987	Congo	3,718	6,806
	Chad	1,524	
	Gabon	563	
1988	Gabon	2,100	2,800
	Total		140,933

Source: Le Serrec 1989

### **Worked ivory imports**

No worked ivory was reported as imported into France from 1979 to 1983. Table 32 shows the quantities and origins of the worked ivory from 1984 to 1987.

Table 32

Main sources of worked ivory imported into France, 1984-1987

Year	Country	Weighed items, kg	Unweighed no. of items	Total weighed items, kg	Total unweighed no. of items
1984	Hong Kong	2,618	257,445	3,362	304,842
1985	Hong Kong	8,337	11,735	10,538	14,743
1986	Hong Kong	~8,400	-	10,472	5,989
	India, Japan, Thailand	~2,000			
1987	Hong Kong	~7,300	-	9,130	11,960
	India				

Some 33.5 tonnes and more than 300,000 worked ivory items were imported in four years, probably totalling more than half a million pieces in all. Hong Kong was overwhelmingly the source of the worked ivory that flooded into France between 1984 and 1987. Additional worked ivory undoubtedly entered France in 1988 and 1989, and a Parisian ivory carver stated that from the mid-1970s to 1989 France was inundated with boat loads of ivory from Asia (Francis Migeon, pers. comm. April 2004), which is confirmed by the import statistics. The significance of this fact will be discussed below. In spite of France's colonial connection with Central and West Africa, African ivory sculpture has never been highly rated in France, and as a consequence imports of African worked ivory have always been low.

### **Raw ivory exports**

Table 33 presents the raw ivory exports from 1979 to 1987, showing that in some years France acted as a transit point for African ivory to Asia. In 1979, France exported considerably more raw ivory than it imported, and in 1987 the quantities were almost equal. No raw ivory was reported from 1981 to 1984 as exported from France, perhaps reflecting a shortage of stocks due to previous exports and/or higher consumer demand.

Table 33

Principal export destinations for raw ivory from France, 1979-1987

Year	Country	Quantity, kg	Total exported, kg
1979	Hong Kong	79,528	94,681
	Japan	11,856	-
1980	Hong Kong	4,708	12,678
	Japan	4,634	-
1981-84	-	0	0
1985	Japan	14,298	14,730
1986	-	0	2,312 ?
1987	Japan	3,444	6,265
	Hong Kong	1,681	-
Total			128,354-130,666

Source: Le Serrec 1989

If the statistics are correct, France only kept 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 stockpiles and privately-owned tusks obtained from auction houses (Migeon and Ciambelli, pers. comm. April 2004).

### Worked ivory exports

France also exported worked ivory, though the statistics do not indicate what proportions might have been locally crafted or re-exported items originating from abroad. Martin and Stiles (2003) found French ivory items for sale in Japan, though not in China, South Korea or Taiwan. The French items in Japan were probably manufactured during the 1980s. Hong Kong was an important destination for worked ivory exported from France from 1979 to 1982, but Europe, North America and Japan became the principal markets from 1983 to 1987 (see Table 34). French worked ivory was not competitive in price with Hong Kong worked ivory at this time (F. Migeon, pers. comm. April 2004), so perhaps from 1979 to 1982 the large number of ivory items consisted of re-exports of African worked ivory, such as jewellery and name seal blanks. In 1986 France re-exported more than 2 tonnes of partially worked tusks from Congo-Brazzaville to Japan.

Table 34  
Principal export destinations for French worked ivory, 1979-1987

Year	Country	Weighed items, kg	Unweighed no. of items	Total weighed items, kg	Total unweighed no. of items
1979	Hong Kong		2,862		3,531
1980	Hong Kong		841		1,198
1981	Hong Kong		11,267		12,056
1982	Hong Kong		11,000		13,374
1983	Denmark		4,914		9,664
1984	USA, Switzerland, EU		448		996
1985	Canada, Switzerland, USA, EU		498	188	1,599
1986	Japan	2,312		3,077	5,556
1987	EU, USA, Canada			810	3,872
1988	Japan	-	-	-	-
Total		2,312	31,830	4,075	51,846

Source: Le Serrec 1989

### Raw ivory prices up to 1989

The price of raw ivory varies considerably according to the size and quality of the tusk, whether it is from the savannah or forest elephant, and the size of the consignment. Larger tusks, forest elephant tusks (called 'green ivory' in France) and smaller batches fetch higher prices. Table 35 shows representative prices from 1975 to 1989.

Table 35  
Raw ivory prices in France, 1975-1989

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

Exchange rate: 6.56 French francs = €1 = USD 1.2

Source: Ivory purchasing records of Francis Migeon, Paris, 2004

## **Sources and prices of raw ivory in France from 1990 to 2004**

At the time of the CITES ban a considerable amount of raw ivory was held in private hands, brought back from Africa by French colonial administrators and business people, and by ivory traders and craftsmen who had imported it previously. Due to the collapse of the ivory market following the ban, there is currently more raw ivory on offer than there is demand (F. Migeon, pers. comm. April 2004). The principal raw ivory supplier in Paris, Bréjoux, was out of business by 1990. More recently, ivory lots, made up of tusks or carved items, are offered for sale occasionally at auction houses such as Hôtel Drouot in Paris and Hôtel de Ventes du Palais in Marseille. These tusks usually come accompanied with certificates from the CITES Regional Management Authority under Article 8 of EC Regulation 338/97, which means that the tusks can be worked and the products sold commercially within the EU. The only ivory specimens that can be sold commercially without documentation are those worked prior to 1 June 1947. Private individuals buy auctioned pairs of tusks as home ornaments, and it is not unusual to see smaller tusks, less than 5 kg, go unsold. Another source of tusks or, more commonly, semi-worked pieces of a particular size needed by a craftsman for a commissioned item, are ivory specialist suppliers. The last one in France is located near Paris in the Seine-St-Denis department and another one is based in Michelstadt in Germany (Jean Colette, ivory carver in Dieppe, pers. comm. November 2004 and Ciambelli pers. comm. May 2005).

The seizure data presented in Tables 29 and 30 suggest that few people attempt to import illegally raw ivory into France, which is logical since French ivory craftsmen do not need it. The average price of raw ivory has actually declined somewhat in inflation adjusted USD prices between 1991 and 2004, supporting a conclusion that there is weak demand for ivory in France (see Table 36).

**Table 36**  
**Raw ivory prices in Paris, 1991 and 2004**

Year	Price/kg in USD for 10 kg tusk	Price/kg in 2004 GDP Inflation Index	Price/kg in USD for 20 kg tusk	Price/kg in 2004 GDP Inflation Index
1991	96	122	110	140
2004	108	108	132	132

Source: Francis Migeon, Paris, 2004 and *La Vie du Collectionneur*, no. 527, p. 16, 2004

Smaller 5-7 kg tusks sold in 2004 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 pays 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 and/or worked) in 2000, but since the amount of ivory held in private hands is not known with any certainty this figure should be regarded with caution.

## **Ivory workshops in France**

The source of information for this section was 77-year-old Francis Migeon, a fourth generation ivory craftsman. His son is carrying on the family tradition, though he spends more time doing ivory restoration work than on carving. Mr Migeon was awarded the title Maître d'Art (Master of Art) in 1996 by the Ministry of Culture for his fine craftsmanship and his efforts to promote the preservation of the traditional art of ivory sculpture in France by training new craftsmen. Additional information was provided by Jean Colette, another fourth generation ivory craftsman in Dieppe, his ivory artisan daughter Annick, and Philippe Ragault of Dieppe. Ivory craftsmen in France face opposition to their profession from animal rights activists. For example, Brigitte Bardot wrote a highly critical public letter to the Minister of Culture expressing her outrage when Francis Migeon was awarded the Master of Art title in 1996, which was followed by a similar letter by the environmentalist Pierre Pfeffer published in *Le Monde* in 1997. In spite of this, in 2004 the Minister of Culture announced two more Master of Art awards to an ébéniste (furniture inlayer) and a turner who both work in ivory (*Le Figaro*, 4 November 2004).

There are several categories of craftsmen who use ivory in France. The sculpteur, or carver, is one who specializes in various types of statuettes and figurines, but might also manufacture jewellery and composite



ornamental items. Other categories include turners, furniture inlayers, knife makers, musical instrument makers, cane and cane pommel makers and restorers. The specialized ivory jewellery factories closed after the ban, and now jewellery makers use ivory only on a very limited scale.

In 1974 a census of ivory craftsmen in France revealed that there were 45 active in Paris and its immediate surroundings, 30 in Auvergne, seven in the Jura and three in Dieppe. Ivory companies in Paris and the Jura employed an additional 122 workers; the figures for Auvergne are unknown. In addition, there were 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 1 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. Today there are only four full-time sculptors left in Paris, three in Dieppe, one in the Hérault department, and 30-35 knife makers in Auvergne and elsewhere in 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. After the ban, the ivory jewellery factory in the Jura closed 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. In the 1970s, when ivory demand was high, Mr Migeon employed two assistant carvers in his workshop; today he works alone, using a combination of electric and hand tools. The Heckmann father and son ivory carving workshop in Paris also operates without assistants, and none of the carvers in Dieppe uses assistants. Table 37 presents the evolution of the number of ivory craftsmen from 1974 to 2004 in France.

Table 37

Estimate of number of workers involved in ivory manufacture in France, 1974 and 2004

Place	Professionals		Other staff		Total	
	1974	2004	1974	2004	1974	2004
Paris area	45	~10	36	0	81	~10
Jura	7	0	86	0	93	0
Auvergne	30	30-35	?	?	>30	30-35?
Dieppe	3	3	0	0	3	3
Elsewhere	17	3	4	?	21	3?
Total	102	46-51	>126	0?	>228	46-51

(These refer to full and part-time workers, but excluded are the large number of craftsmen that worked only occasionally in ivory restoration in 1974 and 2004.)

The number of professional ivory craftsmen in France dropped from 102 in 1974 to approximately 41 in 2004, and salaried staff declined from over 126 in 1974 to probably none in 2004.

Today Mr Migeon crafts a wide variety of objects, including small animals, bangles, polychrome eggs made from carving waste (€150 each), and abstract pieces made from odd bits of tusks. One of the latter sculptures, made from burnt jagged broken tusk pieces, he calls 'Protest' to signal his disapproval of the burning of several tonnes of ivory in Kenya in 1989. He has records of raw ivory purchases going back to 1928 in his father's time. In the 1950s he bought 80-130 kg of raw ivory a year, rising to a peak of 350 kg a year in the 1970s and early 1980s. In the late 1980s demand began to decline and it crashed after the 1990 ban. He bought his last ivory in France in 1998, and today uses his personal stockpile (which has proper documentation) of tusks, blocks and miscellaneous pieces that weigh roughly 300 kg in total. Nowadays he rarely uses more than 10 kg of raw ivory a year, and most of that is odd pieces and waste. Mr Migeon's son, who works mainly as an ivory restorer based in Bretagne, uses 5-10 kg of raw ivory a year (Benoît Migeon, pers. comm. November 2004).

In Dieppe, the Colettes work entirely on commission, usually making Polletais (rustic figurines of 19th century inhabitants of Le Pollet, a district in Dieppe), religious figurines, animal figurines, and other items that customers might order. Philippe Ragault, the other Dieppe ivory craftsman, manufactures a wide variety of items, including animals, busts, dice, creative figurines involving combinations of human, insect or mythological features, jewellery and other objects. He also has a large collection of canes with ivory pommels,

ivory crucifixes, ships and other items, some of which are for sale. Each of these craftsmen consumes 5-15 kg of raw ivory annually.

The consumption of raw ivory in France has declined from several tonnes a year in the 1970s to roughly 350-400 kg in 2004 (F. Migeon, pers. comm. May 2005). Only part of this raw ivory comes from whole tusks.

### **Retail outlets and prices for worked ivory in France**

Prior to 1990, worked ivory was very popular in France and it sold in hundreds of retail outlets throughout the country. After the CITES ban, the vast majority of outlets stopped selling ivory in response to falling demand and pressure from environmental activists. The largest ivory retailer in the country, Aux Tortues in Paris, moved after the ivory ban and now sells only a few ivory items.

In the six cities and towns surveyed in France, 71 outlets were found selling 1,313 worked ivory items. The vast majority of these were in Paris (89%). Most of the outlets and ivory items were found in what could be called antique markets, though the types of shops in these markets varied. Some were exclusive boutiques specializing in antique art, others carried mainly East Asian objects that had been carved not more than 20 or 30 years ago, many were second-hand shops selling an eclectic variety of utilitarian objects such as knick-knacks and the odd figurine, and still others were gift or handicraft shops. The category ‘Antique shop’ is made up of similar types of outlets, but they are not in ‘markets’.

### **Paris**

A total of 63 outlets selling 1,123 ivory items was found in Paris (see Table 38). The four antique markets contained 56 of these shops, 89% of the total for Paris, and displayed 1,074 ivory objects, 96% of the total. Two of the shops also carried 59 mammoth ivory items. One of these shops, not included in the total, had on display well over 1,000 mammoth ivory pieces carved in southern China.

Table 38

Types of retail outlets and number of ivory items surveyed in Paris, April 2004

Type	No. of outlets	% of total	No. of items	Av. no. of items/outlet
Antique market	56	89	1,074	19
Antique shop				
Carré Rive Gauche	3		15	5
Art St Germain des Prés	3		32	11
Faubourg St Honoré	1		2	2
Sub-total	7	11	49	7
Total	63	100	1,123	18

Several of the outlets were not open at the time of the survey as the proprietors of these kinds of shops keep irregular hours. Antiquarians spend considerable time away looking for items to stock their shops. Besides, many have more than one shop in different parts of the city, and some have second jobs. As a consequence some shops are only open certain days of the week and/or only open after 10 or 11 a.m. Therefore, some of the counts of ivory items are based on what could be seen through the shop windows, so the figures in Tables 38 and 39 are minimum numbers. The most numerous items were human figurines (48%), netsukes (9%), jewellery (8%), utensils with ivory handles (7%) and ivory canes/walking sticks with ivory handles (7%). Table 39 presents a breakdown of the types. Of the 996 pieces that could be attributed to regional origin of manufacture, 589 (59%) were from China or Japan and 40 (4%) were from Africa. The remaining 370 (37%) items were of European craftsmanship, consisting mainly of human figurines in Gothic and Romantic or rustic style, jewellery, utensils with ivory handles, walking sticks with ivory handles/pommels, and animals. These were probably all produced in France. The only exceptions were two German 14th-century Gothic diptychs and a 19th-century bust of an

Austrian noble, probably carved in Germany. There were 124 items of unknown origin: cigarette holders, jewellery, paper-knives, and so on. No items were seen of South or South East Asian origin.

Table 39  
Ivory items seen for retail sale in Paris, April 2004

Item	No. of items	Percentage of total
Human figurine	452	48
Netsuke	96	9
Jewellery	87	8
(Bangle 1 cm	12	1)
(Bangle >2 cm	14	1)
(Necklace small beads	5	<1)
large beads/piece	9	<1)
(Pendant	1	<1)
(Brooch	28	2)
(Ear-rings, pair	12	1)
(Ring	4	<1)
(Misc. jewellery	2	<1)
Utensil	82	7
Canes, walking sticks	75	7
Animal figurine	25	2
Box	22	2
Paper-knife	18	2
Baby's rattle	8	1
Cigarette holder	7	1
Noh mask	7	1
Carved tusk	5	
Comb	5	
Jack-knife	4	
Brush	3	
Magnifying glass	3	
Pipe	3	
Chess piece	2	
Cutlery set	2	
Mirror	2	
Spoon	2	
Misc.	213	
Total	1,123	100

Many vendors were asked the age of the ivory items. They all replied that either the item was an antique (manufactured prior to 1 June 1947), or that it had been imported prior to 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 prior to 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 presented as an antique. Some of the items from Asia, in particular, could have been recent illegal imports, though the French authorities would have to investigate these items to prove that such was the case. It should be remembered that massive amounts of East Asian worked ivory were imported in the 1970s and 1980s, thus much could still remain.

### **Antique markets in Paris**

There are several markets on the periphery of Paris, but only one sells antiques. There are also a few street markets in the city, and in areas such as Montmartre there are open-air art markets, but none of these sell ivory. Four conglomerations of antique and arts and crafts shops in Paris could be identified as markets (see Tables 40 and 41).

Table 40

Number of retail outlets in the main antique markets seen with ivory items in Paris, April 2004

Name of market	No. of outlets	No. with ivory	% with ivory
St Ouen Flea Market	~220	21	10
Louvre des Antiquitaires	~200	18	9
Village Suisse	~136	11	8
Village St Paul	~30	6	20
Total	~586	56	10

Table 41

Number of ivory items surveyed in Paris's main antique markets, April 2004

Name of market	No. of items
St Ouen Flea Market	348
Louvre des Antiquitaires	488
Village Suisse	199
Village St Paul	39
Total	1,074

#### St Ouen Flea Market

There are over 200 pavement stalls and shops along the street as well as in the market in the St Ouen area, but only 21 sold ivory. The market is open on weekends from about 8 a.m. to 6 p.m., though it is not active until around 10 a.m. Most ivory items on display were bought by the owners at auction or at antique fairs or from individuals who had come to offer them for sale. Ivory was a minor item in all but one shop, with as few as two items being displayed, going up to 150 in the one ivory specialty shop, which was on a street next to the market. This one specialty shop contained Chinese and Japanese style carvings, some erotic, made on both elephant and mammoth ivory. The French owner was busy negotiating prices with two wealthy Chinese couples at the time of the investigator's visit, but during a break he said that the items were manufactured mostly in Japan and that they were imported prior to 1989. In the other 20 outlets only 16 Asian items were seen, plus three African pieces. Of the European items, utensils with ivory handles were the most common, followed by paper-knives, jewellery, cigarette holders and crucifixes. The crucifixes ranged in size from 6-22 cm and in price from €448 to €2,200. The most expensive ivory item seen was a 42-cm painted Japanese figurine from the Meiji period (1867-1912) priced at €39,998 seen in the ivory specialty shop.

#### Louvre des Antiquitaires

This large building near the Palais Royal holds about 200 boutiques on three floors. The quality of the merchandise is much better than in St Ouen, with several of the outlets selling valuable European and Asian antiques. Eighteen of the boutiques displayed 488 items of ivory, and four outlets specialized in ivory. One shop also had 15 objects made from mammoth ivory. Two shops had only one ivory item. One shop owner had two boutiques on separate floors of the building, one carrying 155 items, the most seen in Le Louvre des Antiquitaires. Most items in these two shops were Asian and were said to be 19th-century Meiji antiques, but for some items this was unlikely. A 15-cm painted Geisha was priced at €3,800, and with bargaining the price dropped to €3,000. Martin and Stiles (2003) found that high quality 15-cm human figurines in Tokyo ranged in price from USD 4,000-14,400, or about €3,335-12,000 at the April 2004 exchange rate. Prices of other items were equally surprisingly low for genuine Japanese antique ivory, or even for recently manufactured high quality Japanese ivory. Netsukes 4-6 cm in size ranged in price from €298-498 in this boutique, again at the low end of the scale of prices seen in Japan. A 36-cm painted Japanese lady carrying a parasol was priced at €42,000. Their second boutique displayed a 1.6 m-long tusk carved on one side the entire length with a Chinese historical scene priced at €154,500, and a painted Geisha 1.1 m high, priced at €250,000. The owner refused to divulge the price of a 52-cm 19th-century Virgin with Child, saying that it was 'very expensive'. In another

boutique, specializing in 19th-century European ivory antiques, a 15-cm female figurine was €4,500 and there were two 25-cm Romantic-style female nudes for €12,598 and €12,898. These sculptures were in fresh, mint condition. Other ivory objects in the boutique looked antique, with signs of ageing and wear, and were higher priced than the 'antiques' that looked new. A large (42 x 39 cm) 19th-century bust of an Austrian noble was priced at €99,000 in April 2004. By November, this piece had been sold.

Another boutique specialized in Art Deco statuettes crafted by Chiparus and Lipshitz. A 42-cm statuette was priced at €33,588 (pictured on the cover of this report) and a 21-cm one cost €11,358.

Other shops carried ink stamps (of family crests or initials) with ivory handles, human figurines, jewellery, netsukes, pipes and walking sticks with ivory handles (€900-3,700). No African items were seen.

This market was visited again in November 2004, and the ivory turnover in many of the shops was considerable, including some of the very expensive items. Some of this apparent turnover could have been due to the shop owners changing the items on display, as it is common practice for antiquaries not to leave the same items on display for long periods.

#### Village Suisse

This shopping centre in the 15th arrondissement advertises that it has 150 boutiques with antiques, art objects and decorations, but the actual number was somewhat fewer. The type of boutiques was quite similar to those seen in the Louvre des Antiquaires, though some sold lower quality merchandise. Eleven boutiques carried ivory totalling 199 items. One boutique specializing in ivory displayed 44 very high quality European and Japanese sculptures. A painted 62-cm Geisha was €90,000 and a 19th-century 24-cm crucifix was €14,000. Another boutique with 29 ivory items was selling what were said to be a 19th-century 16-cm European woman priced at €4,666, 25 Japanese-style figurines 12-22 cm in height priced from €2,216 to €5,711, and a 14 x 18 cm Japanese group scene at €8,660. Two 8 x 9 cm deer were €600 each. The prices in the latter boutique seem too low to be genuine antiques or manufactured in Japan. The quality of carving of some of the Japanese pieces was certainly substandard, suggesting they were carved elsewhere. Another boutique carried six beautiful 12-24 cm bronze and ivory Art Deco figurines. The largest was €19,000. At the lower end of the quality scale one shop was selling 42 second-hand utilitarian ivory objects such as brush pots, hairbrushes, opera glasses, pen handles and powder containers – plus one 11-cm ivory Japanese lady. An ethnic crafts shop was selling two West African 12-cm side-blown horns made from carved tusks at €200 each, and two 18-cm long ones at €450 each. A 25-cm African carved tusk sold for only €700, illustrating the lower value of African worked ivory compared to European or Asian. One shop carried an 11-cm long hippo incisor carved into pigs. Most of the items were carved in Europe (79), 61 were Asian and 10 were African.

#### Village St Paul

Located in the Marais quarter of the 4th arrondissement, the 20 or so shops in this area are located on rue St Paul or inside a courtyard. The shops are similar to those seen in St Germain des Prés. Six were found with 37 ivory items. Thirty-three were European (crucifixes, jewellery and utensils with ivory handles), three were Asian figurines and one was a 22-cm African carved tusk, that looked recent, for €875.

### **Antique shops in Paris**

Most of the non-market shops selling ivory were clustered in areas known for antiques or arts and crafts. Some seven outlets in all were located displaying 49 ivory items (see Table 38).

#### Carré Rive Gauche

This area in the 7th arrondissement of Paris is the expensive art and antique quarter. The antique shops are organized into an association called Carré Rive Gauche and they display signs with this name. Most of the boutiques here can only be entered upon appointment or by ringing a bell or buzzer, as the doors are locked. Many had signs in the display windows indicating that they belonged to the Syndicat National des Antiquaires and/or that they were assessors for the Customs department. Some specialized in furniture, others in paintings, and a few in sculpture, though most contained a mixture. Out of about 30 boutiques in the quarter, only three displayed ivory, some 15 pieces. Eleven items were 14th-16th century Gothic diptychs, triptychs or figurines, two were 19th-century figurines, and two were candlesticks. No Asian or African pieces were seen. Undoubtedly more ivory items existed, but they were almost certainly genuine antiques.

#### Art St Germain des Prés

The St Germain area in the 6th arrondissement of the Left Bank has long been associated with the arts. Today there are dozens of arts and crafts shops in a section of the quarter called Art St Germain des Prés. These shops do not sell expensive antiques, but rather display contemporary paintings, trendy furniture, handicrafts and

ethnic items. Only three shops displayed ivory totalling 32 items, 18 of which were African. None were Asian. The other 14 items were modern jewellery.

#### Other locations

The only other boutique found with ivory was an art gallery on rue Faubourg St-Honoré. The gallery was decorated with two huge 2.1-m long mounted tusks. The salesperson was not certain whether they were for sale, as the owner was not present.

Several expensive art and antique boutiques and tourist shops in the Champs-Élysées/rue Faubourg St-Honoré/rue St Honoré area were surveyed, but none displayed ivory.

No department stores nor hotel gift shops were found selling ivory. About 30 souvenir shops in Paris's China Town in the 13th arrondissement were inspected, but none were selling ivory, though several carried imported bone or plastic substitute carvings, some clearly labelled as such.

Paris holds periodic antique fairs and crafts expositions, most of them taking place between May and October. Antique ivory items and recently manufactured ivory objects made from legal raw ivory are sold at these occasions. These would be the optimum places to sell illegal worked ivory, because the items are only displayed for a short time and then disappear.

### **Retail prices in Paris**

Table 42 shows the prices for various items in Paris.

Table 42

Retail prices for ivory items seen in Paris, April 2004

Item	Size in cm	Where made*	Price range in USD
<b>JEWELLERY</b>			
Bangle	1	?	89-142
	2-4	Europe	192-360
Brooch	4-6	Europe	264-480
Necklace, small beads		?	195-227
	large beads	?	360-650
Pendant	5	Asia	539
Ring, plain		?	59
<b>FIGURINES</b>			
Animal	5-10	Asia	830
		Europe	720-1,199
Human	5-10	China	384-600
		Europe	538-792
	11-20	Asia	2,659-6,853
		Europe	5,400-5,599
	21-30	Europe	2,640-22,800
	31-40	Japan	50,400
41-50	Asia	39,998	
Netsuke	4-6	Europe	99,000
		Asia	300-598
<b>TUSKS</b>			
Carved	10-20	Africa	200-450
	21-30	Africa	840-875
<b>MISC.</b>			
Box	4	China	161
Carved plaque	6 x 8	Europe	163
Cigarette holder	10	?	107-119

Table 42 continued

Item	Size in cm	Where made*	Price range in USD
Jack-knife	10	Europe	185
Knife & fork set, 6	10	Europe	480-600
Paper-knife	10-20	?	216-240

\* Chinese and Japanese carvings were identified as such only when the provenance was certain. Otherwise, their origin is called Asia.

Exchange rate: €1 = USD 1.2

## Other cities and towns

Table 43 presents a summary of the ivory items found in towns and cities elsewhere in France.

Table 43

Types of retail outlets and number of ivory items surveyed, excluding Paris, in 2004

City	Type	No. of outlets	No. of items
Dieppe	Antique shop	2	22
	Workshop showroom	1	111
Marseille	Antique shop	1	8
Nice	Antique shop	4	39
Bayonne		0	0
Biarritz		0	0
Total		8	180



Ivory containers, each for a bottle of smelling salts, from Dieppe in the 18th century

## Dieppe

The Colette family began working ivory in Dieppe in 1824 with the great-grandfather of Jean Colette, Charles Tranquil Colette. The craft has been passed down from father to son, and now Jean's daughter Annick is an ivory carver. She does not know if any of her young children will take up the craft. Philippe Ragault has been working in ivory in Dieppe since about 1986 and has no children.

Most of the worked ivory seen for sale in Dieppe was in the workshop showroom of one of the ivory craftsmen, some 111 items, consisting of animal and religious figurines, game pieces (such as chess and dice), jewellery, walking sticks with ivory pommels, and miscellaneous fantasy items. Not all the pieces were carved by the craftsman. Two second-hand shops displayed 11 ivory items each, consisting of animal and religious figurines, jewellery, a box, a baby's rattle and a paper-knife, all old. One item (a crocodile) appeared to be of African origin, while the rest were European.

A new 10-12 cm Polletais figurine costs about €300, and jewellery falls within the range of prices seen in Table 42 for Paris.

## Marseille

There is no history of carving ivory in Marseille. Out of dozens of shops and department stores surveyed, only one antique shop on the Boulevard de la Valbarelle was found with ivory, some eight items, including two cameo brooches, two 19th-century European figurines (12 cm and 14 cm), a 15-cm paper-knife, and one 6-cm powder container.

The auction house of the Hôtel de Ventes du Palais, near the Palais du Justice, said that they are rarely requested to appraise ivory items or to auction them. There are periodic antique and second-hand trade fairs in the city and occasionally ivory items are put on sale at these.

## Nice

There are no ivory workshops or craftsmen in Nice. Four outlets out of about 50 surveyed contained 39 ivory items for sale, 25 of them East Asian. One shop specialized in East Asian sculpture. It displayed perhaps 100 items, including a very large composite piece of a 1-m Chinese warrior made ostensibly from small ivory plaques, with the head said to be of solid ivory. Upon inspection, the plaques appeared to be bone and the head and helmet were a synthetic resin of some kind. The salesperson said that the piece was made from ivory in the 'Ecole de Tokyo' (Tokyo School). Most of the Japanese-style figurines appeared also to be made from resin or plastic, as they had a dull, waxy sheen to them, and no grain or Schreger pattern (a fine cross-hatching common to elephant ivory). The prices were also too low for genuine ivory, even if made in China. For example, a so-called ivory piece with two 18-cm Japanese peasants on an 'ivory' log raft was priced at €4,000, which is ridiculously cheap for antique Japanese ivory, but hideously expensive for plastic. The only authentic ivory items seen were 19 Japanese-style netsukes (3-6 cm) for €386-986 and a 3-cm rabbit at €280. The fact that a 6-cm netsuke cost €986 and the raft piece, over 20 times the volume of the netsuke, cost only €4,000 certainly seems suspicious.

A second expensive antique boutique displayed 12 ivory items that were mostly from East Asia, while a third had three European pieces. The fourth shop displayed only four metal points with 5-cm ivory handles (see Table 44 for types and prices).

Table 44  
Retail prices for ivory items in Nice, May 2004

Item	Size in cm	No. of items	Price in USD
Rabbit	3	1	336
Crucifix	13	1	14,400
Geisha	15	1	14,939
Art Deco figurine	16	1	18,000
Netsuke	3-6	19	463-1,183
Knife	6	4	144
Total		27	



## **Bayonne and Biarritz**

These two tourist towns on the Basque south west coast of France receive tens of thousands of French and foreign visitors every year, thus it was thought they might sell ivory. Biarritz, in particular, attracts high numbers of wealthy visitors to its fashionable hotels and casinos. Dozens of shops and boutiques were surveyed, but not one was found selling ivory, though three ethnic shops in Bayonne selling Asian and African items carried a few white, imitation ivory pieces of jewellery, and carvings made in bone and synthetic materials.

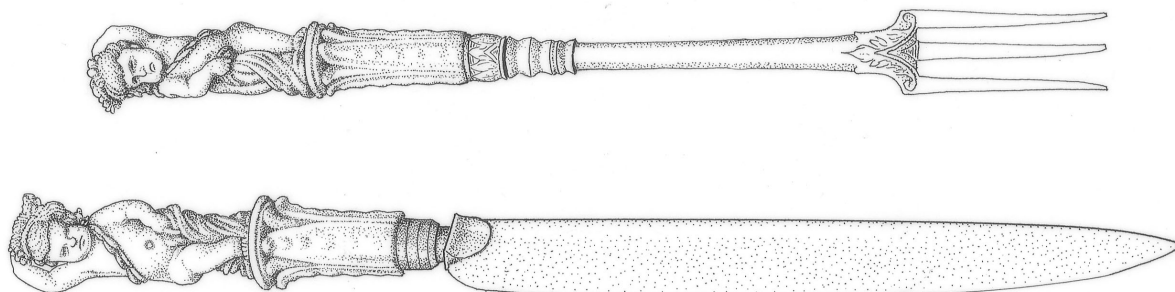
## **The use of ivory substitutes in France**

Most ivory substitutes were seen in Paris. The surest way to distinguish elephant ivory from low value substitutes such as bone, shell, plastic or resins is the price. It is sometimes difficult to distinguish ivory from other materials used for utensil handles, cameos, game pieces and other small objects, but those items with ivory will be significantly more expensive. Vendors in Paris seemed to be quite honest about distinguishing substitutes from ivory. This was not always the case with mammoth ivory. Some boutiques displayed Asian-style mammoth ivory items interspersed with elephant ivory without labelling the difference, apparently trying to give the impression that all the pieces were elephant ivory. Since the investigator was familiar with the distinctive natural colour and artificial staining that is common to mammoth worked ivory in Asia and could identify it, vendors when asked reluctantly admitted that some items were made from mammoth ivory. The prices of similar mammoth and elephant ivory items are comparable. The fact that mammoth ivory is mixed in with what are ostensibly pre-1989 elephant ivory pieces at least presents the possibility that some of the Asian elephant ivory items could have been imported with the mammoth ivory after 1990, making them illegal.

The most widespread substitutes seen in Paris were the plastics used for utensil handles and toiletry articles. China Town displayed dozens of bone, plastic and resin netsukes and figurines similar to the types made of ivory. There were about 1,200 objects seen made from mammoth ivory in three shops in Paris.

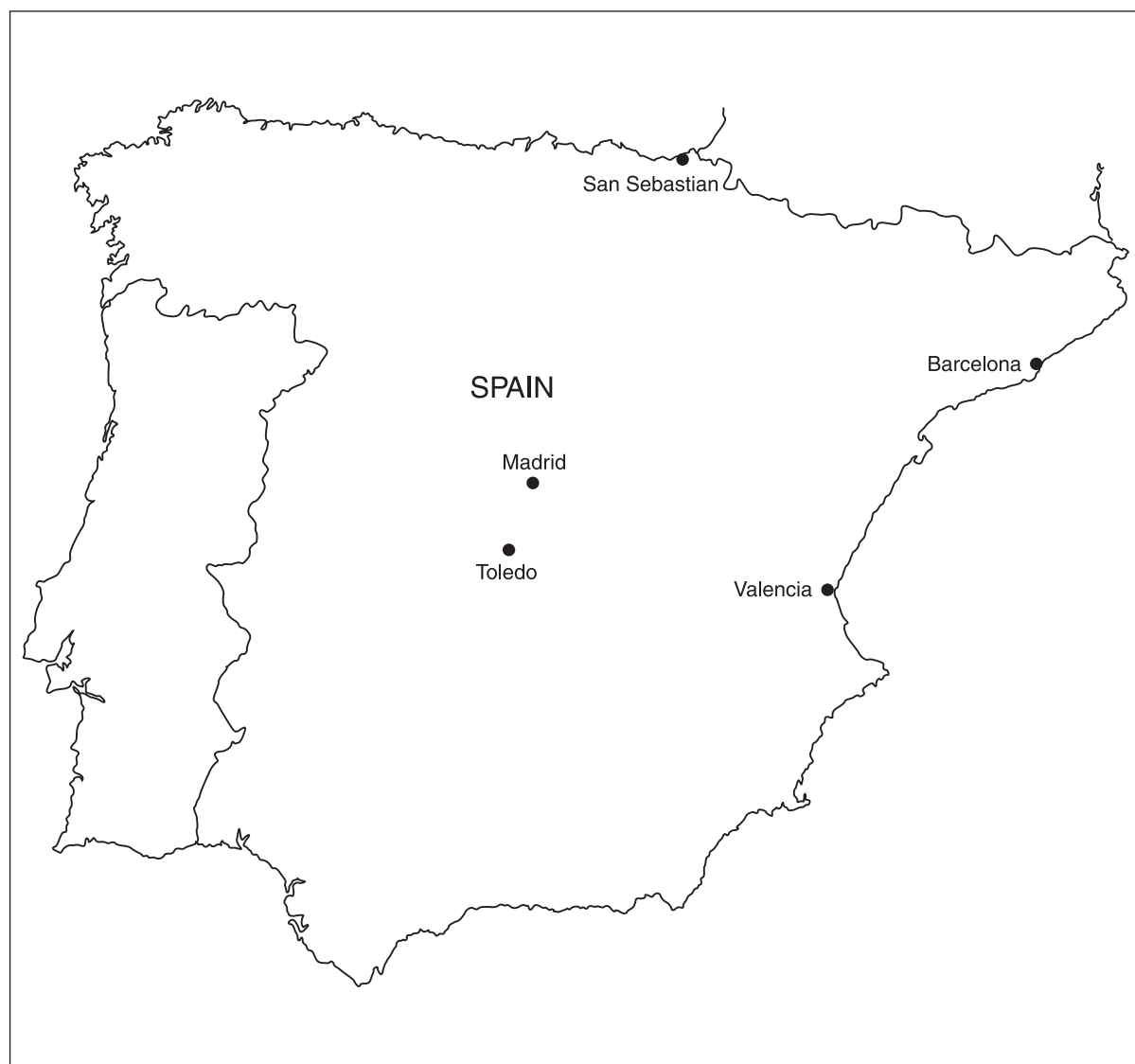
## **Vendors' views on ivory market trends and the future**

Vendors agreed that the demand for inexpensive ivory items had fallen drastically following the 1990 CITES ban. The market for expensive items had not been hit as hard, and there were still enough customers to support about 10 outlets specializing in ivory, with dozens of others selling a few ivory items. Most vendors and carvers thought that there would be a low volume market for worked ivory for the foreseeable future, but that French professional ivory sculptors were in danger of going extinct well before the elephant.



Knife and fork with ivory handles  
made in Dieppe in the early 1700s

# SPAIN



## The legal position of the ivory trade in Spain

CITES entered into effect in Spain on 16 May 1986. The scientific authority responsible for overseeing CITES and regulations related to ivory is the Directorate General for Nature Conservation in the Ministry of Environment. The principal administrative authority for CITES is the Subdirector General of Inspection, Certification and Technical Assistance within the General Secretariat of Foreign Trade, which is under the Ministry of Economy. Additional administrative authority is given to the Department of Customs and Special Taxes, which can detain suspect imports/exports for inspection. The regional offices of the Centres for Technical Assistance and Inspection of Foreign Trade in the Ministry of Economy carries out CITES inspection and documentation for import and export (Ministry of Economy, Government of Spain 2004). There are no specific regulations concerning ivory, but all wild plant and animal imports and exports are addressed in Spanish Royal Decree 1739/1997 and Resolution of 5 May 1998 of the Directorate General of Foreign Trade. These

laws implement within Spain the provisions contained in European Council Regulation 338/97. CITES enforcement within the country is carried out by the Nature Protection Service (SEPRONA), an arm of the Guardia Civil.

It is legal to sell ivory that was imported prior to 1989 and ivory antiques (Miguel Valladares, WWF/Adena, Madrid, pers. comm. May 2004). Ivory that is intended for working and commercial use must have proper documentation of legal import. SEPRONA seized almost 2.9 tonnes of undocumented ivory in Madrid in July 2004 (Anon. 2004d), 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, was legally acquired and registered (Centre for Technical Assistance and Inspection of Foreign Trade, Madrid, pers. comm. September 2004).

The CITES CoP13 ETIS report includes 243 seizures of illegal elephant products made in Spain from 1989 to 2003 (see Table 45). The ETIS report commended Spain for having one of the most complete data sets in Europe.

Table 45

Number of illegal elephant product seizures made in Spain recorded by ETIS, 1989-2003

1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	Total
9	54	6	2	7	1	12	36	5	21	14	23	21	15	17	243

Source: Milliken et al. 2004

The CITES Trade Database contains details of seizures not in the ETIS report. Only 119 ivory seizures are recorded, totalling 814 raw and worked pieces and tusks, plus 66.6 kg of uncounted pieces of worked and raw ivory (see Table 46).

Table 46

Number of illegal ivory seizures reported to the CITES Trade Database, 1992-2003

Year of seizure	Destination	Exporting country	Weight in kg	Number of pieces	Ivory type
1992	Spain	CAR	35		ivory pieces
1992	Spain	Guinea		2	tusks
1992	Spain	Morocco		2	tusks
1992	Spain	?		5	ivory carvings
1992	Spain	?		1	tusks
1992	Spain	South Africa		2	tusks
1992	Spain	Zimbabwe		2	tusks
1994	Spain	Côte d'Ivoire	2		ivory pieces
1994	Spain	Eq. Guinea		4	tusks
1994	Spain	Hong Kong		2	ivory pieces
1994	Spain	Russia		1	ivory pieces
1994	Spain	USA		1	ivory pieces
1994	Spain	Zimbabwe		2	tusks
1994	Spain	Zimbabwe		2	tusks
1995	Spain	DRC		2	tusks
1995	Spain	Cuba		1	ivory pieces
1995	Spain	Eq. Guinea		2	tusks
1995	Spain	Eq. Guinea		2	ivory pieces
1995	Spain	Eq. Guinea		1	tusks

1995	Spain	Nigeria		9	ivory pieces
1995	Spain	Sudan	3		ivory pieces
1995	Spain	Togo		1	tusks
1995	Spain	Venezuela		2	ivory pieces
1995	Spain	Zimbabwe	0.15		ivory pieces
1996	Spain	Switzerland		2	tusks
1996	Spain	Cameroon		6	tusks
1996	Spain	Cameroon		15	ivory carvings
1996	Spain	Egypt		17	ivory carvings
1996	Spain	Egypt		1	tusks
1996	Spain	Eq. Guinea		3	ivory carvings
1996	Spain	Eq. Guinea	3		ivory carvings
1996	Spain	Eq. Guinea		28	ivory pieces
1996	Spain	Eq. Guinea		6	tusks
1996	Spain	Hong Kong	2		ivory carvings
1996	Spain	Hong Kong	5		ivory pieces
1996	Spain	Mexico		6	ivory pieces
1996	Spain	Mozambique		12	ivory carvings
1996	Spain	Mozambique		24	ivory pieces
1996	Spain	Nigeria		2	tusks
1996	Spain	Rwanda		2	ivory carvings
1996	Spain	Turkey	1		ivory pieces
1996	Spain	?		27	ivory carvings
1996	Spain	?		3	ivory pieces
1996	Spain	?	3		ivory pieces
1996	Spain	Zimbabwe		2	ivory carvings
1997	Spain	Angola	0.7		ivory pieces
1997	Spain	Namibia	0.8		ivory pieces
1997	Spain	Togo		2	tusks
1998	Spain	DRC		121	carvings
1998	Spain	DRC		5	tusks
1998	Spain	Côte d'Ivoire	3.5		carvings
1998	Spain	Côte d'Ivoire		3	carvings
1998	Spain	Côte d'Ivoire	0.3		carvings
1998	Spain	Côte d'Ivoire		3	tusks
1998	Spain	Nigeria		4	tusks
1998	Spain	Sudan		1	tusks
1998	Spain	?		4	carvings
1998	Spain	?		5	tusks
1999	Spain	Côte d'Ivoire		4	ivory carvings
1999	Spain	Côte d'Ivoire		2	tusks
1999	Spain	Egypt	2.2		tusks
1999	Spain	Ethiopia		21	ivory carvings
1999	Spain	Eq. Guinea		3	ivory carvings
1999	Spain	Eq. Guinea		8	tusks
1999	Spain	Mali		1	tusks
1999	Spain	Sudan		1	tusks
1999	Spain	Sudan		46	carvings

1999	Spain	Sudan	3.8		carvings
1999	Spain	?		2	ivory carvings
2000	Spain	Côte d'Ivoire		6	carvings
2000	Spain	Côte d'Ivoire		2	tusks
2000	Spain	Spain		2	tusks
2000	Spain	Eq. Guinea		2	carvings
2000	Spain	Eq. Guinea		2	carvings
2000	Spain	Eq. Guinea		4	tusks
2000	Spain	Eq. Guinea		94	carvings
2000	Spain	Eq. Guinea	0.35		carvings
2000	Spain	Eq. Guinea		10	tusks
2000	Spain	Nigeria		1	carvings
2000	Spain	Nigeria		2	tusks
2000	Spain	Uganda		10	carvings
2000	Spain	?		2	tusks
2001	Spain	Côte d'Ivoire	0.6		carvings
2001	Spain	Cameroon		3	carvings
2001	Spain	Dom. Rep.		1	tusks
2001	Spain	Eq. Guinea		6	carvings
2001	Spain	Hong Kong		6	carvings
2001	Spain	Mauritania		3	carvings
2001	Spain	Nigeria		9	carvings
2001	Spain	Nigeria		4	tusks
2001	Spain	Togo		36	carvings
2001	Spain	Zimbabwe		2	tusks
2002	Spain	Cameroon		14	carvings
2002	Spain	Cameroon		4	tusks
2002	Spain	Eq. Guinea		2	carvings
2002	Spain	Eq. Guinea		1	tusks
2002	Spain	Eq. Guinea		2	carvings
2002	Spain	Sudan		4	carvings
2002	Spain	South Africa		4	carvings
2003	Spain	Angola		2	carvings
2003	Spain	Egypt		4	carvings
2003	Spain	Eq. Guinea		89	carvings
2003	Spain	Eq. Guinea	0.2		carvings
2003	Spain	Eq. Guinea		4	tusks
2003	Spain	Hong Kong		2	carvings
2003	Spain	Mozambique		16	carvings
2003	Spain	Sudan		8	carvings
2003	Spain	South Africa		1	tusks
2003	Spain	Zimbabwe		11	carvings
Total 119 seizures			66.6	814	

Source: Wildlife Conservation Monitoring Centre, Cambridge, UK

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. Equatorial Guinea was by far the most common source of seized illegal ivory (23), followed by Côte d'Ivoire (10), Zimbabwe (7) and Nigeria (7).

## **Introduction**

Fieldwork was carried out in Madrid (4.1 million inhabitants) from 30 April to 7 May and in Barcelona (2.9 million) from 9 to 11 May 2004.

## **History**

The oldest elephant ivory items found in Spain date back to about 2400 BC in the southern part of the country. They consist of combs, dagger-pommels and small receptacles. Ivory hair pins, large needles, pens and cosmetic cream containers with application spatulas have been found from the 1st to the 3rd centuries AD Roman sites in Spain. Decorative carved ivory pieces were found at the Late Roman (4th-5th century AD) site of Valdetores de Jarana.

There appears to have been no indigenous Spanish ivory carving prior to the Islamic occupation in the 8th century, and even the Spanish word for ivory, marfil, comes from the Arabic for ivory, umm al-fil. Ivory plaques with Christian themes appeared in Asturia at the same time as the Carolingian plaques in France in the 9th century (Randall 1985). Islamic ivory production in southern Spain gained importance in the 10th and 11th centuries under the Umayyad Caliphate based in Cordoba, with a variety of plaques, decorative inlays and boxes engraved with Koranic or regal texts, floral designs or animals. In 1085, when Castillians seized Toledo from the Moors, ivory carving turned from Muslim to Christian themes while maintaining the quality. Northern Spanish ivory carving used the excellence of Islamic work to produce high quality religious sculptures in the 11th and 12th centuries under royal patronage (St Aubyn 1987). An arm of a Christian cross from the 12th century in the Louvre shows the excellence of indigenous Spanish carvers of this period (Kunz 1916). Examples of Spanish Gothic period sculpture are rare, but high quality caskets and statuettes are known.

Following the conquest of the Philippine islands by the Spanish in the late 16th century, an important ivory carving industry developed under the guidance of the Catholic Church. Raw ivory was brought in from Mozambique, East Africa, and India by Portuguese and Dutch traders. A few Spanish carvers may have instigated the sculpting of religious objects, but it was a Chinese community called the Sangleys who eventually took over, crafting crucifixes, the Virgin and Child, the Christ Child, saints and triptychs. Alternatively, the carvers may have been from Fujian Province in China, which had an ivory carving community, and contacts are known between Fujian Province and the Philippines. Sangleys also produced ivory jewellery and weapon handles (Jose 1990). The earliest known Sangleys ivory carving was in 1591. As Asian and African ivory became more available in the 19th century, the industry grew and objects were sent to Spain and Mexico to adorn churches and cathedrals (Johnston 1985).

Ivory played a minor role in Spain in the arts following the Gothic Age (Johnston 1985). In the 17th century Spanish ivory sculpture is known for its realism, though the general quality was not high (Woodhouse 1976), but later in the century and into the early 18th century an important late Renaissance school developed in Valencia. Between the 17th and 19th centuries ivory manufacture consisted mainly of religious objects, and imports of worked ivory came from the Philippines and Equatorial Guinea. In the 18th century Charles III brought the Italian ivory sculptor Andrea Pozzi to his Buen Retiro Palace where he carved reliefs of classical subjects, portrait miniatures and busts (Johnston 1985). In the 19th and early 20th centuries a gifted ivory craftsman in Valencia produced Spanish, southern French Gothic and Romanesque ivory forgeries to satisfy the demand for antiquities (Barnet 1997).

Between 1969 and 1977 Spain imported about 106 tonnes of raw ivory from a variety of countries, with the CAR and East Africa being important sources. 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 6-19 in 1969-1973, jumping to USD 28-32.50 in 1974-1977. The re-export figures show almost nil, 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.

From 1969 to 1977 Spain imported over 122 tonnes of worked ivory, the great majority coming from Hong Kong (78 tonnes). Only 990 kg originated in the Philippines, indicating that the ivory trading connection there was mostly finished (Parker 1979). Less than 3 tonnes of worked ivory was reported exported,

leaving about 120 tonnes in the country. There is no information available on post-1977 imports and exports of ivory in Spain.

### **Sources and prices of raw ivory in Spain from 1990 to 2004**

No informant could be found who knew anything about raw ivory sources and prices, past or present. Table 46 shows that a wide variety of countries in Africa are sources of origin of attempted 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 smuggling. WWF/Adena does not have a wildlife trade programme and there is no TRAFFIC office in Spain.

### **Ivory workshops in Spain**

All informants, including ivory vendors and WWF/Adena, 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. October 2004). The number of tusks and raw ivory pieces seized since 1992 (see Table 46) suggests that there may be active ivory craftsmen in Spain, but they understandably keep a very low profile.

### **Retail outlets and prices for worked ivory in Spain**

In the two major cities surveyed in Spain, 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 the city has many gift and souvenir shops, but of 26 visited, none contained ivory.

The types of retail outlets have been classed as either in a market or in shops outside a market, as in previous chapters.

### **Barcelona**

All but one of the 24 outlets found selling ivory in the city were located in two of the five markets (see Table 47). There are three main open-air markets, the Ronda Litoral, held on Sundays around the port, Els Encants, a second-hand market held four days a week, and La Rambla, open daily along the central walkway of the main Gothic Quarter thoroughfare. La Rambla's more than 50 stalls sell tourist curios, jewellery and crafts, but no ivory, and no ivory was seen at Els Encants. The Boulevard des Antiquaris is a multi-storied market with expensive antique boutiques on the Passeig de Gràcia, a main shopping avenue, and it is the focal point of ivory selling in Barcelona.

Table 47

Types of retail outlets and number of ivory items surveyed in Barcelona, May 2004

Type	No. of outlets	% of total	No. of items	Av. no. of items/outlet
Antique markets	23	96	367	16
Antique shops	1	4	14	14
Total	24	100	381	16

The most numerous items were human figurines (52%), netsukes (17%), jewellery (4%), a set of 11 items of mini-furniture (3%), animal figurines (2%), cigarette holders (2%) and paper-knives (2%). Table 48 presents a breakdown of the types. Of the 336 pieces that could be attributed to regional origin of manufacture, 192 (57%) were East Asian, 132 (39%) were European, 10 (3%) were South Asian and 3 (1%) were African. No pieces were seen from South East Asia.

Table 48  
Ivory items seen for retail sale in Barcelona, May 2004

Item	No. of items	Percentage of total
Human figurine	200	52
Netsuke	66	17
Jewellery	15	4
Mini-furniture	11	3
Animal figurine	9	2
Cigarette holder	8	2
Paper-knife	8	2
Notebook cover	7	2
Carved plaque	6	2
Misc.	51	13
Total	381	100

### **Antique markets in Barcelona**

The Bulevard des Antiquaris advertises 73 antique and decorative arts shops, but only 44 were counted in the building, 19 of which sold ivory (see Table 49). It opens at 10.30 a.m. daily, except Sundays, and was celebrating its 20th anniversary at the time of the study. The Sunday Ronda Litoral open-air market consisted of around 100 stalls spread out along the quayside. The antique/second-hand section was located just to the west of the Plaça Portal de la Pau. Table 50 shows the number of ivory items counted in the two markets.

Table 49  
Number of retail outlets in the main antique markets seen with ivory items in Barcelona, May 2004

Name of market	No. of outlets	No. with ivory	% with ivory
Bulevard des Antiquaris	44	19	43
Ronda Litoral	~100	4	4
Total	144	23	16

Table 50  
Number of ivory items surveyed in Barcelona's main antique markets, May 2004

Name of market	No. of items
Bulevard des Antiquaris	362
Ronda Litoral	5
Total	367

### Bulevard des Antiquaris

Two of the 19 antique boutiques specialized in high quality Asian and European ivory, one displaying 136 items and the other 75. The boutique with 136 pieces also had 15 mammoth ivory items, the only outlet in this market to carry mammoth ivory. The only Chinese piece was 38 cm in height, with a 25-cm pedestal containing two small (3-and 5-cm) Canton balls and 12-cm human figurines at the base, topped by a 13-cm Canton ball with 22 layers (€10,000). The 82 Japanese items included 6-to 43-cm figurines, many of which had multiple subjects (people, animals and/or other objects) carved on the piece, a 1.1-m carved and painted tusk (USD 49,998) and four 8-9 cm noh masks. Curiously, the shop carried no netsukes. The 53 European ivory objects consisted of 11 Art Deco ivory and bronze figurines, 35 Classical and Romantic-style figurines, an elaborate 98-cm pitcher with hinged cap carved in Classical style, three carved plaques, and a large carved platter (88 cm in diameter). One



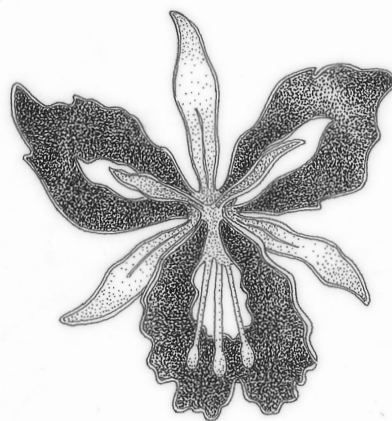
6-cm crucifix in a gilded frame might have been Gothic. The boutique vendor claimed that all the items were antiques. The second boutique with 75 ivory items also sold silver articles and small paintings. Most of its ivory items were netsukes or small human and animal figurines (€220-380), including five 12-15-cm Spanish-style Art Deco human figurines (such as a bull fighter and a Flamenco dancer) and a 14-cm Christian holy man carrying a Bible; also there were two babies' silver wrist-rattles with ivory bangles, a 16-cm crucifix and a carved plaque.

Another interesting shop displayed six large, old South Asian bracelets, a cup, a 13-cm South Asian woman figurine, a 19-cm Buddhist bodhisattva, probably a Nepalese version of Kwan Yin, and a Moghul painting on ivory. The shop was closed at the time of the visit, so no one could be interviewed. The shop next to it displayed a 16-cm 18th-century nobleman made in Dieppe, a 16th-century 13-cm Virgin and Child from Dieppe, a 20-cm 19th-century Portuguese Virgin and baby Jesus, and also an odd 10-cm male figurine wearing a loincloth, and a baby's rattle.

The remaining shops carried an interesting mix of Asian and European ivory items. The only African item was a 5-cm bust of an Egyptian pharaoh (€300). No pieces were found of imitation ivory mislabelled as ivory.

#### Ronda Litoral

The 20 second-hand/antique stalls included four that displayed small amounts of ivory. The only genuine ivory articles seen were a 19th-century Indian bangle with two tiny elephants and a Buddha carved on it (€420), a 5-cm brooch (€280), a 7-cm feng shui charm, a 2-cm ivory and gold Asian elephant, and an 8-cm curved piece of ivory set on a chain as a necklace. No new ivory was seen. One stall displayed 33 fake ivory netsukes (€120-180) made of a synthetic and eight 8-cm Chinese thin figurines made of bone, all labelled as ivory. One 13-cm Kwan Yin (€360) looked like it was made from mammoth ivory. The pieces were displayed in a glass case and a supposed CITES certificate was exhibited inside, issued by the Ministry of Commerce, with no date. The Ministry of Commerce does not issue CITES certificates; the Ministry of Economy does. Another stall displayed five scrimshawed sperm whale teeth and two walrus tusk scrimshaw pieces.



European ivory brooch

## Antique shops in Barcelona

Only one antique store in the Eixample Quarter was found with ivory. It displayed a 35-cm Christ on a 65-cm ivory cross priced at €47,500, a fan, nine 13-28 cm Japanese figurines, a 14 x 10 cm Japanese shrine, and two 15-cm carved Japanese vases.

### Other locations

None of the tourist or religious shops in the Gothic Quarter sold ivory, nor did the museum or hotel shops. The huge Maremàgnum shopping centre in the port and the 'Shopping Line' along Avinguda Diagonal contained no outlet selling ivory. One woman vendor, who carried imitation ivory items made of bone and synthetics in the Gothic Quarter, said that selling ivory was illegal and that everyone had stopped.

## Retail prices in Barcelona

Table 51 shows the prices for various items in Barcelona.

Table 51

Retail prices for ivory items seen in Barcelona, May 2004

Item	Size in cm	Where made	Price range in USD
<b>JEWELLERY</b>			
Bangle	1	?	137
	4	India	505
Brooch	4-5	Europe	237-342
	7	Europe	432
<b>FIGURINES</b>			
Animal	2	Asia	119
	9	Japan	840
Human	5-10	Africa	360
		Japan	660-2,400
	11-20	Asia	1,050-7,200
		Europe	1,800-17,760
	21-30	Nepal	600
		Europe	9,600-18,000
31-40	Japan	3,720-11,940	
	Europe	14,400	
	Japan	22,800	
Netsuke	3-6	Asia	264-456
<b>TUSKS</b>			
Carved	110	Japan	59,998
Polished, mounted pair	120	?	6,000
<b>MISC.</b>			
Carved plaque	12	?	1,919
Cigarette holder	15	?	150-175
Fan	30	Asia	540
	28-32	Europe	600-1,800
Paper-knife	10-15	?	107-143

(The high price of many figurines is because they were antiques.)

Exchange rate: €1 = USD 1.2

## Madrid

A total of 23 shops selling 240 ivory items was found in Madrid. Fourteen shops in four markets contained 141 of these items and nine outlets elsewhere in the city contained the balance of 99 (see Table 52).

Table 52

Types of retail outlets and number of ivory items surveyed in Madrid, April/May 2004

Type	No. of outlets	% of total	No. of items	Av. no. of items/outlet
Antique markets	14	61	141	10
Antique shops				
Salamanca	4		50	13
Gran Via	2		25	13
Plaza Mayor	2		21	11
Ribera de Curtidores	1		3	3
Sub-total	9	39	99	11
Total	23	100	240	10

The most numerous items were human figurines (35%), pens (8%), paint spatulas (7%), knitting hooks (6%), jewellery (5%), and utensils (5%). Table 53 presents a breakdown of the types. All the vendors who were asked the age of the ivory items said either that they were antiques or that they had been imported prior to 1989. The great majority of the items were of European manufacture 154 (64%), followed by East Asian 82 (34%), African 5 (2%) and South Asian 3 (1%). No pieces were seen from South East Asia.

Table 53

Ivory items seen for retail sale in Madrid, April/May 2004

Item	No. of items	Percentage of total
Human figurine	83	35
Pen	19	8
Paint spatula	16	7
Knitting hook	14	6
Jewellery	11	5
Utensil	11	5
Netsuke	8	3
Folding razor	7	3
Opera glasses	5	2
Carved tusk	4	<2
Chinese carved plaque	4	<2
Stamp	4	<2
Knife/sword	3	1
Misc.	51	21
Total	240	100

### Antique markets in Madrid

Four antique markets were found in Madrid, all but one of them located on the long Ribera de Curtidores street (see Tables 54 and 55). This street hosts the most important open-air market in Madrid, El Rastro, held every Sunday. Goods sold at El Rastro do not include ivory. The street is made up mainly of home furnishings and furniture shops, many with second-hand merchandise, and there are three clusters of antique shops in 'galleries' or arcades. Some of the shops sold junk, but others had fairly high quality items. None needed door bells to gain entry. All the antique outlets were between the bottom of the street, where it crosses Rondo de Toledo, and the

Plaza de Cascorro at the top. Chinese businessmen have moved into the area and have opened a couple of antique shops, selling also cheap imported clothing, but there was no ivory.

Table 54

Number of retail outlets in the main antique markets seen with ivory items in Madrid, April/May 2004

Name of market	No. of outlets	No. with ivory	% with ivory
Galerias Piquer	48	6	13
Nuevas Galerias	25	4	16
Galerias Antigüedades	6	1	17
Mercado Puerta de Toledo	47	3	6
Total	126	14	11

Table 55

Number of ivory items surveyed in Madrid's main antique markets, April/May 2004

Name of market	No. of items
Galerias Piquer	62
Nuevas Galerias	58
Galerias Antigüedades	8
Mercado Puerta de Toledo	13
Total	141

(The first three markets were on the Ribera de Curtidores street.)

#### Galerias Piquer

This two-storey gallery contained 48 antique and second-hand shops, but only six of them sold ivory. Several of the shops were still closed at 11 to 11.30 a.m. All the ivory was found in the second-hand shops. One large outlet, crammed with old furniture and a variety of 'art' pieces, was selling as ivory a pair of large mounted elephant tusks, a huge Chinese junk, and Japanese and European sculptures all made of plastic and/or resin. The only genuine ivory items identified in the shop were a 13-cm crucifix and a 13-cm Indo-Portuguese figurine from Goa. One shop displayed a 17-cm African bust on a tusk tip, and another had a 90 x 40 cm piece of wood inlaid with ivory and bone plaques of Japanese women in a traditional setting. Aside from one other crucifix, the rest of the ivory consisted of utilitarian objects (handles of various items and a brush) or ornamental items (fish amulets, a 22-cm Japanese sword handle and scabbard).

#### Nuevas Galerias

This arcade contained 25 antique and arts and crafts shops, four of which sold ivory items. One antique boutique carried six good quality Japanese ivory figurines, including a pair of squat 9-cm dragon-lions costing €6,000, and a 48-cm ivory umbrella handle. It also displayed a 17-cm incised hippo tooth. A second Asian arts and crafts shop sold only 39 poor quality ivory carvings. It displayed two Indian Buddhist temples, one 50-cm tall and the other 22-cm tall, a 52-cm Chinese carved tusk (€4,300), a 12-cm bone Chinese cabbage with five ivory insects on it (€820), 25 Asian 6-22 cm figurines and a 9-cm European figurine. The two other shops carried miscellaneous ivory objects such as opera glasses and powder boxes.

#### Galerias Antigüedades

This small market had only six antique and art shops, one of which carried ivory. An American who has lived in Madrid since the 1960s owned the boutique selling ivory. He obtained his items 'through contacts', rather than buying them at auctions or periodic antiques fairs as other shop owners do. Although a charming man and helpful with information, some of his 'ivory' items were fakes. The genuine ivory pieces, which he said were Meiji Japanese (19th century), were displayed in a locked glass case. Other 'ivory' items were displayed in the open in the showroom, including a 20-cm Japanese peasant priced at €1,900, supposedly also 19th century. It

was made from a synthetic of some kind. A 28 x 10 x 6 cm Chinese-carved 'ivory' box made of bone was priced at €1,300. By contrast, in the locked display case a 32-cm crucifix made in Dieppe in the 18th century cost €15,000 and a 16-cm geisha was priced at €3,000. Two large-bead necklaces he said were ivory were selling for €500 each, but they did not appear to be ivory. It is usually easy to see Schreger patterns on ivory beads, but these displayed none. The shop also had a Chinese fan from the Philippines with ivory filigreed ribbing and figures on it, said to date from about 1830-1850, priced at €500.

#### Mercado Puerta de Toledo

This large, multi-storied building contained 47 shops of various sorts, only three of which sold ivory. One antique boutique, closed at the time of the survey, displayed in the window a 17th-century 10 x 18 cm German scene on a plaque, an 18th-century French 25-cm Virgin, an 18th-century Italian 8-cm bust carved by Putti, and an unlabelled 16-cm crucifix. Another shop carried a poorly carved 45-cm African elephant bridge priced at only €650 and six 3-4 cm ivory cameos costing €200-280.

### **Antique shops in Madrid**

Nine outlets were found in different parts of the city selling 99 ivory items (see Table 52).

#### Salamanca

This smart quarter of the city is situated just north of the Parque del Buen Retiro and contains affluent residential properties, trendy restaurants and cafés, expensive boutiques and other luxury businesses. Three antique boutiques and a second-hand shop were found selling 50 ivory items. One boutique that could be entered only by ringing a door buzzer had a variety of ivory pieces, including several figurines: a 5-cm baby Christ, a 12-cm European lady, and two of the Virgin with Child (10 and 12 cm), two 8-cm Chinese-carved plaques, and two 7-cm stamp handles. One interesting composite piece was African, though the shop owner did not know from which country. The style looked like Kongo carving from the DRC, probably early 20th century. The piece consisted of two 8-cm African men in loincloths carrying a 4-cm European in a covered litter. The carving was poor and the price was €450. The boutique also was selling a Chinese fan 'with Philippine connections' said to date from around 1880, identical to the one for sale in the Galerías Antigüedades. The asking price was €750, and with bargaining the price dropped to €680. As with the other fan, it looked brand new.

A second antique boutique was selling two Japanese busts on small (8 and 12 cm) tusk tips, and eight ivory utensil handles. Nearby, a second-hand shop was selling a cameo, opera glasses, a 16-cm paper-knife, 19 pen handles, two stamp handles and miscellaneous items made of ivory. The last shop in this area displayed six Japanese ivory netsukes. There were about 10 other similar types of outlets in the quarter surveyed that did not carry ivory.

#### Gran Vía

This broad boulevard in central Madrid is a major shopping and tourist locality that contains dozens of souvenir and gift shops. Only two expensive antique boutiques at the eastern end of the street sold ivory. One displayed 23 high quality Japanese pieces consisting of two netsukes, 20 8-42 cm figurines and a 52-cm King Ko with a carp and a goat (€19,000). The other boutique displayed an 8-cm ivory nude European woman kneeling on a rock by a pool, both made of bronze (€2,000), and a 6-cm Japanese figurine.

#### Calle Mayor

Leading off from the Puerta del Sol, this is another major shopping and tourist avenue, and it hosts the large Plaza Mayor, which contains over 50 shops and restaurants, with another 40-50 tourist shops in the vicinity. One jewellery and gift store on the Calle Mayor was found selling 12 ivory items, including two poor quality African pieces, three 15-cm Asian figurines, five religious items and two 20-cm carved plaques. A 13-cm African bust was priced at €250, but the vendor said that he would give a 30% discount. A good quality 25-cm crucifix was priced at €3,795, and a triptych of 12-cm biblical scenes cost €2,560. The shop also contained 98 fake ivory netsukes and six 10-cm Chinese figurines that were labelled as ivory, but looked more like bone, priced at €105 each. The second outlet just off Calle Mayor was a large store selling thousands of religious items, nine of them made of ivory. Two poor quality figurines of Mary and Jesus (14 and 15 cm) were priced at only €270 each, and a high quality 14-cm Virgin in an elaborate painted frame cost €1,518. The shop also displayed two nativity scenes with various objects in it made of ivory.

### Ribera de Curtidores

One second-hand shop that sold ivory was not in one of the three markets that are on this street. It was selling a 15-cm crucifix (€1,500), a 4-cm ivory handle on a steel dagger (€280) and a 4-cm wide bangle (€350).

### Other locations

No ivory was found for sale in the museum shops or at other tourist attractions, nor in department stores such as El Corte Inglés, nor in luxury hotels.

### **Retail prices in Madrid**

Table 56 shows the prices for various items in Madrid.

Table 56

Retail prices for ivory items seen in Madrid, April/May 2004

Item	Size in cm	Where made	Price range in USD
<b>JEWELLERY</b>			
Brooch	4-5	Europe	240-420
Necklace, large beads		?	600 (ivory?)
<b>FIGURINES</b>			
Animal	9	Japan	5,994
Human	11-20	Asia	1,736-3,600
		Africa	302
		Europe	324-1,822
		Asia	1,920-11,880
	21-30	Europe	4,555
		Asia	12,799
		Europe	18,000
Netsuke	3-6	Asia	462-539
<b>TUSKS</b>			
Carved	45	Africa	780
	52	Asia	5,400
<b>MISC.</b>			
Carved plaque	20	Europe	539
Container with lid	5	?	119
Fan	30	Philippines	600-900
Paper-knife	15	?	100

Exchange rate: €1 = USD 1.2

### **The use of ivory substitutes in Spain**

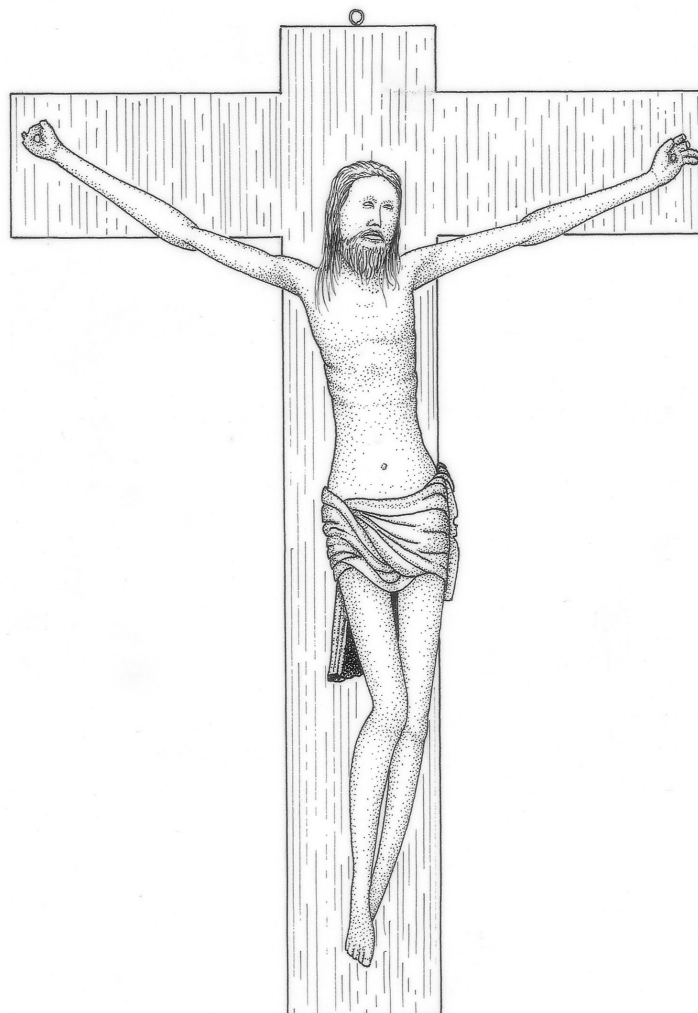
In Barcelona, most ivory substitutes were seen in the tourist and religious shops in the Gothic Quarter. They consisted mainly of synthetic materials such as plastic, resins and plaster, and also bone, but one shop was found selling small animal figurines of vegetable ivory (tagua nut). Only 16 items were found made of mammoth ivory, one at the Ronda Litoral market and the others in one antique boutique in the Boulevard des Antiquaris.

In Madrid, ivory substitutes were common, but were often mislabelled as ivory. The most common substitutes were synthetics – plastic and resin, followed by plaster (mainly for crucifixes or other religious objects) and then bone. No mammoth ivory was recognized. There were many human figurines and netsukes being sold as ivory, but upon inspection they appeared to be made either of synthetics or bone. The prices were too low for ivory, many had the dull, waxy sheen of resin, and no Schreger pattern could be found on the samples examined closely. For example, many items labelled as Japanese ivory netsukes found in tourist souvenir shops were selling for €89-110. Genuine ivory netsukes in antique boutiques in Madrid were priced at €385-450. Authentic ivory netsukes were found in Guangzhou, China, at under USD 100 (€83) (Martin and

Stiles 2003), but they displayed the bright, crisp sheen of polished ivory, and a Schreger pattern could be discerned on many of them. One shop tried to sell the investigator a 1.8-m mounted pair of synthetic 'ivory' tusks, supposedly from the Toledo Palace, for €7,500. Other shops carried accurately labelled imitation ivory items, with both European and Asian motifs. Some of the markets had shops with fake ivory, either resin or bone, that the proprietors tried to sell as ivory. In one shop, the vendor started at €200 each for five resin Japanese netsukes, then dropped to €50. Failing to make a sale with the investigator, he then offered a poorly carved 30-cm heron carved from a deer antler for €200, claiming it was ivory.

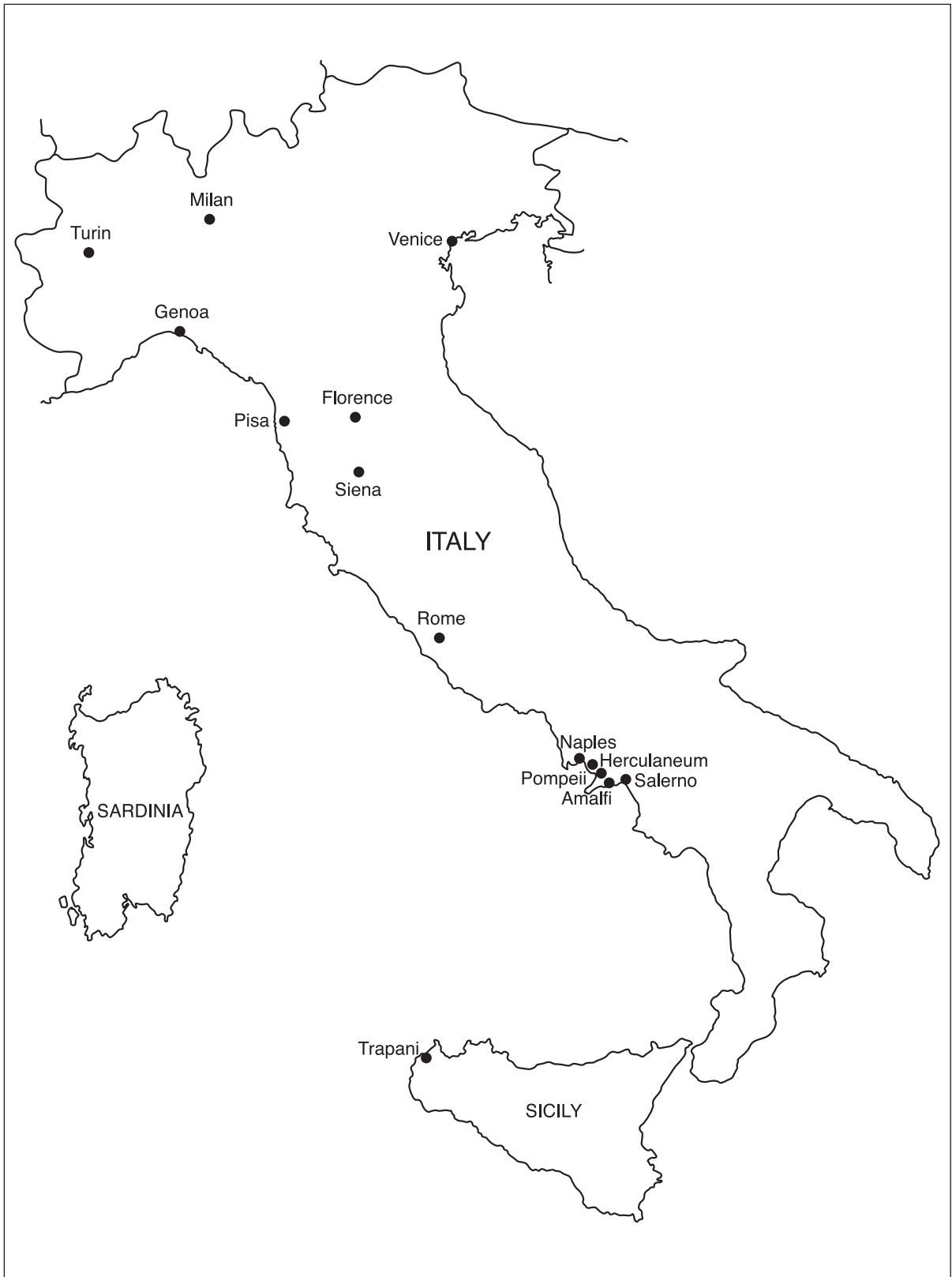
### **Vendors' views on ivory market trends and the future**

Vendors in Madrid and Barcelona who were asked thought that the market for ivory would remain about the same for the immediate future. Most expressed no opinion about the long-term future, though one in Madrid thought that trade would eventually die because of the opposition of environmentalists. Demand for ivory is quite low in Spain at the present time because of high prices for genuine ivory, and the public is very aware of the connection between ivory demand and elephant poaching.



A Spanish ivory crucifix  
from the 18th century

# ITALY





## **The legal position of the ivory trade in Italy**

CITES entered into effect in Italy on 31 December 1979. In Italy the ivory trade is strictly regulated with the application of European Council Regulation 338/97 implemented by the National Law number 150 of 7 February 1992, modified by the Legislative Decree number 275 of 18 May 2001. Trade in ivory (import/export and sale) is illegal except for ivory imported into Italy before 1989 and registered (Massimiliano Rocco, TRAFFIC Italy, Rome, pers. comm. February 2005).

Italy has one of the poorest ivory seizure reporting records in Europe. It has not filed an ivory seizure report to ETIS since its inception in 1998 (Milliken et al. 2004), and the CITES Database of UNEP/WCMC has no ivory seizure record for Italy (John Caldwell, WCMC, pers. comm. August 2004). The Born Free Foundation (Anon. 2002) reported three ivory seizures for Italy in 2001, but the Italian government has not responded to a request by ETIS for verification. Table 57 shows Italy's elephant product seizure reports to CITES from 1989.

Table 57

Number of illegal elephant product seizures made in Italy recorded by ETIS, 1989-2004

1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	Total
0	1	2	2	49	2	2	-	4	1	-	-	-	-	-	-	63

Prior to the CITES ivory trade ban, Grimm et al. (1989) reported that in 1987 Italian Customs seized 20 tusks and 68 kg of worked ivory, and in 1988 13 tusks and 84 kg of worked ivory were seized. There are no other published reports on ivory imports or exports in Italy.

## **Introduction**

Fieldwork was carried out in Milan (1.4 million inhabitants) from 15 to 18 May, in Florence (0.3 million inhabitants) from 19 to 20 May and in Rome (2.7 million inhabitants) from 21 to 27 and 29 to 30 May 2004. A brief survey was carried out in Naples (1.1 million inhabitants) on 29 May.

## **History**

Ivory was a luxury item in the Greco-Roman world. Greek colonists settled in Sicily in the 8th and 7th centuries BC, bringing ivories with them and introducing ivory working to the local inhabitants. The main use of ivory was for decorative lintels and votive figurines of Greek gods (Huyghe 1966).

The Etruscans in northern and central Italy worked ivory in the 6th and 5th centuries BC. They developed their own style using Greek and Near Eastern inspiration to create boxes, combs, figurines, handles, plaques and tools that were owned by wealthy individuals. Some of the objects were eventually used to decorate the large stone tombs of its upper classes.

In the 5th and 4th centuries BC ivory was used sparingly in Rome, in conformance with early Republic prohibitions against ostentation, decorating insignia of high office. By the 2nd and 1st centuries BC, following an influx of luxury items and wealth brought by Roman conquests and trade, ivory became much more common, with boxes, busts, figurines, game pieces, ivory inlay, knife handles and carved plaques being common (Buitron and Oliver 1985). Several ivory pieces, including casket decorations, a figurine imported from India, items used in women's cosmetics, and Roman god and goddess figurines, including fauns, were recovered from the ruins of Pompeii and Herculaneum near Naples. These date from the 1st century BC to the first century AD. Ivory diptychs and triptychs began to be carved in Rome under Diocletian in the 3rd century AD. They originally were given to members of the Roman aristocracy and were connected with the appointment of high officials. Roman ivory carving remained at a high level up to the 6th century, the diptych of Justinianus being a good example, but then there was a decline in artistic quality (Kunz 1916). Christian themes were introduced to Italian ivory carvings from the 4th century AD (St Aubyn 1987).

Up to the extirpation of elephants in North Africa in the 4th century AD most of Italy's ivory originated there, but at least as early as the first century AD Greco-Roman traders based in Egypt began importing ivory from East Africa and India to Rome (Casson 1989). With the East African trade, ivory prices

fell considerably compared with 5th century BC prices. After the fall of Rome trade was taken over by a succession of Germanic and Scandinavian peoples, and ivory does not seem to have been desired by them.

Italian ivory carving did not recover until the 11th century when a school of carving was established at Amalfi, near Salerno, producing mainly poor quality religious ivory plaques. Islamic ivory items were produced in Sicily in the 11th to 14th centuries with both Muslim and European motifs; 'oliphants' or hunting horns carved from tusks, combs, Bishops' croziers and boxes were important items (Randall 1985).

Gothic-style ivory carving started in Italy about the same time as in France, shortly after 1250. At least three religious ivory sculptures have been attributed to the Italian artist Giovanni Pisano between 1270 and 1298, and in the 15th century the Embriachi workshop in Venice produced high quality Gothic sculptures, Bishop's croziers and secular carved plaques and caskets in ivory and bone (Barnet 1997). Florence, Pisa and Siena were also centres of Gothic ivory craftsmanship, and many small workshops in rural areas produced high quality religious and secular pieces. Medieval Italians held strong beliefs about the miraculous powers of certain statuettes of the Virgin and Child, such as the one in Trapani, Sicily, which inspired many ivory copies to be made in later years for church altars or, in smaller form, to be carried for personal devotion.

There is a marked dearth of ivory art in the 16th century at the birth of the Renaissance as artists turned to other media, though utilitarian and decorative items were still produced (Woodhouse 1976). In the 17th century Italians became renowned for producing elaborately carved ivory utensil handles. In the 18th and 19th centuries there was no distinctly Italian style of ivory carving, though intermittent ivory manufacture took place in Naples, Venice and Turin (Johnston 1985).

Between 1970 and 1977 Italy imported approximately 55 tonnes of raw ivory from a great variety of sources, led by Kenya, except for an anomalous import of 14 tonnes from Uruguay in 1973. 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 from 1973 to 1977 (Parker 1979).

From 1970 to 1977 Italy imported over 75 tonnes of worked ivory, with Hong Kong being the most important source with almost 28 tonnes. The remainder came from various parts of Africa, Asia and Europe, with no single country standing out. About 11.5 tonnes of worked ivory were re-exported, indicating that about 64 tonnes remained in Italy (Parker 1979).

Grimm et al. (1989) report that in 1986 Italy imported 1,914 kg of worked ivory and 521 kg of raw ivory, and in 1987 the figures were 988 kg and 354 kg respectively. The main source countries for raw ivory were Cameroon, Chad, Congo, Kenya, Malawi and Nigeria. The main sources of worked ivory in 1987 were Hong Kong, India, Zimbabwe, South Africa and China, in that order. 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 individuals 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 300,000 lira per kg, or about USD 180-230/kg, depending on the exchange rate during this period (the lira was quite volatile). The type of ivory is not specified (Grimm et al. 1989).

## **Sources and prices of raw ivory in Italy from 1990 to 2004**

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 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 in Italy**

No ivory workshops were found in the three cities surveyed. Vendors and tourist information offices knew of no ivory carving currently active in Italy. Grimm et al. (1989) noted that even as long ago as 1988 the cost of labour for 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 in Italy

A total of 61 outlets were found displaying 461 worked ivory items for sale in the four cities visited. These figures 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.

### **Milan**

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. For purposes of statistical presentation, the exposition will be included (see Table 58). The three antique markets contained 29 of the outlets, 94% of the total, and displayed 217 ivory objects, 90% of the total.

Table 58

Types of retail outlets and number of ivory items surveyed in Milan, May 2004

Type	No. of outlets	% of total	No. of items	Av. no. of items/outlet
Antique markets	29	94	217	7
Antique shops	2	6	23	12
Total	31	100	240	8

The most numerous items were human figurines (38%), walking sticks with ivory handles (10%), stamps (8%), carved plaques (5%) and a gentleman's grooming kit (4%). Table 59 shows a breakdown of the types. Of the 204 items that could be attributed to regional origin of manufacture, 147 (72%) were European, 32 (16%) were East Asian, 19 (9%) were from USA, 4 (2%) were Indian and 4 (2%) were African. No items were seen from South East Asia. The remaining 36 items unidentified to region of manufacture were animal figurines, cigarette holders, jewellery and a paper-knife.

Table 59

Ivory items seen for retail sale in Milan, May 2004

Item	No. of items	Percentage of total
Human figurine	90	38
Walking stick	24	10
Stamp	19	8
Carved plaque	13	5
Gentleman's grooming kit	10	4
Animal figurine	8	3
Box	8	3
Carved tusk hollow section	8	3
Jewellery	5	2
Skull	5	2
Netsuke	4	<2
Baby's rattle	2	<1
Cigarette holder	2	<1
Misc.	42	18
Total	240	100

When asked, vendors said that the ivory items displayed were antiques but, as elsewhere, there was no way of confirming this. Ivory items seen in the two shops and in the Lido Antique Market could easily have been recently manufactured, as they looked in fresh condition.

### **Antique markets in Milan**

Three antique markets were seen in Milan, but the days on which the city and surrounding area held other antique and flea markets did not coincide with the time of the survey. A tourist information booklet listed 17 such markets, and it is possible that ivory could be found at one or more of them. Since many antique/second-hand traders move from one to another market, much of the ivory for sale in the Milan area was probably seen by the investigator at the Lido and Porta Ticinese markets. Tables 60 and 61 present a summary of the markets that were surveyed.

Table 60

Number of retail outlets in the main antique markets seen with ivory items in Milan, May 2004

Name of market	No. of outlets	No. with ivory	% with ivory
International Antiquarian Exposition	132	18	14
Lido Antique Fair	34	10	29
Porta Ticinese	~200	1	0.5
Total	~366	29	8

Table 61

Number of ivory items surveyed in Milan's main antique markets, May 2004

Name of market	No. of items
International Antiquarian	156
Lido Antique Fair	60
Porta Ticinese	1
Total	217

#### International Antiquarian Exposition

This important antiques trade fair was held at the Milan fair grounds at Porta Metropolitan from 8 to 16 May 2004. Most exhibitors were from Italy, with companies from Milan, Turin, Rome, Naples and Florence displaying items for sale. Other countries represented were Switzerland, France, Germany, the Netherlands and Belgium. Of the 136 exhibitions, 18 displayed ivory, with the pieces labelled as dating between the 14th and 19th centuries. Only 21 of the items were not manufactured in Europe: 19 Art Deco figurines from the USA, a 22-cm crucifix from Goa, India, and a 9-cm Japanese figurine. Ivory items included representatives of the major sculptural styles such as Gothic, Classical, Romantic and Art Deco, and the most numerous types were human figurines and busts, walking stick with handles, carved plaques, various boxes and caskets, and memento mori skulls. The largest number of ivories displayed by one exhibitor was 36. Since the main patrons of such exhibitions are art collectors and experts, it is unlikely, though not impossible, that any of the ivories were fakes or made with recent, illegal ivory.

#### Lido Antique Fair

The Lido grounds has changed its name to the Infostrada Sport Village, located near the Piazzale Lotto underground stop, but the antique fair is still called the Lido. It is held the second Sunday of the month, open from 9 a.m. to sunset. Ten out of 34 stalls carried ivory items, some of which could easily have been illegal pieces smuggled into the country by the vendors, or bought from such people by the antiques vendors. The largest number of ivory items at one stall was 24, consisting of two poor quality 10-cm and 12-cm African figurines (€375 and €400 respectively), 11 4-6 cm Japanese style figurines and netsukes (€150-175), including some erotic pieces, an Indian 6 x 12 cm erotic carved plaque (€275), jewellery and miscellaneous objects. Another table was selling a single ivory 8-cm Ganesha statuette from India for €400. Other stalls displayed babies' rattles,

cigarette holders, a gentleman's grooming kit with ivory handles on 10 of the pieces (€250), paper-knives, utensils with ivory handles, and a few ivory walking sticks with ivory handles. Most of the stalls in the market sold low to average quality second-hand objects.

#### Porta Ticinese

There are two open-air markets held in this area around the canals on Saturdays. One consisted mainly of contemporary paintings and crafts, with some antique shops on the street on either side of the Naviglio Grande Canal, and the other one nearby on Viale d'Annunzio was similar to Rome's Porta Portese market. There were many stalls on Viale d'Annunzio that sold all manner of ethnic crafts and jewellery from Africa, Asia and elsewhere, but only one ivory item, an old bracelet from India (€417), was seen.



A bishop's ivory crozier made in Italy  
in the early 13th century

## Antique shops in Milan

Only two shops, excluding those in the markets, were found selling ivory. Three expensive antique boutiques in the city were closed, as they were participating in the International Antiquarian Exposition. A large shop specializing in semi-precious stone and mineral objects in the Central Railway Station also carried 21 ivory items for sale, plus a large ivory flower bouquet labelled as belonging to a 'private collection'. Except for six small animals, the ivory pieces were very large, and one painted vase was labelled as Shibayama ivory. The other pieces appeared to be Chinese, though the shop owner said that they were from Japan. The prices were somewhat low if they were Japanese, but higher than comparable pieces in China or Hong Kong. For example, four 38-cm human figurines were priced at €4,000 each, a 58-cm pair of an Emperor and Empress was €13,000, an intricate 78-cm incense burner designed as a multi-tiered pagoda was €25,000, and two painted 80-cm sages were €30,000 each. Another piece was unusual, consisting of a 67-cm deity with three Janus-faced female heads one on the other, topped by a fierce male head, and the body having 16 arms and hands, some of them holding objects. The main deity was the Japanese Kannon (Kwan Yin in China), with Yama ('Lord of Death') at the top.

The other antique shop was located near the Ambrosiana library. It was selling 12 Japanese figurines of 8-14 cm at €400-600 and eight netsukes of 3-5 cm at €60-160, all labelled as ivory. These pieces were made of resin. Only two genuine ivory netsukes were in the shop, priced at €200 each.

No department store or hotel gift shop was found with ivory. The expensive shopping and tourist area around the Duomo (cathedral) was surveyed, but no ivory was seen.

## Retail prices in Milan

Table 62 shows the prices for various items in Milan.

Table 62

Retail prices for ivory items seen in Milan, May 2004

Item	Size in cm	Where made	Price range in USD
<b>JEWELLERY</b>			
Bangle	1	?	210
Bangle	4	India	480
Brooch	4-5	Europe	480-540
Necklace, small beads		?	240
large beads		?	360
<b>FIGURINES</b>			
Animal	4-6	Asia	192-300
Human	5-10	Africa	450
		Asia	264-330
		India	450
	11-20	Africa	480
		Europe	15,600 (antique)
	38	Asia	4,800
	58	Asia	7,800
	67	Asia	15,600
	80	Asia	36,000
Netsuke	4-5	Asia	240
<b>MISC.</b>			
Carved plaque	8 x 14	Europe	4,800 (antique)
	6 x 10	India	330
Cigarette holder	12	?	120
Knife	10	Europe	72
Paper-knife	15	?	144
Walking stick	6-8	Europe	420-1,200

Exchange rate: €1 = USD 1.2

## Rome

A total of 19 outlets selling 126 ivory items was found in Rome (see Table 63).

Table 63

Types of retail outlets and number of ivory items surveyed in Rome, May 2004

Type	No.	% of total	No. of items	Av. no. of items/outlet
Antique markets	1	5	3	3
Antique shops				
Coronari	12		99	8
Babuino/Margutta	2		5	3
Scrofa	2		4	2
Frattina	1		13	13
Torino	1		2	2
Sub-total	18	95	123	7
Total	19	100	126	7

The most numerous items were human figurines (32%), utensils with ivory handles (13%), netsukes (8%) and paper-knives (6%). Table 64 presents a breakdown of the types. Of the 110 pieces that could be attributed to regional origin of manufacture, 63 (57%) were from Europe, 46 (42%) were from Asia, mainly Japan, and one (1%) was African. The 16 items unidentified to origin (such as paper-knives, a cigarette holder and fan) could have been from anywhere. No items were seen from South or South East Asia.

Table 64

Ivory items seen for retail sale in Rome, May 2004

Item	No. of items	Percentage of total
Human figurine	40	32
Utensil	16	13
Netsuke	10	8
Paper-knife	7	6
Animal figurine	3	2
Box	3	2
Carved tusk hollow section	2	<2
Fan	2	<2
Jewellery	2	<2
Snuff bottle	2	<2
Misc.	39	31
Total	126	100

All vendors asked said that the ivory they were selling was antique. Very few pieces were seen that might have been recently manufactured.

### **Antique markets in Rome**

The main open-air market in Rome is the Sunday Porta Portese market. Hundreds of stalls selling a great variety of items line a packed, narrow lane for about a kilometre. No ivory was seen for sale here. The only other market was found in the Piazza Fontanella Borghese, open every day except Sunday, and which specializes in prints, books and antiques. Of 16 stalls open in the market at the time of the survey, only one was found selling ivory items, which consisted of two 14-cm paper-knives and a 6-cm brooch.

## Antique shops in Rome

All the shops selling ivory were found in the main shopping and tourist area around the Spanish Steps and the Pantheon. Some 18 outlets were found selling 123 ivory items (see Table 63).

### Via Coronari

This street specializes in antique shops. Out of about 50 antique outlets, 12 were found selling 123 ivory items. Most of the shops with ivory had only a few pieces, but one displayed 52, including 10 netsukes, eight 8-16 cm Japanese figurines (a 14-cm Geisha was €3,600), a 30-cm hu (elongated tablet used in the Chinese royal court in the Ming Dynasty) (€2,000), a 34-cm Canton ball on a pedestal and two sets of the three monkeys that see, speak and hear no evil, 10-cm tall (€2,400 per set). The only definitely European item in the shop was a 19th-century 12-cm figurine priced at €4,600, though some ivory boxes and paper-knives could have been crafted in Europe. The shop with the second largest number of ivory items carried 15, consisting of a fan, four 23-35 cm ivory and bronze Art Deco figurines (€15,000-26,000), two crucifixes (18 cm (€6,000) and 22 cm), a 10-cm European figurine, a 14-cm Japanese figurine, four knives and forks with carved handles, and a miscellaneous item. The most impressive item seen was a large composite piece of the Chinese Emperor Chen Lun seated in a chair surrounded by six guards. The piece was labelled as dating to the year 1700. It was priced at €50,000. Two shops carried paper-knives with silver handles. One (20 cm) cost €950.

### Via Babuino and Margutta

These two expensive shopping streets run parallel to each other between the Piazza del Popolo and the Spanish Steps. Together, they host 39 antique boutiques, but only one on each street was found selling ivory. One had two items and the other had three. The boutique on Via Babuino displayed a 35-cm tall figurine of Christ being taken down from the cross, and a 22-cm tall double figurine of two Europeans. The Via Margutta shop carried three figurines (14-20 cm) of female nudes in the Classical style.

### Via della Scrofa

Two shops carried ivory on this street, one with two (16 cm and 24 cm) European figurines, and the other with a 14-cm African bust (€500) and a 10-cm Chinese peasant (€360). The extension of this street, Via Ripetta, contained no outlets selling ivory, although there were about 20 shops of the type that might sell ivory (such as antique, second-hand and home furnishings).

### Via Frattina

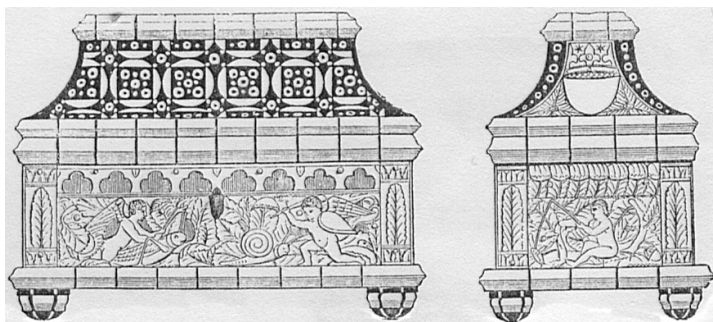
This short street is close to the Spanish Steps and had only one shop selling 13 ivory items, consisting of a set of 12 fruit knives and forks with 10-cm ivory handles (€460) and a necklace of tiny ivory beads with a 5-cm ivory rose pendant (€120).

### Via Torino

This street between the Opera and the Santa Maria Maggiore church hosts a large antique gallery, but the only ivory items seen were two 8-cm Japanese snuff bottles engraved with erotic figures priced at €500 each.

### Other locations

No tourist monument, museum nor hotel gift shop was found selling ivory, nor was any ivory seen in department stores. Ivory crucifixes were seen on the walls of religious shops near St Peter's Cathedral and across from Piazza San Agostino, but the sales people said that they were not for sale.



Italian ivory marriage coffer, 14th century



## Retail prices in Rome

Table 65 shows the prices for various items in Rome.

Table 65

Retail prices for ivory items seen in Rome, May 2004

Item	Size in cm	Where made	Price range in USD
<b>JEWELLERY</b>			
Brooch	6	Europe	159
Necklace, small beads		Europe	144
<b>FIGURINES</b>			
Animal	6-10	Asia	480-960
Human	10	China	432
	8	Japan	2,470
	9	Europe	1,620
	11-20	Africa	600
		Asia	1,140-5,400
		Europe	5,520-21,000
	21-30	Europe	7,800-18,000
	31-40	Europe	27,840-31,200
<b>MISC.</b>			
Cigarette holder (in leather sheath)	12	Europe	384
Container with lid	6	Asia	186
Knife & fork set	12-10	Europe	552
Netsuke	3-6	Asia	420-600
Paper-knife (with silver handle)	20	Europe	1,140
Paper-knife	14-16	?	239-299

Exchange rate: €1 = USD 1.2

## Florence

A total of 11 shops selling 95 ivory items was seen in Florence (see Table 66). The gold and jewellery shops on the Ponte Vecchio can classify as a market, and three shops there, 27% of the total number in Florence, were selling 19 ivory items, 20% of the number seen.

Table 66

Types of retail outlets and number of ivory items surveyed in Florence, May 2004

Type	No. of outlets	% of total	No. of items	Av. no of items/outlet
Antique market	3	27	19	6
Antique shop				
Via dei Fossi	6		15	3
Pitti Palace	2		61	31
Sub-total	8	73	76	10
Total	11	100	95	9

The most numerous types were netsukes (17%), utensils with ivory handles (14%), human figurines (9%) and jewellery (6%). Table 67 presents a breakdown of the types. Florence was remarkable for the small average size of the ivory items, and the great variety of types, with many being single representatives of a category. The largest piece seen was a 22-cm human figurine. Of the 82 items that could be attributed to regional origin of manufacture, 53 (65%) were manufactured in Europe and 29 (35%) were East Asian. No pieces were seen from Africa, South Asia or South East Asia.

Table 67  
Ivory items seen for retail sale in Florence, May 2004

Item	No. of items	Percentage of total
Netsuke	16	17
Utensil	13	14
Human figurine	9	9
Jewellery	6	6
Manicure item	4	4
Scent bottle	4	4
Box	3	3
Animal figurine	2	2
Chess piece	1	1
Fan	1	1
Hair brush	1	1
Opera glasses	1	1
Paper-knife	1	1
Misc.	33	33
Total	95	100

### **Antique markets in Florence**

No ivory was seen in the tourist markets in the Piazza della Repubblica, around the Duomo or along the Arno River near the Ponte Vecchio. Only three of the Ponte Vecchio gold, silver and jewellery shops carried ivory, some 19 pieces consisting of five netsukes (4 cm), four European human figurines (8-12 cm), four thin objects, perhaps spindles (5-6 cm), three table knives with ivory handles, a Greek brooch (3 cm), a hair brush, and a 12-cm diameter round photograph frame. There were about 30 shops on the bridge, so approximately 10% of them carried ivory. Some of these pieces did not look like antiques, particularly a poorly crafted 9-cm European figurine priced at €285.

### **Antique shops in Florence**

#### Via dei Fossi

This street specializes in antique boutiques and hosts about 30 of them. Six shops with 15 ivory items were found, including four 5-cm animal netsukes, three (16-cm, 18-cm and 22-cm) European figurines, two chess pieces, a 5-cm bathing Japanese geisha erotic piece (€500), a box (12 x 18 cm) a carving knife and fork with ivory handles, a diptych (7 x 12 cm), and miscellaneous items.

#### Opposite the Pitti Palace

Two tourist shops selling ivory were found here. One of them displayed 48 small ivory items, the most of any outlet in Florence, consisting mainly of netsukes, scent bottles, boxes and miscellaneous pieces. The other shop carried 13 ivory items, consisting of a fan, a manicure set with ivory handles (€230), two beaded necklaces, a 20-cm carved paper-knife, and five 5-8 cm utensil handles.

#### Other locations

Hundreds of shops all over Florence were visited, but none, other than those described above, were seen with ivory. No hotel gift shops were seen selling ivory. There are occasional antique fairs in Florence, and these could be expected to sell ivory, but none was being held at the time of the survey.

## **Retail prices in Florence**

Table 68 shows the prices for various items in Florence.

Table 68

Retail prices for ivory items seen in Florence, May 2004

Item	Size in cm	Where made	Price range in USD
<b>JEWELLERY</b>			
Bangle	1	?	107
Brooch	3	Europe	360
Necklace, small beads		Europe	480
large beads		Europe	1,320
<b>FIGURINES</b>			
Animal	6	Asia	600
Human	5-10	Asia	600
		Europe	342-900
	11-20	Europe	1,200-8,880
	21-30	Europe	7,800
<b>MISC.</b>			
Box	6	Asia	180
Knife & fork	10	Europe	160
Netsuke	4-6	Asia	240-552
Paper-knife	20	Europe	576

Exchange rate: €1 = USD 1.2

## **Naples**

Part of one day was spent surveying the area around the main railway station, Piazza Garibaldi, and along two of the main streets in the city centre. Some 20 souvenir shops were visited, but none contained ivory.

## **The use of ivory substitutes in Italy**

In Milan, no mammoth ivory was seen. At the Central Railway Station, the shop selling ivory displayed many figurines and jewellery items made of jade, opal and shell that illustrated how these materials can make attractive alternatives to ivory. Resin/plastic netsukes and Japanese-style figurines were seen in several places. In the Porta Ticinese a stall sold a hippo tooth carving, and there were a few bone and synthetic pieces at other stalls there as well as at the Lido Antique Fair. None were mislabelled as ivory, except in one antique shop. The religious stores carried figurines made of plastic and plaster.

In Rome, no mislabelled fake ivory nor mammoth ivory was seen. Tourist curios made of plastic and possibly bone were seen at the Porta Portese and Piazza Fontanella Borghese markets, but no ivory substitutes were seen in the antique shops. Religious figurines made of plastic and plaster were seen in religious paraphernalia stores.

In Florence, no mammoth nor hippo ivory items were seen. Many tourist shops carried resin/plastic or plaster religious figurines, and a few had resin netsukes, accurately labelled and priced at €30-50.

## **Vendors' views on ivory market trends and the future**

The general view of those asked about the future of ivory in Italy was that if the CITES trade ban were not lifted, the market would continue to decline. Vendors were quite aware of the connection between demand for ivory and elephant poaching. One vendor said that there would always be a small market for ivory antiques.

# STATUS OF THE IVORY TRADE IN EUROPE

## Ivory trade indicators for 2004

Below in Table 69 are the aggregated data collected in the cities and towns surveyed in 2004 for the wholesale prices of tusks, the numbers of ivory workshops, craftsmen, retail outlets and the minimum numbers of ivory items.

Table 69

### Ivory trade indicators for Europe in 2004

Place	Wholesale USD price/kg of tusks:		No. of workshops	No. of craftsmen	No. of retail outlets	Min. no. of items
	1-5 kg	10-20 kg				
<b>GERMANY</b>						
Michelstadt	92	244	1	1	4	8,639
Erbach	92	244	7-10	7-10	6	6,170
Berlin	-	-	0	0	128	906
Frankfurt am Main	-	-	0	0	50	729
<b>UK</b>						
London	269	270	0	0	776	8,325
<b>FRANCE</b>						
Paris	55-64	108-132	4	10	63	1,123
Dieppe	96-120	-	2	3	3	133
Nice	-	-	0	0	4	39
Marseille	-	-	0	0	1	8
Bayonne	-	-	0	0	0	0
Biarritz	-	-	0	0	0	0
Auvergne	-	-	?	30-35	?	?
Elsewhere	-	-	?	3	?	?
<b>SPAIN</b>						
Barcelona	-	-	0	0	24	381
Madrid	-	-	0	0	23	240
<b>ITALY</b>						
Milan	-	-	0	0	31	240
Rome	-	-	0	0	19	126
Florence	-	-	0	0	11	95
<b>Total</b>	-	-	14-17	54-62	1,143	27,154

A total of 27,154 ivory items was counted in the 18 cities and towns of the five countries surveyed in Europe. The largest number of objects seen in one place in Europe was in Michelstadt (8,639), with the majority being new (defined here as made after the ivory bans). These new items were processed from legally acquired stocks of tusks (according to traders, and government and non-government sources). Both wholesale and retail sales of these items are permitted in Germany. Michelstadt ranked as one of the major places in the

world that offered ivory items for sale, and had more ivory than any town or city surveyed in East Asia, except Hong Kong. London had the next largest number of ivory items for retail sale (8,325), although it must be noted that over 95% of these were carved before the ivory ban. Erbach had 6,170 ivory items for sale, and most were new and, like Michelstadt, legal. The next largest number of ivory items was in Paris with 1,123 objects. Berlin had 906 items followed by Frankfurt am Main with 729. Barcelona had 381 objects and Madrid 240. Milan had 240, followed by Dieppe with 133. Rome had 126 items while the seven other places surveyed in Europe had less than 100 items each, or sometimes none, for sale. Vendors in France, Spain and Italy claimed that all the ivory they had on sale was either antique, or manufactured recently using legal ivory.

The two small German towns of Michelstadt and Erbach and the French town of Dieppe were the only places surveyed in Europe with a predominance of new items on display. These three towns still had a few remaining active ivory craftsmen. According to German and French government officials, and the ivory vendors and craftsmen, these new items continued to be made and sold legally.

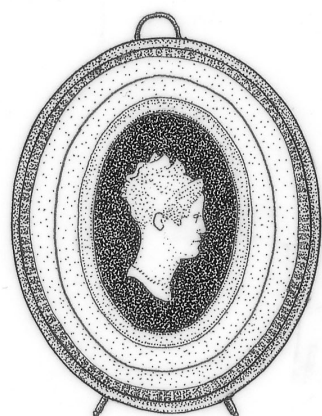
The market scale ranking of the countries visited, based on the number of ivory items surveyed for retail sale, are as follows:

1. Germany
2. United Kingdom
3. France
4. Spain
5. Italy

Almost all the retail buyers of the new and old ivory objects in Germany were Germans; there was little illegal export of these items. Germany also was not a major importing or exporting country for tusks or for wholesale ivory items, according to officials and ETIS. The government authorities and others working in this field believed the trade was under control.

As for the UK, the main buyers of ivory objects in the London retail outlets were non-resident Americans who often take their purchases back to USA without the official permits. Several people in England have been recently found by the police using illegal raw ivory to make items for sale. The British authorities have not been monitoring retail ivory exports rigorously nor implementing their regulations against the use of ivory effectively enough. Concerning imports and exports of tusks and wholesale ivory items, the UK has had a similar number of seizures compared to Germany and France, but ivory moving through these countries was not significant compared to those of Africa and Asia.

France, Spain and Italy had much smaller markets for retail ivory objects. These countries also had a relatively large proportion of Asian worked ivory items for sale, at least 42% of the total seen. It was not possible to verify vendors' claims that these items had all been imported prior to 1989.



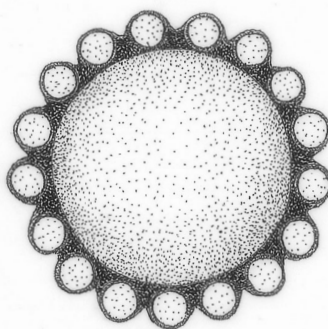
Ivory relief, 19th century Dieppe

## Retail ivory prices for 2004

As significant numbers of new ivory items were seen only in Germany, no country comparisons of prices can be made for these pieces, as old ivory is in general more expensive than new ivory. Thus Table 70 shows the asking prices for old items that were commonly available in the five European countries surveyed. The UK had the lowest prices for most of these, probably because there were more old items in London than anywhere else and therefore prices had to be more competitive. Germany was next for the same reason. Spain had the most expensive common items, such as for animal figurines, bangles, brooches, human figurines and necklaces. London, having the largest number of unique and valuable ivory antiques, such as furniture, had for sale the most expensive items by far.

Table 70  
Retail asking prices for old ivory items in USD in Europe in 2004

Item	UK	Germany	France	Italy	Spain
Animal figurine					
2-4 cm	22-1,665	61-116	-	192-300	-
5-10 cm	100-468	177-371	830-1,199	480-960	5,994
Bangle					
1 cm	18-167	22-305	89-142	107-210	137
2-4 cm	36-360	116-488	192-360	480	505
Human figurine					
5 cm	32-900	69-439	384-600	264-600	360-2,400
11-20 cm	594-6,300	98-5,760	2,659-6,853	600-2,100	302-17,760
Netsuke					
4-6 cm	315-14,400	732	300-598	240-600	462-539
Necklace					
small beads	27-90	24-98	195-227	144-480	-
large beads	180-216	116-354	360-650	360-1,320	600
Pendant	81-2,430	5-104	539	-	-
Tusk, carved					
10-20 cm	54	-	200-450	-	-
21-30 cm	216-1,260	366-1,208	840-875	-	-
Cigarette holder					
10 cm	-	-	107-119	120-384	150-175
Paper-knife					
10-20 cm	50-477	49-482	216-240	144-1,140	100-143
Brooch					
4-6 cm	63-216	35-1,366	264-480	159-360	240-490



European ivory brooch

# TRENDS IN THE IVORY TRADE IN EUROPE

## Indicators of ivory trade trends

Table 71 presents the data on indicators from previous years obtained primarily from informants, as previous published sources do not exist.

Table 71

Past and present ivory trade indicators for Europe

Place	Year	Wholesale USD price/kg for tusks:		Wholesale USD price/kg for tusks in 2004 using GDP inflator index:		Craftsmen	Retail outlets	Min. 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 <sup>1</sup>	16,444 <sup>1</sup>
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 <sup>2</sup>	776 <sup>2</sup>	8,325 <sup>2</sup>
France	1974	-	-	-	-	102	-	-
	1989	118	-	162	-	-	-	-
	1991	96	110	122	140	-	-	-
	2004	108	132	108	132	46-51 <sup>3</sup>	71 <sup>4</sup>	1,303 <sup>4</sup>
Spain	2004	-	-	-	-	0	47 <sup>5</sup>	621 <sup>5</sup>
Italy	2004	-	-	-	-	0	61 <sup>6</sup>	461 <sup>6</sup>

<sup>1</sup> Berlin, Erbach, Frankfurt am Main, Michelstadt

<sup>2</sup> London

<sup>3</sup> Auvergne, Bayonne, Biarritz, Dieppe, Marseille, Nice, Paris, elsewhere in France

<sup>4</sup> Bayonne, Biarritz, Dieppe, Marseille, Nice, Paris

<sup>5</sup> Barcelona, Madrid

<sup>6</sup> Florence, Milan, Rome

## Seizures

Table 72 shows the number of ivory product seizures divided into 1989-1996 and 1997-2003 as reported to ETIS between 1989 and 2003. The purpose is to obtain a rough gauge of whether the frequency of seizures is going up or down since the EU trade ban in 1989. Almost all the elephant product seizures included ivory, but the quantities of ivory are not known (Tom Milliken, TRAFFIC-ETIS, pers. comm. March 2005). Products also consist of elephant meat, hide, hair and so on.

Table 72

Number and annual average of ivory product seizures for 1989-1996 and 1997-2003

Country	1989-1996 No. of seizures	Annual average (8 years)	1997-2003 No. of seizures	Annual average (7 years)
Germany	302	38	270	39
UK	368	46	102	15
France	374	47	187	27
Spain	127	16	116	17
Italy	58	7	-	-

Source: CoP13 ETIS report, Doc. 29.2A, table 2, 2004

The average number of annual seizures has gone down considerably in the UK and France in the seven years up to 2003 compared to the first eight years following the 1989 EU ivory trade ban. The average number of seizures has remained about the same in Germany and Spain. Sufficient data are not available for Italy. There is no reason to believe that the vigilance of Customs officers has decreased in any of the four countries with data, thus it appears that attempts to smuggle ivory into the UK and France are decreasing, while ivory smuggling effort has remained stable over time in Germany and Spain.

### **Prices of raw ivory**

In France, the only country with both pre-1989 and 2004 wholesale raw ivory prices, tusk costs were considerably lower in 2004 than in pre-ban 1989. This pattern supports informants' statements that demand for ivory has fallen significantly in France since the ban. In 2004 in the UK only retail raw ivory prices could be obtained, which in inflation-adjusted US dollars were almost identical to wholesale prices before 1989, also an indicator that raw ivory values were lower in 2004 than in 1989. Pre-ban price data are not available for the other countries, but the recent prices in Germany suggest low demand for medium-sized tusks and fairly high demand for large-sized tusks. No prices were available for Spain and Italy immediately prior to the ivory ban, and no prices are available since then as no tusks are traded there.

### **Workshops and craftsmen**

The number of ivory craftsmen active in France has fallen by about 60% since the mid-1970s, consistent with the price indicator implying lower ivory demand today. In Germany, the number of ivory craftsmen has fallen by about 65% since 1989, a clear indication of decreased ivory demand. There are apparently no active ivory craftsmen in Spain or Italy, and only the occasional (illegal) one in the UK (Milmo 2004; Pendry 2005).

### **Retail outlets**

No quantitative data are available for the number of retail outlets selling ivory prior to 2004, though all informants were quite certain that there were significantly fewer outlets nowadays than prior to 1989. For example, the largest ivory outlet in France, and reputedly in the world, the venerable Aux Tortues in Paris, moved after the ban and now offers only a few ivory items.

### **Retail prices**

No published information was available from the past to observe trends in retail prices of worked ivory.



### Ivory substitutes

The most common ivory substitute seen in Germany was mammoth ivory, mostly originating from Russia (Elfenbeinmuseum, pers. comm. May 2005). This was the only country surveyed where mammoth ivory was being crafted. Germany also had by far the most retail mammoth ivory items seen for sale. In the survey, mammoth ivory was confined to three shops in Paris in France, was rare in the UK and Spain, and not seen at all in Italy (see Table 73). In Germany most of the mammoth ivory pieces were of European subjects, while in the other countries they were all worked in East Asia and portrayed Asian subjects. Good quality mammoth raw ivory is more expensive than elephant raw ivory, despite its tendency to be brittle, smelly, off-white in colour, and sometimes with brown streaks. These characteristics reduce its usefulness as a widespread replacement for elephant ivory. However, it is sought after and hence expensive because complicated paperwork is not required for trading mammoth tusks or worked items either internally or internationally.

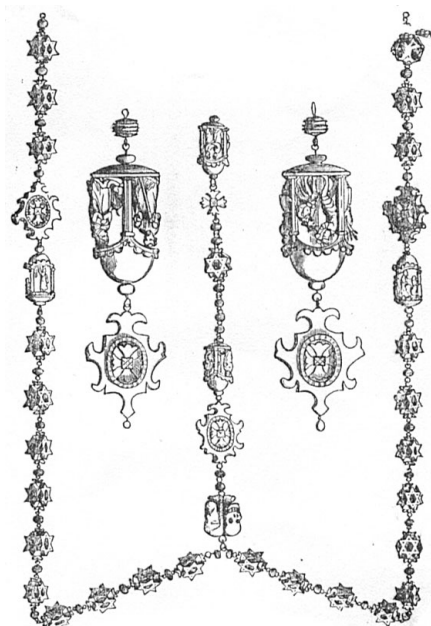
Table 73

Number of mammoth ivory items seen for sale in Europe in 2004

Country	No. of mammoth ivory items
Germany	2,200
UK	8
France	1,200
Spain	16
Italy	0

In France, Spain and Italy the most common substitutes for ivory were various types of synthetics, mainly plastic and resins. In Spain, some shops even tried to pass off Japanese-style synthetic sculptures as ivory. In Spain and Italy painted plaster religious objects were similar in appearance to analogous ivory objects. In France and Italy various white semi-precious stones (such as opal and agate) were commonly used for small figurines and jewellery, and mother-of-pearl was popular for cameo brooches, pendants and rings. Some of these pieces closely resembled ivory.

Unlike Africa and Asia, bone carvings were completely absent in the European countries surveyed and no craftsmen used it as a raw material.



European ivory chaplet, 16th century

# DISCUSSION

## **Law enforcement efforts in Europe**

Each member country of the EU bases its national ivory trade regulations on the provisions contained in European Council Regulation 338/97 and European Commission Regulation 1808/2001.

Compared to Africa and most of Asia, western Europe's enforcement of regulations relating 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 spurred DEFRA and the Customs department to be more vigilant (IFAW 2004; Milmo 2004; Pendry 2005). It should be mentioned, however, that the IFAW (2004) report was not entirely accurate. While it is true that most of the worked ivory sold in London is undocumented, this survey found that the great majority (about 98%) of the items seen were manufactured prior to the 1989 EU international ivory trade ban, and thus should be legal if they were also imported or made in the UK prior to 1989. It is simply a case of owners obtaining the documentation, but this is a laborious process. These pre-1989 items did indeed contribute to the elephant massacres of the 1970s and 1980s, but they are not a result of elephant poaching today. Those items acquired prior to 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 correct in pointing out that it is easy to obtain an assessment for certification purposes that an ivory item dates prior to 1 June 1947, even if the date of manufacture is not known, or even if it is known that the item was manufactured after 1947, or imported illegally after 1989.

Another potential source of illegal worked ivory imports and sales is in the case of Asian objects. Many East Asian so-called antique objects were seen in France, Italy and Spain that looked recently crafted, 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 are being sold illegally. Ivory items can be mixed in with legal mammoth ivory imports used as a screen, and Internet sales facilitate the marketing of this illegal ivory. The auction Web site eBay, for example, has been singled out as an important seller of ivory (HSUS 2002; IFAW 2004).

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 (see Tables 18, 30 and 46; 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. Raw ivory supply exceeds demand, at least in France. Given the sizeable stockpiles in Germany, the high price for 15 kg and above tusks seems unusual (see Table 71). 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. September and October 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. Occasionally a specially sized piece of

raw ivory needed for a commissioned item will move between EU countries. Wholesalers in Michelstadt, Germany or in the Seine-St-Denis department near Paris are the main suppliers of these specialized pieces.

### 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, such as the one reported above in Milan, Italy, in which ivory is exhibited from several countries. Ivory antiques also move between countries from dealer to dealer and to private buyers. There are associations of antique dealers, such as the Syndicat National des Antiquaires, 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 nearly 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. The 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 as said above, 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 re-sale.

Both the CITES and EU ivory trade bans exclude antique ivory which still moves in and out of European countries legally. The main destination of ivory exported from Europe is the USA, and the USA is the principal source of legally imported ivory to Europe (see Tables 74 and 75).

Table 74

Number of legal worked ivory shipments from Europe to the USA, 1995-2002

Country	1995	1996	1997	1998	1999	2000	2001	2002	Total
UK	178	282	313	427	647	669	785	583	3,884
France	6	12	22	32	23	40	30	27	192
Germany	3	15	37	4	5	31	28	25	148
Italy	2	1	2	1	5	7	5	0	23
Spain	0	0	0	0	0	2	2	5	9
Total	189	310	374	464	680	749	850	640	4,256

Source: Williamson 2004

Table 75

Number of legal worked ivory shipments from the USA to Europe, 1995-2002

Country	1995	1996	1997	1998	1999	2000	2001	2002	Total
UK	567	591	874	1,051	757	529	331	432	5,132
Germany	18	8	75	3	1	55	128	65	353
France	2	31	26	4	7	27	2	17	116
Italy	2	4	3	1	11	4	2	18	45
Spain	0	0	0	0	2	10	15	6	33
Total	589	634	978	1,059	778	625	478	538	5,679

Source: Williamson 2004

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 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 re-opening 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 a controlled re-opening of international trade in ivory would reduce the need for elephant poaching by making available legal ivory. They also thought that a re-opening of 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 noncommittal on renewed international ivory sales, though two thought that the ban should remain in order 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.

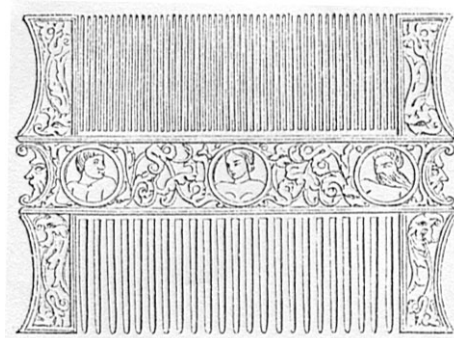
### **European views on the future of the ivory industry**

German ivory craftsmen expressed the view that, if the CITES ban remained in place, ivory carving would die out in Germany when the raw ivory stocks become depleted. Few new craftsmen were being trained, as there did not seem to be much of a future in the craft. They thought there was the possibility that ivory working could be perpetuated by the use of mammoth ivory, but it was too early to tell if the buying public would accept the substitution.

In the UK, vendors were most concerned about the recent drop in ivory buying by Americans, due partly to reduced American travel abroad in the wake of 9/11, and to increased American awareness that buying ivory could threaten elephant conservation. There is no ivory manufacturing industry in the UK. The longer-term view is that the antique trade in ivory will continue, but vendors do not believe that an ivory carving industry will re-establish itself in the UK.

French ivory vendors and craftsmen were less pessimistic than the Germans and British and thought that the current level of ivory production and sales could be maintained for the foreseeable future. Recruitment of new craftsmen is very low, however, and they thought that the craft could possibly die within two generations if the CITES ban persisted and the public attitude against buying new ivory strengthened. This view was particularly strong in Dieppe. Many of the French craftsmen are ardently committed to their centuries-old art and do not want to see it die.

Ivory sales are so minimal in Spain and Italy that the question of the future of the ivory industry was of little concern to vendors, with the exception of a couple of shopkeepers. Aside from some trade in ivory antiques and a few Asian imports, the ivory industry was already dead in these countries.



Italian ivory comb, c. 15th century

# CONCLUSIONS

## Domestic markets

### **Raw ivory**

Germany and France were the only countries visited where there were raw ivory stockpiles and trading. The sizes of the national raw ivory stockpiles are not known, however. In Germany, the total would exceed 20 tonnes, and one source estimated the French stockpile in 2000 at 50 tonnes (Maume and Denhez 2000), though these figures should be considered at best as educated guesses. Informants said that all this ivory was imported prior to 1989 and that the owners held proper documentation for it. Some NGOs have suggested CITES should consider requesting all EU countries to report the pre-1990 ivory stockpile amounts and the current stockpile quantities to CITES, as was done with African countries.

Raw ivory consumption in recent years was a minimum of 300 kg a year in Germany and 350 kg a year in France, a huge decline from pre-1989. Quantities consumed in the UK, Spain and Italy are not known, but they would be negligible as there are no full-time ivory craftsmen in these countries.

### **Worked ivory**

The biggest surprises of this survey were the unexpectedly large size of the German and UK worked ivory markets and the small size of the French, Spanish and Italian markets. TRAFFIC (Milliken 2004), for instance, characterized the German market as small and those of the UK and France as medium in scale. In fact, Germany would rank sixth in size and the UK ninth of all the 33 countries and territories surveyed by the investigators in Africa, Asia and Europe, which means that both markets are relatively large. However, the French ivory market was quite small and on a par with the one seen in Laos. The Spanish market was almost identical in size to Sri Lanka's, the smallest ivory market seen in South East Asia (Martin and Stiles 2002), while the market in Italy was comparable to those of Djibouti and Gabon, the two smallest African ivory markets surveyed (Martin and Stiles 2000).

It is probably true, as claimed by IFAW (2004) for the UK, that most of the worked ivory sold in Europe lacks proper documentation as called for by EU and national regulations, but this state of affairs in most instances is due more to expediency than to purposeful illegal activity. In other words, the great majority of worked ivory sold in the five countries surveyed was manufactured and imported prior to 1989, or was crafted from legal, registered raw ivory stocks after 1989. Most shop owners who sell ivory probably feel that it is too much trouble to obtain documents that would demonstrate the legality of their ivory. The most probable types of illegal, worked ivory being sold in Europe today are East Asian and a few African items, as recently-made items can be imported easily claimed as antiques or mammoth ivory. China is the most probable main source of illegally imported ivory into Europe. This illegal trade is facilitated by Internet sales.

## International implications

### **Movements of ivory**

According to ETIS reports for the five European countries surveyed (Milliken et al. 2004), the majority of ivory items seized by Customs officers in recent years has consisted of small items intended for personal use. No attempted importation of large quantities of raw or worked ivory has been detected by Customs or other authorities since 1999 in any of the four countries that report to ETIS or to the UNEP Wildlife Conservation Monitoring Centre. The situation in Italy is not known, as the government has been lax in its reporting. In addition, there have been no media reports of large ivory seizures during the 1999-2004 period in any of the five countries, except for 2.9 tonnes in Madrid in 2004, which as explained above was made up of pre-1990 ivory carving waste that simply was undocumented. Negligible amounts of raw ivory and small amounts of worked ivory are nevertheless entering the five countries, mainly from Africa and East Asia respectively.

Germany and France export very small amounts of raw ivory to other EU countries for craftsmen to use for specially commissioned items, marquetry and restoration work. Large amounts of worked ivory sold as antiques are exported from the UK, mainly to the USA. France exports small amounts, much of it via the UK, to the USA (HSUS 2002; IFAW 2004; Williamson 2004). The UK, Germany and France import sizeable quantities of worked ivory from the USA. There is no way currently of estimating how much of this trade might be made up of illegal ivory posing as legal antiques.

### Relative scales of the most important ivory markets of Africa, Asia and Europe

Table 76 shows the key indicators for the largest 15 ivory markets in the 33 countries and territories surveyed by the investigators since 1999. The rankings would probably be somewhat different in 2005, as the situation in several countries has changed. For example, Thailand and Vietnam (Stiles 2004a) and Cameroon (Efande 2005) have cracked down on the crafting and selling of illegal ivory, and political instability in Côte d'Ivoire has no doubt seriously reduced the number of foreign potential customers (tourists and businessmen), which has reduced market activity and the number of active ivory craftsmen (Courouble et al. 2003). On the other hand, the ivory market in Khartoum and neighbouring Omdurman in Sudan has recently increased in size with more shops and greater numbers of ivory items than in 1997 (Martin 1998; Martin 2005).

Table 76

#### A ranking of ivory markets in Africa, Asia and Europe

Place	Minimum no. of items	Minimum no. of outlets	Estimated no. of craftsmen	Year of survey
1. Thailand	88,179	194	70	2001
2. Hong Kong	35,884	85	0	2002
3. Egypt	21,460	142	110	1998
4. Zimbabwe	20,475	33	30	1999
5. Côte d'Ivoire	20,114	52	~100	1999
6. Germany	16,444	188	8-10	2004
7. Ethiopia	9,996	54	10-20	1999
8. China	9,096	117	150-200	2002
9. UK	8,325	776	0	2004
10. Japan	7,565	138	~107	2002
11. South Africa	7,386	73	1-3	1999
12. Cameroon	6,015	43	50	1999
13. Nigeria	5,966	40	43	1999
14. Myanmar	5,801	53	55	2001
15. Mozambique	3,619	52	100	1999

Some remarkable facts emerge when the data are looked at objectively. Germany greatly exceeds China, Japan, Cameroon and Nigeria – all viewed as important ivory markets – in market scale and in number of ivory retail outlets. The UK also exceeds all but China of these countries in market scale, and it greatly surpasses China in number of retail outlets that sell ivory. The primary difference between them is that the great proportion of the European ivory is pre-1989 in manufacture and the ivory in China, Cameroon and Nigeria is of recent date, most of it produced from poached elephant ivory. There is some debate about the proportion of Japanese ivory that is legal. A CITES Panel of Experts considered the controls on the Japanese market to be adequate enough, after improvements were made, to permit the 1999 southern African raw ivory sales to Japanese traders (Kiyono 2002), but the Japan Wildlife Conservation Society believes that the ivory market is still not well enough controlled (Sakamoto 2002, 2004).

To compare the regions in relative scale of ivory markets the average number of worked ivory items per town/city can be used as an approximate indicator (see Table 77).

Table 77

#### The average minimum number of worked ivory items for sale per town/city by region

Region	No. of towns/cities	Average no. of items per town/city
South & South East Asia	18	~5,800
Africa	21	~5,200
East Asia	11	~5,000
Europe	14	~1,900

The African and Asian regions surveyed had similar average ivory market sizes per town/city, about 5,000 to 6,000 items each. Europe's ivory markets were distinctly smaller on average per town/city, around 1,900 items each. One could therefore conclude that Europe's ivory markets are of a different, smaller order than those seen in Africa and Asia.

### **Effect of Europe's ivory market on elephant populations**

This survey found that the great majority of ivory being worked and sold today in Germany, the UK, France, Spain and Italy pre-dates the EU and CITES ivory trade bans. Therefore, in principle it is legal, though many of the items lack proper documentation as called for by EC Regulation 338/97. The sale of this old ivory is not the result of recent elephant poaching and therefore does not directly effect elephant populations. However, many animal welfare organizations argue that the sale of this ivory is indirectly detrimental to elephants as ivory market activity of any kind encourages poaching. Whether this view is correct in all cases remains to be demonstrated (Stiles 2004b). Based on ivory seizures reported by national Customs departments and ETIS, relatively small amounts of presumably recent ivory (raw and worked) are entering Europe today, but most ivory is intended for non-commercial, personal use. This ivory does have a small direct effect on elephant populations, as much of it was most likely from illegally killed elephants. It is hoped that the quantities remain small and that enforcement officers remain vigilant.



Ivory casket made in Sicily by the Muslim community in the 13th century

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