

# Assessment of the Availability of Ivory in the Vietnamese Market

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The illegal ivory trade continues to be a major threat to the survival of the African Elephant *Loxodonta africana*. Viet Nam plays a role in ivory trafficking as an important transit country between Africa and China, as well as serving as an end-use market supporting local consumption of ivory products in various parts of the country. This survey assesses the visible ivory trade in 21 Vietnamese cities. Since earlier ivory surveys conducted in 2001 and 2008, the absolute number of ivory pieces on the market appears to have decreased, but it is not clear if the survey results from these disparate efforts are comparable. Since the 16th meeting of the Conference of the Parties (CoP16) to CITES, a CITES National Ivory Action Plan has been developed which aims to strengthen national laws and regulations to prevent illegal trade in ivory. Even though the visible market in ivory appears to be reduced in terms of ivory product availability, this survey does not provide a clear indication that the illicit market in ivory is indeed declining in Viet Nam. It is critical for the Vietnamese government to continue to increase law enforcement and penalize ivory sellers and traffickers. At the same time, strategies should be implemented to reduce the demand for ivory. Viet Nam's continued commitment to combat ivory trafficking and reducing consumer demand is required to support elephant conservation efforts in Africa and Asia.

## INTRODUCTION

The illegal trade in ivory has progressively escalated since 2007 due to resurgent demand, largely from the East Asian market (Milliken *et al.*, 2013). The increase in Asian demand for ivory has been spurred in recent years by rapid economic development and changes in consumption patterns in countries such as China and Thailand, with a growing number of citizens in general having more disposable income to spend on luxury products than ever before.

Viet Nam became a Party to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 1994, with the Vietnamese Management Authority situated under the Ministry of Agriculture and Rural Development. As such, Viet Nam has committed to adhere to governance systems to regulate international wildlife trade, enforcing the Convention through its national legislation.



Fig. 1. Map of Viet Nam with the locations of the ivory surveys conducted in 2001, 2008 and 2014. Round shapes represent locations surveyed in 2001, 2008 and 2014. Triangles represent the locations surveyed in 2008 and 2014. The orange stars represent locations only surveyed in 2014. Adapted from source: <http://vietnammap.facts.co/vietnammapof/vietnammap.php>

The monitoring of illegal trade in ivory was mandated at CoP10 in Harare, Zimbabwe, in 1997 (Resolution Conf. 10.10 (Rev. CoP16)). The Elephant Trade Information System (ETIS) was developed and is managed by TRAFFIC in order to track trends in the illegal trade in ivory and to provide an information database to support decision-making on management, protection and enforcement needs for elephants. ETIS is now the world's most comprehensive elephant products database, holding some 23 000 records of relevant seizures. Analyses of the ETIS records to elucidate trends and identify countries most heavily implicated in illegal trade have been submitted to each meeting of the CITES CoPs since 2002 as a formal agenda item.

At CoP16 in Bangkok, Thailand, in 2013, eight countries in Africa and Asia were identified as "countries of major concern" in the ETIS analysis (Milliken *et al.*, 2013). In Asia, China and Thailand were identified as the principal end-use markets and Hong Kong, Malaysia, the Philippines and Viet Nam were seen as the main transit countries/territories (Milliken *et al.*, 2013). All these countries/territories were mandated to submit time-

Year	No. of locations	No. of shops surveyed
2001	3	267
2008	8	669
2014	21	1614

**Table 1. No. of locations and no. of shops assessed in each of the three surveys.**

Sources: Martin and Stiles, 2002; Stiles 2008

bound National Ivory Action Plans (NIAP) to combat illegal ivory trade and strengthen control of the trade in legal ivory markets. Viet Nam submitted its NIAP in May 2013 as per the agreed deadline and has been part of a CITES oversight process under the direction of the Standing Committee ever since.

A subsequent review of the NIAPs shows that Viet Nam has made some progress in taking measures to stem illegal trade in ivory (CITES, 2014). A number of governmental decrees and directives reflect an ongoing commitment from the Vietnamese government. In March 2014, the Prime Minister issued a directive prioritizing enforcement at all levels and across all ministries to combat poaching and trafficking of African Elephant ivory and rhinoceros horn. Under current laws and regulations, however, it remains permissible to sell worked ivory that was obtained before the country’s 1992 ivory trade ban (Council of Minister’s Decree 18/HDBT). The law opens up the opportunity for illicit trade of ivory obtained illegally post-1992 to be passed off as ivory acquired before 1992 (Stiles, 2009). Despite Viet Nam’s commitment to address illegal ivory trade, Viet Nam remains one of the key transit countries for ivory, whilst the domestic market for ivory has remained relatively modest when compared to neighbouring China and Thailand (Stiles, 2008; Milliken, 2014). Frequent large-scale seizures of ivory demonstrate that shipments are being trafficked to Viet Nam from or via countries such as the United Arab Emirates, the Democratic Republic of the Congo, Mozambique and Malaysia (Agence France Presse, 2015; Tuoi Tre News, 2015; Wambulwa, 2015). Given the relatively small size of the Vietnamese domestic ivory market, it is likely that these large shipments are intended to be trafficked further overland to other countries, most probably China, which shares a long, porous border with Viet Nam.

In Viet Nam, current demand for ivory pieces is not based on a deeply-rooted cultural tradition (Stiles, 2009) as demand for ivory has only grown in popularity since the early 1900s. In this regard, French colonial administrators sought ivory carvings of the art forms that they observed in wood and stone and Chinese merchants began ordering ivory products to meet this demand (Stiles, 2004). Stiles (2009) determined that most buyers of larger ivory products were businessmen from China and Thailand, whilst local Vietnamese people mostly purchased smaller religious pendants and figurines. Because rapid economic development in Viet Nam has led to an increase in the consumption of luxury goods,

and an increasing number of foreign tourists are now visiting Viet Nam, the current status of the illicit ivory trade in the country requires evaluation.

In Viet Nam, TRAFFIC has undertaken two market surveys in the past: in 2001, markets in three cities were surveyed (Ho Chi Minh, Ha Noi, and Vung Tau) (Martin and Stiles, 2002); in 2008 the number of survey sites increased to a total of eight (Stiles, 2008). This paper presents the results of a further assessment of the availability of ivory in 1614 shops across 21 locations in Viet Nam, conducted in 2014 (Table 1 and Fig. 1).

## OBJECTIVES AND METHODOLOGY

Market surveys were conducted from 14 March to 18 August 2014 to assess the prevalence of ivory products for sale in retail outlets across 21 locations throughout the country (Fig. 1). Surveys were conducted by a Vietnamese researcher, who was able to identify ivory. The surveys collected information on the number of items for sale, size and types of items, and price data. Information on the origin of the ivory pieces and current buyers was also sometimes gathered through informal interviews with ivory sellers. Photographs of the outlets were taken, where possible, to determine and assist in verifying and recording the numbers and types of ivory products on sale. The locations surveyed were selected, based on earlier published reports and papers (Martin and Stiles, 2002; Stiles, 2004; Stiles, 2008). Additional sites were selected based on information gleaned from guidebooks and the internet, with a focus on antique and souvenir shops and popular tourist sites for local and international visitors. Different types of shops were surveyed, including market souvenir stalls, antique shops, souvenir shops, jewellery shops, “Feng Shui” lifestyle shops and supermarkets. The exchange rates of USD1=VND21 150 and CNY1=VND3300 were used in this report to analyse the prices of ivory products. No ivory was purchased during this survey.

## RESULTS

In 2014, a total of 1614 outlets were surveyed in 21 localities throughout Viet Nam. Eighty-five of these outlets (5%) were found to have a total of 2300 ivory items for sale. Fig. 2 shows these locations in order of the highest percentage of shops found with ivory on offer. Buon Me Thuat city was found to have the highest percentage of shops (50%) offering ivory.

In 2001, Martin and Stiles (2002) surveyed the ivory retail market in three locations (Ho Chin Minh, Ha Noi and Vung Tau). In 2008, Stiles (2008) increased the number of locations surveyed to eight, including the three previous locations plus Phu Quoc, Ha Tien, Nha Trang, Hue and Ha Long. The 2014 survey significantly increased not only the number of locations, but also the number of shops surveyed (Table 2). It is difficult to discern trends for a variety of reasons; for example, it is not known if the same shops were surveyed in the same

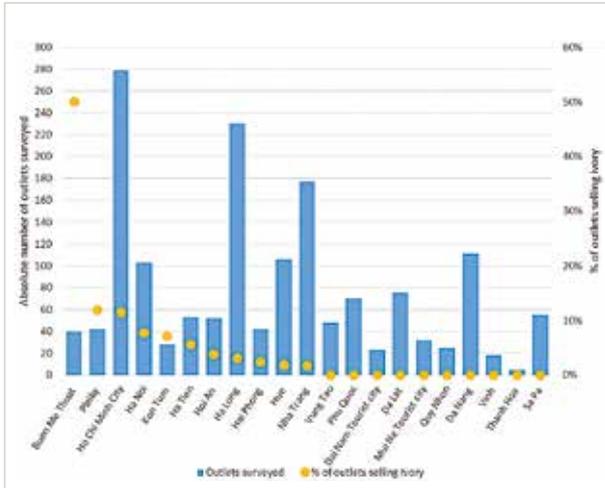


Fig. 2. The 2014 locations ordered by the highest percentage of shops found selling ivory.

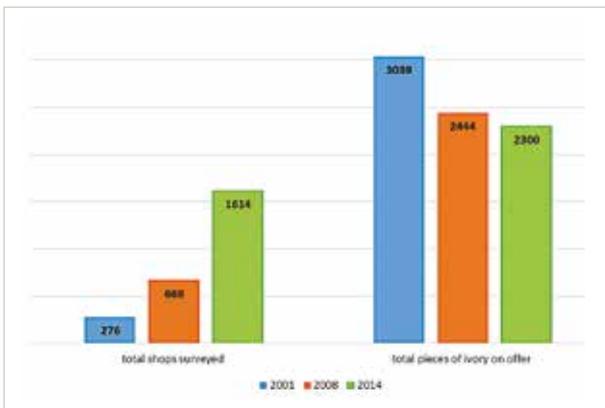


Fig. 3. Comparison of the total number of shops surveyed and the total number of ivory items found during the surveys in 2001, 2008 and 2014.

Sources: Martin and Stiles, 2002; Stiles, 2008

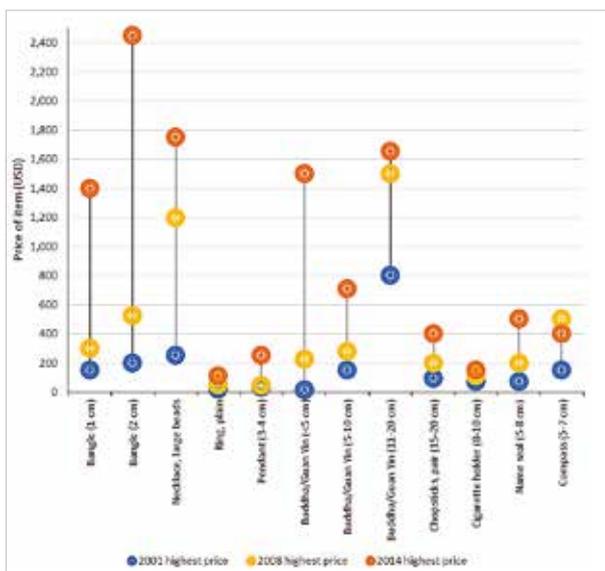


Fig. 4. The highest price (in USD) of some of the most common ivory items compared for the three surveys.

Sources: Martin and Stiles, 2002; Stiles, 2008

locations over time, or whether physical markets are now less important than internet or social media channels for obtaining ivory products in Viet Nam. It can, however, be clearly seen that despite a much expanded coverage in the most recent survey, the total number of ivory items found on sale was less than in the previous surveys (Fig. 3).

## DESCRIPTION OF SURVEY OUTLETS AND ITEMS FOUND

A summary of the 2014 survey findings for selected cities, namely, Buon Me Thuat, Ho Chi Minh City, Ha Noi, Ha Long and Nha Trang, are described below and contextual information is provided to gain insight into the ivory market in these locations.

**Buon Me Thuat City, Dak Lak province:** Buon Me Thuat and its surroundings is a tourist attraction due to its proximity to sites of natural beauty and national parks. With a population of 300 000, it is the largest city in Dak Lak province and is close to the Cambodian border. This city was not included in the earlier surveys, but a recent increase in tourism warranted its inclusion in the 2014 survey.

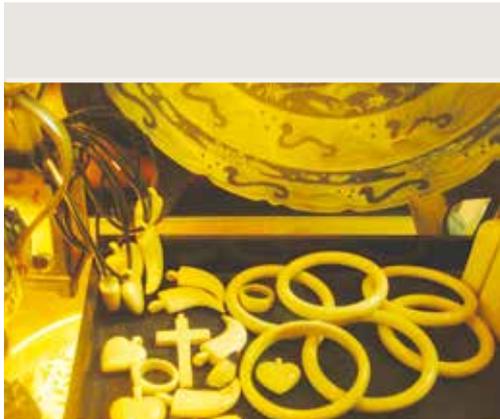
In Buon Me Thuat and its associated Don Village tourist site, half (50%) of the 40 outlets that were surveyed had ivory for sale. This represents a far greater proportion of retail shops with ivory when compared to any other location in the 2014 survey (Table 2). A total of 1282 ivory items were observed, which was the highest number of ivory pieces as well as the highest number of ivory items per shop of all the locations surveyed in 2014. One souvenir shop on Phan Boi Chau Street had 218 ivory products for sale. Two different outlets from the same company also offered, on request only, ivory chips. These were claimed by the sellers to work as a treatment for sore throats and colds when ground up and ingested.

**Ho Chi Minh City (HCMC):** In the previous surveys, HCMC was identified as a major trade location for ivory (Stiles, 2009), therefore the greatest number of shops (279) were surveyed in 2014. Eleven percent (32) of these outlets were found to be selling ivory (Table 2). The An Dong market had the largest number of ivory products, with 73 pieces found in a single shop.

**Ha Noi:** In total, 103 outlets were surveyed in Ha Noi, mostly in the Old Quarter. Eight of these outlets (8%) were found to sell ivory (Table 2), with a total of 169 ivory items on offer. One outlet in Hang Gai Street was found to have 53 items on offer, whilst in Ly Thai To Street, one

Locations	2001			2008			2014			
	No. of shops surveyed	No. selling ivory	Total no. of pieces	No. of shops surveyed	No. selling ivory	Total no. of pieces	No. selling ivory	% shops with ivory	Total no. of pieces	Av. no. of pieces per shop selling ivory
<b>Ho Chi Minh City</b>	99	37	2262	251	49	1776	279	32	516	16
<b>Ha Noi</b>	157	13	777	227	10	407	103	8	169	21
Vung Tau	20	0	0	17	0	0	48	0	0	0
Phu Quoc				26	1	4	70	0	0	0
Ha Tien				33	4	113	53	3	37	12
<b>Nha Trang</b>				27	0	0	177	3	71	24
Hue				59	8	141	106	2	44	22
<b>Ha Long</b>				29	1	3	230	7	55	8
Hai Phong							42	1	8	8
Dai Nam tourist Site (Thu Dau Mot)							23	0	0	0
Da Lat							75	0	0	0
Mui Ne tourist site							32	0	0	0
<b>Buon Me Thuat</b>							40	20	1282	64
Quy Nhon							25	0	0	0
Kon Tum							28	2	39	20
Pleiky							42	5	63	13
Da Nang							111	0	0	0
Hoi An							52	2	16	8
Vinh							18	0	0	0
Thanh Hoa							5	0	0	0
Sa Pa							55	0	0	0
Total	276	50	3039	669	73	2444	1614	85	2300	27

**Table 2. Number of shops and ivory items for sale in 2014, 2008 and 2001.** The highlighted cities are described in the text. Sources: Martin and Stiles, 2002; Stiles, 2008.



PHOTOGRAPHS: TRAFFIC

**Fig. 5. Images showing assorted ivory pieces on sale at outlets in Ha Noi, one of the key locations in Viet Nam for the production of items crafted from ivory.**

outlet had only one bangle (priced at USD286). The types of ivory pieces on offer were notably more diverse than in the other locations and included bangles, necklaces, rings, earrings, pendants, Buddha/Guan Yin figurines, chopsticks, name seals, and a compass (Fig. 5). Ha Noi is one of the key production locations where ivory pieces are crafted from raw ivory (Stiles, 2009). This may indicate that the proximity to the producers could be related to the diversity of items on offer.

**Ha Long:** Ha Long in Quang Ninh province is the gateway to Ha Long Bay, a World Heritage site. A large number of Vietnamese and international tourists visit Ha Long Bay and the city's economy is mostly based on tourism income. A total of 230 outlets were surveyed here and seven were selling ivory (3%), equating to 55 ivory products.

**Nha Trang:** Nha Trang is a beach city in Khanh Hoa province in south central Viet Nam. This city is already popular with Vietnamese tourists, and now its beaches and scuba diving are attracting an increasing number of backpackers, but also more affluent tourists from the Asian continent. A total of 177 shops were surveyed in this location but only three were found to be selling ivory (1.7%). One outlet was selling two ivory bracelets priced at USD1600 each. Another outlet specializing in *Aquilaria* (Agarwood or Eaglewood) furniture and other items had 39 ivory pieces on display, priced in VND.

## BUYERS

It is presumed that the currency in which the price is listed or quoted may indicate the nationality of the most common buyer in that area. Both observations and questions to particular sellers substantiate the fact that ivory is sold to both foreign tourists and Vietnamese nationals. For example in HCMC, the majority of the ivory buyers in the two markets are assumed to be tourists from China as prices were quoted in Chinese Yuan. The HCMC silver and gold shops that also offered ivory (particularly the smaller, religious pendants and figurines) appear to be targeting Vietnamese buyers with prices advertised in VND. In Dak Lak and Ha Tien, the majority of the ivory buyers are assumed to be Vietnamese tourists as prices there were quoted in VND. In Ha Noi, prices were mostly given in USD when enquiries were made, which may indicate that the buyers of ivory pieces are likely to be international tourists. In Ha Long, the majority of prices were in Chinese Yuan, and the sellers further claimed that buyers of ivory pieces are likely to be from China. When the researcher pretended to be a tourist guide, the sellers were willing to offer a 20% commission for ivory bought by new customers. It would be useful to assess regularly tourist locations such as Buon Me Thuat, Nha Trang and Ha Long to gain a better understanding of the impact of tourism on physical ivory markets. When interviewed, sellers claimed that their customers believe that owning ivory helps to prevent, variously, evil spirits, bad luck, typhoid, as well as providing health benefits.

## RETAIL PRICES

There has been a noticeable increase in prices of the most common types of ivory items for sale compared to the earlier surveys in 2001 and 2008 (Fig. 4). Prices were taken from the first quoted price by the seller (i.e. the starting price without negotiations) or the listed prices, as was done in the earlier surveys.

The price of ivory continued to increase exponentially from 2001 to 2014 (Fig. 4 and Table 3). The 2014 survey found the cheapest items offered were rings and earrings, at USD5, and the most expensive items being the larger bangles, with a starting price range of USD378 to USD2450.

## DISCUSSION AND CONCLUSION

In summary, the results of this study indicate that the overall availability of ivory items in Viet Nam appears to be on the decline. In 2014, fewer ivory items were observed on offer than was the case in 2001 and 2008, even with a major increase in the number of shops surveyed and the locations visited. But whether this represents hard evidence of an overall reduction in this market remains to be determined.

The apparent decline in the physical market could in part be the result of decreased demand, but is more likely to reflect increased pressure and law enforcement by the national authorities or a growing perception that ivory trade is likely to attract government attention so that only a few products are displayed. This latter possibility is conceivably supported by the fact that craftsmen were

found to be producing more ivory in 2008 compared to 2001 (Stiles, 2008), and that ivory is also found to be traded extensively online (La Fontaine, 2015; TRAFFIC, 2015a). New avenues of trade for elephant ivory on the internet and through social media may play a more important role than the visible physical markets.

Whilst the open availability of ivory has decreased, the average price of ivory items has increased since 2001. Increasing prices could be the result of lower supply, growing notions of exclusivity or attributable to the rise in cost of living associated with Viet Nam's inflation rate, an increase of 110 points on the Consumer Price Index (Trading Economics, 2015). At the same time, however, growing prosperity in Viet Nam allows consumers to spend more money on "luxury goods" such as ivory. There is an indication that the demand for ivory by international tourists has an effect on the market in Viet Nam as prices of ivory items are quoted in US Dollars and Chinese Yuan.

It is crucial to continue to monitor and evaluate the Vietnamese ivory market. Surveys of the physical markets, interviews with craftsmen working ivory and interviews with the sellers to gain insights into the buyers need to take place on a regular basis. This survey has looked at the "visible" ivory markets only. Future ivory surveys in Viet Nam should, where possible, include an assessment of the online ivory market as well as a survey amongst the craftsmen to assess the amount of ivory pieces being produced. This would provide an indication of the amount of ivory in the Vietnamese market and some understanding as to whether this crafted ivory is being sold openly or is disappearing in the illicit trade.

Type	Size (cm)	2001 price range	2008 price range	2014 price range
<b>Jewellery</b>				
Bangle	0.5	–	50–95	95–189
Bangle	1	70–150	58–300	100–1400
Bangle	2	60–200	203–525	378–2450
Necklace, large beads		75–250	300–1195	250–1750
Ring, plain		10–20	10–50	5–112
Pair of earrings		–	50–100	5–21
Pendant	3–4	25–30	25–45	200–250
<b>Figurines</b>				
Buddha/Guan Yin	<5	15	181–225	71–1500
Buddha/Guan Yin	5–10	30–150	35–280	378–709
Buddha/Guan Yin	11–20	200–800	600–1500	945–1655
<b>Misc. items</b>				
Chopsticks, pair	15–20	36–95	40–200	200–400
Cigarette holder	8–10	35–70	30–110	100–150
Name seal	5–8	20–72	55–200	70–500
Compass	5–7	150	300–500	400
Compass	10–14	350–500	1000	–
Lamp (carved hollow tusk)	40	500–2000	5000	–
Painted plaque	5–14	20–35	55–150	–

**Table 3. Prices (USD) of worked ivory items in 2001, 2008 and 2014. The price ranges were determined by the starting price of the items and reflects the lowest and the highest starting prices given by sellers for similar items. Sources: Martin and Stiles, 2002; Stiles, 2008**

It is possible that, with China's efforts to reduce the illegal ivory trade in its domestic market with increased law enforcement efforts, and countries such as Thailand slowly joining efforts to combat the ivory trade, Viet Nam's role in illegal trade could increase due to its relative lack of law enforcement and punitive measures. Recently, a large number of seizures in the seaport of Da Nang show the inherent adaptability of the illegal trade of ivory (TRAFFIC 2015b). It is vital, therefore, to continue to monitor and analyse ivory seizures and the trade chains of ivory so that interventions to stem the ivory trade can be recommended to Viet Nam's national law enforcement agencies.

A strong legislative and regulatory framework, effective law enforcement and punitive measures are demonstrably key to addressing the illegal wildlife trade in the short term. However, it is also necessary to address consumer demand for ivory in the longer term. It is therefore essential that as the Vietnamese government enforces the law and serves punitive measures on ivory sellers and traffickers, TRAFFIC and other non-governmental organizations work concurrently with key partners in the country to reduce the demand for ivory. While the Vietnamese government is making headway with improving law enforcement efforts, it would benefit from expanding the suite of law enforcement efforts. Collaboration with importing and exporting countries to identify perpetrators moving ivory illegally through their borders would greatly improve efforts to eradicate this problem. Only through these joint efforts can the global poaching of elephants be addressed.

## ACKNOWLEDGEMENTS

Funding for this study was provided by the Polifund project, implemented by GIZ on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). This survey could not have taken place without the facilitation and support of Naomi Doak. The authors also thank Sarah Stoner and Kanitha Krishnasamy and two anonymous reviewers for their helpful comments on the manuscript.

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