

Note: this is the executive summary of a historical overview published in 2000. Parts are outdated but it remains a useful reference.

FAR FROM A CURE: THE TIGER TRADE REVISITED

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2000 TRAFFIC network report

EXECUTIVE SUMMARY

Introduction

Tiger bone has been used as a treatment for rheumatism and related ailments for thousands of years in traditional Asian medicine. In the early 1990s, it became evident that medicinal trade in Tiger bone threatened to drive the already endangered Tiger *Panthera tigris* to extinction in the wild. The importance of this threat was documented in the 1994 TRAFFIC report, *Killed For A Cure: A Review of the Worldwide Trade in Tiger Bone* (Mills and Jackson, 1994). Since the report's publication, there has been increased national and international investment in Tiger conservation and trade control and promotion of substitutes for Tiger bone. But what progress there has been has brought new challenges and some old problems remain to be tackled. This report relies primarily upon market surveys, rather than on official trade statistics, which were the primary source for *Killed For A Cure*, since, with few exceptions, Tiger trade is now illegal. The report compares markets for Tigers and their parts and products in the late 1990s to the early 1990s, to examine the extent to which trade continues to threaten the Tiger going into the new millennium.

Forms in which Tigers are traded

Nearly every part of the Tiger has a value. Live Tigers are sold as exotic pets. Traditional Asian medicine uses Tiger bone in a number of different formulae. Skin is made into magical amulets and novelties, as are teeth and claws, while Tiger penis is an ingredient of allegedly powerful sexual tonics. However, many of these parts and products are fake Tiger, made from the parts of other, more common animals. It is not clear what effect the plethora of fakes has on wild Tiger populations. Fakes may satisfy some consumer demand which would otherwise have an impact on wild Tigers, or they may stimulate increased demand for genuine Tiger parts.

The supply: the origin of illegal trade in Tigers and their parts

Although Tigers in captivity have served as a source of supply to the trade, the primary source has been wild Tigers. Tigers are not only killed illegally for trade, but also because they are a danger to people and damage impoverished livelihoods when they prey on livestock. Population models suggest that Tiger populations may be able to sustain low levels of poaching, but moderate to high levels greatly increase the risk of extinction, even tens of years after the poaching occurs.

Progress in Tiger trade control since the early 1990s

- The Tiger has not become extinct in any range State, despite fears in the early 1990s that this may happen. There has been greatly increased investment in all aspects of Tiger conservation, including anti-poaching, biological monitoring, local community development, public education, and capacity-building. Progress in India, Nepal and the Russian Federation is particularly notable, although problems remain.
- Indian Government authorities seized over 500 kg of Tiger bone, destined for China, in 1993, and China also reported substantial seizures. Official seizures in the late 1990s fell from these peaks, suggesting a decline in illegal trade (although seizure statistics alone cannot show trends without reference to records of enforcement and data-collection effort).
- Prices reported for Tiger parts in Tiger range States by hunters and traders are generally lower or unchanged from the 1990s. While there is continued illegal trade, at least there have not been major price increases, which would increase the financial incentive to poach Tigers.
- In some Tiger range States (India, Nepal, Indonesia, the Russian Federation and Malaysia), Tiger poaching is frequently the result of human-Tiger conflict. There was considerable alarm about the illegal trade threat to Tigers in these countries in the late 1980s to early 1990s. While some illegal trade continues, it no longer appears to be the primary threat, indicating progress in Tiger trade control.
- There is little evidence to indicate the existence of major supplying markets in the range States of Bhutan, Malaysia and the Democratic People's Republic of Korea (North Korea). While Bhutan and North Korea have probably never been major suppliers, trade records showed substantial exports of

Tiger bone from Malaysia in the late 1980s to early 1990s.

Problems in Tiger trade control in supplying markets

- Major illegal supplying markets still operate openly in key Southeast Asian range States, especially Cambodia, Indonesia, Lao PDR, Myanmar and Vietnam. Market surveys indicate sizeable trade volume and, for various reasons, there has been little enforcement action by authorities against poachers and traders.
- Supplying markets in most other range States, including Bangladesh, China, India, Nepal, the Russian Federation and Thailand, are more covert, but still operational.
- Although India and the Russian Federation may have supplied less Tiger bone to the Asian medicinal trade in the late 1990s, a sizeable market for Tiger skins persists.
- Other large cats are poached for substitutes for Tiger bone. Leopard *Panthera pardus* bone is the most common substitute, but the Leopard is also a threatened species in Asia.
- China and Thailand are home to several large captive collections of Tigers. These collections have been called Tiger farms, because one of the reasons for their development in the late 1980s to early 1990s was to explore the possibility of supplying the trade in Tiger bone. Trade bans have prevented these plans from coming to fruition, and now the farms function as tourist attractions, although there is some evidence of illegal trade from all of them. Proponents have argued that a stable, legal source of Tiger bone for the medicinal trade could relieve poaching pressure on wild populations, but others feel that wild Tigers are best protected by eliminating consumption of their parts and that Tiger farms jeopardize progress in that area.

The processing: manufacture and production of Tiger-bone medicines

Traditional preparations including raw Tiger bone would be mixed with herbs and other ingredients by a pharmacist or doctor for a patient. In the late twentieth century, such medicines became factory-produced on a large scale. China stands out as the major producer of Tiger bone pills, plasters and medicinal wine, but such medicines were also made in factories in the Republic of Korea (South Korea) and other Asian countries. It is impossible to ascertain how much genuine Tiger bone these medicines contain. Current forensics techniques cannot detect the presence of Tiger bone in processed mixtures and many in the traditional medicine community say that these medicines are Tiger in name only. However, it is possible that real Tiger bone may have been used at highly dilute quantities.

Progress in Tiger trade control since the early 1990s

- Manufacture of Tiger-bone medicines has officially ceased in key former producer countries (China and South Korea). China is promoting bone of *sailong* (a very common type of mole rat, *Myospalax* spp.) as a substitute for Tiger bone.
- Market surveys suggest that the Tiger-bone medicines seen for retail sale are mostly old stocks, rather than of recent production.
- Tougher legislation was enacted in 1999 in the USA and Australia to prohibit trade in any product claiming to contain Tiger. In line with CITES Resolutions and related actions, most CITES Parties now treat anything labelled as Tiger as real Tiger, providing a “safety net” while research continues towards finding forensic techniques to identify Tiger components accurately in processed medicines.

Problems in Tiger trade control in processing markets

- In the late 1990s, a Japanese manufacturer was producing a brand of Tiger penis pills which were on sale for over USD27 000 per bottle. In December 1999, the Japanese Government announced amendments to national legislation to take effect from April 2000, which prohibit sale of such products. Medicines labelled as containing Tiger bone were still being produced in Vietnam in the late 1990s and also possibly in Thailand and Malaysia. Counterfeit medicines labelled as containing Tiger bone were apparently being produced without official sanction in China.
- Many manufacturers have changed their packaging so that Tiger bone no longer appears in the contents. However, just as it is not possible to determine whether medicines labelled as containing Tiger bone really do, it is equally impossible to tell if the new medicines really do not contain Tiger bone.

The demand: retail consumer markets for Tigers and their parts and products

Progress in Tiger trade control since the early 1990s

- Surveys in the late 1990s in China and other major non-range consuming markets show that availability of Tiger-bone medicines has declined. It is no longer a typical experience in most major cities around the world to walk into a traditional Asian pharmacy and find a variety of Tiger-bone preparations.

- Increased enforcement of domestic trade bans and increased co-operation with the traditional medicine community have helped to reduce retail sale and use of Tiger-bone medicines.
- The first attitudinal studies have been carried out to identify consumers of Tiger-bone medicines, and find out their motivations. Less than five per cent of consumers surveyed in Hong Kong, Japan and the USA said they had ever taken Tiger-bone medicines. Most said they supported wildlife conservation and would use alternatives to Tiger bone, if such alternatives were considered efficacious by respected doctors and were readily available. However, they would still seek out Tiger bone if thought essential for treatment of illness.
- Wholesale prices reported for raw Tiger bone on the black market in China and South Korea were lower in the late 1990s, suggesting a drop in demand from retail outlets. However, black market price data are often not reliable. Higher retail prices were reported for these two countries in the late 1990s, possibly reflecting the increased risks of selling Tiger bone at the retail level.

Problems in Tiger trade control in retail consumer markets

- Although imports of Tiger parts were prohibited in 1980 and imports of “pre-Convention” manufactured medicines were halted in 1993, domestic trade in medicines and tonics containing Tiger parts was still widespread in Japan in the late 1990s and retail prices were among the world’s highest. In December 1999, the Japanese Government announced amendments to its national legislation, which already regulated Tiger hair, skins, teeth, claws and their derivatives, to ban the domestic sale of products containing Tiger bone and Tiger penis, as of April 2000.
- Several Tiger range States have significant consumer markets for Tiger parts, especially Vietnam, Thailand and Indonesia. Illegal retail trade in Tiger parts and products continues in China and several non-range consumer States, but in a more secretive fashion, making it difficult to assess trade organization and volume.

Controlling illegal international trade in Tiger products

Progress since the early 1990s

- Trade bans have led to a sharp decline in international trade in Tiger parts and products, as reported to CITES and in other national government trade data sources. Seizures reported by non-range consumer States have also declined over the 1990s.
- Two major Tiger range States, Cambodia and Myanmar, joined CITES in the late 1990s. Most range and non-range consumer States are now Party to CITES, with the exceptions of Bhutan, Lao PDR and North Korea. The Global Tiger Forum, proposed in 1994 for inter-governmental co-operation among Tiger range States, received the five national ratifications necessary for it to come into effect in 1999. Range States have signed a number of other bilateral and multi-lateral agreements relevant to Tiger conservation and trade control in the late 1990s. Trade control workshops were held in a number of Tiger range States in the late 1990s to provide government officials with training and expertise.

Problems

- The international Tiger trade now operates almost exclusively through smuggling, by means of what has been referred to as “an army of ants” - large numbers of individuals smuggling small volumes of goods through a variety of channels. This type of trade is very difficult to eliminate.

Conclusions and recommendations

Since the publication of *Killed For A Cure* in the early 1990s, there has been greatly increased investment in Tiger conservation and Tiger trade controls. Significant progress has been made over the 1990s in reducing the use of Tiger bone in traditional Asian medicines in China and non-range consuming States. Progress is also evident in Tiger range States India, Indonesia, Nepal and Russia, where key Tiger populations have been protected by anti-poaching measures as well as by programmes which help local communities to benefit from Tiger conservation.

However, despite an apparent substantial fall in consumption of Tiger-bone medicines in former major consuming States, there is little evidence for a major reduction in Tiger poaching. While advances were made in the 1990s towards reducing use of Tiger bone in traditional Asian medicine, the fight to save the Tiger risks being lost if conservationists become complacent with the successes met so far. The conservation community should continue to treat traditional Asian medicine as a leading threat to wild Tigers, while also expanding efforts to eliminate trade in Tiger skins and curios.

Tiger-bone medicines and tonics are an ancient tradition and people will try to obtain them, even at some risk, for years to come. If medicinal trade is able to survive underground, it will provide an incentive for commercial poaching of Tigers, increasing the risk of extinction for vulnerable wild populations. However, underground trade will be difficult to detect by conventional market survey techniques in

consuming markets. Potential consumers of Tiger medicines are widely dispersed and number in the hundreds of millions, while there are not many more than 150 individual wild Tiger populations. In the future, it will be more efficient to prevent illegal Tiger trade by increasing law enforcement and trade monitoring capacity at the source of supply, in rural areas near wild Tiger populations.

Recommendations emerging from this report include the following:

In supplying markets,

- Improved enforcement of trade bans, with aid on an international scale
- Development of programmes which provide incentives against Tiger poaching
- Boosting anti-poaching capacity
- Creation of specialized enforcement units, particularly in China.
- Raising the political profile of Tiger conservation
- Participation of all Tiger range States in CITES and the Global Tiger Forum
- Integration of trade monitoring capacity into Tiger conservation projects
- Improved collection of poaching data, in order to gauge more accurately the impact of illegal trade on wild Tiger populations
- Regular monitoring of major wildlife markets
- Increased penalties for Tiger poaching and illegal trade
- Investment in managing human-Tiger conflict.
- Enforcement of prohibitions against trade in any products from Tiger farming

In processing markets,

- Increased attention to Tiger-bone gelatin
- Ending the manufacture of Tiger tonics in Japan and Vietnam
- Examination of Tiger-bone stocks in China
- Identification of producers of counterfeit Chinese Tiger-bone medicines

In retail consumer markets,

- More vigorous enforcement of domestic trade bans in certain countries, including use of specialized enforcement units for undercover investigations
- Continued close work with traditional medicine practitioners to eliminate Tiger trade and promote use of substitutes, with such work in Vietnam being of high priority
- Continuation of work to raise conservation awareness
- Careful discrimination between real and fake Tiger parts and products
- More consistent reporting of seizures to the CITES Secretariat
- Regular surveys of availability of Tiger parts and products to discern changes in the market
- More attitudinal surveys to identify and understand consumer demand
- Continued efforts to develop effective forensic techniques for identification of Tiger constituents in manufactured products
- Prohibition of trade in any products claiming to contain Tiger