Consumer demand for ivory in Japan declines

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Abstract

In November 2009 the authors visited Japan to survey the current status of the ivory trade. The Japanese ivory traders had in stock about 100 tonnes of raw ivory, including nearly 40 tonnes imported legally that year from southern Africa. Over 15 major ivory traders were interviewed and all reported that they were worried for the future of their business, unless they could obtain a regular supply of ivory tusks from Africa. They would need to buy 50 tonnes of good quality tusks from Africa every five years, priced around USD 200/kg if their businesses were to be sustainable. Future sales, however, will not be permitted by CITES before 2013, if then, and the ivory traders are worried their supplies of good quality tusks will not last. About 80% of the tusks used in Japan is for signature stamps called *inkans* or *hankos*, but other items are also still made from ivory, such as chop-sticks, objects for the Japanese tea ceremony, traditional musical instrument parts, netsukes, small figurines, jewellery and accessories. Overall, production in Japan has declined, with 13 tonnes being used a year in 2001 and 7 tonnes in 2009. This can be explained by a number of factors. Japan's economy has been in recession since 1990 and fewer Japanese are buying luxury ivory items. The Japanese are steadily becoming more westernized and ivory has therefore become less fashionable. Strict government regulations have also become a deterrent to ivory carvers and vendors, and because all ivory exports (except antiques) have been prohibited from Japan since the CITES ban in 1990, foreign visitors can no longer buy ivory items to take home with them.

Key words: Japan, ivory traders, CITES, ivory auctions, ivory carvers, elephant tusks, mammoth ivory

Résumé

En novembre 2009 les auteurs ont visité le Japon pour étudier la situation actuelle du commerce de l'ivoire. Les négociants japonais d'ivoire avaient une réserve d'environ 100 tonnes d'ivoire brute, y compris presque 40 tonnes importées légalement d'Afrique australe cette même année. Plus de 15 négociants majeurs d'ivoire ont été interviewés et tous ont rapporté qu'ils avaient des soucis pour l'avenir de leurs affaires, à moins qu'ils puissent obtenir un approvisionnement régulier de défenses d'ivoire d'Afrique. Ils devraient acheter 50 tonnes de défenses de bonne qualité d'Afrique tous les cinq ans, évaluées à environ 200 dollars US/kg si leurs entreprises devaient continuer. Cependant, les futures ventes ne seraient pas autorisées par la CITES avant 2013, et les négociants en ivoire ont des soucis que leurs réserves de défenses de bonne qualité ne dureront pas. Approximativement 80% des défenses utilisées au Japon sont pour les cachets appelés inkans ou hankos, mais d'autres articles sont également toujours faits d'ivoire, tels que les baguettes, des objets pour la cérémonie japonaise du thé, des parties d'instruments traditionnels de musique, les netsukes, de petites figurines, des bijoux et des accessoires. En général, la production au Japon a décliné, avec les 13 tonnes étant utilisées par an en 2001 et 7 tonnes en 2009. Cela peut s'expliquer par plusieurs facteurs. L'économie du Japon est en récession depuis 1990 et moins de Japonais achètent des articles de luxe en ivoire. Les Japonais deviennent de plus en plus occidentalisés et l'ivoire est donc devenu moins à la mode. Les règlements stricts du gouvernement servent de dissuasion aux sculpteurs et aux vendeurs de l'ivoire, et puisque toutes les exportations d'ivoire (sauf les antiquités) ont été interdites du Japon suivant l'interdiction de la CITES en 1990, les visiteurs étrangers ne peuvent plus acheter des articles en ivoire et les ramener chez eux.

Introduction

Since the CITES ban on ivory imports and exports in 1990, Japan has been the one country to have been allowed to import raw ivory on two occasions, both times from well controlled auctions in southern Africa (in 1999 and 2008) under CITES regulations. Japanese traders imported 50 tonnes in 1999 and nearly 40 tonnes in 2009, but traders are concerned, however, as future supplies are uncertain. At the last CITES conference in Doha in March 2010, Tanzania and Zambia were not allowed to sell their ivory because there had been increasing incidents of ivory smuggling from both countries recently. Southern Africa cannot sell tusks for a minimum of nine years since their last sale in 2008. Therefore, Japan's traders must make do with present stocks (39 tonnes imported in 2009 and about a further 60 tonnes of older stock). Traders want 50 tonnes of ivory imported every five years (an average of 10 tonnes of raw ivory per year) in order to be economically sustainable. Those southern African range States with their elephants on Appendix II could provide this amount directly to Japan sustainably with CITES approval. This country is an end user and prohibits ivory exports effectively. Japanese-carved items are too expensive, compared with Chinese items, to sell abroad in large numbers, and Japan is a small country, surrounded by sea, making law enforcement easier. Most African countries, excluding those in southern Africa, are generally against the ivory trade, even to Japan, as their elephant populations have been seriously reduced or threatened by ivory poachers. They are worried that any legal trade might encourage illegal trade, as recently expressed at the 15th Conference of the Parties to CITES in March 2010.

While Africa's raging debate on ivory sales continues to be documented in the world's press, Japanese consumers have been steadily losing interest in ivory anyway, according to vendors in Japan. The ivory traders in Japan are currently hard hit at both ends. While some have given up since the CITES ban, more now are thinking of moving into other businesses.

History and legislation

The first ivory items probably reached Japan around 750 AD from China. Tusks were not imported in any quantity into Japan until the 16th century, but this was stopped in 1639 when the country was closed off from foreign influence. By the late 19th century, after Japan had opened it borders again, the quantity of tusks imported annually rose from less than 3 tonnes in 1883 to a peak of 29 tonnes in 1899, mostly from Asia. Imports continued to increase until 1938. From 1942 to 1947 no tusks were imported. By the 1960s, tusk imports had recovered to 95 tonnes annually, mostly from central and eastern Africa. In the 1970s Japan's imports averaged 255 tonnes a year at USD 43/kg. In the 1980s, while imports remained steady, the price rapidly rose from USD 76/kg in 1980 to USD 288/kg in 1988, with most tusks coming from central Africa. Japan was consuming more than Europe or the USA in the 1980s (Martin 1985; Martin and Stiles 2003).

Japan joined CITES in November 1980; CITES banned the international ivory trade a decade later, prohibiting all trade except antiques. Japan's domestic ivory trade is legal but strictly controlled. All ivory importers, manufacturers, wholesalers and retailers must register with the authorities (CITES 2006). All tusks and pieces held commercially also have to be

Figure 1. This department store salesman in Osaka points to his display of ivory *inkans* (signature stamps).

registered. Many ivory items for sale display labels with the CITES logo to give customers confidence, which are received when the ivory is certified by the government (Sakamoto 2007). Retail sales of signature stamps (*inkans* or *hankos*) must be recorded in ledgers that can be inspected any time. *Inkans* make up about 80% by weight of retail sales; this is a sizeable portion that the government can check. Ivory items in people's homes do not need to be registered. Although personal items may be imported or exported for residents, this is rare.

Methodology

The above history and legislation supplies the background to our methodology. The authors carried out fieldwork in Tokyo and Osaka, the main centres for ivory in Japan, from 1 to 12 November 2009. The study was to update information collected during Martin's previous study in 2002 (Martin and Stiles 2003). We visited all the main department stores, shops and stalls that sold sizeable amounts of ivory items in 2002, counting and recording items with prices, and comparing them with the previous survey. We asked vendors whether sales of certain items were going up or down since 2002 and who the main buyers were. We had extensive meetings with members of the two main ivory trade associations: the Tokyo Ivory Association (JIA) and the Osaka Ivory Arts and Crafts Association in their respective cities. We interviewed six of the main ivory traders in Tokyo and eight in Osaka to learn about prices of ivory, percentages of different ivory items presently produced, numbers of *inkans* made and earnings for craftsmen. We also were informed about the recent ivory auctions in southern Africa, and the traders' views on the ivory trade and its future. In Tokyo we had a meeting with the President of the Japan Ivory Sculptors' Association to find out about current demand for high quality ivory carvings and netsukes in Japan, and the carvers' opinions about their business. With the CITES conference in Doha approaching, it was important to learn about Japan's present ivory trade, being one of the major buyers and consumers of ivory, and to discuss the situation with the dealers.

Results

Recent sources and prices of raw ivory in Japan

In 1997 CITES allowed Japanese traders to buy at auctions that took place in 1999 5,446 tusks weighing 49,571 kg from Botswana, Namibia and Zimbabwe. In November 2008 auctions took place in Botswana, Namibia and South Africa with Japan and for the first time China as CITES-authorized buyers. Nineteen Japanese traders representing 19 companies (14 of which were from Tokyo and 5 from in and around Osaka) went to these countries to buy top grade heavier tusks (averaging 10.6 kg), as opposed to the smaller tusks, which the Chinese traders bought. It is these larger tusks that are in demand in Japan, mostly for the making of *inkans*. The Tokyo traders bought 25 tonnes and the Osaka traders bought almost 15 tonnes totalling 3700 tusks. They paid USD 166/kg on average, and for the best quality tusks USD 200/kg. The supply arrived in Tokyo in June 2009; it has been the only recorded legal ivory entering Japan in that decade.

Of the 39 tonnes bought by 18 of the traders, they discovered when the ivory reached Japan that some pieces were cracked or incorrectly weighed. Although the auctions were well run, the traders said they were disappointed by some tusks. They said that too many were poor quality from being found after too long in the bush and were thus dry and brittle, or were not kept in humid enough storerooms to maintain the best quality. Badly damaged tusks with cracks can only be used for accessories, such as jewellery, but demand for ivory jewellery is declining due to a change in fashion, so the traders were quite disappointed by the many cracked tusks that have limited use.

Table 1. Average wholesale prices of ivory tusks in Tokyo for 2002 and 2009

Weight/type	*Price/kg in JPY and USD in 2002*	*Price/kg in JPY and USD in 2009*
10 kg soft	JPY 30,000/USD 240	JPY 30,000/USD 333
5 kg soft	PY17,500/USD 140	JPY 25,000/USD 278

N.B. USD 1=JPY 125 in 2001, USD 1=JPY 90 in 2009
Source: JIA

The traders have been selling a little of this new raw ivory in Tokyo at auction for an average of Japanese yen (JPY) 30,000 (USD 333) a kg for an average 10 kg tusk (see Table 1). These wholesale prices per kilo in yen were the same in 2001, although the price rose in dollar terms by 38% due to its devaluation against the yen from USD 284 to USD 340 for a 10-kg tusk and from USD 200 to USD 285 for a 5-kg tusk.

Tokyo and Osaka ivory workshops

In 2001 Japanese artisans used around 13 tonnes of ivory (Martin and Stiles 2003). The figure then dropped to 6 or 7 tonnes a year. While in 2001 there were up to 120 artisans carving ivory figurines and netsukes in Japan, by 2009 there were about 80. In 2009 10 companies (6 in Tokyo and 4 in Osaka) made ivory *inkans*, down from 17 in 2000 (Kyono 2002). There were eight companies in 2009 making *bachis* (a plectrum for the stringed instrument, the shamisen) which was the same as in 2001, but the number of items produced declined. In 2009 seven or eight companies made ivory jewellery, two firms made tea ceremony parts (mainly spoons and tea container lids) and one company made chop-sticks, according to members of the JIA. Certain traditional musical instrument parts, such as for the *biwa* (a short necked lute), are made now only on request.

Master carvers produce figurines and netsukes, of which about 60% are made from hard ivory (from the forest elephant), which they prefer to soft (from

Table 2. Percentages of raw ivory used to make items in Japan calculated from gross weight

Item	*1980*	*1988*	*2001*	*2009*
Inkans	55	64	80	80
Jewellery	20	8	2	2
Musical implements	10	12	10	12
Figurines and netsukes	5	6	5	4
Miscellaneous items	10	10	3	2

Sources: Martin 1985; Milliken 1989; Martin and Stiles 2003

Table 3. Percentages of hard/soft ivory for items made in recent years in Japan

Item	*1980*	*1988*	*2001*	*2009*
	Hard/soft	Hard/soft	Hard/soft	Hard/soft
Inkans	65/35	10–15/85–90	3/97	10/90
Netsukes	95/5	Mostly soft	50/50	50/50
Figurines	80/20	–	70/30	–
Piano keys	0/100	0/100	0/0	0/0
Musical implements	>95/<5	–	100/0	100/0
Jewellery	60/40	–	40/60	10/90

N.B. – =no data

Sources: Martin 1985; Milliken 1989; Martin and Stiles 2003

Table 4. Estimated number of ivory *inkans* made in Japan in recent years

Year	*Number*
1980	2,000,000
1988	850,000–1,000,000
2001	116,000
2008	20–27,000

Sources: Martin 1985; Milliken 1989; Martin and Stiles 2003; JIA (unpublished)

the savannah elephant) as it can be more intricately carved. Large ivory carvings are very rarely made any more due to lack of demand. Netsukes originated in Japan to wear with the kimono, and carvers take great pride in making them. Nowadays netsukes are being copied in China, usually with far less skill and in much larger quantities as labour there is considerably cheaper. A skilled Japanese master carver in 2009 earned perhaps USD 4700 a month compared with USD 3200 in 2001. There are perhaps only 20 master carvers left. Many live in the Kanto region near Tokyo as they find the big cities too congested these days and the rent too high. They work mostly out of their homes.

As stated earlier, about 80% of Japan's ivory is used to make *inkans* (see Table 2). Nowadays, 90% of the *inkans* are made of so-called 'soft' ivory (see Table 3). Probably the largest manufacturer is based in Osaka. This company produces about 9000 ivory *inkans* and also sells 50-60,000 buffalo horn ones each year. Production of ivory *inkans* has been declining steadily. Japan produced 20,000 to 27,000 ivory *inkans* in 2008 compared with 116,000 in 2001 (see Table 4). The best quality ivory *inkans* are hand-carved from the core of the tusk and at the tip where the grain is dense. Most are machine-made.

The other items are produced in small quantities, such as small objects for the traditional Japanese tea ceremony—tea containers, lids and spoons—which may be all or part ivory. Traditional musical instrument ivory parts require the largest tusks, especially for the *bachi*, which needs a 20–30 kg tusk that must be perfect with no cracks. Traders would like to sell these tusks for JPY 60,000 (USD 667) per kg but in 2009 the highest price received was JPY 40,000 (USD 444) per kg. Such a tusk can produce four *bachis*. Parts for traditional musical instruments must be made of the stronger 'hard' ivory which is still available from old stocks in Japan. Ivory chop-sticks must also be made from hard ivory to prevent them from breaking or warping. Jewellery is made usually from left-over pieces of ivory, of which 90% is from soft tusks.

There is a great deal of scrap ivory from *inkan*-making, which is stored in boxes at the workshops. Some of it is made into beads for Buddhist rosaries and jewellery. As labour costs are so high in Japan, it is not practical to make many small inexpensive items out of scrap. Cufflinks, for example, are only made on request nowadays. Other accessories, such as good luck charms and string ties (preferred by older people) are sometimes made, but the labour cost is often prohibitive. China, with cheap labour, would like to buy the scrap, but Japan is not allowed to export it and China cannot import it.

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Figure 2. This ivory specialty shop displayed a large assortment of ivory items for sale, nearly all made recently in Japan.

Tokyo and Osaka retail outlets

We returned to the main retail outlets selling sizeable numbers of ivory items that had been surveyed in 2002. Most were department stores (but also *inkan* shops, gift shops, antique shops and ivory specialty shops). Ivory items are still for sale in most department stores in Tokyo and Osaka, but reduced in variety and number on display compared with Martin's 2002 survey. They are usually displayed in glass cabinets, being expensive, and often with a glass of water present to keep the air humid to help prevent the items from cracking. Types of items most frequently for sale were ivory *inkans* in the stationery depart-

ment, ivory tea container lids and spoons in the tea ceremony section, ivory chop-sticks in the household items department, and other small ivory items, such as antiques or new objects with ivory inlay, sometimes in special gallery exhibits. In Osaka, of the seven department stores we visited with ivory, we counted 176 items on display of which 134 were *inkans*. This is less than in 2002 when 263 items were counted of which 175 were *inkans*. Some items were no longer for sale at all: pipe holders, shamisen bridges and good luck charms. In Tokyo, of the six department stores we visited that carried ivory items, we counted 120 objects on display of which 73 were *inkans*. This again is less than 2002 when there were 171 items counted of which 94 were *inkans*.

Prices for ivory *inkans* varied according to size, with the hallmark engraving usually included in the price (see Table 5). Sometimes in the department store, beside the *inkan* sample displays, there is a desk for an astrologer, who advises customers on the type of *inkans* and engravings to choose, based on their horoscopes. These are more expensive as a consultation fee is added.

The Japanese, if they can afford it, prefer the prestigious department store *inkans* where they can trust the quality. In general a boxwood *inkan* is the most popular of the higher quality ones, followed by black buffalo horn (which is dyed a uniform black), so-called 'Dutch' buffalo horn (of natural colour) and then ivory. For *inkans* measuring 1.5 in diameter by 6 cm long, these four materials were selling in the department stores at JPY 10,000 (USD 111) for the wood, JPY 12,600 (USD 140) and JPY 29,269 (USD 325) respectively for the horns and JPY 50,940 (USD 566) for ivory. For the cheapest and most common *inkans* used, for example on receiving a package, plastic ones are bought, but they can change in shape over time as they are not durable. Many customers, having priced the *inkan* they like in a department store, will then go and buy it more cheaply in an *inkan* shop. Although larger ivory *inkans* are used by companies, the great majority are for personal use.

In the department stores, the next most common items were tea container lids, teaspoons and chop-sticks. We counted 46 tea lids, occasionally with an ivory container but usually a valuable pottery one, all kept on display as each container is unique. For ivory chop-sticks, different types and sizes were displayed with additional ones in drawers. A man's pair is slightly longer and was priced on average at JPY 33,750 (USD 375) while women's were on average JPY 27,860 (USD 310). Most chop-sticks for sale are

Table 5 Retail prices in US dollars for recently-made popular Japanese ivory items in Osaka and Tokyo in November 2009

Item	*Size in cm*	*Price range*	*Average price*
Bachi	Small	1333–4222	3194
	Large	7,556–14,444	10,111
Chop-sticks, pair	19.5	233–408	310
	22.5	233–537	375
Figurine, human	10	2222–11,111	5333
	15	1611–44,444	23,500
Good luck charm	6	24–222	82
Jewellery: brooch	5	100–300	200
Jewellery: necklace	Medium beaded	222–722	356
Jewellery: pendant	7	256–567	403
Inkan	1.2 x 6	210–463	333
	1.5 x 6	292–758	566
String-tie clasp	5	222–400	322
Tea container with ivory lid	12	431–4433	1414
Teaspoon	18	151–388	259

wooden and often lacquered. Some department stores no longer display ivory ones, due to falling demand, but they could order them which would take a week to 10 days.

Scattered through the cities of Japan are *inkan* shops where all types, materials, styles and sizes of *inkans* can be found. Japanese people, once they are old enough to sign a document, must own an *inkan* and sometimes have several to sign different types of documents. We returned to the main *inkan* shops that were surveyed in 2002 and found that they were still displaying ivory *inkans* in similar quantities, with many more stacked in drawers to sell, as opposed to the displayed samples. There appeared to be no shortage of ivory *inkans* in these shops, although production has fallen sharply since 2002. One such shop in Tokyo had ivory *inkans* on special offer on a table on the pavement, selling off older stock.

The number of ivory specialty shops selling ivory has decreased since 2002. Some had closed down, while others were diversifying into other items due to poor sales of ivory. For example, ivory jewellery and accessories are being replaced by pearls, coral and gemstones. A few gift shops and antique galleries, especially those in the smartest hotels, still sell expensive ivory carvings, such as netsukes and figurines. A few small gift shops in tourist areas, such as near temples, may sell ivory accessories, mostly ear picks and good luck charms to hang on mobile phones, but there is little profit made from these.

Vendors' views on ivory market trends

Department stores in Japan have been under pressure from some wildlife organizations which have been demanding that they stop selling ivory. Vendors told us that some stores have complied or have reduced their items for sale. Older people are the main buyers of ivory nowadays, as it is considered old-fashioned or out of fashion by many younger people. Vendors in department stores selling ivory *inkans* told us that grandparents bought ivory items as presents for newborn babies, for coming of age, and for weddings, wrapped in department store paper for prestige. Westernization has led to more people using credit cards that require western signatures, as opposed to *inkans*. The elderly rich are the main buyers of ivory chop-sticks nowadays. The younger wealthy Japanese prefer silver chop-sticks which are usually hollow to reduce weight. Some may have ivory handles and a silver base. Younger people no longer want to buy ivory as they feel guilty, following the trend of the West where ivory went out of fashion, except for antique collectors, after the international ban (Martin and Stiles 2005, 2008). The young are changing their values and generally are less interested in traditional culture, such as the tea ceremony and traditional Japanese music, which further reduces interest in ivory.

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Figure 3. In a Tokyo department store an artisan engraves chop-sticks with people's names; ivory ones are displayed in a glass case at the top of the picture.

Demand for ivory items has also fallen largely due to Japan's economic recession which has continued since 1990. There is a particular lack of demand for ivory jewellery, and we saw little for sale, except in ivory specialty shops where vendors lamented the slow turnover. The export ban on all ivory, except antiques, has hugely hindered sales, vendors said. Foreign visitors used to be important buyers of expensive ivory items before 1990. American collectors, for example, had been the main buyers of netsukes. In comparison, not many Japanese collect netsukes, so sales have reduced.

Ivory associations in Japan

Membership for the two main associations for ivory traders and ivory manufacturers— the JIA and the Osaka Ivory Arts and Crafts Association—is falling. In Tokyo the JIA had 37 members in 2001, but

32 members in 2009, and two more said they were withdrawing in 2010 due to poor business. Membership costs JPY 10,000 (USD 111) per month. The Association needs its members to pay off a shared loan for an office where they hold meetings twice a month and display ivory items for sale. The JIA holds four ivory auctions a year for raw ivory, where members can sell some of their raw ivory to other members. These include two joint auctions with the Osaka Association who had 12 members in 2009 (and 13 in 2001); more are thinking of leaving. Membership there costs JPY 3,000 (USD 33) a month. They meet in Osaka once a month and if there is no ivory shortage they have two of their own ivory auctions a year. For 2008 and 2009 the Association held no auctions in Osaka due to lack of tusks, but some of the traders sold tusks privately. Japanese ivory traders all feel uncertain for their future and fear that a big campaign against the ivory trade could easily kill the ivory business in Japan.

In December 2008 the JIA auctioned 50 kg of raw ivory. In 2009, the JIA failed to auction ivory in March and in June as buyers were waiting for the new tusks from southern Africa. These were put on auction in September 2009; 100 kg were sold at an average price of JPY 30,000 (USD 333) per kg. Dealers look for specific tusks for the item they produce. For example, a near-perfect, round, female tusk is needed to make a certain round container with fitted lid for the tea ceremony. Fewer tusks were sold than hoped, as many were cracked.

All traders agreed that it is difficult to make a business selling ivory if no one knows what will happen regarding future supplies of raw ivory. For this reason, traders said they had no positive expectations for the ivory business and were reluctant to pass it on to their children. If they could be secured of a stable supply of ivory, then traders would be confident that they could teach their successors to keep the business profitable. They said, 'As ivory is a luxury item, demand will not increase; our economy is going down compared with China where the economy is booming—that is why the Chinese traders bought more ivory (62 tonnes) than we did in the 2008 auctions.' This is compounded with the fact that China has many more consumers.

Ivory traders regret that they are not trained in public relations or marketing, expressing the public's need for information about their legal ivory sources and the need for ivory sales to help elephant conservation in Africa. They said that this is little understood in Japan because the wildlife protectionists are such a strong lobby. The traders said also that 'CITES seems to support the preservationists more than the consumers.' They asked us, 'If ivory is prohibited then the countries that have elephants, what will they do with the tusks?'

There are two different associations in Japan for ivory carvers who produce works of art. The Japan Ivory Sculptors' Association produces a catalogue of their work for an exhibition held every year in a main Tokyo department store. Members pay a fee of JPY 20,000 (USD 222) to exhibit up to three items for six days. In 2009 the Association hosted its 32nd annual exhibition. This way they promote their work to dealers. Most concentrate on making small figurines and netsukes which use very little ivory (*The 31st Exhibition of Japan Ivory Sculptors' Association*, 2008). The most expensive item offered in the 2009 exhibition was an unusually high 20-cm sculpture for JPY 5 million (USD 55,555), but it had not yet sold at the time of our visit. Sculptors also sell small carvings to gift shops or to middlemen for display in department stores. If an item is sold in a department store, the middleman, the store and the artisan each receive a third of the retail price. Carvers do not sell items on the Internet because it is difficult to sell expensive items online.

The President of the Sculptors' Association wants to promote their ivory items by telling the Japanese that ivory is imported legally into Japan and that all trade in Japan is legal, as many potential customers are confused. He wants more Japanese to be more aware of their long artistic tradition in ivory from the Edo shogunate to the Meiji period and to become collectors, now that foreigners are not buying recently-made, expensive ivory items due to the export ban. Another problem, the President said, most ivory master carvers are over 60 years old and their numbers continue to decrease. A few young people from art college are trying to become netsuke carvers, but it takes five years of training to become a professional ivory carver and most are not prepared to wait that long. It is getting harder to employ ivory artisans and the younger people today prefer to become office workers where they receive a good salary more quickly. Furthermore, complicated official paperwork is discouraging carvers from working with ivory. In 1980 the Sculptors' Association had 100 members and in 2001 there

were 60 members; by 2009 they were down to 46 members. They are worried for the Association's future survival.

The second association is the smaller Tokyo Ivory Carvers' Friendship Association, which in 1980 had 25 members, but in 2009 only 5 members (as in 2001). These members attempt to maintain especially high standards of carving.

These four ivory associations try to improve business by managing their trade as efficiently as they can, keeping one another well informed and maintaining their reputation. This helps prevent corrupt individuals from dealing in illegal ivory. The ivory associations' members try to work closely to keep their integrity and good name.

Mammoth ivory as a substitute for elephant ivory

There is very little demand for mammoth ivory in Japan. Mammoth tusks were imported as an experiment in the 1980s, but were not a success. The ivory associations are not interested in them and cannot currently see any future for mammoth ivory in the country. Its price is similar to that of elephant ivory, although much of it cannot be used because it is often rotten, cracked, stained or smells. The tusks are so old and brittle that they often crack further when carved. Japanese consumers like brand recognition and want the whiter ivory from the elephant. Carvers prefer to work with the higher quality elephant ivory so they no longer use mammoth ivory.

One large ivory gift shop in Tokyo sold elephant and mammoth ivory objects. The mammoth ivory, mostly jewellery, was carved in the 1980s. There were 62 mammoth ivory pieces on display, especially brooches. Of about 130 ivory items sold a year, perhaps 30 of these are mammoth ivory objects: 20 pieces of jewellery and 10 netsukes. Some of the mammoth ivory pieces are exported, mainly to the USA. In place of mammoth, carvers prefer to make netsukes from deer antlers that they obtain free from the deer population around the shrines in the old Imperial city of Nara. About 10 netsukes carved from deer antlers are sold each year from this shop, mostly to Japanese buyers. Bones are not so popular, nor are tagua nuts due to the hole from the seed in the middle.

Recently-carved mammoth ivory netsukes from China were for sale in some of the hotel gift shops and in the Tokyo National Museum gift shop. The museum shop manager said she sold about 100 a year. There were 10 animal netsukes on display, and 27 duplicates in a box for customers to choose. There are no restrictions on mammoth ivory imports or exports, because the species is extinct.

Discussion and conclusion

As one well-known wholesaler of ivory items in Tokyo described it, the ivory business in Japan has suffered a triple punch. Ivory exports from Japan are banned, the economy is in a long severe recession, and a lot of artisans have given up due to the excessive paperwork now required to meet the strict controls on ivory. Ivory carvers cannot change easily to carving stone as the technique is very different, so some have become cooks or taxi drivers instead. Large ivory items are rarely carved any more—these used to be bought by foreigners until the 1990 export ban.

Some ivory specialty shops are sitting on old stocks of ivory items that they cannot sell. The main buyers of netsukes used to be foreigners, particularly Americans. There are fewer Japanese collectors, especially since the recent recession. The making of netsukes and figurines consume extremely little ivory, unlike the *inkan* industry, whose traders require the largest amount of Japan's ivory annually (80%). But demand for *inkans* is also falling as the Japanese are becoming steadily more westernized. Similarly, ivory tea ceremony items and traditional musical instruments with ivory are in less demand. Ivory chop-sticks, jewellery and accessories are largely out of fashion, and are bought mainly by the elderly rich.

The golden days of ivory carving in Japan have ended. With most of central Africa's elephant populations in significant decline, which formerly supplied the hard ivory, and with imports of new raw ivory from Africa uncertain, coupled with the recession in Japan, the current strict regulations, prohibited exports, and also changes in fashion and taste, both traders and buyers are gradually losing confidence and thus interest in ivory.

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