THE LION'S SHARE OF THE HUNT

TROPHY HUNTING AND CONSERVATION:
A REVIEW OF THE LEGAL EURASIAN TOURIST HUNTING MARKET AND TROPHY TRADE UNDER CITES

A TRAFFIC EUROPE REGIONAL REPORT

BY
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WITH CONTRIBUTIONS OF

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GLOSSARY

CAMPFIRE	Communal Areas Management Programme for Indigenous Resources *CAMPFIRE was officially established in 1989 in Zimbabwe with the aim of combining rural development and sustainable use of wildlife resources. Wildlife is managed as a common resource and the local communities are entitled to the returns. Several sources of income from wildlife have been developed, including tourist hunting. The programme is regarded as successful, but at the same time is heavily criticised.*
CIC	Conseil International de la Chasse et de la Conservation du Gibier *The International Council for Hunting and Wildlife Conservation is a non-governmental organisation, founded in 1929. The CIC has approximately 20 000 members in 50 states. The members are delegates of governments, authorities, or associations, as well as elected individuals. The Board is based in Paris.*
CIS	Commonwealth of Independent States *Since 1991, the territory of the former Soviet Union, excluding the three Baltic states Estonia, Latvia, and Lithuania, is called the Commonwealth of Independent States (CIS).*
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora *CITES entered into force in 1975, and has more than 156 member states as Parties (as of 11 February 2002). The Convention regulates the international trade in wild animals and plants, and their parts and derivatives. Parties act by banning commercial international trade in an agreed list of endangered species and by regulating and monitoring trade in others that might become endangered. Parties meet at the Conference of Parties (COP) on a biennial basis, to discuss matters relating to the Convention.*
CMS	Convention on the Conservation of Migratory Species of Wild Animals (Bonn Convention) *The Bonn Convention entered into force in 1983, up to now it has more than 70 member states as parties. The objective of the convention is to protect migratory species listed in two appendices. Parties are obliged to strictly protect Appendix I species and encouraged to conclude agreements for the the conservation and management of Appendix II species.*
COMECON	Council of Mutual Economic Aid *The council was set up in 1949 by Bulgaria, Czechoslovakia, Hungary, Poland, Romania and the USSR; several additional member states and observers participated in subsequesnt years. In 1991, COMECON was replaced by the Organisation for International Economic Cooperation.*

FACE	Fédération des Associations de Chasseurs de l'U.E. *The Federation of National European Hunting Associations was founded in 1977 by the national hunting associations of the EU member states. Today, the federation is open to all parties of the Council of Europe and has 22 national hunting associations as members. FACE supports hunting and the interest of hunters in Europe.*
IUCN	IUCN-The World Conservation Union *IUCN was founded 1948 and as of January 2001 is a union of 78 states, 112 government agencies, 735 non-governmental organisations, 35 affiliates and some 10 000 scientists and experts from 181 countries. Its objective is to encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable.*
Reg. (EC) 338/97	Regulation on the Protection of Species of Wild Fauna and Flora by Regulating Trade Therein *This regulation implements the provisions of CITES within the EU member states and provides possibilities for more restrictive trade regulations. Annexes A to C mainly correspond to CITES Appendices I to III.*
SRG	Scientific Review Group *The SRG is an advisory body established through Art. 17 of Reg. (EC) 338/97. Its function is to develop recommendations concerning the detrimental impacts of import on the conservation of species listed in the Annexes of Reg. (EC) 338/97. In general, recommendations of the SRG are implemented by all EU member states, and pertain to implementing domestic measures that are stricter than CITES.*
UNEP	United Nations Environment Programme *UNEP was founded in 1972 as a special organisation of the United Nations. It implements projects and programmes concerning environmental protection and conservation.*
WCMC	World Conservation Monitoring Centre *WCMC was founded by IUCN, WWF, and UNEP in 1988 to provide objective, scientifically rigorous and focussed information on global biodiversity. In 2000, the institution became UNEP-WCMC, established as the world biodiversity information and assessment centre of UNEP. Its purpose is to provide information for policy and action to conserve the living world.*
WTO	World Tourism Organisation *WTO is an intergovernmental organisation, that serves as a global forum for tourism policies and issues. It consists of 138 countries and territories plus 350 members from the public and private sectors.*

EXECUTIVE SUMMARY

In recent years there have been increasing attempts to integrate trophy hunting into conservation programmes and projects as a conservation tool, as a means to achieve the sustainable use of wildlife. As this view is subject to much debate, in 1998 TRAFFIC Europe initiated a review of the Eurasian mammal trophy hunting market, to gain a better understanding of demand, products and supply. For the purpose of this study, the term trophy hunting is used in place of the terms "foreign hunting" and "tourist hunting", and is defined as "hunting activities for one or more specimens of a certain species by a foreign hunter, who is willing to pay a fee for the special hunting experience and/or the trophy attained".

This report aims to provide a basic overview of the Eurasian tourist hunting market. It describes the European demand for foreign hunting, as well as the available facts and figures about the status and relevance of foreign hunting in Eurasian supply countries. This information is complemented by a review of the international trade in trophies of mammal species listed in the Appendices of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). Within the Eurasian market overview, there has been a focus on German hunters. The scope of the study extends to 18 countries in Europe regarded primarily as demand countries, and 38 countries in Eurasia regarded as supply, or destination, countries.

The Eurasian tourist hunting market review

About 20 - 30% of the European hunters (EU plus Norway, Switzerland, Malta) travel abroad for hunting, at least occasionally, although the percentage of tourist hunters from each country varies. Germany, Austria, the Benelux countries, Italy, and Spain are the main European demand countries. Destination preferences differ from country to country. German and Italian hunters travel to a wide range of European destinations, Spanish tourist hunters prefer North America, and Benelux hunters are much more oriented towards Africa. In general, the majority of tourist hunters visit destinations that are relatively close to home.

The game species preferred by German and Spanish hunters hunting abroad are ungulates, mainly Red Deer, Roe Deer, and Wild Boar, and to a lesser extent antelope and gazelle, and wild sheep and goats. Forty-five percent of German tourist hunters have hunted for small game and waterfowl, at some point in the past. Approximately 18.5% of German hunters have already hunted for big game carnivores. Italian tourist hunters prefer bird hunting abroad.

More than 50 % of German tourist hunters spend between € 1 250 and € 3 000 per expedition. The average price for a foreign hunt is about € 2 000, and for Eurasian destinations the fee is slightly less, € 1 500. More than 50% of German tourist hunters arrange their foreign hunts via private contacts.

Tourist hunting agencies market foreign hunts to European hunters. Their role is comparable to a tour agency. They market a great diversity of tourist hunting products. In Germany, approximately 100 agencies could be identified, in Italy 40 agencies. But in fact, only 5-10 agencies dominate the German market, 4-10 agencies the Italian market. Concerning Austria, Spain, and Belgium, also only a handful of agencies dominate the market.

A review of advertisements (including those on the internet), catalogs and price lists reveals that at least 29 ungulate and 15 carnivore species are offered in Europe for tourist hunting in the supply countries surveyed during this project (Eastern Europe, Central Asia, Himalaya, Mongolia, and China). Including the subspecies specified in the offers, 18 taxa are listed in Appendix I or II of CITES, and 41 in the 1996 IUCN Red List. No illegal hunts were offered by European agencies. The number of the offers reflects a preference of tourist hunters for Moose, Roe Deer, Red Deer, Mouflon, and Wild Boar.

The regulatory, administrative and economic framework for foreign hunting in the 38 selected Eurasian supply countries varies from country to country. Organisers (or outfitters) have the right to sell hunts/licenses to foreigners, and they can be private persons or co-operatives, governmental organisations, or commercial firms. The countries with some similiarities in the structure of regulation and administration for tourist hunting can be clustered into Scandinavia, the Baltic countries, Eastern Europe, Russia/CIS, the Middle East/Caucasus/Himalayan region, and Mongolia/China.

The supply for foreign hunting in the selected countries differs considerably. While Hungary or Poland can supply 10 000 - 20 000 hunts per year, the Central Asian countries or China currently reach a limit within the hundreds. Even within the main supply countries, the economic relevance of foreign hunting is extremely small on a national level (e.g. Hungary: 0.0005% of the GNP). There is considerable market fluctuation within some countries, due to political and economic instability as well as very responsive reactions of tourist hunters to information on hunting success or the image of organisers.

Based on available data gathered during this study, it can be estimated that European hunters generate approximately € 40 - 50 million annually, which remains in the Eurasian supply countries. Information about the use and re-investment of this revenue into conservation and wildlife management, is largely unavailable and is often regarded as a very private issue in the foreign hunting context.

Trophy trade under CITES

A review of trophy imports of CITES-listed species into North America and Europe for the period 1990 to 1996, revealed that a total of 88 013 trophy items of 249 mammal taxa were imported into Europe and North America from all over the world. Nearly 50% of this trade is between Canada and the USA, and is mainly Black Bear *Ursus americanus*.

Overall, this review revealed that the trophy trade involves very small numbers of specimens. For the 1990 to 1996 period, Europe imported 25 428 trophy items of 107 mammal taxa from origins all over the world. Imports fluctuate considerably from year to year, although imports have doubled over this seven year period. Spain and Germany reportedly imported 68% of these trophies. Regular trophy item imports in considerable numbers are recorded for Brown Bear *Ursus arctos*, Wolf *Canis lupus*, and Argali *Ovis ammon*.

The review of CITES annual report data indicates a number of problems in reporting, and standards of reporting. Analysis of trophy trade between the 38 supply countries and 18 demand countries covered by this study reveals that 46 taxa have been recorded as objects of trophy trade. Import and export data differ considerably, however, with 1 924 mammal trophies reported as imported into the 18 demand countries, and 2 678 mammal trophies reported as exported from the

38 supply countries. This is in part an example of the differences in the reporting practises, which can be done on the basis of permits used, or permits issued (which may not necessarily be used). This data analysis has been further complicated by the fact that it is frequently impossible to cross-check single trade operations. Further, it is not possible to classify a specific trophy item trade operation reliably as the result of a foreign hunting activity. Nor is it possible to define whether one or several trophy items refer to one or several specimens.

Conclusions and recommendations

The lion's share of the Eurasian tourist hunting market for mammals is hunting by Central European (Germans and Austrian) and Spanish hunters in Eastern Europe for abundant species, with low risk concerning hunting success, organisation, or security, and with prices comparable to an average holiday. There is only a narrow interface between foreign hunting and the main Eurasian conservation issues/hot-spots, which are mainly situated in the Asian part of the continent. For successfully integrating foreign hunting into conservation initiatives, from the market perspective, three recommendations are given:

1. Integration of tourist hunting into conservation programmes or projects should be undertaken using a case-by-case approach that will yield the benefits of that option in individual cases. A realistic pre-evaluation of the option will clarify whether it promises to be helpful for the specific initiative. Important questions to be asked are:
   - What is the specific target group of hunters interested in this kind of hunt? *(How many are interested? Where do they come from? How can we contact them? What are they willing to pay?).*
   - Are there effective and efficient means for successful marketing of conservation-oriented hunting, and can it be marketed credibly?
   - What are the criteria, risks and opportunities to implement sustainable tourist hunting locally under specific circumstances? *(Quotas? Monitoring and control? Administration? Re-investments?).*

2. Dialog between tourist hunting stakeholders on a project level as well as generally should be encouraged, because it has the potential to promote conservation issues within this target group. The majority of foreign hunters rejects illegal and unsustainable hunting, and even condemns those who endanger the public image of hunters by inconsiderate behaviour. Initiating a common certification process for tourist hunting destinations/organisers may be a strong long-term instrument to reduce unacceptable practises by focussing the hunters' attention on accepted tour operators/organisers.

3. CITES personal effects regulations and reporting practises differ a lot among the countries within the regional scope of this study, even among the EU Member States. Standardisation of both should be reached to enhance the conservation goals of the convention and to support effective enforcement. For EU Member States, the EU Committee on Trade in Wild Fauna and Flora should address possible means of harmonising the implementation of the personal effects regulations and reporting practises.

Important note: From the methods used described in this report it is impossible to conclude any order of magnitude of poaching, of other illegal hunting activities or of such hunting activities which are detrimental to the survival of wild populations. If such incidents take place, they would do so in the supply countries and would be beyond the scope of detection of this report.

1. INTRODUCTION

Wild Boar *Sus scrofa*. Credit: © WWF-Canon/Martin Harvey

Background

In March 1999, a press release published by the Secretariat of the Convention on the Conservation of Migratory Species (CMS) reported on the progress of a re-introduction project for six antelope species in North Africa. The economic relevance of successful antelope re-introduction for tourism, including trophy hunting, was mentioned (Anon., 1999). This event illustrates that trophy hunting has increasingly become part of conservation issues and policies, and is promoted as a low-impact sustainable use approach and to add value to natural resources. Nevertheless, the issue is controversial and is discussed among and within a variety of key interest groups, including conservation, animal welfare and hunters, as well as governments, on national and international levels.

Trophy hunting is a controversial and misunderstood activity for several reasons. Firstly, trophy hunting is controversial on ethical, social and cultural levels. The practice of trophy hunting generates contradictory positions towards hunting in general. While some believe that the consumptive use of individual animals for the sake of the population, the species, or the ecosystem is ethically acceptable, others vehemently oppose the killing of animals for personal satisfaction. The media publish highly emotional reports on illegal or unethical practises with sensational, sometimes shocking illustrations, and create public resentment. Further, the public perception of trophy hunting is still influenced by the image of big game hunters operating during the colonial era (Spehr, 1993; Hofer *et al.*, 1995).

There is much disagreement about the social equity and economic implications of trophy hunting. The Communal Areas Management Programme for Indigenous Resources (CAMPFIRE) in Zimbabwe, officially established in 1989, exemplifies this. Trophy hunting developed as one of the major sources of income from wildlife use in several CAMPFIRE districts (Nuding, 1996). Since its beginning, CAMPFIRE has been documented and analysed extensively (e.g. Edwards and Allen, 1992; Child, 1996; Nuding, 1996). However, identical facts and data are used for promotion as well as for critique, depending on the particular personal attitudes and values of the observer (e.g. Fuhr, 1994; Wendler and Stickroth, 1999)

Nevertheless, trophy hunting is a phenomenon that has found its way into conservation practises and projects. Examples from policy setting initiatives by government agencies (e.g. Große *et al.* 2001), inter-governmental organisations (e.g. IUCN, 2000) and non-governmental organisations (e.g. DJV and CIC, 2000) depict the demand for more objective and factual information on the issue. With more information available, the issue can be better dealt with. In this report, we try to be descriptive about those issues investigated, and as far as possible, avoid making value judgements.

Another reason for controversies is the uncertainty about the ecological, economic or social consequences of trophy hunting. Few studies exist about the impact of trophy hunting, e.g. on the natural composition of populations, on the gene pool of rare species, or on possible long term effects on habitats. Some examples indicate that through trophy hunting, wildlife becomes economically important and increases the interest and concern of rural populations to conserve this source of income. Other examples reveal that through trophy hunting, government agencies are interested in enacting adequate legislation, supporting protection efforts and research and monitoring activities, and that revenues gained can be reallocated to management, protection and habitat conservation. Other cases illustrate that trophy hunting may be part of or result in short-sighted overexploitation of populations, illegal killing and smuggling, and that neither conservation returns nor advantages for the local population are guaranteed. As there are few and often contradictory facts and figures, it is difficult to foresee the consequences of a trophy hunting initiative (for the Eurasian context see Fedosenko, 1999; Harris and Pletscher, 1997; Johnson, 1997).

As a third point it must be mentioned that sometimes the use of the term “trophy hunting” leads to disagreements. There is no generally accepted definition. The most comprehensive use of the term comprises any hunting activity aiming at attaining a trophy - implying that the motivation of the hunter defines the phenomenon. In practise, the term is frequently used to express the willingness of the hunter to pay for a special hunting experience and/or trophy. And "trophy hunting" also invokes notions of safari or hunting in exotic environments. Some initiatives, projects or studies focus on even more limited sectors, such as hunting on game farms, but use the term "trophy hunting" (e.g. Crowe *et al.*, 1997). Therefore being aware that the term "trophy hunting" can lead to misunderstandings, we try to clearly define the use of the term according to the perspectives, scopes and objectives of this study as follows:

In this report, the term "trophy hunting" is interpreted as encompassing the terms "foreign hunting", "hunting abroad" and "tourist hunting". Specifically, in the context of this report it means
• hunting activities for one or more specimens of a certain species
• by a foreign hunter,
• who is willing to pay a fee for the special hunting experience and/or the trophy attained.

The first part of this report provides the reader with a basic overview of the Eurasian tourist hunting market. It describes the European demand for foreign hunting as well as the available facts and figures about status and relevance of foreign hunting in Eurasian destination countries. The second part of this report consists of an analysis of official data compiled by WCMC on the international trade in trophies of species regulated under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

Objectives and scope of the Eurasian tourist hunting market review

A review of European and North American hunting journals reveals that there is a considerable and global market for foreign hunting. It is a world-wide business. The demand seems to be mainly driven by North American and European hunters. The supply derives from numerous countries all over the world, with Africa, Eurasia, and North America being the main destination continents for tourist hunters. In a German handbook for foreign hunting, 85 destination countries and 180 game species are described (Lechner, 1995). However, foreign hunting from the market perspective remains little studied. The status of the industry has not yet been assessed. The objective of this market review is to provide an overview of the Eurasian tourist hunting market in terms of demand, products, and supply. Topics of investigation are:
• description of the European tourist hunting clientele:
• description of the role of tourist hunting agencies on the European market;
• Eurasian mammal species offered, and prices on the European tourist hunting market;
• legal and commercial setting for foreign hunting in Eurasian destination countries;
• status of foreign hunting in Eurasian destination countries.
The geographical scope of the study is Eurasia. The term Eurasia for the purpose of this study is defined as including all European and CIS countries plus Iran, Afghanistan, Pakistan, Mongolia, China, Nepal, and Bhutan (Figure 1).

Figure 1
Geographical scope of the study

Moreover, the countries of scope are divided into two groups: foreign hunting demand countries and foreign hunting supply countries. Demand countries are defined as including all EU member states plus Switzerland, Malta, and Norway. The European hunting industry is one of the largest and most affluent in the world and European hunters travel all around the world as tourist hunters. Eurasian tourist hunting destination countries are defined as including all countries east of the EU plus Scandinavia. These include the 12 countries of the Commonwealth of Independent States (CIS) and three Baltic countries of the former Soviet Union, and the five countries of the former Yugoslavia. Also included are Mongolia and China both of which have opened up to the west, and the former COMECON nations. The political changes in the former socialist countries have opened a wide market to foreign hunters. National conservation and hunting policies are still in a state of development, closely linked to land tenure and privatisation. The tourist hunting market is very young in some countries, e.g. Iran, or not yet established in others, e.g. Georgia, and is therefore still developing. In other countries, where foreign hunting was a continuous source of foreign currency during communism, changes are taking place according to the particular economic system. Moreover, these countries as well as those in Scandinavia, provide a wide variety of species of special interest to hunters.

Objectives and scope of the CITES trophy trade data analysis

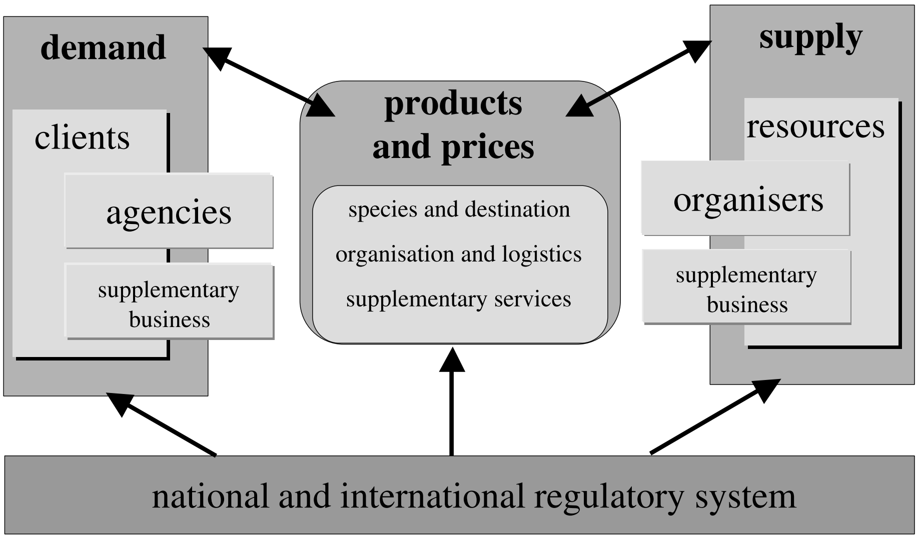
WCMC manages a CITES Trade Database on behalf of the CITES Secretariat. As each CITES party is obliged to report on their wildlife trade on the basis of permits issued and/or used on an annual basis, the database allows for the generation of global statistics on wildlife trade. The objective of the review of CITES data is to determine the relevance of foreign hunting for CITES-listed species and the relative relevance of the importing (demand) and exporting (supply, destination) countries within the international foreign hunting market. Moreover, the analysis reveals the suitability of CITES as an instrument for monitoring and control of the international trophy trade. Again, the geographical scope is Eurasia as defined above. The analysis is limited to mammal species.

Countries of Scope	Demand	Both	Supply
Afghanistan			x
Albania			x
Armenia			x
Austria	x		
Azerbaijan			x
Belarus			x
Belgium	x		
Bhutan			x
Bosnia-Hercegovina			x
Bulgaria			x
China			x
Croatia			x
Czech Republic			x
Denmark	x		
Estonia			x
Finland		x	
France	x		
Georgia			x
Germany	x		
Greece	x		
Hungary			x
Iran			x
Ireland	x		
Italy	x		
Kazakhstan			x
Kyrgystan			x
Latvia			x
Lithuania			x
Luxembourg	x		
Macedonia			x
Malta	x		
Moldova			x
Mongolia			x
Nepal			x
Netherlands	x		
Norway		x	
Pakistan			x
Poland			x
Portugal	x		
Romania			x
Russian Federation			x
Slovakia			x
Slovenia			x
Spain	x		
Sweden		x	
Switzerland	x		
Tajikistan			x
Turkey			x
Turkmenistan			x
Ukraine			x
United Kingdom	x		
Uzbekistan			x
Yugoslavia			x

A general model of the tourist hunting market and clarification of terms

The tourist hunting market, like any other market, is impacted by demand and supply, costs and benefits, and by national and international regulatory systems. The demand is driven by the desires, needs and motives of the customers, i.e. hunters who want to travel abroad for a special hunting experience. The supply is provided by the resources demanded: populations of wild species that can be hunted, and habitats that support and provide the populations and the experience. These natural resources have to be attainable to the clients. That means tourist hunting has to be: a) politically and socially accepted; b) endorsed by legal and organisational means; and c) transformed into products that meet the needs of hunters and that can be offered and obtained for an appropriate price.

Figure 1b
A general model of the tourist hunting market system
Some of the terms used in Figure 1b are explained below.



Clients or customers of the foreign hunting business are hunters, who for certain reasons travel abroad to obtain a certain hunting experience and/or trophy and are willing to pay an appropriate price for it.
Agencies are the traders on the foreign hunting market. They can be compared to travel agencies. They arrange, offer and sell foreign hunts via advertisements and contacts on the European market. They mainly do not organise the hunts in the destination countries but function as agents who find and market those offers that best meet the client's requirements. Agencies also negotiate with the organisers to arrange hunts in a way that can be marketed to the hunters.

The ***organisers*** (sometimes called outfitters) are those entities who have the right to sell hunts to foreigners in the respective destination countries. According to the respective national regulations, they can be private persons, government agencies or commercial enterprises. They locally manage the business. They set the prices according to costs and profit margins, to prospective legal frameworks, and to the client's willingness to pay. They usually pay commissions to the agencies that sell their hunts.

Supplementary businesses that profit from the tourist hunting market are those who provide special services, such as equipment, trophy transport, taxidermy or transport, accommodation, translation, guides and related services in the destination country.

A ***regulatory system*** comprises a framework of national legislation concerning hunting, wildlife management and conservation, and can also pertain to economic issues. International regulations such as CITES or the EC Regulation 338/97, control and influence the market.

II. METHODS

Altai Argali or Altai Mountain Sheep *Ovis ammon ammon*. Credit: D. Yakovenko/WWF Russia

The main objective of the study is to provide an overview of the legal Eurasian tourist hunting market and the trophy trade in CITES-listed species. Conducted over a period between 1998-2000, the project was carried out with a focus on German tourist hunters, supported by studies in Belgium, Italy and Spain; components of the research were conducted in collaboration with the German Hunters Association (Deutscher Jagd-Schutzverband DJV). The geographical scope of the study comprises 18 potential demand and 38 supply countries. Obviously it was not possible to investigate extensively in every country and on every topic. Hence, detection of illegal tourist and trophy hunting activities were rare and incidental during this study. From the methods used described hereafter it is impossible to conclude any order of magnitude of poaching, of other illegal hunting activities or of such hunting activities which are detrimental to the survival of wild populations. If such incidents would happen, they would take place in the supply countries and would not or hardly ever appear in interviews, fairs and trade statistics.

Moreover, comprehensive data on foreign hunting does not exist or very often just touches upon specific details, e.g. number of foreign hunters in a certain hunting district, so that secondary sources for facts and figures are scarce. In consequence, some assessments were made by plausible extrapolations, and some gaps and uncertainties will remain. They will be discussed in the respective chapters. Based on the collected data, facts and information, the study is an exploratory and descriptive investigation of the Eurasian tourist hunting market. A description of the methods used during the study is presented in Table 1.

Table 1
Overview of assessment and investigation methods

Subject of investigation	Methods
Extent of demand; review of tourist hunting industry in importing countries	• Interviews (mainly Germany, Italy, Spain, Belgium) with tourist hunters, agencies, and other stakeholders such as hunting associations or journalists • Joint survey of TRAFFIC Europe-Germany and the German Hunters Association (Deutscher Jagdschutz-Verband) among German tourist hunters • Visits to hunting fairs • Review of secondary sources, i.e. advertisements, literature, surveys
Species offered, prices	• Analysis of catalogues, price lists, advertisements, internet • Visits to hunting fairs • Review of secondary sources, literature
Extent of supply; review of tourist hunting industry in supply countries	• Literature review • Survey of experts in 38 Eurasian supply countries
Trade in trophies regulated by CITES	• Analysis of all CITES species trophy trade (1990 - 1996) between 18 importing countries and 38 exporting countries • Analysis of customs data and information • Survey of experts in 38 Eurasian destination countries

III. EURASIAN TOURIST HUNTING MARKET REVIEW

Grey Wolf *Canis lupus*. Credit: WWF-Canon/Jean-Louis Klein

Number of European tourist hunters

In terms of hunting, Europe is diverse. The hunting systems, the role of hunters in society, their motivations, their traditions and their way of viewing themselves, differ from country to country, and from region to region. In addition, the number of hunters and their personal investment in hunting differs. Table 2 provides an overview of the number and expenditures of European hunters, published by the Fédération des Associations des Chasseurs de l´U.E. (FACE) after a study by Pinet (1995). The European Union has about 6.2 million hunters, approximately 1.7% of the total EU population. Including Switzerland and Norway, there are about 6.4 million hunters in the 18 European 'demand' countries as defined for the purpose of this study.

For part of the EU, FACE gives an estimate of the direct expenditures of hunters for hunting (Table 2). Expenditures include regular costs (administration, insurance, taxes), rent of hunting districts or license fees, costs for equipment, dogs, and travel, and they include the expenditures for travel to hunt abroad. Pinet (1995) estimates the average personal expenditure of an EU hunter to be about € 1 500 annually, meaning an extrapolation of nearly € 10 000 million per year spent by hunters in Europe. The share of expenditures for hunting abroad is estimated at € 131 million.

Table 2
Number of hunters and expenditure (€) by European hunters within Europe

	number of hunters[1)]	percentage of population	hunters per km≤	annual expenditures for hunting [1)](€)
EU				
Austria	110 000	1.41	1.31	120 300 000
Belgium	29 000	0.29	0.81	235 500 000
Denmark	177 000	3.47	4.11	
Finland	300 000	5.96	0.89	173 000 000
France	1 650 000	2.89	3.00	1 950 100 000
Germany	338 000	0.42	0.95	736 300 000
Great Britain	625 000	1.12	2.56	4 013 400 000
Greece	293 000	2.84	2.22	
Ireland	120 000	3.43	1.71	63 500 000
Italy	925 000	1.62	3.07	
Luxembourg	2 200	0.55	0.85	
Netherlands	33 500	0.22	0.81	
Portugal	300 000	3.00	3.37	149 600 000
Spain	1 000 000	2.56	1.98	27 000 000
Sweden	320 000	3.64	0.71	174 000 000
subtotal EU	**6 222 700**	**1.70**	**1.92**	**>7 642 700 000**
non EU				
Malta	14 000	4.00	44.40	
Norway	170 000	3.95	0.52	
Switzerland	30 000	0.43	0.73	
subtotal non EU	214 000	2.19	0.63	
total European demand countries	**6 436 700**	**1.95**	**1.28**	**estimated order of magnitude ~ 10 000 000 000**

1) Source: Fédération des Associations de Chasseurs de l`U.E. (FACE) after a reprint in DJV (1999).

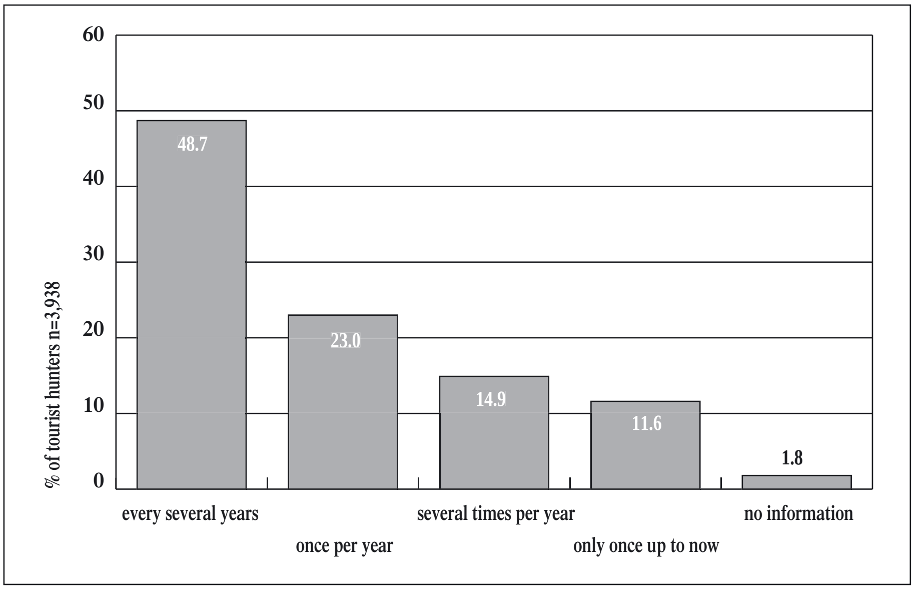
Concerning tourist hunting, Pinet (1995) estimates that about 30% of the European hunters travel abroad for hunting. For Germany, in a reader survey conducted by a German hunting journal in mid 1998 (Conrad, 1998), 33% of the participating hunters stated that they hunted abroad (Conrad, 1999). Our interviews confirmed these estimates, but the formulated impressions give lower percentages for Austria, Belgium, Italy, and Spain. The number of tourist hunters differs from country to country, depending on factors such as the financial and economic situation, the regional hunting traditions, or the possibility of satisfying hunting needs at home (Lecocq, *in litt.*, 27 May 1999). In summary, it seems a plausible estimate that about 20 - 30% of all European hunters travel abroad for hunting, at least occasionally.

Preferences and characteristics of European tourist hunters

This information presented below is mainly based on data from Germany, supplemented by information from interviews and investigations in additional European countries. In 1999, a joint survey on tourist hunting was conducted by the German Hunters Association (DJV; Deutscher Jagdschutz-Verband) and TRAFFIC Europe-Germany (Hofer, 1999). A questionnaire was published in periodicals for hunters in ten German states. A total of 3 961 tourist hunters filled in and returned the questionnaire.

Of all respondents, 48.7% hunt abroad "every several years", which does not necessarily mean that they hunt abroad regularly. However, about 38% of all respondents stated that they hunt abroad regularly, i.e. once or several times per year (Figure 2). These results correspond well with the reader survey previously mentioned (Conrad, 1999), where more than 50% of the tourist hunters indicated that they hunt abroad every several years, nearly one third once per year and about 14% several times per year. For Europe, Pinet (1995) estimates that about 50% of the European tourist hunters hunt abroad once or twice in their life, and 50% hunt abroad regularly.

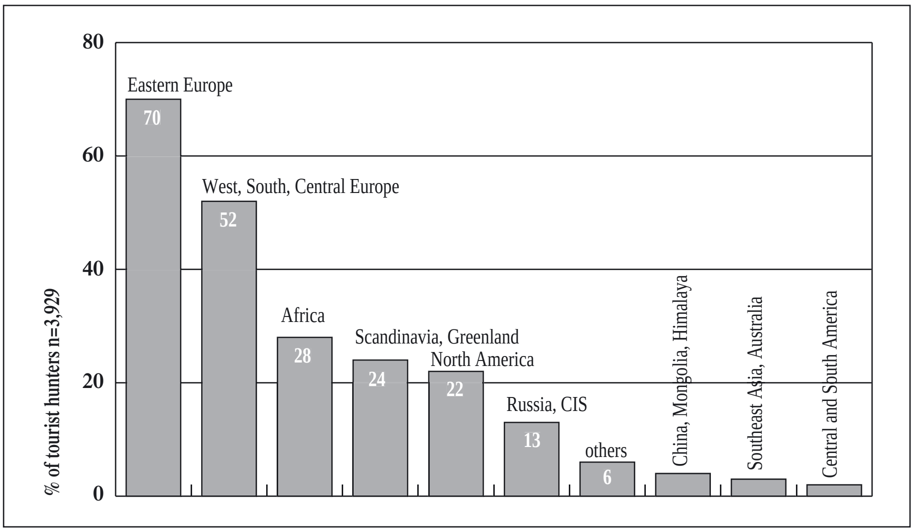
Figure 2
How often do German tourist hunters hunt abroad?



Source: DJV and TRAFFIC, 1999.

The majority of German tourist hunters are oriented towards neighbouring European countries (Figure 3). This is confirmed by Conrad (1999), Drengk (pers. comm., 17 September 1999), and Lechner (pers. comm., 20 July 1999). A question on the destination of the last foreign hunt revealed that 47% of German tourist hunters hunted in Eastern Europe, and 60% hunted in the countries covered by this study. Concerning the destination preferences, some national differences between tourist hunters are visible. Italian tourist hunters mainly choose European destinations, and are not interested in North America. Instead, South America and Cuba, in particular, are popular countries for hunting (Rocco, 1999). In Spain about half of the tourist hunters prefer North America (Herrero and Blanco, 1999), and the Benelux hunters seem to be much more oriented towards Africa than hunters from other countries (Van Krunkelsveen, 1999).

Figure 3
German tourist hunters have been hunting in...



Source: DJV and TRAFFIC, 1999.

German hunters clearly prefer those species groups that are well known from hunting in Germany: ungulates and small game (Table 3). The Spaniards also are mainly ungulate hunters abroad (Herrero and Blanco, 1999). Italians, in contrast, are mainly bird hunters. The main Eurasian destinations for Italian tourist hunters are, for example, Hungary, the Danube delta, and Albania (Rocco 1999).

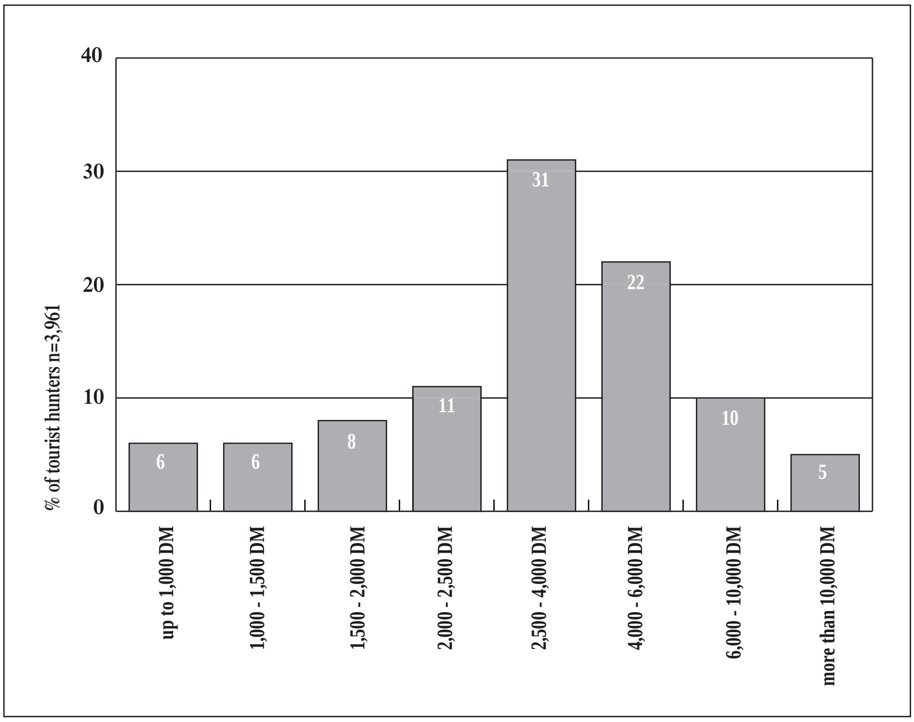
Table 3
Species preferences of German tourist hunters

Species groups	% of tourist hunters who have already hunted abroad for	% of tourist hunters who would like to hunt abroad for
cervids	81.8%	41.5%
wild pigs	60.3%	30.7%
small game, waterfowl	45.8%	19.4%
antelopes, gazelles	28.7%	17.4%
wild sheep and goats	28.4%	17.6%
big game carnivores	18.5%	15.7%
horses	9.0%	3.8%
wild cattle	9.2%	13.9%
others	8.4%	3.3%
elephants	2.0%	2.6%

Source: DJV and TRAFFIC, 1999.

More than 50% of German tourist hunters spend between DM 2500 and 6000 (appr. € 1250 to 3000) per hunt. Our interview with agency representaives revealed about € 2000 as an average price per hunt in general, for hunts in Eurasian destinations the average is lower, at € 1500. These prices include fees for the hunt and the trophy, travel costs and additional costs such as customs and other fees.

Figure 4
Average expenditure of German tourist hunters per hunt (all inclusive)



Source: DJV and TRAFFIC, 1999.

Table 4 indicates that German tourist hunters select their hunts abroad mainly according to their desire to hunt for a certain species in a certain country/landscape and that they favour those offers with a good chance of hunting success (Table 4). The other possible motivations obviously influence the decision process as secondary criteria for selection.

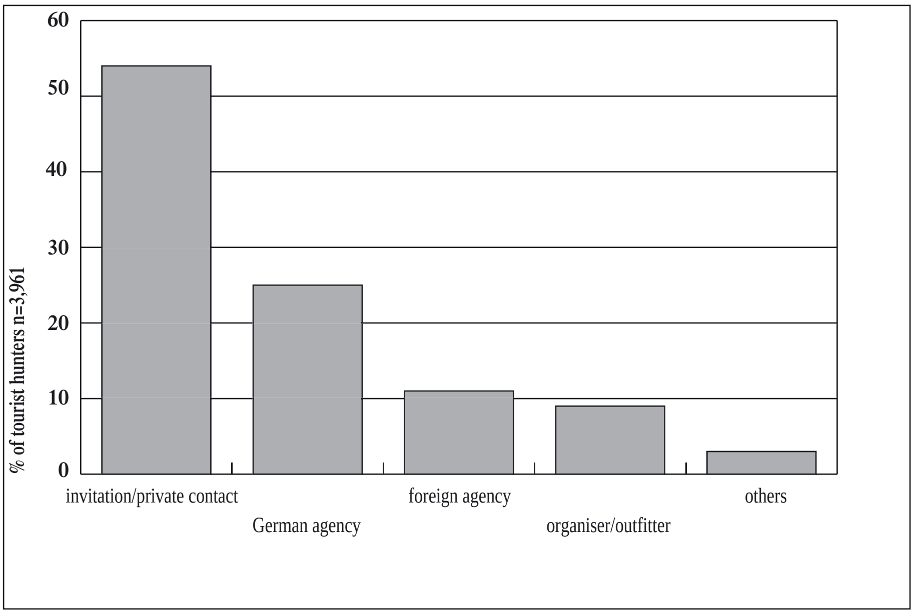
Table 4
Criteria used by German tourist hunters to select trips

Criteria indicated for selection of the last hunt (multiple answers possible)	# of tourist hunters	% of tourist hunters
certain (desired) game species	2 314	58.4%
attractive destination country	1 624	41.2%
good chance of hunting success	867	22.0%
poor possibility to hunt at home	612	15.5%
comfortable holiday with hunting opportunities	589	14.9%
certain hunting method	567	14.4%
physical and psychological challenge	463	11.7%
recommended by reports, friends	446	11.3%
inexpensive special offer	433	11.0%
potential for high trophy quality	398	10.1%
other criteria	205	5.2%

Source: Tourist hunting 1999. Joint survey of DJV and TRAFFIC.
Note: n = 3 961.

A considerable part of the German tourist hunting market seems to materialise via private contacts (Figure 5). A further indication for that is the immense amount of private advertisements and offers in hunting journals, in Germany as well as in other European countries. The results of the survey, moreover, show that those hunters who indicated travel via private contact also indicated lower average expenses per travel. The share of commercial and private arrangements differs according to the destination (Table 5).

Figure 5
The last hunt of German tourist hunters was arranged via...



Source: DJV and TRAFFIC, 1999.

Table 5
Share of private/agency arrangement per destination of German tourist hunters' last hunt

Destination of last hunt	% private arrangement	% agency arrangement
Scandinavia/Greenland	88	12
Western, Southern, Central Europe	78	22
Africa	53	47
North America	40	60
Eastern Europe	36	64
Russia/CIS	28	72

Source: DJV and TRAFFIC, 1999.
Note: "Private arrangement" refers to arrangements made via personal contact, where there is no involvement of agencies. "Agency arrangements" refers to entities like agencies and organisers (who both can be single persons) that work for hunting tourism on a commercial basis. "Private arrangements" can be operated on a commercial basis, too, but must not necessarily be.

Agencies, product design and pricing

European tourist hunting agencies

Agencies that offer hunting trips and safari hunts were identified by analysing advertisements in hunting journals in Belgium, Germany, Italy, and Spain. Two fairs on hunting and fishing (Munich, 20-26 April 1998, and Dortmund, 26-27 January 1999) were visited in Germany, and one in Spain (Ficar, 19-20 February 1999).

In Germany, about 100 agencies advertise in hunting magazines. In Italy, 40 agencies were identified, but only a small portion seem to operate continuously and professionally. The survey revealed that not more than four agencies dominate the Austrian market (Lebersorger, pers. comm., 3 May 1999), four dominate the Belgian market (Van Krunkelsveen, 1999), five to ten prevail in the German market (Krawehl, pers. comm., 17 September 1998), and only a few in the Italian and the Spanish markets (Rocco, 1999; Herrero and Blanco, 1999).

Agencies may roughly be classified as:

- professional agencies offering a complete spectrum of hunting trips to destinations all around the world;
- professional agencies specialising in certain destinations;
- individuals acting as agents, sometimes as a second job,

There seems to be considerable fluctuation. Many small and specialised agencies in particular cannot be found a year after an advertisement was published, or names and addresses change rapidly. These agencies often propose very special arrangements and target a narrow market segment. The market seems competitive - at least in Germany. There is not much co-operation between the agencies. Some German agencies tried to co-operate by forming an association early in the 1990s, but this effort failed. This is likely to be due to competition between agencies, and to people who took the opportunity to live on the experiences and ideas of others, rather than contributing to working for common interests (Lechner, pers. comm., 20 July 1998). Presently, a few big companies appear to aim at expansion and internationalisation. They open up branches in other countries or try to buy out smaller companies.

Tourist hunting has a high personal, emotional value. The more valuable the hunt, the more contact, confidence, and negotiation will be expected by the prospective client. The hunter wants “his” hunt to perfectly meet his expectations. Dealing with valuable hunts is compared to trading antiques (Lechner, pers. comm., 20 July 1998). Besides the cost-benefit factor, hunters will also look at the quality of their relationship with the agency, and the trust that they can put in the agency. These aspects determine further or repeated bookings.

Product design

The hunts that are marketed by the agencies are diverse and designed as a fine-tuned combination of many elements. There are offers that focus on luxury trips, good trophy quality, and high chances of success. Others emphasise adventure and physical challenge. Some stress the opportunity of combining a family holiday with hunting. Elements of tourist hunting offers can be:

Hunt	Travel	Stay
• species or species combination • destination country/region • hunting methods • organisation • guide • hunting license • insurance • trophy preparation	• tickets • transfer to hunting area • visa • gun/rifle import or transit documents • CITES documents • veterinary certificate • trophy transport	• food and accommodation • translation services • transport • cultural or other accompanying programs

The particular arrangements shape the attractiveness and price of the offer. Offers can roughly be classified into three categories:

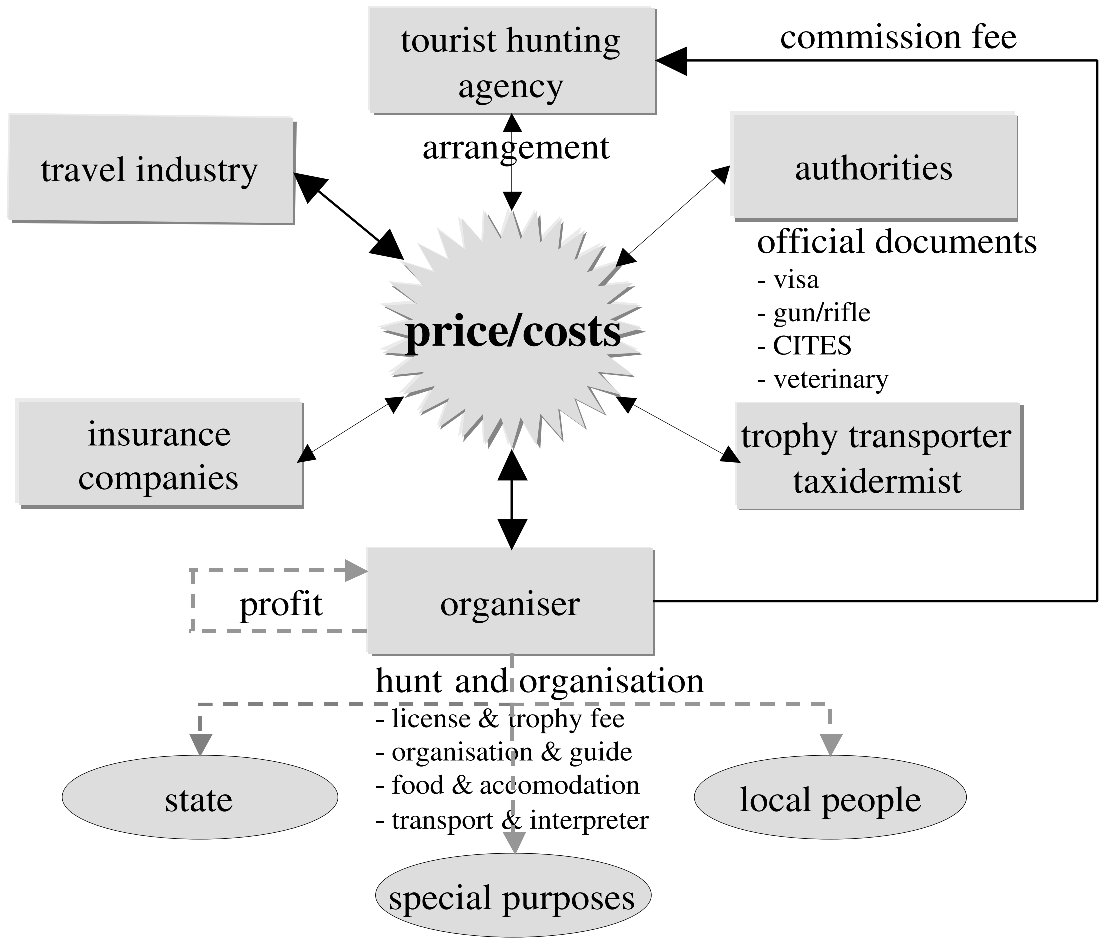
- all-inclusive hunts;
- arrangements that leave some choice to the hunter (e.g. concerning the trophy quality, the travel arrangements, the quality of accommodation);
- and individual arrangements.

Pricing of tourist hunts and money flow

Figure 6 shows both the main components of the price of a foreign hunt, and the money flow. Any of the particular components can, but must not necessarily, be included in the price given in the offer, but have to be paid by the hunter. Analysing the offer reveals that as an overall average, the hunt itself makes up one third of the price, the second third is for travel costs, and the supplementary costs comprise the final third. But of course there is a wide range, depending on the distance of the destination, and the species to be hunted. For their service, the agencies charge a fee from the hunter of about € 75 to 200. Their main income comes from the commission fees paid by the respective organisers for the hunts sold. Commission fees amount to approximately 10 - 20% of the hunt's value (Krawehl, pers. comm., 17 September 1998). To what extent and for which purposes the organisers re-invest the money they generate, cannot be determined.

One important element of the price is the trophy fee, which is the price the organiser sets for the cull of a certain specimen. Depending on the country and hunting system, the trophy fee sometimes set by an authority. It can be either a fixed price, or progressive according to trophy quality, which is mostly the case with large carnivores and antlers. Moreover there can be a fee for wounding an animal, a repayment if the hunt is not successful, a (reduced) fee for a second cull during the booked hunt.

Figure 6
Elements of prices and money flow



BOX 1: TROPHIES AND TROPHY APPRECIATION SYSTEMS

According to a definition in the Encyclopedia Britannica, the word "trophy" has its roots in the Greek tropaion, from trope, "rout". In ancient Greece, it referred to a memorial of victory set up on the field of battle at the spot where the enemy was defeated. The "trophy" consisted of captured weapons and standards ('military flags') hung upon a tree or stake, in the semblance of a man, and was inscribed with details of the battle along with a dedication to a god or gods. After a naval victory, the trophy, composed of whole ships or their beaks, was laid out on the nearest beach. To destroy a trophy was regarded as a sacrilege since as an object dedicated to a god, it must be left to decay naturally.

In the context of hunting, the term trophy is used for special parts of the bagged animal that are keepsakes for the hunter. Trophies are used as wall decorations or as ornaments, as talismen or jewellery.

The most important trophy items of mammal species are listed below. There are other types of trophies for birds or fish.
- antlers and horns, mostly with the skulls
- teeth: mainly canines and molars of carnivores; also tushes of Red Deer, tusks of Wild Boar or elephant; front teeth of rodents
- claws
- tails
- bones: e.g. skulls, penis bone
- skin/coat/hide
- hair: e.g. the long back hairs of Chamois, Red Deer, Wild Boar
- abnormalities: e.g. wig antlers
- stuffed heads or complete animals

Trophy appreciation is in the context of trophy hunting widely used for pricing. Many national or species specific trophy appreciation systems exist. According to Lechner (1995), there are five international standards or systems:

• Safari Club International (SCI)
The most comprehensive and popular system; there are standards to measure antlers or horns, skulls of carnivores, elephant tusks, or crocodiles. The system is designed to be applicable to all trophy species worldwide and is based on objective measures such as length, diameter and weight. On a biennial basis SCI publishes the "SCI-Recordbooks for Trophy Animals", one for Africa and one for the other continents. The recordbooks only list records bagged by SCI members.

• Conseil International de la Chasse (CIC)
This system is also comprehensive. Today this system is primarily applied on the European continent for the antlers/horns of European species, and for the carnivores Bear, Wolf and Lynx. It also takes into account some subjective criteria, e.g. colour or markings.

• Rowland Ward
This system was primarily developed to measure African antelope trophies, and has been in use for over one hundred years.

• Boone & Crocket Club
This system is based on North American trophies; the standards have not changed since 1950.

• Norman Douglas
Most trophies in Australia and New Zealand are appreciated according to this system.

The example of the Brown Bear illustrates the differences in pricing strategies (Table 6). Bulgaria and Romania apply progressive accounting by trophy quality and according to a nationally standardised scheme. Estonia and Slovakia also value trophy quality, but by a few weight classes. Some districts in Russia charge by weight classes, but the country also has offers that set a fixed fee. Kazakhstan and Mongolia solely charge fixed fees for a bear cull and trophy.

Table 6
Eurasian trophy prices for Brown Bear (€), 1998 - 2000

Country	Price according to trophy quality	Fixed fee (€)	Fee for wounding	Repayment if no success
Bulgaria	2 800 to 8 700 *(+150 per add. CIC)* *(300 CIC to 400 CIC)*	1 500		
Romania	1 700 to 8 300 *(+50 per add. CIC)* *(200 CIC to 400 CIC)*		1 400	
Estonia	2 100 or 2 800 *(<200 kg or >200 kg)*			
Slovakia	1 500 to 3 100 *(<70 kg to >130 kg)*		1 500	
Russia	2 200 or 2 800 *(<200 kg or >200 kg)*	2 100	700	1 900
Kazakhstan		2 600	1 300	
Mongolia		2 300		

Source: Catalogs and pricelists.
Note: Trophies in some countries are evaluated according to the CIC appreciation system. For example in Bulgaria, Brown Bear is classified with 300 CIC points, and the cost is € 2 800. The price increases up to € 8 700 for trophies with 400 CIC points. If trophy quality exceeds 400 CIC points, € 150 are charged for each additional CIC point.

Eurasian mammals offered for tourist hunting on the European market

The list of species offered from the 38 supply countries covered by this survey has been compiled from advertisements (including internet), catalogs and price lists (Table 7). The price offers come from the four major agencies in Belgium for 1998/99, 30 agencies in Germany 1998/99; 40 agencies in Italy 1999; and 20 agencies and hunting magazine advertisements in Spain. The 44 species that could clearly be taxonomically identified are listed in Table 7. The listing is limited to Carnivora and Artiodactyla, the two most important groups for tourist hunting, and to the 38 supply countries. Apart from the Carnivora and Artiodactyla, there are only a few other mammal species offered: Marmot, (probably Bobac Marmot *Marmota bobac*) in Mongolia, Beaver *Castor fiber* in Lithuania, Muskrat *Ondatra zibethica* in Hungary, and rabbit and hare in Eastern European countries.

Table 7 covers a limited segment of the foreign hunting market. It comprises official/legal offers of a sample of agencies over a two-year period, 1998 and 1999. It represents the main share of the market, but does not cover illegal offers or rarities, which need a more extensive investigation. A review of selected information from previous years, may provide an indication of what could be available to foreign hunters. For example, Bactrian Deer *Cervus elaphus bactrianus* (CITES Appendix II) may be available, as two licenses were granted by Uzbekistan in 1995 (Chestin, 1998). Kulan *Equus hemionus* (CITES Appendix I) may be available, as 100 licences were granted to foreign hunters by Turkmenistan in 1993/1994 (Resolution No. 91 of the Minister of Nature and Environmental Protection, in Chestin, 1998). Turkmenistan also granted two licenses for Leopard *Panthera pardus* (CITES Appendix I) to foreign hunters in 1993/1994 (Resolution No. 91 of the Minister of Nature and Environmental Protection, in Chestin, 1998). Further, Tiger *Panthera tigris* (CITES Appendix I), offers have been found in Russian advertisements some years ago and there are indications that an American bid USD 250 000 for Tiger hunting (Krawehl, pers. comm., 17 September 1998). Snow Leopard *Uncia uncia* (CITES Appendix I) offers can be found in Russian advertisements (A. Vaisman, *in litt.*, 5 May 1999), and Tien Shan Brown Bear *Ursus arctos isabellinus* (CITES Appendix I) may possibly be offered in Tadjikistan (Chestin, 1998).

Table 7
Eurasian mammals offered for tourist hunting by selected European agencies, 1998-1999

Italicized subspecies not offered, but listed for completeness; (+) can be higher according to trophy quality; (inc) including hunt/stay, no mere trophy price given.

scientific name	english name	price €	CITES	EU Reg. 338/97	IUCN (1996) Red List
Carnivora					
Alopex lagopus	Arctic fox	90	-	-	-
Canis aureus	Golden jackal	25 - 100	III	C	-
Canis lupus	Grey wolf	0 - 1 200	II, I	A	removed 1996
Felis silvestris	European wildcat	25 - 150	II	A	-
Gulo gulo	Wolverine	280 - 920	-	-	VU A2c
Lynx lynx	Eurasian lynx	670 - 1 950	II	A	-
Martes foina	Beach marten	100	III	C	-
Martes martes	Pine marten	0 - 100	-	-	-
Martes zibellina	Sable	100	-	-	-
Meles meles	Badger	20 - 60	-	-	-
Mustela lutreola	European mink	5 - 50	-	-	EN A1ace
Mustela putorius	European polecat	25 - 50	-	-	-
Nyctereutes procyonoides	Raccoon dog	0 - 90	-	-	-
Ursus arctos	Brown bear	1 400 - 8 700(+)	II, I	A	-
Vulpes vulpes	Red fox	0 - 70	-	-	-
Artiodactyla					
Alces alces	Elk, Moose	500 - 6 460(inc)			
A.a.alces	European moose		-	-	-
A.a. pfitzenmeyeri	Sibiran moose		-	-	-
Bison bonasus	European bison	1 550 - 5 050(+)	-	-	EN A2ce C2a
*Bos mutus**	Yak	3 200 (inc)	I	A	VU A1d2d C1
Budorcas taxicolor	Takin	24 050	II	B	VU A2cd
Capra aegagrus	Wild goat	1 850 - 3 850(inc)	-	-	VU A2cde
Capra (ibex) caucasica	Kuban or West caucasian tur		-	-	EN A1d2cde
Capra cylindricornis	Daghestan or East caucasian tur	1 800 - 2 200	-	-	VU A1d2cde C1
Capra falconeri	Markhor	13 800 - 36 800	I	A	EN A2cde
Capra ibex	Alpine ibex		-	-	LR lc
Capra (ibex) sibirica	Sibirian ibex	1 000 - 5 100	-	-	LR lc
Capreolus capreolus	Roe deer	35 - 2 700(+)	-	-	-
Capreolus pygargus	Siberian roe deer	900 - 1 400	-	-	-
Cervus albirostris	White lipped or Thorold´s deer	11 800	-	-	VU C1
Cervus elaphus	Red deer	150 - 18 400(+)			
C.e.elaphus	European red deer		-	-	-
C.e.maral/sibiricus	Maral		-	-	-
C.e.xanthopygus	Isubra or Manchurian Wapiti		-	-	-
Cervus nippon	Sika Deer	150 - 1 450(+)	-	-	-

scientific name	english name	price €	CITES	EU Reg. 338/97	IUCN (1996) Red List
Dama dama	Fallow deer	4800 - 3 150(+)	-	-	-
Gazella subgutturosa	Goitered or Blacktailed gazelle	700	-	-	LR nt
Hemitragus jemlahicus	Himalayan tahr	8 750 - 12 550(inc)	-	-	VU A2cde
Moschus spp.	Muskdeer	1 400	II, I	B, A	VU A1cde/LR nt
Ovis ammon	Argali	10 250 - 50 150(inc)			
O.a.ammon	Altai Argali		II	B	VU A2cde C1
O.a.collium	Kazakstan Argali		II	B	VU A2cde C1
O.a.darwini	Gobi Argali		II	B	VU A2cde C1
O.a.hodgsonii	Tibetan Argali		I	A	VU A2cde
O.a.jubata	*Shansi, Northchinese Argali*		II	B	EN C12a D1
O.a.karelini	Tien-Shan Argali		II	B	VU A2cde C12a
O.a.nigrimontana	Karatau Argali		I	A	CR C2b
O.a.polii	Marco-Polo, Pamir Argali		II	B	VU A2cde C1
Ovis nivicola (spp.)	Snow sheep	3 550 - 10 600(inc)			
O.n.alleni	*Okhotsk Snow Sheep*		-	-	LR lc
O.n.borealis	Putoran, Norilsk Snow Sheep		-	-	VU D2
O.n.lydekkeri	Yakut Snow Sheep		-	-	LR lc
O.n.nivicola	Kamtchatka Snow Sheep		-	-	LR nt
Ovis orientalis	Mouflon, Urial	300 - 12 800(inc)			
O.o.arkal	Transcaspian Urial		II	B	VU A2cde
O.o.bocharensis	Bukhara Urial		II	B	EN A1cde C12a
O.o.cycloceros	*Afghan Urial*		II	B	VU C1
O.o.gmelinii	Armenian Mouflon		-	-	VU A2cde
O.o.isphahanica	Esfahan Mouflon		-	-	VU A2c
O.o.laristanica	Laristan Mouflon		-	-	VU A2c
O.o.musimon	European Mouflon		-	-	-
O.o.orientalis	Red Sheep		-	-	not eval.
O.o.punjabiensis	*Punjab, Salt Range Urial*		II	B	EN A1cde C12a
O.o.severtzovi	Severtzov´s Urial		II	B	EN A2cde C2b
O.o.vignei	*Ladakh Urial, Shapu*		I	A	EN A2cde C12a
Procapra gutturosa	Mongolian or Whitetailed gazelle	450	-	-	LR nt
Procapra picticaudata	Tibetan gazelle		-	-	LR nt
Pseudois nayaur	Blue sheep	2 650 - 8 600 (inc)	-	-	LR nt
Rangifer tarandus	Caribou, Reindeer	920 - 1 100	-	-	-
Rupicapra rupicapra	Chamois	550 - 2 850(+)	-	-	LR lc
Saiga tatarica	Saiga antelope	1 000	II	B	VU A1a
Sus scrofa	Wild boar	150 - 1 650(+)	-	-	-

** offered in Bulgaria, introduced population presumably extinct*

The most attractive carnivores for tourist hunting are Wolf *Canis lupus* and Brown Bear *Ursus arctos*. Special hunts for these species are organised and offered. Bear populations are easy to manipulate from the perspective of hunting and the success rate is significant, providing adequate effort and time are allocated. For wolves, there is a specific hunting method, “sewelling” or “beating with flags”, which is of interest for some hunters and possibly improves the chance for success. (This hunting method has already been used during the Middle Ages for hunting wolves and other species: An area where wolves have been tracked is surrounded by scraps of cloth, which are lined up on ropes. Then the wolves are driven. The wolves do not flee through the scraps of cloth, so their movements can be manipulated.)

Lynx *Lynx lynx* and Wolverine *Gulo gulo* are difficult to hunt and the risk of not being successful is very high. So no special hunts are organised, but many offers stress these species as additional possibilities. Many small carnivores are offered as potential species. They can be taken for free or for a small extra fee if there is the possibility during the hunt.

A minimum of 29 ungulate species is offered for tourist hunting within the 38 Eurasian supply countries reviewed during this study. Further more, according to the number of offers, the important species are Moose *Alces alces*, Roe Deer *Capreolus capreolus*, Red Deer *Cervus elaphus*, Mouflon *Ovis orientalis musimon*, and Wild Boar *Sus scrofa*. They are widely distributed in abundant populations. In general, their behaviour and ecology is well known. They have a “history” in hunting and there are many techniques that allow effective management. They can be hunted with a good guarantee of success. European hunters are familiar with these species and with the hunting methods. In general, the eastern populations or subspecies of these species result in bigger trophies than the Central European ones. Furthermore, according to the number of offers, all Caprinae are of relevance for the tourist hunting business. The remaining species are either mentioned rarely or in combination with hunting of other species.

There is a broad range of prices, which reflects the rarity of the species or the difficulty to hunt them, as well as the differences in trophy quality. The lower price limit for many species concerns females or juveniles (e.g. Moose, the common species of deer, or Wild Boar). The upper limit is for high quality trophies, mostly evaluated according to standards of the Conseil International de la Chasse (CIC). Within the Argali *Ovis ammon* and Mouflon/Urial *Ovis orientalis* subspecies group, price range also includes differences in subspecies or even populations. The prices given in Table 7 are those from published offers. Especially for the high profile and high price species like sheep, the upper limit could be considerably higher. It is known from Central Asia that sheep hunts are auctioned in USA at up to USD100 000 (Chestin, 1998).

BOX 2: EURASIAN WILD SHEEP AND TOURIST HUNTING

Wild sheep are both a conservation issue on the one hand, and a highly valued trophy species on the other. Within Eurasia, Urial and Argali are the most attractive trophy species. They are mainly distributed in Central Asia, Mongolia, and China. The Urial occurs west of the mountainous zone extending from Uzbekistan to northern Pakistan, as far as Iran and the Caspian coast. Argali occur east of this line. The two species occur in several subspecies, which are the objects of interest for hunters. Most of the sheep subspecies are protected by law in the Red Data books of the distribution countries. At the same time, in the CIS as well as in China and Mongolia, legal provisions exist to issue hunting permits for at least some of the subspecies for the purpose of trophy hunting or research. As taxonomy is constantly debated and and a system of subspecies is under permanent discussion, it is frequently difficult to assign a taxonomic classification to a common name used for a trophy hunting offer, especially because sometimes regional names are used. A brief overview of common names frequently used in trophy hunting offers for certain subspecies, is given below. As a reference, the taxonomy used by Shackleton (1997) for the IUCN Caprinae Action Plan has been adopted.

- *O. orientalis arkal:* Transcaspian Urial, Ustyurt Urial, Ustyurt sheep, Ustyurt Arkal
- *O. o. bocharensis:* Bukhara Urial, Bukharskiy Argali, Tadjik Urial
- *O. o. cycloceros (= blanfordi):* Afghan Urial, Turkmen Urial
- *O. o. punjabiensis:* Punjab Urial, Salt range Urial
- *O. o. severtzovi:* Severtzov´s Urial, Kizil-Kum Urial, Severtzov Argali
- *O. o. vignei:* Ladakh Urial, Shapu
- *O. ammon ammon:* Altai Argali
- *O. a. collium:* Kazakstan Argali, Semipalatinsk Argali, Karaganda Argali, Saur Argali
- *O. a. darwini:* Mongolian Argali, Gobi Argali;
- *O. a. hodgsonii* (=dalai-lamae, adametzi): Tibetan Argali, Altunshan Argali;
- *O. a. jubata:* Shansi Argali, Northern Chinese Argali, Gansu Argali;
- *O. a. karelini* (=littledalei, sairensis): Tien Shan Argali, Djungarian Argali, Littledale Argali, Kulja Argali, Saur Argali
- *O. a. nigrimontana:* Kara Tau Argali
- *O. a. polii:* Marco Polo Argali, Pamir Argali

Data and information about population status are scarce, not to mention any ideas about the ecological and economic implications of trophy hunting. There is considerable uncertainty about the quantity of annual licenses issued for trophy hunting and about the amount of animals actually and officially shot by foreign hunters. Data that could be compiled within the scope of this project, are shown below:

- *O. o. arkal:*
  Iran: no population estimate (Shackleton, 1997), hunts offered
  Kazakhstan: population 5 - 6 000; 20 licences, 5-19 shot annually (Fedosenko, 1999);
  Turkmenistan: ?
  Uzbekistan: 2 licences annually (Chestin, 1998)
- *O. o. bocharensis:* population < 1 200 (Shackleton, 1997);
  Tadjikistan: population around 1 000 (Shackleton, 1997)
  Turkmenistan: ?
  Uzbekistan: 2 licences annually (Chestin, 1998)
- *O. o. cycloceros (= blanfordi):* population > 12 000 (Shackleton, 1997);
  Afghanistan: no population estimate (Shackleton, 1997), no hunts
  Iran: ?
  Pakistan: population 4 000 - 5 000 (Shackleton, 1997)
  Turkmenistan: population 10 500 - 11 000 (Shackleton, 1997), 20? licences, 10-13 shot annually (Fedosenko, 1999)
- *O.o. punjabiensis:* population < 2 000 (Shackleton, 1997)
  Pakistan: population (= world population) < 2 000, no hunts (Shackleton, 1997)
- *O. o. severtzovi:*
  Uzbekistan: population (= world population) >2 000 (Shackleton, 1997), ~ 1 300 (Ivanovic, 1996); 2 licences (Chestin, 1998);
- *O.o. vignei:* < 2 100 (Shackleton, 1997)
  India: population 1 000 – 1 500, no hunts (Shackleton, 1997)
  Pakistan: population <600 (Shackleton, 1997)
- *O. a. ammon:*
  China: population only several hundred (Shackleton, 1997)
  Mongolia: population <20 000 (Shackleton, 1997), < 30 licenses annually (Ivanovic, 1998);
  Kazakstan: no hunts (Chestin, 1998)
  Russia: no hunts (Ivanovic, 1996)
  Kazakstan and Russian population together 450 - 700 (Shackleton, 1997)
- *O. a. collium:*
  Kazakstan: population (= world population) >8 000 (Shackleton, 1997); 20 licences, ~ 10-12 shot annually (Chestin, 1998; Fedosenko, 1999); some percentage of the income from trophy hunting is used for Argali research and conservation, Ivanovic (1996) gives the share with 50%, Kalmykov (1997) between 13% of USD 154 070 in 1993 and 45% of USD 173 700 in 1994.
- *O. a. darwini:*
  China: population 2 100 – 2 800 (Shackleton, 1997)
  Mongolia: population 3 000 (± 1 132) (Shackleton, 1997)

- *O. a. hodgsonii (=dalai-lamae, adametzi):*
  China: population 29 000 – 36 000 (Shackleton, 1997)
  India: population 200, no hunting (Shackleton, 1997)
  Nepal: no population estimate, no hunting (Shackleton, 1997)
- *O. a. jubata:*
  China: population (= world population) 600 - 700, no hunting allowed (Shackleton, 1997)
- *O. a. karelini (=littledalei, sairensis):* population < 10 500 (Shackleton, 1997).
  China: population 6 000 – 8 000 (after Shackleton, 1997), few licences (Ivanovic, 1998)
  Kazakstan: 7 licenses from 1993-1994 (Chestin, 1998)
  Kirgistan: population 7 500; no licences (Chestin, 1998)
  Uzbekistan: 2 licenses in 1995(Chestin, 1998)
- *O. a. nigrimontana:*
  Kazakstan: population (= world population) ~ 250 (Shackleton, 1997); no licences (Ivanovic, 1998); before 1996, some scientific licenses were given to foreign hunters (Ivanovic, 1996)
- *O. a. polii:* population < 15 000 (Shackleton, 1997);
  Afghanistan: no recent population estimate (Shackleton, 1997), no hunts
  China: population 1 000 – 3 000 (Shackleton, 1997), no hunts
  Kirgistan: population 9 000 (Ivanovic, 1996), 7 - 8 000 (Fedosenko, 1999); 20 - 25 licences, 10 - 20 shot (Chestin, 1998; Fedosenko, 1999)
  Pakistan: population <200 (Shackleton, 1997), no hunts
  Tadjikistan: population (of the Pamir population) 10 000 (Fedosenko, 1999); 20 - 40 shot in 1992 (Chestin, 1998); 15 - 30 annually shot between 1988 and 1996 (Fedosenko, 1999)

Urial as well as Argali are CITES listed, mainly because trophy hunting is the dominating reason for trade. The taxonomic reference for CITES appendices (Wilson and Reeder, 1992) classifies Urial as *O. vignei* with nine subspecies.

- All Argali *Ovis ammon* are listed in CITES Appendix II, with the exception of *O.a. hodgsoni* and *O. a. nigrimontana*, which are Appendix I taxa. Within the EU, Argali are listed in Annex B or A (Regulation (EC) 338/97), according to the CITES listing.
- Urial *Ovis vignei* originally was listed in Appendix I. The Conference of Parties (COP10) in Harare in 1997 removed all *Ovis vignei* except the Ladakh sheep *Ovis vignei vignei* to Appendix II. At the same time, range states were encouraged to enforce legislation for all Urial subspecies comparable to Appendix II species (Anon., 1997). At COP11 in Nairobi in 2000, all subspecies of *Ovis vignei* were listed in Appendix II. *Ovis vignei vignei* is listed in Annex A and *Ovis vignei* is listed in Annex B of Regulation (EC) 338/97. Under CITES the following subspecies are recognized for *Ovis vignei: arkal, cycloceros, punjabiensis, severtzovi, vignei.*

The overview in Table 8 shows the offers of European agencies per destination country. For some of the countries, information from published offers were scarce (e.g. Albania, Nepal, or Slovenia) and it is likely that the agencies offer more species than noted in Table 8.

Table 8
Eurasian mammals offered for tourist hunting by selected European agencies, 1998/1999, per destination country

Italicized Ovis subspecies in 2nd column not offered, but mentioned for complete overview on occurring subspecies

scientific name	english name	AF[1]	AL	AM[2]	AZ	BA	BG	BT[2]	BY	CN	CZ	EE	FI[3]	GE[1]	HR	HU	IR	KZ	KG	LT	LV	MD[2]	MK	MN	NP	NO	PK	PL	RO	RU[4]	SE	SK	SI	TJ	TM	TR	UA	UZ	YU
Alopex lagopus	Arctic fox																													x									
Canis aureus	Golden jackal						x																													x			
Canis lupus	Grey wolf				x		x		x			x						x	x	x	x			x				x	x	x						x	x		x
Felis silvestris	European wildcat						x																	x					x										
Gulo gulo	Wolverine																							x						x									
Lynx lynx	Eurasian lynx											x								x	x			x					x	x						x			
Martes foina	Beach marten						x		x							x												x			x						x		
Martes martes	Pine marten						x					x									x							x			x						x		
Martes zibellina	Sable																													x									
Meles meles	Badger						x																	x					x	x	x								
Mustela lutreola	European mink																				x			x							x								
Mustela putorius	European polecat						x									x					x																		
Nyctereutes procyonoides	Raccoon dog								x			x				x				x	x			x				x											
Procyon lotor	Raccoon															x																							
Ursus arctos	Brown bear					x	x					x			x		x	x						x					x	x	x	x		x		x	x		
Vulpes vulpes	Red fox						x		x			x				x				x	x			x				x	x	x	x					x	x		
Alces alces	Elk, Moose																																						
A.a.alces	European moose								x			x	x							x	x			x		x		x		x	x						x		
A.a. pfitzenmeyeri	Siberan moose																													x									
Bison bonasus	European bison						x		x											x								x		x							x		
Bos mutus	Yak						x[6]												x																				
Budorcas taxicolor	Takin									x																													
Capra aegagrus	Wild goat																x[7]																			x			
Capra (ibex) caucasica	Kuban or West caucasian tur				x																									x									
Capra cylindricornis	Daghestan or East cauc. tur																													x									
Capra falconeri	Markhor																										x			x					x				
Capra ibex	Alpine ibex						x																																
Capra (ibex) sibirica	Siberian ibex				x					x								x	x					x			x			x									
Capreolus capreolus	Roe deer					x	x		x		x	x			x	x				x	x		x			x		x	x	x	x	x	x				x		x
Capreolus pygargus	Siberian roe deer									x								x						x						x									
Cervus albirostris	White lipped or Thorold's deer									x																													
Cervus elaphus	Red deer																																						
C.e.elaphus	European red deer					x	x		x	x	x	x			x	x				x	x		x					x	x	x		x					x		x
C.e.maral/sibiricus	Maral									x								x						x						x									
C.e.xanthopygus	Isubra or Manchurian Wapiti									x																				x									

scientific name	english name	AF[1]	AL	AM[2]	AZ	BA	BG	BT[2]	BY	CN	CZ	EE	FI[3]	GE[1]	HR	HU	IR	KZ	KG	LT	LV	MD[2]	MK	MN	NP	NO	PK	PL	RO	RU[4]	SE	SK	SI	TJ	TM	TR	UA	UZ	YU
Cervus nippon	Sika deer									x						x												x									x		
Dama dama	Fallow deer					x	x				x				x	x				x			x					x	x			x					x		x
Gazella subgutturosa	Goitered or Blacktailed gazelle																	x						x														x	
Hemitragus jemlahicus	Himalayan tahr																								x														
Moschus spp.	Muskdeer																							x															
Ovis ammon	Argali																																	x[8]	x[8]			x[8]	
O.a.ammon	Altai argali									x														x						x									
O.a.collium	Kazakstan argali									x																													
O.a.darwini	Gobi argali									x								x						x															
O.a.hodgsonii	Tibetan argali									x[9]																													
O.a.jubata	*Shansi, Northchinese argali*																																						
O.a.karelini	Tien-Shan argali									x[10]								x	x											x									
O.a.nigrimontana	Karatau argali																													x									
O.a.polii	Marco-Polo, Pamir argali									x									x											x				x					
Ovis nivicola (spp.)	Snow sheep																																						
O.n.alleni	*Okhotsk Snow sheep*																																						
O.n.borealis	Putoran, Norilsk Snow sheep																													x									
O.n.lydekkeri	Yakut Snow sheep																													x									
O.n.nivicola	Kamtchatka Snow sheep																													x									
Ovis orientalis	Mouflon, Urial																																	x[8]	x[8]			x[8]	
O.o.arkal	Transcaspian urial																x													x				x	x				
O.o.bocharensis	Bukhara urial																													x									
O.o.cycloceros	*Afghan urial*																																						
O.o.gmelinii	Armenian mouflon																x[11]																			x			
O.o.isphahanica	Esfahan mouflon																x																						
O.o.laristanica	Laristan mouflon																x																						
O.o.musimon	European mouflon						x				x				x	x							x					x	x			x							x
O.o.orientalis	Red sheep																x																						
O.o.punjabiensis	*Punjab, Salt Range urial*																																						
O.o.severtzovi	Severtzov' s urial																													x[12]									
O.o.vignei	*Ladakh Urial, Shapu*																																						
Procapra gutturosa	Mongolian or Whitetailed gazelle																							x															
Procapra picticaudata	Tibetan gazelle									x																													
Pseudois nayaur	Blue sheep									x								x							x														
Rangifer tarandus	Caribou, Reindeer																									x				x									
Rupicapra rupicapra	Chamois					x	x								x								x						x				x			x			x
Saiga tatarica	Saiga antelope																	x												x									
Sus scrofa	Wild boar		x		x	x	x		x	x	x	x			x	x	x	x		x	x		x	x			x	x	x	x	x	x				x	x		x

1 trophy hunting not possible by law.
2 no relevant information on offers.
3 not mentioned an introduced population of White-tailed deer *Odocoileus virginianus*, which is popular for foreign hunters.
4 includes offers for other CIS countries, if country not specified.
6 small population introduced during socialistic era, possibly extinct by poaching.
7 offers mention "ibex", which presumably means *Capra aegagrus*.
8 offers mention "wild sheep hunting".
9 also offered as *O.a. dalailamae* or *O.a. adametzi*.
10 also offered as *O.a. littledalei* or *O.a. sairensis*.
11 Iran also offers Kerman sheep, which presumably is *O.a. gmelini x cycloceros*.
12 also offered as *Ovis ammon severtzovi*.

Tourist hunting in Eurasian supply countries

The status and relevance of foreign hunting in the 38 selected supply countries for tourist hunters was assessed through a literature review and distribution of a questionnaire to 82 experts from governmental and non-governmental organisations for hunting and/or conservation. Some personal interviews were also conducted. Twenty-six of the 82 experts contributed information, which in many cases is incomplete. The personal interviews revealed that information is hard to get and sometimes does not exist. Information from literature is also very scarce, and is often very specific and limited.

Table 9 provides some basic information on the selected countries. In 35 countries, tourist hunting in general is possible. Afghanistan officially is closed for foreign hunters. No information could be obtained on Bhutan, but presumably there is no foreign hunting because of Bhutan´s restrictive tourism policy. In Georgia, hunting temporarily stopped in 1996 (with the exception of migratory bird hunting) in order to develop new hunting legislation; this has not yet been completed and therefore Georgia remains closed to all foreign hunters except those hunting migratory birds.

Table 9
Basic data about the selected Eurasian destination countries

country	ISO code	population (millions)*	area (1 000 km^2)*	population density (people/km^2)*	GNP (billion $)*	GNP per capita ($)*	entry into force of CITES (dd/mm/yy)	trophy hunting possible
Afghanistan	AF						30.10.1985	no
Albania	AL	3	27	119	2.5	750	-	yes
Armenia	AM	4	28	133	2.0	530	via Russia	yes
Azarbaidjan	AZ	8	87	87	3.9	510	21.02.1999	yes
Belarus	BY	10	207	50	22.1	2 150	10.08.1995	yes
Bhutan	BT						-	?
Bosnia-Hercegowina	BA						-	yes
Bulgaria	BG	8	111	76	9.4	1 140	16.01.1991	yes
China	CN	1 227	9 326	129	1 955.4	860	08.01.1981	yes
Croatia	HR	4	56	85	20.7	4 610	12.06.2000	yes
Czech Republic	CZ	10	77	134	53.5	5 200	01.01.1993	yes
Estonia	EE	1	42	35	4.8	3 330	22.07.1992	yes
Finland	FI	5	305	17	123.8	24 080	08.08.1976	yes
Georgia	GE	5	70	78	4.6	840	19.09.1996	temp. no
Hungary	HU	10	92	111	45.0	4 430	27.08.1985	yes
Iran	IR						03.08.1976	yes
Kazakstan	KZ	16	2 671	6	21.8	1 340	19.04.2000	yes
Kyrgystan	KG	5	192	24	2.0	440	via Russia	yes
Latvia	LV	2	62	41	6.0	2 430	11.02.1997	yes
Lithuania	LT	4	65	57	8.3	2 230	09.03.2002	yes
Macedonia	MK	2	25	77	2.2	1 090	02.10.2000	yes
Moldova	MD	4	33	132	2.3	540	via Russia	yes
Mongolia	MN	3	1 567	2	1.0	103	05.01.1996	yes
Nepal	NP	23	143	150	4.8	210	18.06.1975	yes
Norway	NO	4	307	14	158.9	36 090	25.10.1976	yes
Pakistan	PK	137	771	169	67.2	490	20.04.1976	yes
Poland	PL	39	304	127	138.9	3 590	12.03.1990	yes
Romania	RO	23	230	98	32.1	1 420	18.08.1994	yes
Russian Federation	RU	147	16 889	9	403.5	2 740	13.01.1992	yes
Slovakia	SK	5	48	111	19.8	3 700	01.01.1993	yes
Slovenia	SI	2	20	99	19.3	9 680	23.04.2000	yes
Sweden	SE	9	412	21	232.0	26 220	01.07.1975	yes
Tajikistan	TJ	6	141	42	2.0	330	via Russia	yes
Turkey	TR	64	770	80	199.5	3 130	23.09.1996	yes
Turkmenistan	TM	5	470	10	2.9	630	via Russia	yes
Ukraine	UA	50	579	89	52.4	1 040	29.03.2000	yes
Uzbekistan	UZ	24	414	55	23.9	1 010	18.10.1997	yes
Yugoslavia	YU						-	yes

**Source:* The World Bank World Development Report 1998/99

Regulatory, administrative and economic framework (legal and organisational setting) for tourist hunting in the Eurasian supply countries

The national framework of tourist hunting is defined by the particular hunting system and by the respective economic liberty to realize commercial structures and practises (not every country allows e.g. private persons to sell hunts to foreigners or to establish commercial enterprises for that reason). Two distinctive situations form the general constitution of a hunting system.

- District system: Hunting rights are tied to the land. the benefits from wildlife generally belong to the landowner. Even if the landowner does not fulfil the particular requirements set by law to manage and perform hunting by himself, or if he is not interested in it, he may benefit by leasing or selling his rights.
- License system: Any citizen has the right to hunt.The benefits from hunting generally belong to the public or to the state respectively. Hunters that fulfil the particular conditions pay a fee for exercising their right, mostly per animal hunted, into the common budget. The implementation of both systems in terms of administration, wildlife management, prerequisites for hunting, or control, is quite sophisticated and differs from country to country or even from region to region, as it is in some federal systems. There are various intermediate forms of both systems.

In general, the Central, Northern and some Eastern European states have hunting rights tied to the land. The southern and eastern neighbours, the Mediterranean countries, Russia and the Asian states, implement the license system. In Eastern Europe, as for example in Hungary, Poland, Bulgaria, Romania, or Ukraine, the hunting rights belong to the state, but the predominant part of the country is divided into hunting districts and the hunting rights are given to private co-operatives (e.g. 82% of the districts in Hungary (Kovács, undated)), to hunting associations, to the forest service, or other relevant users. They take over the management, but have to pay compensation to the state, for example for licenses.

Besides the general provisions set by the particular hunting system, tourist hunting needs a set-up of organisational structures and practises to keep up the business. The degree of state regulation defines the possibilities to develop the trophy hunting business. There may be restrictive regulations for reselling hunting rights/licenses, for pricing, for specific areas dedicated to tourist hunting, for harvest quota shares provided for foreigners, for bag limits, and so on. Or the state may promote foreign hunting by marketing or other supporting means.

Scandinavia
In Scandinavia, hunting is based on the district system, with some special arrangements for common lands and Same (Lapp) lands. Many districts are managed by the owner or leased by hunters or hunting co-operatives. They are responsible for wildlife management including planning of and adherence to the quota, and are supported and controlled by professional state institutions, such as the Directorate of Nature Management in Norway or the Finnish Game and Fisheries Institute. The holder of the hunting rights may allow anybody to hunt on his land who meets the national standards for hunters. He may sell hunts by himself directly to the customers or via an organiser or agency. He can also set prices for the trophy, organisation of the hunt, accommodation and so on. The only condition is that foreign hunting has to take place within the provisions of the hunting law and the hunting quota set for the district (T. Schandy, *in litt.*, 3 November 1998; M. Pirinen, *in litt.*, 8 January 1999).

Foreign hunting is handled quite liberally, and there is not much state involvement, either restrictive or supportive. The reason for this may be that Scandinavian hunters traditionally hunt for meat, and it is obvious for them to use the resources for their own needs. The wildlife management system presumably is the most scientific one on the Eurasian continent and is regarded as sustainable, based on high quality ecological knowledge. Foreign hunting is regularly occurring as a kind of supplementary source of income if it fits into the usual hunting practises of the respective district. Special activities undertaken for foreign hunting are exceptional. The number of commercial firms offering hunts is relatively small.

Baltic countries

In Estonia and Latvia, hunting districts are managed by the owner/user of the hunting rights. Many districts are rented by private hunting co-operatives, and some are managed by state hunting enterprises, about ten in each country. They set hunting quotas under control of a state administration according to censuses and other indicators, i.e. forest damage. They are free to sell hunts within the framework of the hunting law and quota, and set free market prices. Within the collectively managed districts, the harvest quota is distributed among the members. The local demand is high, so only a few hunts are re-sold to foreigners (T. Reindveer, pers. comm., 3 August 1998; T. Reindveer, *in litt.*, 3 November 1998; Z. Andersone, *in litt.*, 6 November 1998). Foreign hunting is mainly a matter of the state hunting enterprises. They contract with European agencies and organise tourist hunts. Through these special enterprises, the foreign hunting business is mainly run by the state. Lithuania in general runs a rather similar model, but with more state involvement. In 1996, the Ministry of Environment issued a regulation stating that only people with special skills are allowed to organise hunts for foreigners. There is also state regulation of prices (Vaiciunaite, *in litt.*, 24 November 1998).

Eastern Europe

Poland, Czech Republic, Slovakia, Hungary, Slovenia, Croatia, Bosnia-Hercegovina, Federal Republic of Yugoslavia, Macedonia, Romania, Bulgaria, Belarus, and the Ukraine organise hunting through the license system. In general, the holder of the hunting rights may act as an organiser for tourist hunts. While in Scandinavia a considerable number of districts is owned or leased by single persons, this is the exception in Eastern Europe. The majority of hunting districts are either managed by private hunting co-operatives, by chapters of the national hunting associations, or by the forest service. Concerning foreign hunting, the districts act relatively independently in terms of offers and services. They may be direct contractors of agencies offering the hunts on the European market. As it is quite inefficient for agencies to contract single districts, organisations evolved operating as intermediate organisers or pools. They act on behalf of a number of districts as organisers of tourist hunts and appear as contractors, so that agencies get access to several districts. The organiser pools can be commercial firms, state organisations, private non-profit organisations, or any intermediate types of entities.

In all these countries, the forest service plays a prominent role in wildlife management, hunting, and foreign hunting, either as a state authority essentially involved in the quota setting and control process, or as an important organiser, or both. In Poland, for example, the state forest service is responsible for setting the harvest quota for ungulates, and issues the licenses (Steinbach, 1999). At the same time, the forest service is an organiser of tourist hunts in a considerable number of hunting districts. Corresponding set-ups are found in Bulgaria, Romania, Ukraine, as well as the countries comprising the former Yugoslavia.

The tourist hunting business as part of hunting and wildlife management is actively taken into consideration by the state authorities. Hence, there are more specific regulations than in Scandinavia or the Baltic countries. The state regulates prices, so for example, as a protective minimum, revised game species and price lists are published annually in Bulgaria (K. Georgiev, *in litt.,* 3 November 1998). In Romania, a maximum of 30% of the harvest quota may be given to foreigners (S. Negush, pers. comm., 2 August 1998). Or indirect regulations exist as in Serbia and Montenegro, where the state agrees upon a price list suggested by the respective hunting unions of both federal countries (M. Paunovic, *in litt.,* 3 January 1999). In Poland, the organisers must be approved by the state (Steinbach, 1999).

Some of the Eastern European countries have a history of tourist hunting. During communism, it was a source of state income and foreign currency, for example in the former Yugoslavia, Poland, or Bulgaria. A lot of experience was gathered then, on how to produce high price trophies, and many artificial management practises were implemented such as artificial feeding, breeding stations, or introducing trophy species. Some of these practises are debatable from a conservation perspective, but shall not be further discussed in this report. Moreover, a number of these countries developed strategies to organise and market tourist hunts according to the wishes and needs of western hunters.

A very special system for tourist hunting can be found in Albania. Hunting districts are given in a prepayment process directly to commercial organisers. Act 7875/1994 and Regulation 2/1995 declare wildlife as a national property, and define game and protected species. The hunting terrain is divided into four categories: free hunting zones; breeding zones; hunting reserves; and fauna or nature reserves (Vraka, 1997). The General Directorate for Forestry and Pasture (GDFP) is the administration in charge of providing hunting licenses. Licenses are distributed through a tendering process and relate to a specific hunting zone. Licences for foreign hunters are mainly acquired through ten commercial firms. The price per hunting zone is approximately USD 5 200. This payment is a minimum as well as an advance payment. There is a fixed fee per hunted animal. If harvest exceeds the prepaid fee, the company has to compensate for the difference. If harvest does not add up to the prepaid fee, there is no return. Albanian hunters pay about USD 3.00 per hunt, foreign hunters about USD 30.00, plus the fee per bagged animal (Dr. A. Vaso, *in litt.*, 21 December 1998). The district forest directorates set the hunting quota per hunting zone, and control the hunts. They register and validate licenses, accompany the hunters, and assess the balance at the end of the day (Dr. A. Vaso, *in litt.,* 21 December 1998).

Russia and the CIS

Russia and the five Central Asian countries of the CIS (Kazakhstan, Kyrgystan, Tadjikistan, Turkmenistan, and Uzbekistan) cover a vast part of the Eurasian continent. Concerning economic, legal, and administrative development, this seems to be the most unsettled part of Eurasia. At the same time, it contains an extraordinary number of trophy species due to the diversity of ecosystems covered. In Russia, game is considered public property. Any hunter needs a state hunting document and has to pay an annual fee of approximately USD 2.00. In general, hunting is allowed everywhere, with the exception of specially protected areas. On public lands, any hunter has the right to hunt. Hunting is divided into licensed and common rule hunting. Licensed hunting means the hunter needs one license per hunted animal of an annually revised list of species, which includes all ungulates, bears, sable, otter, lynx, marten and beaver. Common rule hunting comprises mainly small game and birds that can be hunted without bag limits during defined hunting seasons. On part of the public land, hunting rights are given to specific users, for example hunting cooperatives, who manage these districts as special game areas. Hunting there requires the permission of the user, and the user is free to resell licenses or set up specific regulations, for example, bag limits. The user is also free to set fees for hunting as well as for the services provided in its game area. This system in general has been adopted by the CIS countries, with few or minor modifications. In Russia, quota setting and control is under the jurisdiction of the state game departments under the federal ministry for agriculture. The departments provide a web of regional and local hunting inspectorates, who also distribute the licenses. Quotas for licensed hunting are set through a formal process (Chestin, 1998; A. Vaisman, pers. comm., 8 June 1998; A. Vaisman, *in litt.,* 5 May 1999).

In Russia, licenses can be resold to agencies or foreign hunters by the user of the game area, as well as via commercial firms or private operators. The market is difficult to understand and often unofficial, because of the attempts to escape taxes. As there are no special regulations for tourist hunting, the game departments do not differentiate between foreign and domestic hunters or between animals shot by foreigners or local hunters. From 1999 on, any foreigner requires a temporary hunting permission for about USD 8.60 per day. That may help in the future to get some data on the numbers of foreigners hunting in Russia (A. Vaisman, *in litt.,* 5 May 1999).

The term corruption seems to be inseparably tied to the term tourist hunting in Russia and Central Asia. When discussing tourist hunting, it comes to mind more quickly than with any other Eurasian region. The possibilities to earn an immense amount of money through fees for trophies and services by reselling relatively cheap licenses, combined with the absence of accepted regulations, the lack of oversight by state authorities, the unfavourable economy, and the processes of quota setting and license distribution, together seem to promote a rather unstable system. The distinctive feature seems to be the space for negotiation in regulations and processes concerning tourist hunting. Russia and the Central Asian countries have Red Data Books that list protected species; these species are generally not game animals. Nevertheless, there are provisions, such as by special government decree, by which hunting for listed species can be permitted for scientific purposes or for foreigners. That softens up the border between legal hunting and poaching, depending on the practises of issuing permits and control. Quota setting (see Chestin, 1998) follows the common bottom up strategy and is based on the proposals of game areas and then is approved step by step by authorities along the given hierarchy. The permitted number of licenses then is distributed by the hunting inspectors. Within that process there seems to be much space for negotiation and the people earning money by reselling licenses are tempted to report that wildlife populations are as abundant as possible (A. Vaisman, *in litt.,* 5 May 1999). Certainly, the specific attitudes of citizens towards the state and the tempting possibilities of the vast country may play an additional role.

Middle East, Caucasus and Himalayan region

Information on the hunting systems in the countries of this region that could be collected for the project is very fragmentary. There is minimal data or information on foreign hunting. Turkey seems to have a well-organised tourist hunting system. There are legal provisions set up by the Central Hunting Commission that regulate the strict prerequisites and conditions foreigners have to fulfill for hunting in Turkey, as well as the fines for violating the rules. Only tourism agencies approved as “A”-class agencies get permits to sell hunts to foreigners. From approximately 100 “A”-class agencies, only four are active in this field. Prices as well as hunting quotas are set by the Central Hunting Commission in co-operation with the organisers and NGOs (S. Umar, *in litt.,* 29 December 1998). Hunts in Iran were officially offered in Germany for the first time in 1999. It seems that there have been tourist hunts during the past two years. Commercial firms and/or state enterprises are possibly the organisers (H. Asadi, *in litt.,* 10 February 1999).

In the Caucasus region, Georgia is the only country where information could be obtained. The hunting system is in transition. Since 1996, only hunting of migratory birds is allowed, for resident hunters as well as for foreigners. But as there are no organisations or structures, there seems to be no hunting tourism yet. The information on hand suggests that Georgia is developing a hunting system resembling that of Albania (G. Sanadiradze, *in litt.*, 12 November 1998). In Pakistan, only Wild Boar and a few small species are defined as game. Except in certain cases, no other trophy species may be hunted. For example, between 1980 and 1990, in North and Northwestern Provinces a small programme of tourist hunting in three regions, Torghar Hills, Chitral District, and Bar Valley, administered by the state authorities, was developed to improve the local economy and promote conservation (Johnson, 1997; A. Khan, *in litt.*, 15 January 1999). A few Ibex and mountain goat licenses are sold annually, as are a handful of Markhor *Capra falconeri* hunts. Hunting and export quotas of the latter are regularly reviewed because of the CITES I status of the species. Nepal also runs a small tourist hunting programme on Himalayan Tahr and Blue Sheep under the jurisdiction of the Department of National Parks and Wildlife Conservation (Fox, *in litt.*, 14 December 1998).

China and Mongolia

The Mongolian Law on Hunting, 1995, defines wildlife as state property until the moment somebody takes possession of it. Any citizen who meets the special requirements of a hunter, may hunt by purchasing licenses. If persons or entities own land (habitats), they are liable and obliged to finance hunting management there. Quotas are set on the basis of administrative units by the Ministry for Nature and Environment according to the regional requests. Species are divided into very rare (listed by law), rare (annually revised list), and abundant. Very rare and rare maybe hunted only for special purposes, abundant species for household, commercial and special purposes. Foreigners visiting for hunting may hunt or trap rare and abundant species. The fee for foreign hunting is higher than that for resident hunters, and the Mongolian Law of Hunting determines, that 70% of the fee goes to the federal government, 20% to the county government, and 10% to the hunting organisation. There are four to six important organisers of tourist hunts, commercial as well as hunting associations, which arrange the contacts for agencies. The government decides which licenses the organisers get. Apart from the state license fees, the organisers are free to set prices. Many of the local guides working for the organisers are independent contractors. Traditionally, Mongolians are subsistence or commercial hunters, in rural areas nearly everybody is a hunter. The demand for resident hunting is high. Most trophy species attractive for foreigners are listed as rare, and may not be hunted by residents, but there seems to be a considerable amount of poaching (Otchir, pers. comm., 7 September 1998; R. Reading, *in litt.*, 9 December 1998).

In China, there are two organisations organising tourist hunts: the China Wildlife Conservation Association and the China Forestry Travel Service. Both are attached to the State Forestry Bureau and have an intermediate status between governmental and non-governmental organisations. As in Mongolia, most of the species desired by tourist hunters have a national protection status. The quotas are set according to the suggestions of the mentioned organisations and are approved and controlled by the state game department. License prices for foreigners are about ten times the prices for resident hunters. In contrast to Mongolia, China has never developed a "hunting tradition", and there are few local hunters (R. Harris, *in litt.*, 11 January 1999; Lajia, *in litt.*, 30 January 1999).

Status and relevance of tourist hunting in Eurasian supply countries

The data and views given below mainly derive from secondary sources. No comprehensive data could be found in available national tourism or land use statistics, nor from the World Tourism Organisation (WTO). Further, during this survey, efforts to contact national authorities or hunting associations met with varying levels of success. In some countries the formal process to get official information or even to find out whether relevant information exists, is complicated and time consuming. Even if there are formal regulations or documents that allow assessment of the number of foreigners visiting a country for hunting, these data very often are not centrally located or compiled. The more free market qualities the national tourist hunting setting has, the less reliable data are available concerning the respective income. Therefore, information resulting from interviews with hunters, agencies and specialists in Europe, as well as from reviews of hunters´ magazines, was an important source of information for this survey (Table 10).

Table 10
Status of tourist hunting in selected Eurasian destinations, 1999

country	number of professional organisers	foreign hunters per year	most hunters from	annual revenue generated by foreign hunters (€)	structures	demand	remarks
Albania	~ 10	~ 150 -200	Italy	~ 400 000	stable	↘	mostly bird hunting; situation before Kosovo war stable; demand decreasing because of Kosovo conflict
Armenia	?	?	?	?	?	?	hardly any foreign hunts
Azarbaidjan	~ 2 - 3	< 10	USA, Spain, Germany, Austria	~ 50 000	stable	→	
Belarus	~ 5 - 10	~ 50 -300	Germany, Austria, Norway, Denmark	~ 100 000 - 200 000	stable	↗	
Bosnia-Hercegowina	~ 3 - 5	?	?	?	developing	?	no data after the war ended in 1995; before, few hunters from USA, Mexico
Bulgaria	~ 4 - 10	~ 1 500 - 2 000	Germany, Austria, Italy, France, Spain	~ 2 000 000 - 3 000 000	stable	→	until 1989, an income of € 7.5 mio is given; number of hunters has not changed considerably
China	2	~ 60	North America, Mexico, Germany, Spain	~ 800 000	stable	↗	
Croatia	~ 3 - 6	~ 300 - 500	Italy, Austria, Germany, Switzerland	< 500 000	stable	↗	highest number of hunters given: 3 000 annually
Czech Republic	~ 6 - 10	300 - 500	Germany, Austria, USA	~ 300 000 - 500 000	stable	→	very expensive pheasant hunts; many enclosures; demand was higher before 1993
Estonia	~ 10	1 800 - 1 900	Finland, Germany, Sweden, Denmark	~ 300 000 - 500 000	stable	→	
Finland	?	800 - 900	Germany, other EU countries	~ 300 000 - 500 000	stable	→	
Georgia	-	-	-	-	shifting	-	legislative changes stopped hunting on mammals in 1996
Hungary	~ 15 - 20	~ 15 000 - 25 000	Germany, Austria, Switzerland, Italy	~ 8 000 000 - 10 000 000	stable	↘	highest income given: € 60 million
Iran	1	~ 30 - 40	France, Italy, Germany, Spain, USA, Mexico	~ 400 000 - 600 000	?	↗	
Kazakhstan	~ 6 - 10	~ 2 000 - 3 000	Germany, Austria, Benelux, Spain, USA, Mexico, Denmark	~ 1 500 000 - 2 000 000	stable	↗	potential for more foreign hunting
Kyrgystan	~ 5	~ 100 - 150	Germany, Austria, USA, Spain, Benelux,	~ 200 000 - 400 000	stable	↗	
Latvia	~ 9	~ 200	Germany, Scandinavia, Benelux	~ 200 000 - 300 000	stable	→	
Lithuania	~ 10	~ 400	Germany, Austria, Scandinavia	~ 500 000	stable	→	
Macedonia	~ 3 - 5	~ 50	Austria, Germany, Spain	~ 100 000 - 200 000	stable	↘	before Kosovo war structures and demand stable; demand decreasing because of war
Moldova	?	?	?	?	?	?	hardly any foreign hunts
Mongolia	~ 3 - 6	~ 200 - 300	USA, Germany, Austria, Denmark, Switzerland, Spain, Benelux	~ 300 000 - 600 000	stable	↗	demand high because of excellent organisation; but seems to be at a limit concerning target species' populations
Nepal	~ 2- 3	< 50	USA, Germany, Austria, Spain	~ 200 000 - 300 000	stable	→	
Norway	~ 5 - 7	~ 1 500 - 1 700	Sweden, Denmark, Germany	~ 200 000 - 300 000	stable	→	
Pakistan	few	~ 50 - 100	USA, Mexico, Europe	~ 200 000 - 300 000	stable	↗	
Poland	~ 2 important	~ 15 000	Germany, Italy, France, Austria, Spain	~ 2 000 000	stable	↗	
Romania	~ 2 important	~ 300 - 500	Germany, Austria, Spain	~ 1 000 000 - 2 000 000	stable	↘	
Russia	~ 15 - 20	~ 3 000 - 3 500	Germany, Austria, Italy, France, Spain, USA	~ 3 000 000 - 7 000 000	stable	↗	
Slovakia	~ 5 - 10	~ 200 - 400	Germany, Austria	~ 400 000 - 600 000	stable	↘	
Slovenia	~ 3 - 6	~ 300 - 500	Austria, Germany, Italy	~ 200 000 - 400 000	stable	↗	
Sweden	~ 5 - 7	~ 1 000	Germany, Austria, Denmark	~ 200 000 - 300 000	stable	→	
Tajikistan	~ 3 - 5	~ 20 - 50	USA, Europe	~ 200 000 - 400 000	stable	↗	
Turkey	~ 4 - 6	~ 500 - 600	Germany, USA, other EU countries	~ 400 000 - 600 000	stable	↗	
Turkmenistan	~ 2 - 4	< 50	Germany, USA, Arabian Peninsula	~ 300 000 - 500 000	stable	→	
Ukraine	~ 12	~ 600 - 800	Germany, Austria, USA, Spain, Denmark, Norway	~ 1 000 000	stable	↗	
Uzbekistan	~ 2 - 4	< 50	Germany, USA, Arabian Peninsula	~ 100 000 - 200 000	developing	↘	
Yugoslavia (Serbia + Montenegro)	~ 10	~ 200 - 300	Germany, Austria, Italy, Benelux	~ 600 000 - 800 000	stable	↘	also considerably higher number of hunters were given; figures depict the situation before Kosovo war; demand decreasing because of war;

Number or organisers

As mentioned before, in many countries, the owner or holder of the hunting right may organise and sell hunts. Table 10 (column 2) reflects the number of those organisers with a noticeable performance on the market. They are the main business partners for western agencies, but not the only ones. In some cases, they represent a certain number of organisers.

Foreign hunters

As regards the number of foreign hunters, where they come from, and the annual revenues generated from tourist hunting, most of the figures presented are reasonable estimates, with some based on official numbers, and others on expert information. In some cases data were only available for state enterprises or for some specific organisers. The numbers comprise all foreign hunting, big game as well as small game. Approximately 45 000 to 60 000 foreign hunters visit Eurasian destinations per year. The most popular countries for hunting tourism are Hungary and Poland. The other Eastern European countries also attract a considerable number of hunters. There seems to be a gradient according to the distance from central Europe and to the degree of affinity with central European attitudes towards hunting. German hunters dominate on the Eurasian continent together with Austrians, Spaniards, and Italians, whereby Italian hunters mainly go for small game and bird hunting. North American tourist hunters are more important in the Central and East Asian destinations; they are not common customers in Eastern Europe. Foreign hunters are estimated to generate an annual income of approximately € 26-38 million.

Organisational stability and demand trends

The stability of the structures is an indicator of the reliability of a country among potential hunting tourists. The demand trends shown in Table 10 are a provisional and temporary evaluation of the developments in the countries under review. The information is based on experiences, opinions and judgements of interviewees and experts, their personal experiences in supply countries, as well as review of literature and marketing material. The evaluation also integrates the customers' viewpoint, which can be found in hunting magazines, through recommendations of agencies, or through interviews.

Most of the countries retained or developed more or less stable structures for foreign hunting, over the past five to ten years. Nevertheless, it is clear that demand is quite unsteady, and that there are cyclical fluctuations in the tourist hunting business. Only a few countries, for example the Baltic states, have found a balance for their foreign hunting businesses after the change to new political and economic systems (Ivanovic, pers. comm., 1 June 1999). It seems that the rush to Eurasian destinations following political change, has now stopped. According to agencies, German and Austrian hunters' interest in North American destinations is growing (Krawehl, pers. comm., 17 September 1998).

Market characteristics

Market regulation mechanisms

In the Eurasian countries reviewed during this study, there are many examples of fluctuations in the number of hunts sold per year. Lithuania, for example, noted a boom in foreign hunters after offering foreign hunts at the beginning of the 1990s, when up to 1 200 hunters visited the country annually. Soon however, the country could not meet the demands of so many hunters, and success rates and trophy quality decreased. The market collapsed and measures were taken by the authorities to regulate foreign hunting. Now it seems as if there is a balance at a level of about 400 hunters per year (Krawehl, pers. comm., 17 September 1998). There is no doubt that the customers are the regulating forces in the tourist hunting market. They are very sensitive in rejecting or accepting offers, and they seem to react quite strongly to the experiences reported by other hunters or acknowledged experts (Ivanovic, pers. comm., 1 June 1999). In consequence, agencies are quite selective in contracting organisers.

Some particular attributes of tourist hunters that are formulated by agencies, organisers, and the hunters themselves seem to explain the influence of European hunters on market regulation.

- Tourist hunters are traditional: They tend to prefer species and hunting methods they are familiar with. They expect similar hunting "ethics" they are used to and will be quite critical if this is not the case.
- Tourist hunters are tempted by novelties: They tend to take chances on new opportunities. Species or destinations appearing on the market for the first time or that have been redesigned, will attract many hunters. But the novelty will soon wear off, if other conditions do not fit.
- Tourist hunters enjoy achievement: They tend to favour those destinations that are likely to offer successful hunts and high trophy quality and reject those where there are indications that wildlife populations are not likely to meet that demand.
- Tourist hunters are practical: They tend to prefer hunts that promise efficient and competent organisation. They reject those where there are indications that organisation is likely to waste their time. Further, they tend to believe more in experiences than in promises and advertisements. They look for confident sources of information, and behave according to the recommendations.
- Tourist hunters are sensible: They tend to look for a fair balance of costs and benefits. If there are any indications of trickery, they reject the offers. But they can spend a lot, if the benefits meet their wishes.

Additional factors of course are the general security of a country in terms of civil unrest or criminality, or international regulations like CITES. The organisers´ role appears more or less reactive. They are forced to meet the hunters´ demands, if they want to keep up a continuous income from foreign hunting.

Market size

Estimating the market size is a difficult exercise. But as there are facts, estimates, and clues from both the demand and supply side of the market, an attempt has been made to ascertain the size of the Eurasian tourist hunting market. In Table 11, the total annual turnover generated by hunters from the European demand countries in the 38 supply countries, is estimated.

Table 11
An estimation of the tourist hunting market size in Eurasia

Factors used to estimate market size	Estimate (based on survey data and information from demand countries)	Estimate (based on information from supply countries)
Total number of European hunters	6.4 million	
Total number of European tourist hunters (hunters, who hunt abroad)	1.3 million (~ 20% of 6.4 million)	
Total number of tourist hunts undertaken annually by European tourist hunters (not every tourist hunter hunts abroad every year)	330 000 (~ 25% of 1.3 million) (note: 1.3 million European hunters hunt abroad once or more in their life. They are the target group for foreign hunting offers. However, not every potential tourist hunter hunts abroad each year, so that target group is good for buying and conducting appr. 330 000 hunts in foreign countries annually)	
Total number of hunts undertaken annually to Eurasian destinations	80 - 90 000 (~ 25% of 330 000 hunts, according to destination preference data)	45 - 60 000 foreign hunters (including some non-Europeans; see Table 10)
Annual expenditure for 80 - 90 000 hunts	€ 120 -180 million annually (based on ~ € 1 500 per hunt for Eurasian destinations)	
Annual expenditure that remains in the supply countries	€ 40 - 60 million annually (~ 1/3 of the expenditures stay with the supply country)	€ 26 - 38 million annually (according to Table 10)

The difference between both estimates seems considerable at the first glance. But as we know, a quite big share of the Eurasian market materialises through private contacts, which may not be completely realized by statistics and experts from the destination countries. It seems to be realistic and plausible to estimate the Eurasian tourist hunting market at € 40 - 60 million annually.

Re-investments

Key questions raised in many discussions about tourist hunting include: 1) What happens to the money that a hunter pays for a hunt abroad? and 2) How much is re-invested in wildlife management and conservation? Reliable and comprehensive data on this topic is largely unavailable. Nevertheless it is known that in some countries the organiser has to pay a certain amount of his income to the federal or local government, for example in Mongolia, where the Hunting Law of 1995 has provisions for the use of the income resulting from hunting payments and fees. Specifically, App. J, Art. 7.8 states that "An appropriate percentage of payments and fees may be spent for the protection, breeding, and introduction of animals according to the decisions of the respective Soum or Duureg Citizen Representative Khural", while Art. 7.9 states that "10% of the payment transferred to the central budget shall be deposited in the Nature Protection Fund." In reality however, information is unreliable. Even in systems with a high degree of state regulation, i.e. China, the distribution and use of the money obviously cannot be followed, as is apparent from review of information presented by Liu (1995), Harris (1995) and Harris and Pletscher (1997).

Illegal practises

It is no secret that illegal practises occur in the field. Illegal hunting occurs without a permit, or is undertaken while a hunter has a permit, whereby illegal activities are conducted, in a manner that "legalizes poaching". This is done by undermining a quota system by shooting the wrong animal (e.g. age, gender, subspecies), by killing several animals to obtain the best possible trophy, by using licensed hunts to sell or buy additional unlicensed hunts through bribery, and by using illegal hunting methods. Methods of smuggling trophies are varied, e.g. in a private jet. Although anecdotal and confidential information on illegal practises was gathered during this survey, for mammalian trophies it does not seem to be occurring on a large scale.

About 11% of the German tourist hunters surveyed indicated that they were aware of or were affected by illegal or unacceptable practises. They complained about: a) hunting techniques that are unacceptable in terms of German hunting ethics, e.g. shooting from the car, night hunting with searchlights, abandoning wounded game, using poorly trained dogs; or b) the behaviour of the guides, who were drunk or exhibited otherwise inappropriate behaviour. Of the hunters surveyed, only a few were unsure about whether their hunt was legal.

IV. TROPHY TRADE UNDER CITES

Brown Bear *Ursus arctos*. Credit: © WWF/UNEP/TOPHAM

Background and historical remarks on trade in hunting trophies under CITES

A review of Eurasian mammals offered for tourist hunting revealed that the hunting market concentrates on non-CITES species. Nevertheless, tourist hunting and CITES are subject to continuous discussion. Trade regulations are an effective instrument to regulate hunting of listed species and therefore heavily influence the market. Moreover, the few CITES-listed species that are offered for tourist hunting are high profile and high price trophies, such as bear and argali in Eurasia, or elephant and wild cats from Africa.

Regulation of the trade in hunting trophies presents a complex issue with regard to enforcement and CITES. The Convention distinguishes between commercial effects and personal or household effects. For personal goods, which are not further specified, trade restrictions and formal regulations are reduced. The Conference of the Parties recommended in Resolution 2.11 (Rev.) "...that with the exception of the rare case of exemptions granted under paragraph 3 of Article VII of the Convention, trade in hunting trophies of animals of the species listed in Appendix I be permitted only in accordance with Article III, i.e. accompanied by import and export permits..." (after Wijnstekers, 1995). The aim of this resolution was to allow trophy trade only where it would enhance the survival of the species concerned, for example in the case of the Leopard. A quota system could secure the positive effects of the regulation (Wijnstekers, 1995). In fact, the resolution opened the possibility of defining Appendix I species trophies as personal goods – which possibly meets the point of view of the hunters, for whom trophies are very personal souvenirs which they very rarely resell after returning from a hunting trip.

CITES implementation in the EU and the regulation of trade in hunting trophies

Within the European Union, Council Regulation (EC) 338/97 applies CITES in the Community. The EU regulation provides at the same time possibilities for more restrictive trade regulations than CITES. For example, the Regulation's Annexes A, B, and C generally correspond to the CITES Appendices I, II, and III, however, with some European species receiving stricter protection such as the Appendix II species Wolf, Brown Bear, and Lynx, which are listed in Annex A.

Of further importance for the purpose of this study, Regulation (EC) 338/97 also distinguishes between trade in commercial and in personal goods, but under Article 2 ('Definitions') does not take special provisions for trophies. Here, under paragraph (j), it is stated that "personal or household effects shall mean dead specimens, parts and derivatives thereof, that are the belongings of a private individual and that form, or are intended to form, part of his normal goods and chattels". Additionally, Article 7(3) ('Derogations - Personal and household effects') of the respective Regulation states that "By way of derogation from Articles 4 and 5 [*i.e. Introduction into and export or re-export from the Community*], the provisions therein shall not apply to dead specimens, parts and derivatives of species listed in Annexes A to D which are personal or household effects being introduced into the Community, or exported or re-exported therefrom, in compliance with provisions that shall be specified by the Commission....".

Only the implementing Commission Regulation (EC) No 1808/2001 which lays down detailed rules concerning the implementation of Council Regulation (EC) No 338/97 includes, under Article 27 ('Introduction into the Community of personal and household effects'), a specification regarding Article 7(3) of Regulation (EC) 338/97 ('Derogations'), stating: "This derogation shall only apply to specimens, <u>including hunting trophies</u>, if...".
The predecessing Implementation Regulation (i.e. Regulation (EC) 939/97), however, had no special provisions for trophies. As a consequence, until 2001 some member states did apply the personal effects regulations for hunting trophies (e.g. Germany), while others did not (e.g. Netherlands, France). The major difference occurs in Annex B and C species. In "personal effects" countries, Annex B species trophies may be imported with a valid export permit of the country of origin only, and Annex C species trophies without any CITES documents. In "commercial effects" countries, Annex B species trophies need an import permit prior to the actual import operation, and Annex C species have to be registered at Customs only.

Appendix A species trophies need an import permit prior to the actual import operation in any case. If the permit is issued by the respective national CITES Management Authority, it stays valid for a certain time period. When the trophy to be imported appears at Customs, the import permit will be accepted only under the condition that valid CITES export documents from the country of origin are presented. Applications for Annex A trophy import permits can be refused on the basis of restrictions referred to in Regulation (EC) 338/97 or Regulations suspending the imports of specimens of certain species based on decisions of the respective EU DG XI Scientific Review Group (SRG) (Sterz, pers. comm. to R. Melisch, January 1999). According to Art. 17 of the Regulation (EC) 338/97), the SRG develops recommendations concerning the detrimental impacts of imports on the conservation of listed species. These evaluations lead to the practise where trophies of a particular species may be imported from certain countries, but not from others. These country- or species-specific decisions of the SRG have to be implemented by all EU CITES authorities immediately.

CITES trade data and comparative analysis

The World Conservation Monitoring Centre manages the CITES Trade Database on behalf of the CITES Secretariat. As each CITES party is obliged to report on trade on the basis of permits issued and/or used on an annual basis, the database allows for the generation of global statistics on wildlife trade of species listed on CITES. Table 12 explains the content of the information entered into the database and the selection of data for the following analysis. The analysis aims at giving an overview on the magnitude of CITES species trophy trade. After working with the available trade data, it appears important to clearly comment on the significance of the data. There are some characteristics of the database and the reporting practises that limit the importance of the results. The scope of the study has been restricted to: a) mammals; and b) importing countries, defined as European demand countries, plus USA and Canada (=North America) for comparison.

Table 12
Description of the selected WCMC trophy trade data

COLUMN	CONTENT	SELECTION FOR ANALYSIS
Year:	year of trade operation	1990–1996
Purp:	purpose of trade operation	H (hunting), P (personal), blank (no purpose given)
App:	CITES appendix	All
Taxon:	scientific name of species traded	Mammals
I:	country of import/declared destination	European import (demand) countries (Fig. 1), plus USA and Canada
E:	country of export/consignment	All
O:	country of origin	All
Quantity:	quantity of items reported as traded	All
Unit:	e.g. kg	the study looks at numbers of items only, excluding measures and weights
Term:	description of items traded	body, horns, skin, skull, trophy, tusks
S:	source of items	All

The first question that arises is how to classify a specific trade operation as the result of a tourist hunting activity. There are two columns that potentially contain this information: the purpose of the trade operation, and the term, i.e. the description of the items traded. Possible trophy trade operations are not only reported under the purpose hunting (H), but also under the purpose personal (P), or without any purpose given (blank). Not every item given under the selected purpose usually is a hunting trophy. The file contains, for example, carvings, garments, skin pieces, horn scraps, bones, and other items. There are items that are more likely to be trophies than others, i.e. bodies, claws, ears, horns, skins, skulls, tails, teeth, trophies, or tusks. But also among these items there might be some that could be part of a another, larger trophy. It would be unusual for a hunter to take only claws, ears, or tail without the "primary" trophy, the skin or skull. The following results, therefore, only represent the "primary" trophy items: bodies, horns, skins, skulls, trophies, and tusks.

This restriction will avoid an exaggerated estimate of the trophy trade. However, it will not allow one to infer from the total number of traded trophies, the total number of specimens hunted. There are different reasons for this. Firstly, it cannot be verified whether different parts of the animal are reported as one trophy trade operation or as several. It is usual to take skin and skull of one carnivore specimen as trophies, or horns and skin of an ungulate specimen. They can be reported as different items, or as one trophy. "Trophy" is a collective term for all the other trophy items but is used on the same level. Moreover, there are cases where skins, skulls, tusks, or trophies are reported in kg or m^2, and a conclusion about the number of items or even specimens cannot be easily made. As this is the case with a minority of trade operations, the following data only take into account those where the number of items is reported. For an in depth analysis of a specific species, the other units would have to be considered.

The CITES Trade Database is comprised of reported imports and exports. Ideally, every reported import should have an export counterpart, and vice versa. In reality, the numbers of exported items differ markedly from the number of imported items. This is mainly due to a remarkable diversity of reporting practises. Some countries report on the basis of permits issued, which may not necessarily be used, while others report on the basis of permits used. The given purpose, term, or unit in an export document is not necessarily used in the import documents, so that the export and import of one specific trophy may appear as two different trade operations. The differences between import and export reports do not follow any pattern, and to at least find some concurrence, a case by case analysis would be necessary. For the following, it is hypothesised that the reported imports better reflect the actual amount of trade, because the data from European and North American customs and administrations are considered as the most reliable in this context.

Taking into account all the factors mentioned previously, the following tables draw a rough picture of the known CITES species trophy trade. Table 13 comprises those trade operations that are most likely to be the result of a tourist hunting activity. It shows the number of "primary" trophy items imported into Europe and North America. This is the best possible approximation of the number of specimens traded as trophies, but is not at all an indicator of the real number of hunted animals. Based on these preconditions, trophy items of 249 mammal taxa were imported to North America and the European demand countries between 1990 and 1996 (see Annex 1). For a complete overview of CITES taxa traded as tourist trophies, 21 additional taxa are listed with no import quantity given, which means that only trophy exports have been reported.

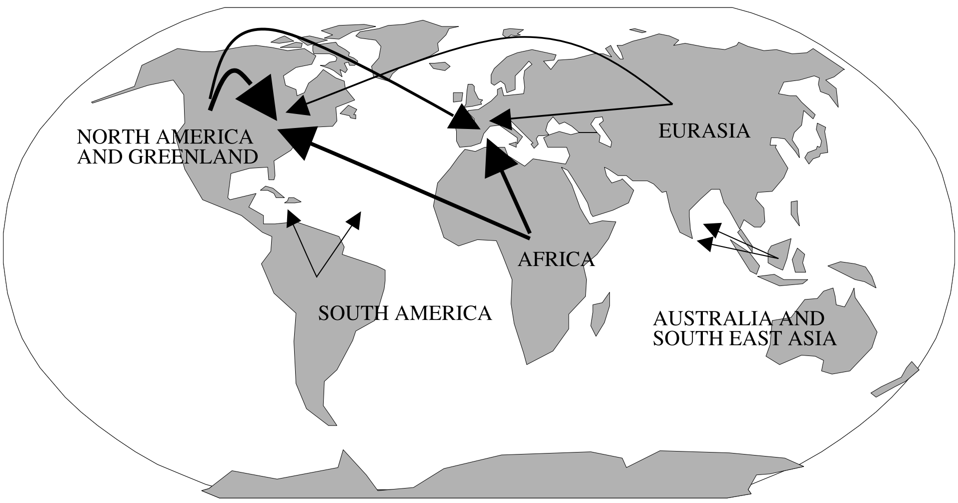
Table 13
CITES-listed mammal trophies reported as imports into Europe and North America[1], 1990 –1996

Number of imports from:	to:	Year 1990	1991	1992	1993	1994	1995	1996	Total
Africa	Europe	1 603	2 179	3 024	2 059	2 570	2 279	2 500	16 214
	North Am.	2 152	2 075	2 219	2 275	1 971	1 913	2 337	14 942
Eurasia	Europe	43	62	59	206	242	244	246	1 102
	North Am.	181	737	272	209	248	167	255	2 069
North America[1] & Greenland	Europe	409	458	614	1 270	1 125	1 375	1 542	6 793
	North Am.	451	655	4 927	8 753	8 089	11 693	8 477	43 045
Southeast Asia & Australia	Europe	1	1 051	4	1	7	4	15	1 083
	North Am.	79	379	102	89	75	40	434	1 198
South America	Europe		6	25	10	35	30	105	211
	North Am.	166	126	93	110	134	130	121	880
Unknown	Europe			2	23				25
	North Am.	75	71	49	41	147	22	46	451
Total	**Europe**	**2 056**	**3 756**	**3 728**	**3 569**	**3 979**	**3 932**	**4 408**	**25 428**
	North Am.	**3 104**	**4 043**	**7 662**	**11 477**	**10 664**	**13 965**	**11 670**	**62 585**

Source: WCMC CITES Trade Database.
[1] includes USA and Canada

The main CITES species trophy trade occurs within North America, which is due to a considerable number of Black Bear *Ursus americanus* trophies traded from Canada to the United States. North America and Europe import approximately the same amount of trophies from the African continent. From Eurasia, North America in total imported about twice as many CITES species trophies within the analysed time frame than Europe. But there is a clear increase in European imports, and from 1993 on the amount is nearly the same. From the Southeast Asian/Australian region, relatively few trophy items are imported in fluctuating numbers. Europe shows a slight increase in imports from South America (Table 13 and Figure 7).

Figure 7
Main origins of CITES trophy imports into Europe and North America



In total, 25 428 trophy items (bodies, horns, skins, skulls, trophies, tusks) of 107 CITES-listed mammal taxa have been imported into the defined European demand countries between 1990 and 1996. The total number of imported trophy items has doubled during the period under review. The most attractive CITES species for European hunters are African Elephant *Loxodonta africana*, American Black Bear *Ursus americanus*, Hippopotamus *Hippopotamus amphibius*, Lion *Panthera leo*, Leopard *Panthera pardus*, Zebra *Equus zebra hartmannae*, and Brown Bear *Ursus arctos*. Their trophies comprise approximately 60% of total imports (Annex 2). North America, within the same timeframe, imported 62 585 items of 226 CITES-listed mammal taxa. American Black Bear trophies make up nearly two thirds of the total amount. Three more carnivores, Leopard, Lion and Wolf, seem to be of great interest for the North American tourist hunter.

Within Europe, the most important importing countries are Spain and Germany. Together, they imported 68% of the mammal trophy items between 1990 and 1996. While imports to Spain decreased from 1991 to 1996, German trophy imports increased considerably. Also, imports to Denmark, Sweden, and Portugal increased. Austria, Belgium, Switzerland, United Kingdom and Luxembourg regularly imported trophies in slightly fluctuating numbers. The other European countries import CITES species trophy items irregularly and in small numbers (Table 14).

Table 14
Annual imports of trophies of CITES-listed species into European countries, 1990-1996

Importer	**Year**							**Total**
	1990	1991	1992	1993	1994	1995	1996	
Spain	887	2 379	2 172	1 340	1 128	1 105	1 009	10 020
Germany	431	655	662	891	1 177	1 408	1 991	7 215
Denmark	314	345	381	355	402	465	579	2 841
Austria	172	157	99	149	360	290	94	1 321
Belgium	33	38	42	346	250	87	101	897
Italy	151	64	90	57	116	131	105	714
Switzerland	9	9		202	166	119	161	666
United Kingdom	43	55	79	38	118	88	69	490
Sweden	9	25	53	81	80	105	132	485
Portugal		3	6	34	24	37	123	227
France			104		88			192
Norway		9	13	33	37	61		153
Luxembourg	5	9	10	13	5	14	8	64
Finland		1	2	12	18	4	22	59
Netherlands		1	13	2	1	17	13	47
Greece	2	6		7	1	1	1	18
Malta				4	8			12
Ireland			2	5				7
Total	**2 056**	**3 756**	**3 728**	**3 569**	**3 979**	**3 932**	**4 408**	**25 428**

Source: WCMC CITES Trade Database.

This brief analysis provides a rough picture of the trophy trade situation based on data from importing countries. In addition to the database characteristics and general uncertainties concerning reporting practises, the reflected trends in trade may also be influenced by changes in reporting and enforcement practises, for example EU import restrictions prior to Regulation (EC) 338/97. These circumstances may obscure the picture for particular years and particular species, e.g. Polar Bear or Lynx.

Trade in trophies of CITES-listed mammal species from the Eurasian supply countries to Europe and North America

Focussing on the defined Eurasian supply countries, Table 15 shows the number of primary trophy items that where reported to be imported by/exported to the defined European demand countries and North America. From the Eurasian supply countries, 1 924 imports and 2 678 exports respectively were reported between 1990 and 1996. The European demand countries imported 912 trophy items, whereas 1 833 exports were reported by Eurasian supply countries. For North America, 1 012 imports are conflicting with 845 reported exports. Table 15 shows those primary trophy items for which one of the defined Eurasian supply countries is reported as an exporter or country of origin (unknown origin excluded). It comprises all given sources of the item, with the exception of pre-convention specimens. They were excluded from this analysis.

A total of 42 taxa seem to be the object of trophy trade operations from the defined Eurasian demand countries. For five taxa, Yak *Bos mutus*, Markhor *Capra falconeri*, Serow *Capricornis sumatraensis*, European wildcat *Felis silvestris* and Goral *Naemorhedus goral*, only exports are reported, but no respective imports are documented. Some of the taxa listed will possibly not be in trade as a result of an actual tourist hunt, because they are not distributed in the Eurasian countries of interest, e.g. Lion *Panthera leo*, Primates spp., Zorro gris (or Chilla) *Dusicyon (Pseudalopex) griseus* and Grizzly *Ursus arctos horribilis*. For the other taxa it is also not clear that every trade operation is due to tourist hunting. The data do not allow for a definitive classification of trophy trade resulting from tourist hunting, or for other purposes, despite the intention of CITES reporting standards.

Only a few species appear as regular trophy item imports in considerable numbers: Brown Bear *Ursus arctos*, Wolf *Canis lupus*, Lynx *Lynx lynx*, and Argali *Ovis ammon*. While the three carnivores are also the object of commercial trade (i.e. furs, and bear parts for traditional medicine), the trade in Argali is definitely due to tourist hunting. As foreign hunting is presumably the main reason for wild sheep to be listed in CITES, it would be advantageous for conservation monitoring purposes, if trade records could be used to analyse the number of specimens traded, the origin of the specimens in trade, and the trade route from point of export to point of import. In fact, there is hardly one trade operation that can be followed from origin to destination by corresponding export and import reports.

Table 15
Taxa likely to be objects of tourist hunting operations imported from Eurasian supply countries into Europe and North America, 1990-1996

	YEAR (IMPORT/*Export* QUANTITY)							**TOTAL**
Taxon	1990	1991	1992	1993	1994	1995	1996	
Bos mutus					*1*			*1*
Budorcas taxicolor					**1**	*1*	**2** *3*	**3** *4*
Canis lupus	**7**	**5** *7*	**16** *4*	**23** *92*	**50** *76*	**36** *122*	**41** *10*	**178** *311*
Canis lupus pallipes	**2**	**1**						**3**
Capra falconeri		*2*	*4*	*2*				*8*
Capricornis sumatraensis		*2*						*2*
Cervus elaphus bactrianus						**2**		**2**
Dama mesopotamica			**12**					**12**
Elephantidae spp.				**1**				**1**
Enhydra lutris				*8*				*8*
Felis silvestris					*7*			*7*
Lutra lutra					**3**			**3**
Lynx lynx	**1**	**6** *24*	**1**	**11** *11*	**1** *225*	**4** *20*	**13** *6*	**37** *286*
Lynx lynx lynx				**1**				**1**
Mellivora capensis				**1**				**1**
Monodon monoceros				**7**				**7**
Moschus moschiferus			**3** *3*	*3*	*1*			**3** *7*
Moschus spp.	**2**							**2**
Mustela sibirica	**1**							**1**
Naemorhedus goral	*3*	*4*						*7*
Odobenus rosmarus			**4**	**7**	**6**	**3**	**1**	**21**
Ovis ammon	**37** *1*	**46** *66*	**81** *80*	**25** *17*	**28** *72*	**27** *38*	**23** *3*	**267** *277*

	YEAR (IMPORT/*Export* QUANTITY)							**TOTAL**
Taxon	1990	1991	1992	1993	1994	1995	1996	
Ovis ammon ammon	**20**	**16**	**15**	**1**	**3**	**6**	**10**	**71**
Ovis ammon dalailamae				*1*	**1** *2*	*3*		**1** *6*
Ovis ammon hodgsonii	**42**	**14** *1*	**17**			**2**	**7**	**82** *1*
Ovis ammon karelini				*8*	*1*	*1*		*10*
Ovis canadensis		**4**						**4**
Ovis orientalis ophion					**2**			**2**
Ovis vignei				*9*		**1**		**1** *9*
Panthera leo	**2**							**2**
Panthera pardus	**2**	**1** *1*	**1**					**4** *1*
Panthera tigris tigris						**2**		**2**
Pantholops hodgsonii				**1**				**1**
Phocoena phocoena	**20**							**20**
Primates spp.		**7**				**1**		**8**
Pseudalopex griseus						**1**		**1**
Saiga tatarica					**11**	**6** *24*	**16**	**33** *24*
Ursus arctos	**18** *3*	**39** *186*	**113** *251*	**258** *574*	**290** *384*	**225** *290*	**192** *29*	**1 135** *1 717*
Ursus arctos horribilis					**1**			**1**
Ursus maritimus				**1**				**1**
Ursus spp.	**1**		**3**					**4**
Ursus thibetanus					**1**			**1**
TOTAL	**155** *7*	**139** *293*	**266** *342*	**345** *717*	**398** *769*	**316** *499*	**305** *51*	**1 924** *2 678*

Source: WCMC CITES Trade Database.

Examples of legal import procedures and seizures and confiscations of hunting trophies

BOX 3: AN ITALIAN INVESTIGATION IN THE ILLEGAL TRADE OF HUNTING TROPHIES

During the last years TRAFFIC has observed within Italy a general increase of interest for hunting abroad, particularly for trophy hunting in countries outside of the EU. This interest, however, has also led to a parallel illegal market with increased offers of illegal hunts and subsequent illegal trade of trophies of endangered species.

An initial national investigation led by the Forest Corps noted the interest of hunters towards rare and most famous mammals. Subsequently, the Forest Corps (i.e. the respective enforcement and policing authority), has implemented a plan to control the national market and in 1997 promoted an investigative action to control some of the suspected illegal transactions.

During the first part of this investigation the Forest Corps revealed that the suspects had killed endangered and protected species in many different countries. The survey found that rare species (see Table 16) were internationally offered and subsequently hunted for their trophies in India (Tiger, Gaur, Leopard), Myanmar (Tiger, Gaur, Clouded leopard), Mexico (Ocelot, Jaguar) and in some Central Asian countries (Markhor, Urial, Argali). To obtain those species, the hunters were willing to pay large amounts of money to have the possibility to hunt them and keep the trophies. The investigation has involved at least two hunters. The Italian Police Authority has subsequently prosecuted these hunters for illegal trade of rare and protected species. In many cases, however, even the actual hunt was illegal according to the laws of the respective countries where the trophies were obtained. All illegal trophies collected by one of the hunters have been confiscated and are now entrusted to a National Natural History Museum. The judicial procedure for the second hunter is ongoing. See Table 16 for specimens seized in these two cases.

During the inquires, the Forest Corps discovered not only illegal trade of many protected species but also the illegal trade of common and legally offered hunting species. The latter transactions included false certificates or total absence of certificates and involved both international and Italian hunting agencies.

This Italian investigation reveals that trophy hunting can in some cases - rather than providing economic benefits for the conservation of habitats and species for the respective supply countries – have also a detrimental effect for nature conservation. International trade monitoring and stakeholder co-operation remains to be crucial to safeguard the future of rare species. Enforcement work should involve an effective co-operation between management authorities, Interpol, national police authorities and interested co-operators from the hunting society itself.

Table 16.
Specimens seized during two cases of an Italian investigation on illegal trade in trophies in 1997-1998.

2	*Bos gaurus*	1	*Ovis ammon collium*
3	*Capra falconeri*	1	*Ovis ammon darwini*
3	*Ovis orientalis vignei*	1	*Ovis ammon karelini*
1	*Ovis ammon nigrimontana*	1	*Ovis ammon polii*
1	*Ovis ammon hodgsonii*	1	*Ovis ammon ammon*
1	*Selenarctus thibetanus*	4	*Ursus arctos*
1	*Panthera onca*	2	*Ursus arctos horribilis*
5	*Panthera pardus*	4	*Ursus americanus*
1	*Neofelis nebulosa*	1	*Ursus arctos middendorfii*
1	*Panthera tigris*	1	*Ursus maritimus*
2	*Panthera tigris* (skins)	3	*Saiga tatarica*
1	*Felis pardalis*	2	*Canis lupus*
8	*Loxodonta africana* (tusks)	1	*Felis silvestris*
2	*Loxodonta africana* (feet)	2	*Lynx lynx*
		15	*Felidae* spp. (skulls)
		1	*Antilope cervicapra*
		1	*Addax nasomaculatus*
		1	*Ammotragus lervia*

Source: Italian Forest Corps, 1998

BOX 4: HUNTING TROPHIES – LEGAL PROCEDURES IN GERMANY AND EXAMPLES OF ILLEGAL IMPORTS

How do trophy hunters / organisers apply for CITES import permits in Germany ?

CITES import permits for hunting trophies are issued by the Bundesamt für Naturschutz, the German CITES MA. Since many potential applicants confirm the procedures prior to applying for an importing permit at the German CITES MA by webpage or telephone call, written permit refusals had rarely to be issued in the past. The level of awareness with regard to CITES regulations among German hunters was thus, in general, concluded to be comparatively high. (M. Sterz, Bundesamt für Naturschutz, 19. Jan. 1999 pers. comm. to TRAFFIC-Europe Germany).

Who applies for CITES permits ?

In Germany, applicants for CITES import permits for hunting trophies include about 50% of hunters themselves and another 40% of forwarding agencies with an authorisation by the hunters to forward their trophies. (M. Sterz, Bundesamt für Naturschutz, 19. Jan. 1999 pers. comm. to TRAFFIC-Europe Germany).

Examples of seizures and confiscations of hunting trophies in Germany

A check of the data concerning infringements and illegal imports of mammal trophies** from Eurasian supply countries* recorded from 1992 until 1995 revealed that only insignificant incidents were reported among the controlled and seized goods. Trophies were never concealed and no intentional smuggling was detected. Most illegally imported items were seized due to missing or expired export documents only, infringements which bear administrative fines at the most, if at all. Of the supply countries, Mongolia was initially recorded more frequently. However, the situation of imports from Mongolia has improved significantly until now (M. Sterz, Bundesamt für Naturschutz, 19. Jan. 1999 pers. comm. to TRAFFIC-Europe Germany).

After evaluating German customs seizures and confiscations from selected 23 Eurasian countries in the period from 01 January 1996 to 24 November 1998, 37 specimens** from 8 mammals related or possibly related to hunting trophies were seized and confiscated by German authorities. They have been referred to as trophies (TRO, 8 specimens), skins (SKI, 24) and skulls (SKU, 5). However, in all incidents (particularly in the case of confiscated skins), it is not clear whether the confiscated commodity referred to a specimen which was actually obtained during a trophy hunting activity. Mammal species most frequently confiscated were Wolf (13), Brown Bear (10), Argali (5), Snow Leopard (3), Eurasian Lynx (3), Eurasian Otter (1), European Wildcat (1) and Leopard (1). All but one transactions referred to imports into Germany, only one transaction was an export from Germany. The confiscated specimens came from the following eight countries of origin: Bulgaria, Georgia, Iran, Kazakhstan, Nepal, Pakistan, the Russian Federation and Turkey. In five cases the country of origin remained unknown. As countries of export, only Mongolia and Belarus add to the aforementioned countries of origin (M. Sterz and F. Böhmer, Bundesamt für Naturschutz, *in litt.* to TRAFFIC-Europe Germany 27. November 1998, and 25. November 1998, respectively).

<u>* countries checked (n= 23):</u>
AZ, BG, BY, CN, CZ, GE, HR, HU, IN, IR, KZ, LT, MN, NP, PK, PL, RO, RU, SI, SK, TR, UZ, YU

<u>** WCMC codes checked:</u>
BOD (bodies), BON (bones), BOP (piece-bone), CLA (claw), EAR (ear), FOO (foot), HOR (horn), SKI (skin), SKU (skull), TAI (tail), TEE (tooth), TRO (trophy)

V. CONCLUSIONS AND RECOMMENDATIONS

In conclusion, tourist hunting in Eurasia is a stable market with strong self-regulating mechanisms. The majority of European hunters are relatively responsive and reject or avoid destinations that have a “bad image” in terms of hunting success, security, organisation, or cost-benefit relationship. Client requirements for hunting seem to support at least some minimum conditions of sustainability; most populations concerned are therefore not overexploited. Hunter pressure on prices is likely to prevent economic abuse.

The lion’s share of the Eurasian tourist hunting market for mammals concerns hunting by Central European (Germans and Austrian) and Spanish hunters in Eastern Europe. About 50% of the annual tourist hunts take place in Hungary and Poland, which together provide about 30 000 - 40 000 hunts for foreigners. The main target species are Red Deer, Roe Deer and Wild Boar, which are distributed there in abundant populations. In these countries, the national relevance of tourist hunting is extremely small. For Hungary, the income from tourist hunting is estimated at approximately 0.0005% of the GNP.

The Asian destination countries, plus large parts of Russia, Central Asia, Mongolia, the Himalayan region and China, are of greater interest for international conservation. There are global biodiversity hotspots identified and they provide habitat for many rare and endangered species, which are attractive for Western hunters. Some of these species may be legally hunted, e.g. species of wild sheep. Others can only be hunted illegally, e.g. Snow Leopard. At the same time, hunting there is a physical and psychological challenge and relatively expensive. Therefore only a small number of hunters travel annually to these destinations. Even Mongolia, which has a good reputation as a tourist hunting destination, is not visited by more than 200 - 300 hunters per year. Presumably only a small number of hunters hunting in the Asian destinations are involved in illegal hunts. Of course, there is considerable incongruity between the value of such a hunt and the average local income, which might be a motivation to promote illegal hunts. But the “target group” among hunters for illegal practises seems to be very small.

The analysis of CITES trophy trade indicates that the annual trade in trophy items of CITES-listed species is a matter of very small numbers, and confiscations of trophies from actual hunting operations are exceptional. CITES is a powerful instrument to regulate the tourist hunting market, as regulations may lead to a nearly complete breakdown of foreign hunting on the particular species. Furthermore, when in 1991 several Tien Shan Argali were shot accidentally instead of Marco Polo Argali in Kirgistan, after complaints and warnings by the CITES Secretariat, foreign hunting was banned completely from the region where Tien Shan Argali occur (Chestin, 1998). The control of the trade has significant impact on the one hand, however it is not a guarantee that quotas will be controlled in the field, or that illegal hunts will not occur.

Besides the detection of violations, CITES provides trade statistics that may help to indicate the global relevance of a specific species or use. This review revealed that while the trophy trade is a matter of very small numbers, there are many uncertainties in the reporting practises that do not allow precise documentation of the trade. It is also not possible to conclude whether a trophy trade transaction under CITES really refers to an actual tourist hunting activity. Additionally, it is not possible to estimate the total number of animals hunted.

A final point of discussion relates to the recent attempts to integrate foreign hunting (called trophy hunting in this context) into conservation programmes or projects (e.g. Johnson, 1997; Festa-Bianchet, 1997). Also, the more recent IUCN/SSC Action Plans e.g. on Wild Cats (Nowell and Jackson, 1996), on Wild Sheep and Goats (Shackleton, 1997), and Bears (Servheen *et al.*, 1999) address trophy hunting, and some include recommendations. Moreover, policies (WWF, 1993) or guidelines have been formulated (Edwards and Allen, 1992; Prescott-Allen, 1993; Freese, 1996; Cromsigt, 1999). Common goals are to develop tourist hunting as a sustainable use of wildlife and as a conservation tool, and to minimise negative impacts on conservation. The results of this study indicate that there is only a narrow interface between foreign hunting and the main Eurasian conservation issues/hot-spots, which are mainly situated in the Asian part of the continent. Within this context, three general recommendations are provided:

1. Integration of tourist hunting into conservation programmes or projects should be undertaken using a case-by-case approach that will yield the benefits of that option in a individual cases. A realistic pre-evaluation of the option will clarify whether it promises to be helpful for the specific initiative. Important questions to be asked are:
   - What is the specific target group of hunters interested in this kind of hunt? *(How many are interested? Where do they come from? How can we contact them? What are they willing to pay?);*
   - Are there effective and efficient means for successful marketing of conservation-oriented hunting, and can it be credibly marketed?
   - What are the criteria, risks and opportunities to implement sustainable tourist hunting locally? *(Quotas? Monitoring and control? Administration? Re-investments?).*

2. Encouraging dialogue with tourist hunting stakeholders on a project level as well as generally is recommended because it promotes conservation issues within this target group. The study showed that the majority of foreign hunters support conservation and even condemn those who endanger the public image of hunters by inconsiderate behaviour. Initiating a common certification process for tourist hunting destinations/organisers may be a strong long-term instrument to reduce unacceptable practises by organisers, by focussing the hunters' attention on certified organisers.

3. CITES personal effects regulations and reporting practises differ a lot among the countries within the regional scope of this study, even among the EU Member States. Standardisation of both should be reached to enhance the conservation goals of the convention and to support effective enforcement. For EU Member States, the EU Committee on Trade in Wild Fauna and Flora should address possible means of harmonising the implementation of the personal effects regulations and reporting practises.

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TRAFFIC, the wildlife trade monitoring network, works to ensure that trade in wild plants and animals is not a threat to the conservation of nature.

TRAFFIC works in co-operation with the Secretariat of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

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