



**Sayı** : 38591462 - 490.02 - 2020 - 1121

02/04/2020

**Konu** : Yaban Hayatı için Birliktelik (United for Wildlife) Derneği Nisan 2020 Bülteni Hk.

**Sirküler No :411**

Sayın Üyemiz,

**İlgi** : Uluslararası Deni Ticaret Odasının (ICS) 01/04/2020 tarihli ve MC(20)32 sayılı yazısı.

Uluslararası Deniz Ticaret Odası (ICS) tarafından gönderilen ilgi yazıda, "Yaban Hayatı için Birliktelik(United for Wildlife) Derneği Ulaştırma Görev Gücü" tarafından hazırlanan, yasa dışı yaban hayatı ticareti konularına yer verilen 2020 Yılı Nisan ayı bülteni Ek'te sunulmaktadır.

Bahse konu bültende, koronavirüs salgınına rağmen, yaban hayatı kaçakçılık faaliyetlerinde bir duraklama yaşanmayacağı, belli alanlarda kaçak avlanma ve yaban hayatı yasa dışı ticareti ile ilgili yeni fırsatlar bulunabileceğinin değerlendirildiği ifade edilmektedir. Ayrıca, yasa dışı yaban hayatı ticaretinde satış piyasasının güçleneceği, Asya, Afrika, Nijerja ve Malezya'daki tedarikçilerin, olumsuz piyasa koşullarından, fiyatların düşmesinden etkilenmemek için ellerindeki stokları satarak veya ihraç ederek tüketmeye yönelecekleri ve böylelikle yasa dışı ticarete artış görülebileceği bilgilerine yer verilmektedir.

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Saygılarımla,

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**Ek:** İlgi Yazı ve Eki (7 sayfa)

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01 April 2020

**MC(20)32**

**TO: MARINE COMMITTEE**

**Copy: All Members and Associate Members (for information)**

**UNITED FOR WILDLIFE TRANSPORT TASKFORCE BULLETIN**

**Action Required: *members are requested to distribute the attached Transport Taskforce Bulletin to their member shipowner companies for their information.***

As members will be aware and further to ICS Circular BOARD(15)44 as a signatory to the declaration on illegal wildlife trafficking ICS will distribute the bulletins produced by United for Wildlife to all members.

The latest Transport taskforce bulletin is self-explanatory and is attached as an annex to this circular for member shipping companies' information.

Chris Oliver  
Nautical Director

Annex A – UNITED FOR WILDLIFE TRANSPORT TASKFORCE BULLETIN

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# How will COVID-19 impact global wildlife trafficking?

Dr Tim Wittig

United for Wildlife Financial & Transport Taskforces, Head of Intelligence & Analysis

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This special analysis provides a predictive assessment of likely impacts of the COVID-19 pandemic on illegal wildlife trade activities and associated risks to transport and finance companies.

Overall, we assess that there will be **no widespread operational pause for wildlife traffickers**, despite various specific adaptations brought about by the pandemic and its response. There will be **some localised disruptions**, but the pandemic will **not significantly diminish** illegal wildlife supply availability, smuggling modes, or demand patterns in the short to medium terms. On the contrary, it will very likely open up **new opportunities for traffickers and poachers** in certain areas. In the medium to long terms, however, wildlife traffickers will face **unprecedented vulnerabilities** due to macroeconomic and macro-political uncertainties.

Whether or not wildlife traffickers will be able to successfully adapt to and thrive in these new conditions will depend primarily on how aggressively the global counter-wildlife trafficking community is able to target and exploit these vulnerabilities in a strategic and systematic way.

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## Introduction

The following set of predictions are based on Taskforce assessment of both open-source and confidential law enforcement and NGO reporting, as well as analysis of relevant macro-level trends and plausible future scenarios.

We have moderate confidence in this assessment, due to the fast-changing nature of the pandemic and the lack of immediately current intelligence on wildlife trafficker activities and intentions since the COVID-19 outbreak.

These predictions will be the subject of a United for Wildlife Taskforce webinar on 8 April 2020 to discuss further and solicit feedback from Taskforce members and partners on the impact of the pandemic on global wildlife trafficking.<sup>1</sup>

## Predictions

The United for Wildlife Taskforce assesses the following future trends and shifts to be likely impacts of the COVID-19 pandemic on global wildlife trafficking.

### 1. Poaching will increase in some key areas

We assess that poaching rates of elephants, rhinos, big cats, and other species will likely rise in Africa and Asia.

- This rise is likely to be especially acute in South Africa, Botswana, Kenya, Namibia, and Tanzania. This is in particular in and around national parks and conservancies formerly popular with international tourists but which have seen precipitous drops in tourism numbers and accompanying revenue due to the pandemic.
- Poachers – both subsistence and organised criminal gangs – will seek to exploit local security vacuums in areas heavily hit by COVID-19, taking advantage of law enforcement and security forces being reprioritised to pandemic response or keeping public order.
- At the same time, we predict there will be significantly more incentives and opportunities for local people and unscrupulous wildlife rangers to engage in and/or facilitate poaching, both for subsistence and for profit, due to declining economic and social welfare of local communities living near parks and private reserves.
- Over longer terms, we predict poaching will significantly increase – in some places likely to crisis levels – in reserves and protected areas which have been forced to reduce ranger force staffing levels, patrolling and intelligence operations, training, and/or equipment provision due to loss of tourism revenue or donor funds. These impacts will be especially acute in protected areas which lack mutually positive relationships with the local communities that surround them.

### 2. Wildlife traffickers will be vulnerable to macroeconomic swings

We assess that the macroeconomic impacts of the pandemic will undermine the overall profitability of the global illegal wildlife trade, but these impacts will be short-lived unless concerted effort is made to exploit the current economic vulnerabilities of wildlife traffickers.

- In the short to medium terms, the macroeconomic shocks accompanying the current pandemic will have knock-on negative economic impacts on the illegal wildlife industry. This will cause a – likely temporary –

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<sup>1</sup> NOTE: For the purposes of this assessment, temporal terms are roughly defined as follows:  
'immediate' = next 2-6 weeks; 'short term' = Q2 to Q3 2020; 'medium term' = Q4 2020 to Q2 2021; 'long term' = Q3 2021 and beyond.

decrease in buying power among many core consumers of illegal wildlife, especially in southern Chinese cities, Southeast Asia, Europe, and North America.

- In the short to medium terms, legal restrictions on selling wildlife products will increase the transaction costs for purchasing illegal wildlife and at the same time reduce the status of illegal wildlife products among many potential consumer segments – a shift that is already taking place for example among the urban upper and middle classes of Beijing and Shanghai, according to recent polling.
- These impacts will likely drive continued declines in prices for many illegal wildlife products including ivory and rhino horn, and reduce the profitability of the illegal wildlife trade in general, especially for traders operating at smaller margins, over the short to medium terms.
- Over longer terms, illegal wildlife traders will be most vulnerable to measures that:
  - a. diminish the social status and increase the stigma of owning and trading in wildlife products;
  - b. reduce the price of illegal wildlife products;
  - c. undermine the perception of the illegal wildlife trade being a stable and profitable business;
  - d. shift public perception in demand countries of illegal wildlife trade as a threat to national pride, public health, and security, especially in the context of being a key vector for the COVID-19 crisis and potential future pandemics and the huge related social costs.
- If no such concerted pressure is brought to bear against illegal wildlife traders, we predict they will easily adapt to the new macro market conditions and return to full profitability within 2-3 years, in line with the aftermath of the 2002-03 SARS outbreak.

### **3. Illegal wildlife traders and wholesalers will shift to online selling**

Driven by the continued bans on physical wildlife markets, including wet markets, and the shift to online shopping and distribution accompanying pandemic-related lockdowns, we assess that there will be a shift, likely already underway, to selling and trading illegal wildlife products online, both at wholesale and retail levels.

- This shift is likely to incentivise some smuggler and supply networks to attempt to establish relationships directly with major online traders.
- Shifting online will make wildlife traffickers more vulnerable to electronic surveillance and offensive cyber operations.

### **4. Poly-crime networks involved in IWT will diversify more into cybercrime and fraud**

We predict transnational organised crime groups and other criminal networks involved in multiple crime types including wildlife trafficking will likely prioritise cybercrime and fraud over illegal wildlife trade in at least the short to medium terms. These networks will seek to take advantage of the explosion of high-profit and low-risk criminal opportunities brought about by the pandemic and the widespread shift into online working and communications, as well as large influxes of funds to support pandemic responses.

**5. The wholesale market for illegal wildlife will consolidate**

We assess market conditions will force changes in behaviour among wholesalers, aggregators, and distributors of illegal wildlife. In Asia and Africa, illegal wildlife aggregators – such as those in Nigeria and Malaysia – will likely attempt to sell off or export existing stocks of illegal wildlife to hedge against supply chain instability, price drops, and other negative market conditions. Conversely, some illegal wildlife wholesalers in Southeast Asia and China are likely to use the pandemic as an opportunity to expand their operations and market share, especially those linked to registered wildlife farms and legal wildlife trading businesses.

**6. New wildlife 'bans' will create new illegal business opportunities**

We assess that newly implemented restrictions (often reported in the media as 'bans') on the selling and consumption of wildlife in China, Vietnam, and elsewhere will create and/or expand illegal profit-making opportunities, especially for already established legal wildlife traders. These new illegal business opportunities will focus on:

- Selling and renting legally obtained wildlife trading permits, licenses, and certificates to illegal traders.
- Leveraging legal wildlife supply and distribution chains to traffic and sell illegal wildlife products, often laundered as legal trade.

**7. The line between legal and illegal wildlife trading will increasingly blur, especially regarding Traditional Chinese Medicine (TCM) suppliers and wildlife farms in Asia**

We assess that legally registered wildlife trading businesses, such as wildlife farms, zoos, breeding facilities, and TCM suppliers, will become increasingly dominant in the illegal wildlife trade over the medium to long terms. In the short term, many legal wildlife businesses will enter the illegal market – or expand their existing involvement – as a hedge against market instability, and to take advantage of new profit-making opportunities.

Over the longer term, we predict wildlife traffickers will increasingly use TCM product wholesalers and distributors, wildlife farms, and other legal wildlife businesses as a cover to transport and bring to market illegal wildlife products. This will in turn likely lead eventually to a greater emphasis for many wildlife trafficking networks on less 'iconic' species more easily covered by the legal trade, such as frogs, birds, turtles, and snakes.

**8. Passenger air will cease being a major mode of smuggling for the duration of the pandemic**

We assess wildlife traffickers will adapt to current air travel conditions and significantly reduce their use of passenger air travel for smuggling, given far fewer available routes and flights, comparatively much greater scrutiny on remaining passengers, and widespread restrictions on entry and exit in most countries. Illegal wildlife products previously transported by passenger air will likely instead use air cargo or maritime shipments, or in the case of fragile items or certain live specimens, air express services.

**9. Traffickers will focus on proven smuggling routes and modes**

We assess that wildlife traffickers will refocus most smuggling activities on maritime, air cargo, and air express networks, given COVID-19-related restrictions are not applied to the movement of cargo in most countries. We

assess in parallel that traffickers will continue to use existing proven smuggling routes, and will not focus on – or be able to – develop new routes or criminal contacts in the short to medium terms.

#### 10. **Insider threat and corruption risks will significantly increase**

We assess that wildlife traffickers will seek to exploit the pandemic to corrupt both government and private industry employees.

- Given the declining economic situation in many key source and transit countries, and diversion of law enforcement attention to the pandemic crisis, wildlife traffickers will likely have more opportunities to bribe and corrupt government officials, especially customs officers, border officials, and rangers, as well as unscrupulous businesspeople and company employees, especially those working in or having access to ports, logistics firms, or financial institutions.
- Trafficker opportunities to corrupt company employees during the pandemic period will also be greater as more employees will have remote access to company systems without any physical supervision.
- Risks of detection for bribery and corruption offences will likely diminish during the pandemic for traffickers, as law enforcement and border security ability to conduct investigations will diminish in the context of pandemic lockdowns and social distancing requirements.

#### 11. **Traffickers will become vulnerable to political narratives linking illegal wildlife trade to COVID-19 and resultant costs to society and national reputation**

We assess that in the long term, wildlife trafficking will become increasingly understood as the ultimate cause of COVID-19 and as a future threat for other new zoonotic disease pandemics. This will create a substantial political vulnerability for wildlife traffickers and its facilitators. Whether these vulnerabilities impact the illegal wildlife trade is dependent on how much they are exploited effectively by respective countries and also internationally, especially in terms of:

- Strong enforcement crackdowns on known wildlife trafficking networks in key source, transit, and destination countries which have also had significant economic and social costs due to the pandemic, such as China, Vietnam, South Africa, Kenya, and Nigeria.
- Measures to increase social stigma for consuming and trading in illegal wildlife products – generally and also in terms of specific species / wildlife categories.

#### 12. **Wildlife traffickers will suffer from new vulnerabilities**

We assess that global wildlife trafficking will be more sensitive than before to:

- Know Your Customer (KYC) controls and enhanced due diligence tailored to the above likely risk trends.
- Proactive, targeted, intelligence-led interventions against known risk factors, especially if done with coordination and intelligence-sharing across industries and/or jurisdictions.
- Effective strategic communications efforts that target the price of illegal wildlife products, the profitability and social acceptability of trading in and/or consuming illegal wildlife, and the responsibility wildlife traffickers played in the human and economic costs of the current pandemic.

- Intensive law enforcement pressure on remaining illegal wildlife smuggling, wholesale, and retail trading networks (including those online) in the short to medium terms.
- Investigation, exposure, and prosecution of corrupt government officials and business people for links to the illegal wildlife trade, and by association, causing the pandemic.

#### About

United for Wildlife is a program of the Royal Foundation of the Duke and Duchess of Cambridge. This Special Analysis was first published in the 1 April 2020 United for Wildlife Taskforce Intelligence Bulletin. Taskforce Intelligence Bulletins are joint monthly advisories for both Buckingham Palace and Mansion House Declaration Signatories on issues of high concern related to wildlife trafficking and the finance and transport sector, and are a core output of the Taskforce Information Sharing System. The Bulletins are published by the Basel Institute on Governance on behalf of United for Wildlife. All rights reserved.

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