

SUMMARY REPORT



*Dining on shark fins:
a snapshot of shark fins offered by
Macau's leading casino-hotels*



BLOOM Association Hong Kong
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SURVEY HIGHLIGHTS

1

Macau's hospitality industry has been steadily expanding over the past decades. Number of hotels in Macau has risen from 40 in 1999 to 67 in 2012. Of these, 33 are casino-hotels. Correspondingly, the total number of tourists has risen from 6.9 million in 1998 to 28 million in 2012.

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In the four years between 2007 and 2010, **Macau's shark fin-related imports from Hong Kong have doubled**. Their staggering import volumes between 2000 and 2009 landed them 8th in ranking for the greatest volume of shark fin imports in the world, according to the United Nations Food and Agricultural Organization (UN FAO).

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Only **2 of the 33** casino-hotels in Macau have removed shark fin dishes from their menus **completely**.

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In addition, only **7 of the 33** surveyed casino-hotels have announced Corporate Social Responsibility statements that are to do with their restaurants' **seafood procurement policies**, or that indicate consideration for sustainability in seafood sourcing practices.

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**FAR TO GO
FOR ASIA'S
CASINO CITY**

Given the extent of shark fin consumption within Macau's casino-hotels, these casino-hotels and their operators have the **responsibility** to encourage a more sustainable attitude towards the culinary use of shark-related products, and to provide **environmentally conscientious menu choices**. Each hotel is recommended to have at least a **seafood procurement policy** to guide the sourcing of shark fin and other seafood, and avoid unsustainable sources.

INTRODUCTION

*"We want only to live in peace
in our territory.
We want no wars, we want no fights,
we want our dignity.
But you cut our fins, toss us back,
and we sink to the deep."*

*Lyrics from "Voice",
Written by Cuckoopella, 2015*

The food and beverage industry are in a unique position to significantly reduce a region's shark-related consumption and demand.

Considered one of the greatest delicacies in Chinese culture, shark fin soup can almost always be found in the menus of high-end Chinese restaurants, especially those in hotels frequented by Chinese tourists. A change in the way that these hotel restaurants provide shark fin can hence hugely influence the way that shark fin is consumed in that region.

Macau is a territory and Special Administrative Region of the People's Republic of China, neighbouring Hong Kong, also a Special Administrative Region of China, and Guangdong province. Tourism and casino-driven revenues are by far the two key sources of income for the territory's economy. In 2013, Macau's gaming industry gave a total gross revenue of 360.749 billion patacas (USD \$46.25 billion), surpassing any other in the world (Government Information Bureau, 2014)

The success of Macau's tourism is supported by a rapid growth in hotel development. In 2002, the Macau government opened up the gambling/gaming industry to local casino-operators, and **subsequently as of 2012 over 30 new licensed hotels were erected**. With the expansion of casinos and related tourism bringing high-spending visitors into Macau,

and a rising standard of living among locals benefitting from the increased tourist flow, the demand for high-end cuisine and fine dining has also steadily grown.

Feeding this rising demand for precious foods are the casino-hotels. Living up to expectations of luxury, casino-hotels' restaurants serve their guests with high-end cuisine, among which sharks fin will most certainly be offered.

With the rising consumer demand, it is possible that the overall shark fin-related consumption in Macau will consequently increase, as suggested by the ever-rising volumes of shark fin-related imports into Macau year by year (see page 7).

Between May to July 2013, a study was conducted in part by BLOOM Association Hong Kong, to understand the availability of shark-related products in Macau's leading casino-hotels. The core objective was to find out whether shark fin dishes are served at banquets offered by each hotel, and whether the operators of casino-hotels have seafood procurement policies that are guided by a principle of sustainability.

In some regions around the world, the food and beverage industry are committed to promoting sustainable seafood, by educating consumers and avoiding serving species that are unsustainable. Macau has far to go before it can develop such a sustainable seafood market. Suggestions are made for Macau to move towards sustainable seafood consumption, and participate in the global initiative for marine conservation (see page 11).

Macau hotels are not alone in taking progressive steps to protect sharks.

At least 30 hotels in Hong Kong have pledged to either remove any shark fin-related product from all catering menus, or at least to serve such products only upon specific request. These are commendable examples that Macau's casino-hotels should strive to follow, inviting leadership from the hospitality industry and the demonstration of greater environmental stewardship and responsibility.

METHODOLOGY

As of 2013, Macau was home to a total of 33 legally operating casino-hotels. These hotels all belong to one of the 6 casino-operators legally authorized by the government of the Macau Special Administrative Region to operate "games of fortune and of chance" (Gaming Inspection and Coordination Bureau Macao, 2014). All 33 casino-hotels were included in this survey.

There were 2 key components to the survey: a) availability of shark fin-related sale and extent of consumption at Macau casino-hotels, and b) presence of a seafood procurement policy at those same casino-hotels.

Sale and consumption

Within the survey period from May to July 2013, various investigative missions to the 33 casino-hotels in Macau were conducted. From each hotel, pre-set banquet menus were collected for reference and comparison. In addition, communication with banquet staff was also made by email and phone.

For each set of menus from the hotels, the survey assessed:

- i.) the availability of shark fin-related dish(es) on regular banquet and wedding banquet menus,
- ii.) the provision of alternatives to shark fin-related dish(es), and
- iii.) indication of a seafood-related procurement guideline, highlighting sustainability issues related to the acquisition of marine products.

Seafood procurement policies

In addition to collecting banquet menus and speaking to the banquet staff, annual reports

and corporate social responsibility (CSR) reports were also collected from each of the 6 operator's website, where available. These reports were examined for any mention of seafood-related procurement policies.

Shark fin trade statistics

Customs import data from major shark fin trading countries/territories were consulted, namely Taiwan, Japan, Singapore, Hong Kong and mainland China. The commodity codes for shark-related products for these countries were identified for this process (see page 4).

Macau import-related statistics were retrieved through manual compilation from the Government of Macau Special Administrative Region Statistics and Census Service's (DSEC) electronic statistics search engine service (Statistics and Census Service, 2015) (see Table 1, page 7), and from other relevant documentation published by that department (including the yearbooks of statistics, gaming sector surveys or tourism statistics).

COMMODITY CODES INDEX

China

0305 7100	Dried sharks fin, not smoked	<i>Revised in 2012 (previously 0305 5920)</i>
0302 8100	Dogfish & other sharks, fresh or chilled	<i>Revised in 2012 (previously 0302 6500)</i>
0303 8100	Dogfish & other sharks, frozen	<i>Revised in 2012 (previously 0303 7500)</i>

Taiwan

0304193000-6	Shark fins, edible, fresh or chilled	<i>Revised in 2009 (previously 0304103000-5)</i>
0304993000-9	Sharks' fin, edible, frozen	<i>Revised in 2009 (previously 0304903000-8)</i>
1604202011-7	Fins (including shark skate and ray fins), prepared or preserved, frozen	
1604202012-6	Fins (including shark, skate and ray fins), prepared or preserved, canned	
1604202019-9	Other fins (including shark, skate and ray fins), prepared or preserved	
0305592000-8	Sharks' fins, dried	
0305692000-6	Sharks' fins, salted or in brine	

Singapore

0305 7100	Shark fins	
1604 2019	Sharks fins for immediate consumption not in airtight containers	
1604 2011	Sharks fins for immediate consumption in airtight containers	
0302 8100	Dogfish and other sharks, fresh or chilled, excluding livers & roes	
0303 8100	Dogfish and other sharks, frozen excluding livers & roes	

Japan

0305 71-010	Shark fins (smoked)	
0305 71-090	Shark fins (dried, salted or in brine)	

KEY FINDINGS

I. HOSPITALITY IN MACAU

1. Macau's hotel industry has been on the rise since 2002.

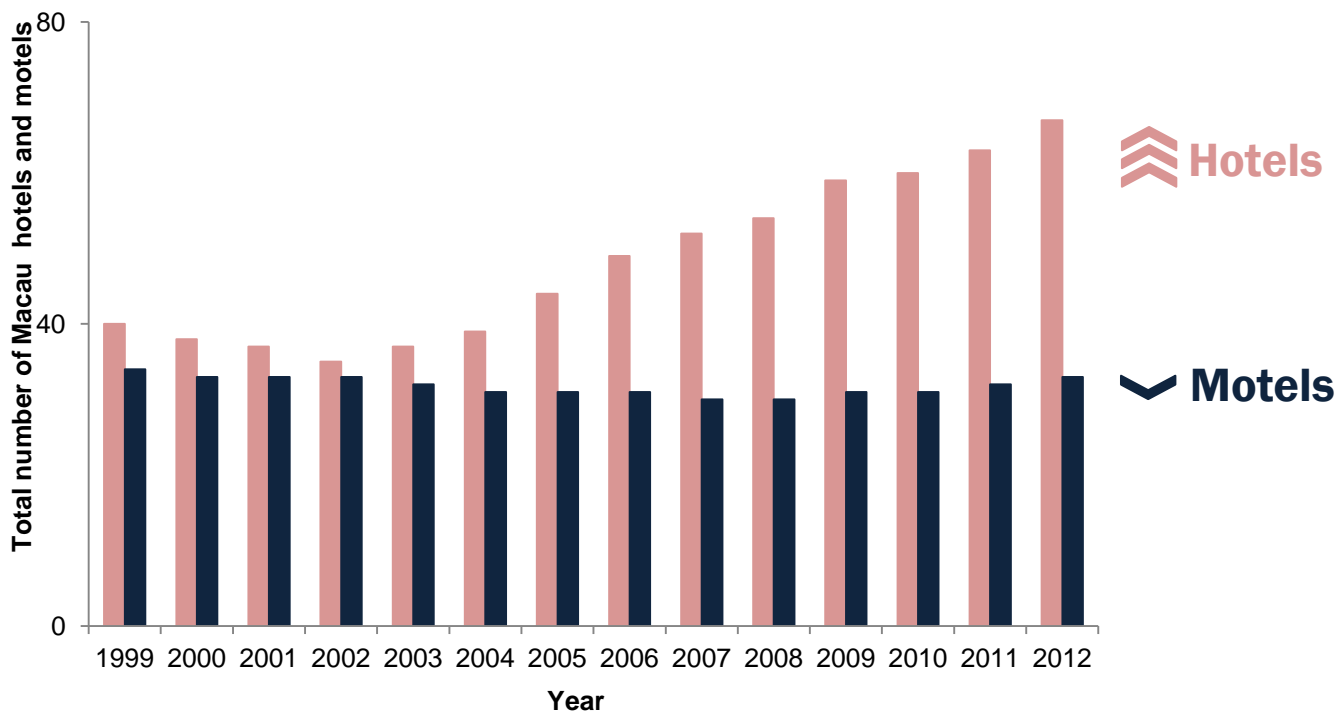


Figure 1 - Trends in the total number of hotels and motels in Macau from 1999 to 2012

The total number of hotels in Macau was lowest in 2002, with only 35 registered hotels, dropping from 40 hotels in 1999. Since then, the total number of hotels appears to have experienced a steady and substantial increase, reaching 67 hotels in 2012.

It is worth mentioning that the rate of hotel increase between 2002 (the year the Macau government opened up the gambling/gaming industry to foreign operators) and 2012 was 6.8% per annum. Contrarily, the total number of registered motels has remained relatively stable with slight decrease.

Out of the 67 hotels, 33 are "casino-hotels". All 33 of these casino-hotels were surveyed in this study.

Why Casino-Hotels?

There is no industry more representative of Macau's economy than casino-hotels. These hotels carry the reputation of prestige, quality, extravagance and affluence, and are assumed to be where shark fin is most available for consumption. Although the possibility of shark-related products to be served through other outlets is not disregarded, the size of operations of casino-hotels and the influence of their international reputations render them most suitable and representative for the purpose of this study.

2. Number of tourists visiting Macau, whether or not for an overnight stay, is generally increasing.

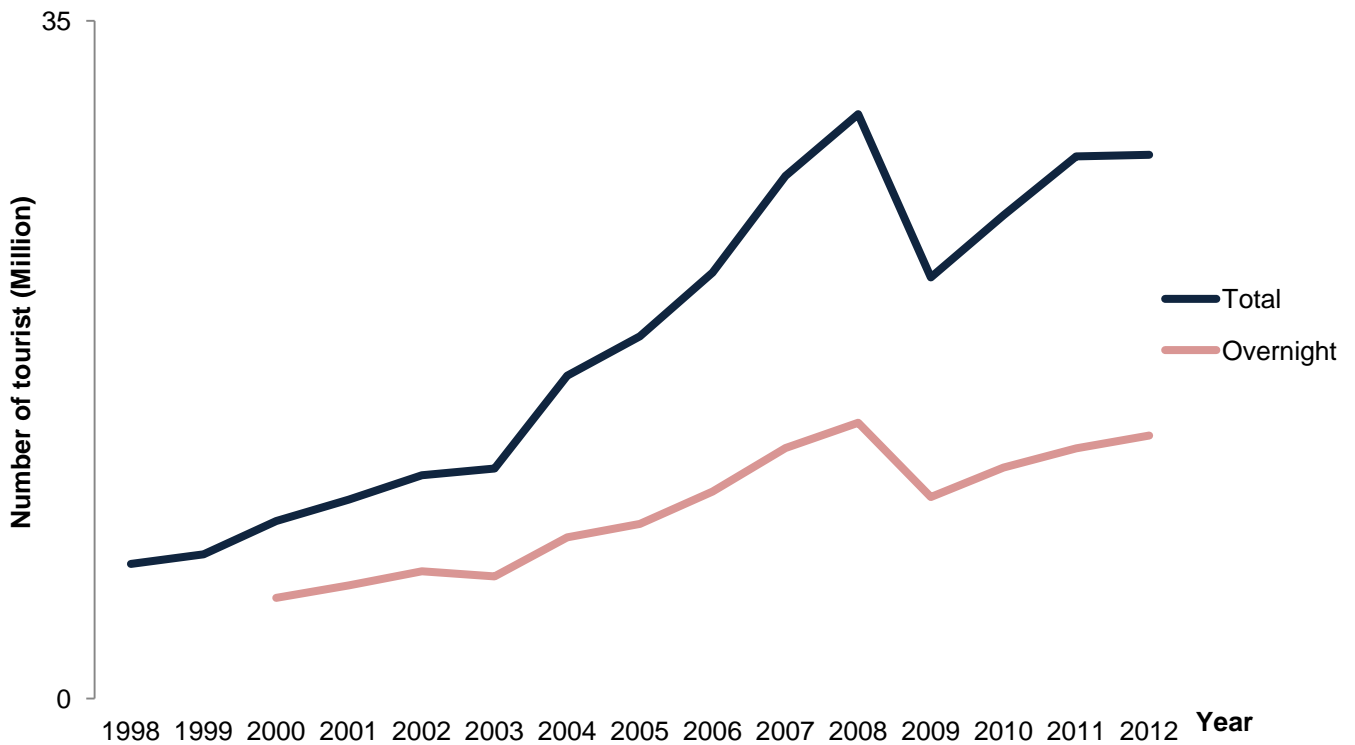


Figure 2 - Annual total number of tourists and total overnight tourists in Macau from 1998 to 2012

The total number of tourists visiting Macau has increased from 6.9 million in 1998 to an estimated 28 million arrivals in 2012, with a peak of an estimated 30.2 million tourists in 2008.

Macauhub (2013)
In 2012, Macau's total population was 582,000
 only a fraction of the visitor numbers at any point in time.

The total number of overnight tourists (spending one or more nights in Macau) has also showed a consistent upward trend between 2000 and 2012, with an average increase of 9.3% per annum. With only 5.2 million overnight visitors in 2000, the number peaked in 2008 to 14.2 million, and fell slightly to 13.6 million in 2012. Notably, fluctuations between 2009 and 2012 averaged 12.2 ± 1.4 million, representing more than a 20-fold of Macau's resident population.

Notably, in 2008 a series of policies were launched to limit the flow of mainland Chinese tourists into Macau. The effects are reflected in the drop of visitors seen in 2009.

II. SHARK FIN IN THE MACAU TRADE

METHOD: GATHERING MACAU IMPORT DATA

Macau is not a known commercial producer of shark fin. All shark fin found in Macau must be imported from other countries. These imports are documented in Macau's DSEC under five categories of shark fin and shark-related products, as shown in Table 1.

HS-8 Code	Corresponding shark fin and shark-related products category
0302 8100	Dogfish and other sharks, fresh or chilled, excluding livers and roes and fish fillets and other fish meat of heading
0303 8100	Dogfish and other sharks, frozen, excluding livers and roes and fish fillets and other fish meat of heading
0305 7100	Shark fins, dried, salted, in brine or smoked
1604 2011	Shark fins, prepared or preserved, canned
1604 2091	Shark fins prepared or preserved, not canned

Table 1 - Macau Census and statistics department commodity codes for shark fin and shark-related products

Access to the complete dataset of Macau's shark fin import or re-report/export is partially restricted by the DSEC due to statistical confidentiality. Information on Macau's shark fin trade was hence derived from the export/re-export data of Macau's top shark fin trading partners, as seen below.

- Hong Kong is by far the greatest exporter/re-exporter of shark fin-related products to Macau, and is seen to continue rising.

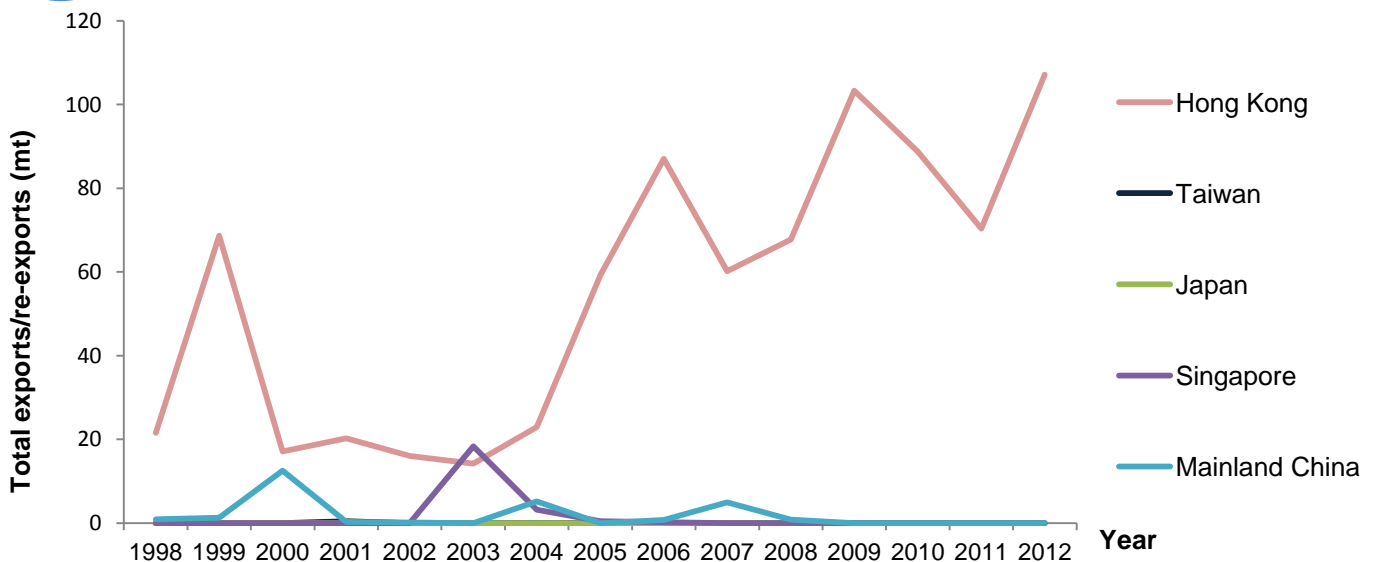


Figure 3 -Total exports/re-exports of shark fin-related products from the selected fin trading partners between 1998 and 2012

Hong Kong was, by far, the greatest exporter/re-exporter of shark fin to Macau. Declared fin exports/ re-exports to Macau from Taiwan, Japan, Singapore and mainland China averaged less than 2 metric tons (mt) per annum between 1998 and 2012. Hong Kong exported an estimated 55 mt of shark fin and fin-related products to Macau per annum.

Between 1998 and 2012, the lowest declared volume of shark fin exported from Hong Kong to Macau was around 14 mt in 2003, possibly due to the effects of Severe Acute Respiratory Syndrome (SARS) on the demand for luxury products. Since then, there has been an overall upward trend in the trade, reaching the declared 107 metric tons of shark fins and fin-related product exports in 2012.

CLOSING IN: MACAU IMPORT VOLUMES

AS SEEN THROUGH HONG KONG'S EXPORT/RE-EXPORTS

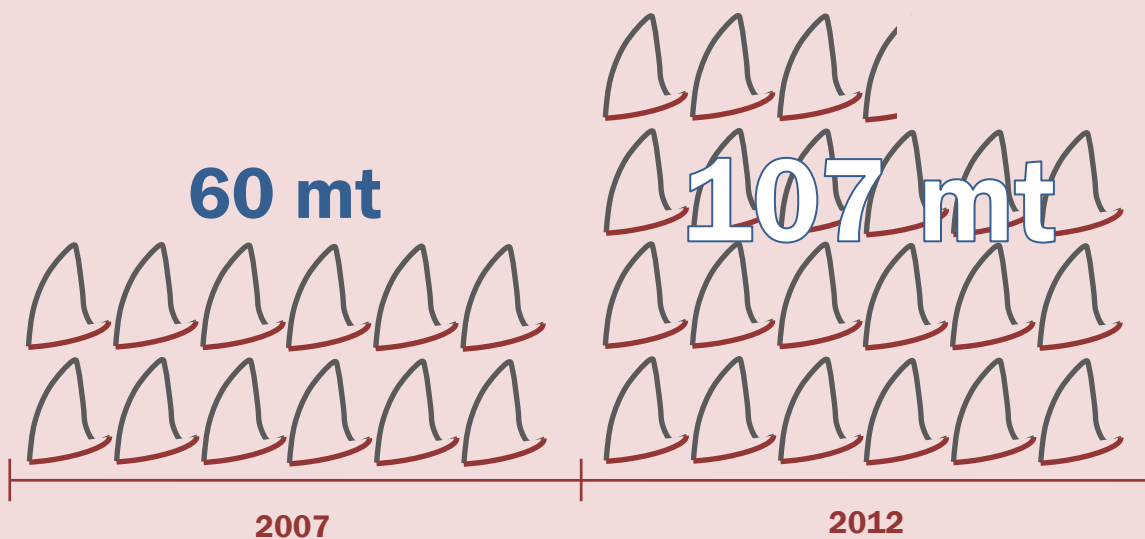


Figure 4 - Comparison of Hong Kong's total exports/re-exports of shark fin to Macau between 2007 and 2012

Solely based upon the export/re-export data of Macau's greatest source of shark fin imports - Hong Kong - it is found that Macau's shark fin imports have almost doubled in just five years, from 60 mt in 2007 to a staggering 107 mt in 2012. According to the UN FAO trade statistics, Macau imported 1,136 tons of shark fins between 2000 and 2009, **ranking Macau the 8th greatest shark fin importer in the world.**

III. SHARK FIN AVAILABILITY IN CASINO-HOTELS

1. Availability of shark fin dishes in hotels.

YEAR: HOTELS IN:	2011 HONG KONG	2013 HONG KONG	2013 MACAU
Number of hotels that...			
serves shark fin on menu	36	9	18
serves shark fin based upon request only	4	19	4
provides shark fin-alternative dishes in menus	34	40	17
have removed shark fin completely	2	14	2
did not provide Chinese banqueting or wedding banqueting during the study period	2	2	9
Total number of studied hotels	44	44	33

Table 2 - Overview and comparison of examined hotels with or without initiatives on shark fin issues between Hong Kong and Macau

During the survey period, it was found that only 2 out of the 33 (6.06%) surveyed casino-hotels in Macau did not serve shark fin-related dishes. To offer a comparison, 14 of the 44 (31.82%) surveyed hotels in Hong Kong had already removed shark fin from all their menus.

On the other hand, 18 (54.55%) of Macau's casino-hotels are still serving shark fin.

Encouragingly, 17 (51.52%) of Macau's casino-hotels are already offering alternatives to shark fin-related dishes. However, this percentage is still far lower than that of Hong Kong (90.91% as of year 2013).

The results suggest that shark fin soup continues to remain a core component of Macau's fine-dining culture.

IV. SEAFOOD PROCUREMENT POLICIES

1. Few casino-hotel operators have a competent seafood procurement policy.

"...[Operator A] is helping to ensure a greener environment for future generations by promoting environmental sustainability in our business..."

"...As a resort hotel operator, we consume energy, water and other resources – and generate waste. Our environmental impacts, therefore, must be carefully monitored and mitigated..."

"...[Operator B] is dedicated to helping protect our planet. By integrating a comprehensive environmental responsibility program, we are able to reduce our negative impacts on the environment, while continuing to provide our customers with a superior guest experience..."

"...As a leader in sustainability, [Operator B] is committed to making a difference that will last for generations..."

"...In order to make smarter buying decisions, [Operator B] considers raw materials, logistics, and the overall performance of a product. Being mindful of our supply chain impacts, and selecting products that meet our standards helps conserve natural resources and lessen our impacts on the environment."

"...Our responsibility to the planet is as important to us as our commitment to the comfort and well-being of our guests and Team Members..."

"...When purchasing materials and supplies, we consider the relative environmental and health consequences of available choices. Our environmentally responsible procurement policy, which covers the areas of construction, renovation, and operations, helps us manage these impacts. We purchase sustainable products and materials wherever possible, including Energy Star certified equipment; eco-friendly cleaning products; low Volatile Organic Compound (VOC) paints, coatings, adhesives and sealants; and carpet that meets the requirements of the Carpet and Rug Institute's Green Label Plus program..."

"...As a responsible corporate citizen, [Operator C] is committed to supporting the Macau SAR Government in accelerating the growth, prosperity and sustainable development of Macau. Fully committed to fulfilling its social responsibilities, [Operator C] actively contributes to society's different community and volunteering initiatives..."

"...We believe in putting in every effort into upgrading the quality of life in Macau, especially for those who do not benefit immediately from Macau's rapid economic transformation. We place special emphasis on improving social welfare, medical services and education in Macau..."

Figure 5 - Highlights of the 5 available CSR statements from hotel operators on environmental issues

Out of the 6 casino-operators that are included in the survey, only 5 had made their CSR reports accessible to the public.

Furthermore, of all the surveyed hotels, most have made public CSR statements with promises of sustainable development, natural resource protection, and planetary ethical duties. Yet, none of the statements showed any mention of a seafood procurement policy, or responsibility for the sustainable use of marine resources.

At the hotel level, only 7 out of the 33 studied hotels have mentioned their CSR strategies or procurement policy guideline with specific focus on seafood-related sustainability issues.

DISCUSSION

Hotels can make a real, measurable difference when it comes to managing an area's consumption of precious seafood like shark. Especially in cities such as Macau, where shark fin soup carries a reputation for prestige and royalty in the culinary culture, and where vacationers and casino-dwellers search for the ultimate experience of luxury and extravagance in its many, gold-shimmering hotels, shark fin and other shark-related products become hugely demanded to satisfy customer fine-dining expectations.

In 2010, BLOOM commissioned the Social Sciences Research Centre of The University of Hong Kong to carry out a survey on Hong Kong's shark fin and shark-related products consumption habits, revealing that at least 70% of the survey's respondents consumed shark fin in a restaurant, whilst only approximately 22% had ever eaten the dish at home (Ho & Shea, 2015).

This illustrates the essential role that hotel restaurants have as a platform for shark fin consumption.

Evidently the hospitality and tourism industries of Macau have enjoyed tremendous success in the past decade. The steady increase of visitors and vacationers coming into Macau ensures that the city's economy may continue to flourish, creating income and business for locals and foreign entrepreneurs alike. While the elements that drove the city's success in becoming a world-known holiday getaway are many-fold, the expansion of casino-hotels has played an irreplaceable role. An added advantage is Macau's proximity and accessibility to Hong Kong and mainland

Chinese tourists, to whom Macau provides an ideal and highly popular choice for a weekend retreat. Despite multiple attempts by the Chinese government to limit entry through policies and visa restrictions, Macau has remained highly popular among Chinese tourists.

Unsurprisingly, with the expansion of the industry came a greater demand for expensive but often controversial foods like shark fin-related products.

Needless to say, the conservation of global marine resources has not been a priority for the 6 casino-hotel operators included in this survey. Judging from the 5 CSR statements that were made available, there is immense potential for greater environmental literacy to be shown, and for practices demonstrating awareness for environmental issues, such as marine resource conservation, to advance.

SUGGESTIONS FOR ACTION: MACAU HOTELS

Bare Minimal. First and foremost, each casino-hotel operator must make accessible the company's CSR statements. This is the absolute minimal for any responsible corporation involving people and impacting the environment on any scale.

Establish. Once the above is fulfilled, it is suggested that a **seafood procurement policy** be included in the CSR statements of every casino-hotel operator.

Presently, where environmental sustainability is mentioned in the available CSR missions and strategies, the focus is placed mainly on issues related to carbon footprint, waste, water management, green building, and recycling. Biodiversity preservation and responsible food sourcing is barely mentioned.

A seafood procurement policy should be a basic prerequisite for any restaurant that serves seafood, and should be designed to uphold the preservation of marine resources as priority. The use of threatened and endangered species as food in restaurants cannot and should not be tolerated in any degree.

Many marine resources, not only sharks, are quickly becoming depleted from overharvesting and awareness for the necessity of their conservation is growing. Sustainable seafood consumption practices will inevitably take centre stage in the culinary industry as an indication of responsible entrepreneurship. These considerations should be taken into account to form part of the hotels' brand positioning and marketing strategies.

By establishing a procurement policy now for shark fin, hotels are also getting better prepared for the future. While shark fin is now the topic of discussion, it is foreseeable that many other types of seafood, such as sea cucumber or bluefin tuna, will also soon be demanding similar attention to ensure sustainability in species survival and trade.

Promote. Advisably, the established seafood procurement policies should be made visible around the hotels (e.g. printed on the menus of each restaurant), to help spread the message of marine conservation, to promote sustainable practices in the consumption of seafood, and demonstrate the hotels' leadership.

Collaborate. Understandably, Macau's hotels may not know where to begin to establish seafood procurement policies, or to seek sustainable shark fin (as well as other seafood) sources. Hotels may also consider collaborating with marine conservation NGOs, whether from Hong

Kong or otherwise, to develop a strategy best suited to each hotel's operations.

SUGGESTIONS FOR ACTION: MACAU GOVERNMENT

A new awareness for the responsible consumption of shark fin and other seafood products in hotels provides an opportunity to initiate a widespread change in consumer attitudes in Macau. Given this opportunity, it is suggested that the Macau government may also demonstrate their support for this initiative to fuel the interest and support from the public. Three courses of action are suggested for the Macau government:

One. It is suggested that the Government exemplifies their interest in the matter, by taking action to cease the consumption of shark fin-related products in all official banquets, unless these products are provably from sustainable sources. Notably, both the government of the Hong Kong SAR (SCMP, 2013) and the People's Republic of China (SCMP, 2013a) have already pledged their commitment to banning shark fin dishes from official banquets and functions since 2013 (the Hong Kong government had taken their vow further to include the endangered bluefin tuna as well). The participation of the Macau government will be a welcomed addition supporting the ruling out of **irresponsible uses** of shark fin-related products on the Chinese dinner table.

Two. To further combat the irresponsible use of shark products, regulations governing the import and export of shark fin must be reviewed and revised. More specifically, regulation should revolve around identifying and refusing the entry of illegally traded shark fin, including those involving species with endangered or threatened statuses. The development of

such a regulatory framework and its successful implementation may inform similar measures for the trade of other fishery types in the future.

To complement an improved regulatory framework, it may be worthwhile to consider holding training workshops for Macau's customs service to become more familiar with the conservation challenges faced in the shark fin trade. These workshops should also train officers to be able to visually recognize fins belonging to CITES-listed or illegally traded species, so that these shipments may be identified at port for confiscation and prosecution. Several governments around the world, including Hong Kong's, have already held such workshops.

Three. Data regarding the shark fin trade, including the quantity, source countries, species composition and other information should be made publicly accessible. Transparency is necessary to facilitate NGOs and other interest groups in conducting research and trade data analysis crucial to understanding the role of the Macau market on global shark fin trades, through which further measures to minimize Macau's impact on global shark resources can be identified. In Hong Kong, for instance, all such data is made available for open access through a comprehensive system of data storage in the Census and Statistics Department (CSD), making possible researches and studies into the details of the trade. The cooperation of the Macau government on this matter is vital.

In addition to the abovementioned, it would be desirable for the Macau government to express their support for regulating the consumption of shark fin explicitly, to ensure that the conservational messages may reach

Macau's tourists and citizens. The timely combination of efforts between the government and hotels is crucial in bringing up to date Macau's habits and attitudes in consuming shark and other seafood.

Actions for Hong Kong?

In comparison, Hong Kong's hospitality industry and government may appear to be relatively more aware than Macau about the existing problems in shark fin-related consumption and the threats to shark conservation, **but there is still a vast potential for greater conservation effort.**

In reality, Hong Kong is still one of the world's largest trading hubs of shark fin. As illustrated by the findings of this survey, Macau receives most of its shark fins from Hong Kong, placing Hong Kong in a strategically accountable position to regulate the shark fin-related trade and control the import/re-export of shark fin to and from its trading countries.

Some actions that Hong Kong could take:

1. **Improve capacity to identify and confiscate illegally traded CITES species at ports** to prevent those illegal shark fins from reaching the end consumers who depend on Hong Kong's re-exports, such as Macau, thereby encouraging compliance among shark fin traders, both in Hong Kong and from source and destination countries.
2. **Form collaborations with other shark fin consuming and supplying governments in the region**, to exchange intelligence on the local shark fin trade, and formulate strategies for shark conservation.

For more suggestions for actions for Hong Kong, please view BLOOM's *Summary Report: Survey on shark consumption habits and attitudes in Hong Kong 2009/2010* (Ho & Shea, 2015).

CONCLUSION

Putting effort into conserving marine resources now is a means of ensuring that these resources remain available for future generations to enjoy.

As the Asia-Pacific region holds some of the world's largest consumer markets of seafood, it behoves culinary and hospitality establishments in the region, such as those in Macau, to be more conscientious on the food choices they provide to diners.

The necessity for conservation actions has evidently already been recognized by hotels and governments in Hong Kong, China, and many other regions around the world, albeit in varying degrees. Macau's leading casino-hotels should not lag behind in the growing global momentum to protect sharks and the integrity of our marine environment.

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