



Carol Kerven Odessa Centre Ltd



Kyrgyz Sheep and Goat
Breeders Association

REPORT ON THE FIRST ASIAN CONFERENCE ON CASHMERE

Bishkek, Kyrgyzstan

January 27-30 2007



Opening the conference: Carol Kerven (standing), Akylbek Rakaev (left) and Aidos Smailov (right). Photo: Linda Cortright, WildFibers

Summary

The aim of the conference was to bring together representatives from the Asian cashmere-supplying countries, as well as from other countries which research, purchase, test and process cashmere. In the past decade, some Asian countries, mainly in the former Soviet Union, have become new suppliers of cashmere, mostly to processors in China. Prior to this conference in 2007, there has been no opportunity for many of those involved in cashmere – whether as traders, researchers, community groups, development agents or processors – to meet and share ideas on how the cashmere industry can be further developed for the benefit of producers and their national economies.

The main conclusions of the conference were:

There is no central point for information exchange on cashmere. It is necessary to establish a centre, due to the importance of cashmere sales income for poorer households raising goats in some of the most marginal regions of Asia. The centre would collect and disseminate information on:

- Research on breeds, nutrition, veterinary care and harvesting
- Breed characteristics by region and country
- Availability of genetic material
- Quality and quantity of cashmere available in regions
- Best husbandry and marketing practices
- Business opportunities for investment, buying or selling
- Standards and testing facilities
- International commercial requirements

Production, marketing and processing of cashmere is changing rapidly. Some countries have newly entered the supply chain and are starting up processing industries. There are differing levels of experience between countries with relatively long familiarity in the cashmere business versus countries now seeking to develop cashmere marketing. Opportunities exist for sharing best practices between these countries.

As an internationally-traded commodity, cashmere cuts across national boundaries, often produced in one country, processed in several others and sold to consumers in third countries. There is a need to understand the impact of these chains on the livelihoods of producers and on national economies.

Buyers and sellers of raw cashmere have difficulties in matching grades and price expectations, in those Asian countries where harvesting, sorting and marketing are not yet well-organised. Cashmere quality is mainly measured by fibre diameter fineness in microns, with very tight commercial specifications. A difference of only one or two microns in fibre diameter has a significant impact on price. There is market malfunction when producers do not know how to meet commercial grading requirements, while buyers are unable to gain reliable supplies of graded cashmere. This is to the detriment of both producers and processors. There is justification for intervention by government and external agencies, to train producers on methods of harvesting and grading raw cashmere, and to link processing companies with producer organisations that are able to supply what is required.

The final point is that paradoxically, the luxury fibre of cashmere is supplied by some of the poorest rural inhabitants in Asia, living in the “forgotten regions” of mountainous terrains and deserts where

infrastructure and development efforts are least concentrated. Internationally-coordinated attention to cashmere producers will help alleviate poverty by supporting prices for a desirable livestock output on global markets.

Background

The indigenous domestic goats of Asia produce a downy undercoat of cashmere in cold-winter regions. Cashmere has a high international commercial value and is an important source of income for livestock-dependent peoples in the Asian rangelands –according to the International Livestock Research Institute, there are some 43 million such people in the countries represented at this conference, plus a further 20 million livestock-dependent people in China¹. The population of goats has been increasing in most of these countries, and many of these goats produce cashmere. Surveys find that in countries of Central Asia and in India, for example, households with the fewest livestock and other assets are more reliant on raising goats than other livestock species.

China is the world's main source of cashmere goats, and has recently become the principal buyer and processor of cashmere produced in other Asian countries. Chinese companies are now seeking to gain global control of cashmere purchasing and manufacturing². Italy is the main buyer of processed cashmere from China (69% in 2005), followed by the UK (19%)³. UK companies have also become major players in cashmere manufacturing in China. The USA is a major market and in 2006, imported cashmere sweaters with a value of USD 493 million, of which 87% were made in China, at an average price of USD 32 each. Average prices for sweaters made in Italy were USD 71 and USD 116 for those made in the UK⁴.

Asian countries where cashmere is produced include: Afghanistan, Iran, Kazakhstan, Kyrgyzstan, Ladakh, (India, Mongolia, Tajikistan, Uzbekistan, Turkmenistan, Kashmir/India/Pakistan, the Tibet Autonomous Region, Inner Mongolia and other provinces of western China (PRC). Mongolia is the world's second largest source of cashmere after China, followed by Afghanistan and Iran. The former Soviet states of Central Asia are becoming increasingly significant suppliers of cashmere to China and Europe.

Demand by processors for the best quality cashmere normally exceeds supply. World demand for cashmere garments – especially in lower-end markets - is growing rapidly, while the number of goats in China is stable or declining as a result of government environmental protection policies. This led Chinese companies to seek out new sources of supply. Chinese industry experts expect demand for raw cashmere to continue rising in response to the boom in markets for low-cost cashmere garments in USA, Europe and the far East (China Forum 2005).

Conference participation

¹ ILRI (International Livestock Research Institute) 2002. *Mapping Poverty and Livestock in the Developing World*. Eds. P.K.Thornton et al. Nairobi.

² Chinese Chamber of Commerce 2005. China International Cashmere Forum Documentation.

³ www.gschneider.com

⁴ Cashmere and Camel Hair Manufacturers Institute, www.cashmere.org

There were 42 participants, representing 11 countries of Asia as well as Australia, USA, Germany and the UK. See **Annex I** for list of participants. China was not represented, although an invitation was extended to a Chinese cashmere researcher in the Tibet Autonomous Region, who unfortunately was unable to attend. The conference was held in the Alpinist, a small private hotel in Bishkek, the capital of Kyrgyzstan, over three days. Participants also went on field trips, one to a large wool and cashmere mill and the other to a goat farm 200 km from Bishkek, which is a member of the Kyrgyz Sheep and Goat Breeders Association.



Group at conference. Photo: Linda Cortright, WildFibers

The composition of the participants, according to their primary activity, is shown in **Table 1**. Some participants were engaged in multiple activities relating to cashmere, e.g. research and community projects.

Activity	Countries	Number of participants
National or local cashmere trader/buyer	Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan, USA	10
Research	Afghanistan, Australia, Germany, India, Iran, Kazakhstan, Kyrgyzstan, Ladakh (India), Mongolia, Pakistan, UK	13
Development project	Afghanistan, Kazakhstan, Kyrgyzstan, Ladakh (India), Mongolia, Tajikistan	11
Large scale buyer, processor/manufacturer	Germany, Mongolia	2
Fine fibres media or trade association	Kyrgyzstan, USA (also for Italy, Japan, UK etc.)	3
Community association	Nepal, Ladakh (India)	2
International aid agency	UK	1

Among those who participated, 21 were self-funded either through their projects or private businesses. Fourteen participants were sponsored by a grant from the UK government Department for International Development (DFID) <http://www.dfid.gov.uk/> . Four participants were funded by the Global Livestock

Collaborative Research Support Program (GL CRSP) <http://glcrsp.ucdavis.edu/> and three were funded by the World Initiative for Sustainable Pastoralism (WISP IUCN) <http://www.iucn.org/wisp/>

The conference organizers wish to express their sincere appreciation to these agencies for their support, although the views expressed in this report do not necessarily reflect the opinions of these agencies.

Papers presented

A total of 22 papers were presented, on topics ranging from international standards for testing cashmere to community cashmere marketing groups in the Himalayas. See **Annex 2** for the agenda. The first day began with a discussion of methods and standards for assessing cashmere quality, and proceeded to country case studies presented in alphabetical order, starting with Afghanistan and ending on the second day with Uzbekistan. In all, there were 15 country case studies, some focusing on research and others on marketing and export. Presentations were given either in English or Russian, with simultaneous translation. Most presenters used Powerpoints, while some read out their papers. The electronic presentations were transferred onto disks as it is hoped that a website will be created on which these presentations can be uploaded. This depends on further funding.



Delegates from Mongolia, Ladakh and Nepal, with Kyrgyz shepherd examining cashmere sample. Photo: Linda Cortright, WildFibers

On the morning of the third day, participants split into three topic-focused discussion groups, which were asked to identify the key issues on their topic and make recommendations to the plenary session which ended the meeting.

The three topic groups were:

- Trade and marketing
- Sampling and testing
- Research and community groups

Main points

1. There is a need for an international central point for cashmere research and information exchange. Many participants commented that it is difficult to find out about cashmere production, research or marketing in other countries. It was suggested that the agricultural institute of ICIMOD

(International Centre for Integrated Mountain Development, based in Kathmandu, www.icimod.org) was a potential locus for a cashmere programme. The region covered by ICIMOD includes some of the main cashmere-producing countries (China, Afghanistan, India, Pakistan and Nepal), but does not cover the former Soviet republics of Central Asia, or Mongolia. It was agreed that a group of participants would write a joint funding proposal to establish a cashmere centre at ICIMOD or an alternative agricultural centre. Another suggestion was to add a link translated into Russian to the Cashmere and Camel Hair Manufacturers Institute website (www.cashmere.org) but again, funding would be needed for this.

Cashmere goat in northern Afghanistan. Photo: Alimuddin

2. The existence of national cashmere research and development programmes that had not previously



been in contact with each other, emphasised the need for information to be spread between countries. It was recognised that information data bases would have to be in at least two languages, English and Russian. Several researchers expressed interest in exchanging genetic material for goat breeding schemes, as they learned from the conference that certain breeds in some countries produced superior cashmere. Chinese researchers have recently been in the

forefront of research and breeding on cashmere goats, and it was suggested that contact be made with them.

3. Rural development projects could share information on the best methods for improving livelihoods of livestock-keepers by developing cashmere production and marketing. In some countries, for example, Kyrgyzstan and Tajikistan, new donor-funded projects are planning to develop cashmere marketing, while other countries, such as Mongolia and Ladakh in India, had extensive experience of implementing such projects. It would be beneficial to exchange ideas and experiences between these countries. This type of information could be posted in the form of project reports, on the proposed cashmere website.

4. In many cashmere-supplying countries, there has been no systematic characterisation of the quality of cashmere from different goat breeds or regions within each country. Some indigenous breeds are at risk of being lost, though interbreeding or other changes in management practices. While the diverse cashmere goat breeds have been assessed in China, Mongolia and Iran, this is not the case in the former Soviet Central Asian republics, or in Pakistan or Afghanistan, for example. Assessing the cashmere characteristics of indigenous breeds is of commercial significance, as international buyers often prefer to purchase particular types of cashmere, according to colour, length or diameter of fibre, or style. At present, purchasing in some countries is somewhat haphazard, as buyers do not have objective data on the characteristics available in different locations. One result is that purchasers cannot offer differentiated prices to producers for better-quality cashmere, since various qualities are bulked together for domestic processing or export.
5. Following from the last point, participants acknowledged that the marketing of cashmere had to be improved in order for producers to gain more value from selling their product. Better marketing depends on several interlinked factors. First, producers require training to recognise the quality differences in cashmere, as international prices vary considerably according to quality. At the same time, producers will respond to price differentials if premium prices are offered for superior cashmere. However, participants representing the commercial sector noted that they are unable to offer premium prices unless the raw cashmere sold by farmers and herders is initially sorted into quality classes. This returns to the issue of training producers. The conclusion was that producers and commercial processors must be more closely linked, through trained collection agents, community bulk marketing schemes and pre-season advertisement of prices for quality classes.



6. The demand for cashmere is

Community-based cashmere dehairing machine. Ladakh. Photo: Tsering Phuntsog

growing, as consumers' incomes are rising in different parts of the world and there is demand elasticity for luxury items. The supply of cashmere is very limited with only about 8,000 tonnes annually available and the high price for raw cashmere reflects this scarcity. China increasingly dominates the world

output of processed and manufactured cashmere garments, through sourcing raw or semi-processed cashmere in other Asian countries. Production in developed countries such as Australia, USA and in Europe, is minimal due to small populations of cashmere goats. Therefore the Asian supplying countries can benefit from adding value to their cashmere through domestic processing, though only a few have developed manufacturing industries and these are in competition with China.

Mongolia's experience as the second main supplier of cashmere in the world, is instructive. Faced with strong price competition from Chinese buyers, the Mongolian industry has been seeking to upgrade the quality and reputation of its cashmere, through strict testing, brand identification and exploiting niche markets for better quality products.

7. Finally, it is recognised that cashmere has been and is becoming an important income source for livestock-keepers in some of the most remote and poorest regions of Asia. In some mountainous areas, farmers and pastoralists have retained their traditional skills of harvesting, spinning, weaving and knitting cashmere from their goats – as in the Wakhan region of northeast Afghanistan, the



North West Frontier of Pakistan, Ladakh in the Indian Himalayas – making items such as pashmina shawls which sell for up to several thousand dollars.

Pastoral women weaving cashmere in Ladakh. India. Photo: Tsering Phuntsog

Elsewhere, cashmere-producing goats still persist in the deserts and mountains of Central Asia, despite the introduction of angora and Russian goat breeds during the Soviet era. Here until quite recently, the downy undercoat developed

by indigenous goats in winter was not used, while only the rough outer fibre was made into ropes for yurts and reins. The rising global demand for cashmere has changed the value of this once worthless item, as buyers have probed into the far corners of the rangelands to purchase cashmere from livestock-keepers in springtime when the down is moulted. Greater efforts are required to ensure that the producers can realise more value from this commodity, sought by the more affluent members of society.

Conclusions and Recommendations

Each discussion group reported back to the plenary on the problems and solutions within their topics.

1. Trade and marketing

The initial problem is to create awareness of Central Asian cashmere in the global markets. This awareness should include reliable data on quality and quantity available for purchase by international buyers.

The first step to achieve this is to host a website on which contact information for buyers and sellers can be posted. This should be an open site with a wide geographical coverage, including Asian cashmere suppliers and those in Europe, North American and Australia, which also produce commercial cashmere. The website could become self-supporting through annual membership fees, but would need start-up funding initially. The website could be advertised in fibre industry sources such as the Wool Record, UK.

The group also identified a problem in the lack of contact and dispersed nature of buyers at the local level who purchase cashmere from producers, as they lack channels of communication to large-scale processors.

The proposed solution was to create a cashmere business association, again using the internet. The President of the Cashmere and Camel Hair Manufacturers Institute, who was present, suggested this could be linked with his organization which represents some of the largest cashmere manufacturers.

In discussion it was noted that the website could also be used to disseminate research publications and development reports on cashmere.

The group proposed that Akylbek Rakaev, the Kyrgyz host of the conference and director of the Kyrgyz Sheep and Goat Breeders Association, be co-opted as the liaison for the website and business association. It was agreed in the plenary that funding would be sought by some participants, to support the website.

2. Sampling and testing

There is currently no single international standard for testing cashmere, in contrast to sheep wool, which has standardized methods of testing under the International Wool Trade Organization (IWTO). China, the USA, the EU and Mongolia all have different definitions and tests for cashmere. One result was the increasing sales of poor quality garments on the market, which are labelled as cashmere but in some cases are mixed with other fibres, which harms the reputation of cashmere as a luxury fibre and therefore high-priced commodity.

Discussions are ongoing between those representing the international cashmere industry and legal authorities in the various countries.

The second problem noted was that of how to sample cashmere from the goat, for subsequent testing. It was agreed that sampling methods had to vary according to the purpose (e.g. breeding, national breed characterization, or commercial assessment). It was also agreed that the rigour of sampling had to depend on funding available, and practicality e.g. when sampling from farmers' flocks in the field. The more accurate method was to take a number of samples on a grid across a whole fleece, but an acceptable method would be to sample at the shoulder, midside and leg.

There was also an issue of variable results from different assessment laboratories around the world. To increase confidence limits, it is desirable to carry out series of blind trials of samples between different laboratories, as all testing machines and operators have a bias. A group of conference participants then planned such a trial for Afghanistan cashmere, to be conducted in spring 2007.

3. *Research*

Uncontrolled cross breeding is a problem, particularly with goats which are not cashmere types. The solutions were to conserve and genetically improve cashmere goats in their purest form through proper genetic management. Secondly, use of artificial insemination (AI), freezing semen and genetic exchange among countries would enhance local breeds.

Another set of problems were in nutrition and health management as nutrition is the main hurdle affecting productivity, while fecundity is also compromised in nutritionally resource-poor areas. Ticks and parasites affect the production and quality of cashmere, reducing the price for producers.

There are often poor links between researchers, farmers and the commercial sector. Production and research should be demand-based, by starting with the industry requirements for cashmere, since this is a “cash crop”. Encouragement of community and cooperative development at the local production levels would improve channels for extension messages.

Common breed descriptors need to be developed for cashmere goat breeds in each country. This objective could be achieved by creating a central research laboratory and institution at the international level. The centre would also tackle issues like standardization, sourcing and classification, storage and transporting genetic material. There is no central location for documentation and literature development on cashmere. Donor support is required for establishing an international laboratory and research centre.

Research priorities:

- Improve biomass of the areas being grazed by goats
- National evaluations conducted of cashmere goats, including distinctions between cashgora and cashmere types
- Establish producer and trader awareness programmes through extension education, training and demonstrations
- Study of current harvesting methods in different locations in each country
- Improve veterinary services, to increase yield and quality
- Studies on how to improve marketing and processing methods



Delegates from Kazakhstan, Pakistan and Australia examine a Kyrgyz goat at the farm, with Akylbek Rakaev. Photo: Linda Cortright, WildFibers

ANNEX 1: CONFERENCE PARTICIPANTS

Country	Person	Position and Organisation	Email
Afghanistan	Dr. Alimuddin Naseri	Livestock Coordinator, Aga Khan Foundation, Kabul	alimudin1@yahoo.com Alimuddin.Naseri@akdn-afg.org henri.suter@akdn-afg.org
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	Michael dal Grande	Director, Naturfasern cashmere importers and processors, Lorrach	Profibre@t-online.de
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	Marjan Marshall	Fine fibre trader, Atryau, western Kazakhstan	
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Ladakh in Jammu & Kashmir (India)	Dr Tsering Phuntsog	Cashmere dehairing and sales company, and breeding, Leh, Ladakh	pslahdc@yahoo.co.in
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	Dr. Yo Zagdsuren	Director, Animal Husbandry Institute, Ulan Bataar	
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ANNEX 2: Conference agenda

Saturday 27 January

- 9.30 Welcome and introduction by Carol Kerven and Akylbek Rakaev
- 10.0 International standards for testing cashmere quality: Dr. Kim Hô Phan, DWI Aachen, Germany
- 10.30 *Tea/Coffee break*
- 11.0 Testing cashmere in Kazakhstan, Tajikistan and Afghanistan: Hilary Redden, The Fibre Lab, UK
- 11.30 Commercial requirements for cashmere: Batsaihan Baatar, Goyo Factory, Mongolia
- 12.0 Questions and answers
- 12.30 Lunch

Country presentations on cashmere. *Chaired by: Akylbek Rakaev, KSBA*

- 14.00 World market definition and demand for cashmere: Karl Spilhaus, Cashmere and Camel Hair Manufacturers' Institute (CCMI)
- 14.30 USA cashmere breeding and marketing. Linda Cortright, WildFibres Magazine
- 15.0 Afghanistan development projects: Dr. Alimuddin Naseri, Aga Khan Foundation
- 15.30 Australia research and marketing: Dr. Bruce Mcgregor, Primary Industries Research
- 16.00 Questions and answers
- 16.30 *Tea/coffee break*
- 17.0 India research and marketing: Dr. Satendra Singh, Central Research Institute for Research on Goats
- 17.30 Iran research and marketing: Dr. Hamid Ansari-Renani, Animal Science Research Institute
- 18.0 Group discussion on the days' presentations
- 19.00 *Dinner*

Sunday 28 January

Country presentations continue. *Chaired by: Carol Kerven, Macaulay Institute*

9.0 Kazakhstan research: Prof. Serik Aryngaziev, Sheep and Goat Breeding Institute

9.30 Kazakhstan testing and marketing: Murat Oтынshiev, ST Group Kazakhstan

10.0 Tea/coffee break

10.30 Kyrgyzstan research: Sabyr Toigonbaev, German NGO, Osh

11.0 Kyrgyzstan development: Saidulla Bektimirov, Mercy Corps, Osh

11.30 Questions and answers

12.00 Ladakh (India) research: Dr. Tsereng Phuntsog, Ministry of Agriculture

12.30 Ladakh (India) community cooperative marketing. Konchok Stobgais, NGO

13.0 *Lunch*

Chaired by: Aidos Smailov, Eurasia Foundation, Kazakhstan

14.0 Mongolia market development: Erdenebileg Ulgiit and Jigjidmaa Dugeree, Mercy Corps

14.30 Mongolia breeding and research: Dr. Yo Zagdsuren, Animal Husbandry Institute

15.0 Nepal community marketing: Cchimi Gurung, Community Management

15.30 Pakistan: Research and development: Dr. Fateh Ullah Khan, Agricultural Research Council

16.0 Tea/coffee break

16.30 Tajikistan: marketing and community development: Gafor Isanov, trader, and Asror Rahimov, German Agro Action

17.0 USA processing and marketing: Talibah Al-Rafiq, California Cashmere Company

17.30 Uzbekistan marketing: Madraimov Salizhan, trader and processor

18.0 Group discussion on day's presentations

19.00 *Dinner*

Monday 29 January

8.30 am. Break into groups, for round table discussions and recommendations

1. Trade and marketing
2. Sampling and testing
3. Research and community groups

10.30 *Tea/coffee break*

11.0 Plenary session: Each group present conclusions and recommendations

12.30 *Lunch*

14.0 A) Visit Tokmok wool and cashmere processing factory near Bishkek, courtesy of ST Group Company (Kazakhstan and Kyrgyzstan).

OR B) Visit to Kyrgyz cashmere goat farm (courtesy of Kyrgyz Sheep and Goat Breeders Association)