

Fine Cashmere Available in Kazakhstan and Kyrgystan



There is an opportunity to develop local processing factories and export high quality cashmere from Central Asia.

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*For the original report please visit:
www.thefibrelab.co.uk

Carol Kerven (wearing hat) with villagers in Kazakhstan.



World demand for cashmere garments - especially in lower-end markets is growing rapidly. The number of goats in China, which produces some 70% of the world's cashmere, is stable or declining as a result of government environmental protection policies since 1998. This has led Chinese companies to seek out new sources of supply, which has brought Central Asian countries of the former Soviet Union firmly into the global cashmere market.

Processed (washed, dehaired and spun) cashmere is currently exported from China to Europe to be made up into expensive garments marketed under well-known brand names. European-based cashmere companies are mainly in Italy and Britain. British

firms with long-established reputations concentrate on producing the very finest and best quality yarn for the European fashion industry including houses such as Burberry, Dior and Gucci, along with manufacturing garments for UK companies such as Barrie and Jaeger. Most of the cashmere bought by these companies is processed in China, though it does not necessarily originate there.

There is also a rising demand for coarser and cheaper raw cashmere to make into mass-market garments sold by companies such as Wal-Mart in the USA or Marks and Spencer in the UK.

This dual market is significant for Central Asia as both coarse and fine cashmere is available in Kyrgyzstan and Kazakhstan.

Kazakhstan has approximately one



million cashmere-producing goats mainly in the southwest desert of Kyzyl Orda and the western regions. Kyrgyzstan has around 700,000 local goats mostly in the southern and eastern regions of Osh, Naryn and Issykul. The official export of cashmere (whole fleece and combed down) from Kyrgyzstan in 2004 was 855 tons; similar data for Kazakhstan are not available. It is widely recognized that much cashmere leaves both countries unofficially for China and is therefore not recorded.

In Kyrgyzstan and Kazakhstan, there are large numbers of Soviet-era cross-bred cashmere and angora goats; this type of goat produces cashgora,

which is coarser in diameter and commands a lower price when purchased by processors. However, indigenous goats remain in some regions of these two countries and these goats produce fine diameter cashmere (less than 16.5 microns) that would be graded as Superior or Grade I in Mongolia. This type of finer cashmere could be sorted by producers at source and marketed separately from the cashgora, if buyers were prepared to pay a higher price than presently offered by Chinese buyers for unsorted raw cashmere.

(At the beginning of the 2005 season, Kazakhstan livestock owners were receiving a maximum of \$15/kg, (2.2 lbs.) while some Kyrgyz farmers

were able to get \$20/kg. At the same time in Mongolia, raw cashmere of 13.0 to 15.5 micron was being sold by livestock owners for around \$34/kg. In 2004, the average price for raw cashmere received by Mongolian livestock owners was \$22/kg while producer prices in Kazakhstan and Kyrgyzstan were about half of this.)

Researchers in each country have recently created small elite cashmere breeding flocks, with international assistance from the British Embassy, German technical assistance and the United States Agency for International Development (USAID). Imported genetic material has been introduced to these elite flocks, from Mongolian



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goats in the case of Kyrgyzstan, and from Scotland and wild Central Asian goats in the case of Kazakhstan. An expanded elite breeding program would have a greater impact on stabilizing the output of high quality cashmere.

To determine the quality of the fiber produced in Kazakhstan, a sample study was undertaken. In April 2005, 72 samples of raw cashmere were collected from 19 farmers' herds in seven villages within the Kyzyl Orda region of southern Kazakhstan. Two types of test were carried out on these samples.

First, all samples were assessed by subjective methods involving a visual analysis of the cashmere sample or fleece. The cashmere was classified as hosiery cashmere, with a mean cash-

mere diameter less than 16.5 m, or weaving cashmere, with a mean cashmere diameter of more than 16.5 m but less than 18.5 m.

Mean fiber diameters estimated at more than 18.5 m are not normally considered cashmere in the commercial industry. Cashmere of more than 18.5 m can also be traded (generally at a low price) and may be used to blend with other higher value cashmere or wool. 17% of the sample was white.

Then, a sub-sample was tested at the Fiber Lab in Aberdeen, UK. Results showed a mean fiber diameter of 15.9 m, with a range from 13.1 m to 18.5 m.

The length of the samples measured was within acceptable commercial limits and the occasional animal with longer fiber (provided it retains a cashmere type crimp and not a tendency to mohair style) will increase the quality rather than decrease it. Most processors prefer cashmere to be 40-60 mm in length pre-processing (i.e. in the raw state). This is because cashmere is normally woolen spun and shorter or longer lengths are more difficult to process. Cashmere that is longer than 60 mm can also have high value for blending, as the longer fibers can aid in the spinning of very fine yarns.

The fiber diameters measured at the lab indicate that the fiber tested from the Kazakh goats fell within the definition of hosiery cashmere. There has been a trend internationally to prefer finer cashmere of 15.5 m or less and the fiber from one district falls within that preference. Some of the samples are super-fine, e.g. 13.3 m.

This uniformity in fiber diameter variation is preferred by commercial processors as it makes a yarn with less inconsistencies and a more predictable finished product.

In the past few years, European and American cashmere companies have relocated much of their operations to



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China and have also invested in Mongolia, taking advantage of lower labor and transportation costs. In Mongolia, international donor programs such as USAID and international cashmere processing firms such as Mongol Amicale (an American company), have supported breeding improvement schemes, herder cooperative marketing and training programs, market information and local market auctions.

If the Central Asian countries are to develop a cashmere industry, market conditions have to be boosted. Producers and local traders require improved access to market information to be able to respond to signals on

world production trends and quality requirements by processors. With the objective of improving the quality of cashmere, it is necessary for

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national scientific research institutes to upgrade the present breeds of goats raised by local farmers. Goat selection work in Kazakhstan must meet the



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standard industry requirements for goat down. This means that breeding and selection should be directed towards improving fiber quality by: decreasing the length of guard hair; decreasing the diameter of fiber; increasing the length of down; producing light colour down, preferably white; improving the ratio of goat down in terms of fiber length and diameter; and increasing the content of down in the whole coat.

The quality of down produced by Kazakhstan goat breeds fully meets the demands of the world market and, with an annual yield of 100-150 tons of raw down, processing goat down in Kazakhstan is feasible. This volume of raw material is sufficient for running

small-scale processing factories such as those operating in Mongolia. Competitive products can be made in Kazakhstan to export to the world market. However, processing raw materials in Kazakhstan factories will require support and assistance of either state credits or foreign investment.

Based on Mongolia's experience, procurement networks or village organizations could carry out purchasing of raw material from farmers via local, state or foreign factory-enterprises. However, it will be necessary to improve the skills of those people engaged in the procurement of raw materials: most cashmere exported from Kyrgyzstan and Kazakhstan is

not sorted at source, since neither producers nor local traders are able to distinguish the quality grades.

At present there is no cashmere assessment laboratory in either Kyrgyzstan or Kazakhstan. There are wool-testing laboratories but their staffs are not trained to assess cashmere by internationally-recognized standards. A USAID-funded project is supplying training to fiber technicians at these laboratories on how to test cashmere using OFDA equipment (Optical Fiber Diameter Analyser).

There is now only one small processing factory, in Naryn, Kyrgyzstan. A large domestic textile conglomerate is considering the establishment of a cashmere processing plant. Nearly all the cashmere from these two countries is exported raw to China, Mongolia, Iran and other countries. The loss in value-added along the market chain is considerable. These are potential development directions to be explored in Central Asia.

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