

Cashmere marketing is a new income source for Central Asian livestock farmers

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Introduction Some indigenous goats in the Central Asian republics of Kazakhstan, Kyrgyzstan and Tajikistan produce good quality cashmere (Millar 1986). International processors have recently been buying this cashmere. (Kerven *et al.*, 2005), but Central Asian producers are not equipped to take full advantage of these new marketing opportunities. The U.S. AID Global Livestock-Collaborative Research Support Program project, "Developing Institutions and capacity for sheep and fiber marketing in Central Asia" is working to increase the income of small-scale livestock farmers through improved cashmere marketing.

Methods Project activities are targeted at the Kyzyl Orda region of southwest Kazakhstan, semi-arid rangelands (100-300 mm annual precipitation) in which high quality cashmere goats have been identified. Information is collected on the marketing chain from farmers to local traders and to international processors. Farmers are shown demonstrations of cashmere harvesting by combing and fibre quality assessment, and receive global market information. The project is also assessing the quality of cashmere according to international standards and training national livestock scientists.

Results Central Asian producers are generally unable to distinguish good from poor quality cashmere. Raw cashmere requires particular processing techniques by industrial processors who have tight specifications for quality and reward quality with higher prices. Producers and local traders lack global market information on demand and prices. Producers sell individually to traders rather than pooling their fibre to gain higher prices. Mean prices in 2004 in the project area were \$2-3/kg for whole fleeces. Mongolian farmers received on average \$22/kg and Chinese farmers got \$31/kg for raw combed and sorted cashmere (ACDI/VOCA 2004; Schneiders 2003/4). Strong international demand continues for cashmere. Central Asian countries could learn from Mongolia's experience, where herders now gain their main income from cashmere sales (World Bank 2003). Poorer farmers in remote mountainous and desert regions tend to have more goats than sheep, partly because goats reproduce faster than sheep, often producing twins and kidding twice a year. They also cost less to feed over winter than fine wool sheep. In Kazakhstan, goat populations have been rising since independence, from 700,000 in 1992 to 1.4 million in 2003. Goats are preferred by poorer farmers trying to restock since the reduction of sheep numbers from 34 million in 1992 to 10 million in 2003.

Conclusions Kazakh livestock farmers have the potential to increase their incomes through improved marketing of high value cashmere, especially where alternative income sources are extremely scarce. Currently, such farmers rely on selling live animals, which is not sustainable for very small flocks. Local goat breeds thrive in the semi-arid shrub ecology of Kazakhstan's rangelands. In 2004 traders were offering Kazakh farmers from \$11-19/kg for combed and sorted cashmere, which very few farmers were able to supply. This is a sharp contrast to \$0.20/kg offered by traders for coarse sheep wool produced by local breeds. Based on the respective amounts of cashmere and wool produced, one Kazakh goat could have yielded a gross income of approximately \$4.75, while income from the wool of a coarse-wooled sheep would be \$0.50. Enabling Central Asian farmers to realize the full value of their cashmere requires farmer training and dissemination of market information, improved goat breeding, cooperative marketing, capacity-building of national scientists and better connections to international markets.

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