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Alternatively, if you have a question, type it in the Questions Panel and click Send. We will do our best to answer as timely as possible.

You can find the Attendee Registration List under “Handouts” to see who else is on the call (note: not everyone registered will be present).
Meeting Notes

We will send a follow-up email with meeting materials.
Agenda

1. Welcome: Introductions, Chatham House Rules, Anti-trust Declaration
2. Why cashmere?
3. Why a Responsible Cashmere Round Table?
4. UNDP work
5. Discussion
6. Next Steps?
Welcome
Why Cashmere?
The Impacts

Land  |  Social  |  Animal Welfare  |  Processing  |  Market
Land Impacts

- Fragile ecosystems
- Global warming
- Over-grazing leading to erosion, degradation or desertification of land, and increased vulnerability to droughts and floods
- Grazing pressures
- Impacts on natural wildlife and biodiversity
Social Impacts

- Cultural erosion threats: herders are leaving the land to move to cities
- Pressure to increase herd size in order to generate sufficient income
Animal Welfare

- Opportunities to improve fiber harvesting methods and general animal health and handling
- Address the Five Freedoms of animal welfare:
  1. Freedom from hunger or thirst
  2. Freedom from discomfort
  3. Freedom from pain, injury or disease
  4. Freedom to express (most) normal behaviour
  5. Freedom from fear and distress
Processing

- Social
- Environmental: water, energy, waste
- Chemical use
H&M, Zara and others ban mohair products after animal cruelty investigation


Market Impacts

H&M to phase out use of conventional cashmere

Activity in Mongolia

Private Brand Standards
Why a Responsible Cashmere Round Table?
What is a Round Table?

A round table is a multi-stakeholder initiative designed to bring key players together to improve sector connectivity and explore ways to, pre-competitively, address barriers to success. It is important that outcomes benefit all.

The RCRT is meant to be a neutral space for stakeholders to learn, discuss and understand, and to provide aligned input into the solutions being developed.
What does “Responsible” mean?

/ˈrɛspənsəb(ə)l/

1. Having an obligation to do something, or having control over or care for someone, as part of one's job or role.

2. Being the primary cause of something and so able to be blamed or credited for it.

3. (Of a job or position) involving important duties, independent decision-making, or control over others.

**It will ultimately be the role of the RCRT to define what this means in the context of cashmere.**
Questions?

- Do we even need a Round Table?
- Do we want to be a Global or a Mongolian Round Table?
- Are we looking at cashmere or herding?
- Do we include farming systems?
- Do we address processing?
- Are we a Round Table for brands and retailers, or for all stakeholders?
- What roles do we want to play?
Stakeholder Groups

- Brands and Retailers
- Supply Chain
- Civil Society
- Producers
- Professional Services
- Governments
10 Reasons Why We Need A Responsible Cashmere Round Table (RCRT)

1. To create a common understanding of the important social and environmental issues facing cashmere production.

2. To create a shared awareness and understanding of the different programs and initiatives currently addressing issues in cashmere production.

3. To identify the core needs to be addressed and determine the gaps that need to be addressed.

4. To find ways to increase market support for best practices in cashmere production.

5. To encourage and support brands and retailers to make commitments to source more responsible cashmere.
6. To provide a pathway to grow the supply base over time.
7. To build integrity in right from the start.
8. To explore different business models and innovative financing schemes that will support better practices.
9. To review improvements and monitor impacts.
10. To set up a platform that will allow for clarity, alignment and support of the various initiatives that are active in Mongolia (?).
Potential Outcomes

- A platform to connect and share stories and perspectives of the full supply chain
- Clarity and shared understanding of the issues and opportunities with Mongolian cashmere.
- Agreement on what constitutes “sustainable” or “responsible”
- Transparency map of programs and initiatives in Mongolia (recently produced by the UNDP).
- Web page for Responsible Cashmere to share relevant information with the public, and with businesses.
- Collective voice and coordinated platform to talk and work with other stakeholder groups (governments, media, investors, etc.)
- Identification of impact indicators to measure performance of the different initiatives
- Possible benchmarking of the different programs and standards in Mongolia and link to brand actions
- An LCA on cashmere.
- Other?
Funding Requirements

- Staff time
- Round Table virtual meetings
- In-person meeting at Textile Exchange conference
- Website
- Travel
- Publications

Target amount for Round Table work in 2019: $20,000
Minimum amount to establish the Round Table: $15,000
Pledged to date: $2,000 (Anne – through donation of time)
UNDP Work
Agenda

I. Pilot Project in Eastern Mongolia

II. Supplier Analysis – Comparative Analysis of Sustainable Cashmere Projects in Mongolia

III. Demand Analysis – Market Demand, Sustainability Standard and Investment

IV. Vision for Roundtable on June 12
Agenda

I. Pilot Project in Eastern Mongolia
II. Supplier Analysis – Comparative Analysis of Sustainable Cashmere Projects
III. Demand Analysis – Market Demand, Sustainability Standard and Investment
IV. Vision for Roundtable on June 12
UNDP is experimenting the commercial viability of Sustainable Cashmere Value Chain in the Eastern Region to offer inside-out perspectives.

<table>
<thead>
<tr>
<th>Input</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designing the model to be piloted addressing the key challenges</td>
<td>5-8 tons “Sustainable Cashmere” collected from 200-400 herder households</td>
</tr>
</tbody>
</table>

**Output**

Pilot project execution (Facilitating the transaction of 5-8 tons of “Sustainable Cashmere”)

**Outcome**

Sharing knowledge and assessing the model’s scalability or lack thereof

Two baghs in Norovlin soum, Khentii aimag

Two baghs in Bayan-Uul soum, three baghs in Tsagaan-Ovoo soum, Dornod aimag
Desertification mapping (2013)
Key development partners and non-profit, non-governmental organizations providing input for Sustainable Cashmere value chain

**Cashmere Market Value Chain**

- **Herders**
- **Cooperatives**
- **Washing, dehauling processors**
- **Knitting, spinning and weaving firms (Int'l / national)**
- **Int'l / national apparel firms**

**Supplier support**: Projects that focus on herder training on Sustainable Pasture Mgmt.

- Middle men usually sell to Chinese companies. Domestic companies cannot compete with the prices offered by Chinese companies.

- >100 processing factories; larger companies have their own facilities.

**Intermediaries support**

**Buyer support**

- Suppliers
- Intermediaries
- Buyers
Conversations with prospective buyers revealed four key challenges facing Mongolia’s nascent Sustainable Cashmere (SC) market:

- Inadequate traceability
- Quality deficiency
- Competition from private traders (mostly Chinese middle men)
- Unclarity about what constitutes SC
Buyers don’t trust the authenticity of SC due to inadequate traceability

- Inadequate traceability
- Quality deficiency
- Competition from private traders
- Unclarity about SC definition
As a solution, UNDP is assessing the benefits of blockchain technology

- Inadequate traceability
- Quality deficiency
- Competition from private traders
- Unclarity about SC definition

*Pictures taken on March 26, 2019 by UNDP staff members*
Sustainability does not necessarily result in quality cashmere

- Inadequate traceability
- Quality deficiency
- Competition from private traders
- Unclarity about SC definition

*Pictures from external sources*
UNDP and its partnering organizations provided training on basic sorting as a part of cashmere harvesting support training.

- Inadequate traceability
- Quality deficiency
- Competition from private traders
- Unclarity about SC definition

*Pictures taken in Feb 2019 by SFA staff members*
Attractive prices and financial agreements offered by private traders result in suppliers’ high defection rates

Cashmere market value chain

- Inadequate traceability
- Quality deficiency
- Competition from private traders
- Unclarity about SC definition

Source: UNIFEM, 2005
A right combination of incentives will commit herders to agreements made with buyers

**UNDP experiment results**
- Negotiations for premium price with prospective buyers failed
- Advances have been provided for co-ops but did not matter in the end
- Won hearts and minds of herders aware of pastureland degradation with a vision for country’s inclusive growth

Source: UNIFEM, 2005
Buyers are confused about the sustainability concept

- Inadequate traceability
- Quality deficiency
- Competition from private traders
- Unclarity about SC definition

100% Sustainable Cashmere. Buy it
Agenda

I. Pilot Project in Eastern Mongolia

II. Supplier Analysis – Comparative Analysis of Sustainable Cashmere Projects

III. Demand Analysis – Market Demand, Sustainability Standard and Investment

IV. Vision for Roundtable on June 12
The study examined six development projects which produced Sustainable Cashmere as project outputs

<table>
<thead>
<tr>
<th>Implementing Org.</th>
<th>Funders / Donors</th>
<th>Project Name</th>
<th>Project Duration</th>
<th>Total area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADB</td>
<td>ADB</td>
<td>Supporting Agriculture Value Chain</td>
<td>2017-20</td>
<td>33,418,931</td>
</tr>
<tr>
<td>AVSF</td>
<td>European Union</td>
<td>Sustainable Cashmere-Fiber Supply Chain in Mongolia STEPCOLAB</td>
<td>2014-2019 (extension is being considered)</td>
<td>2,864,046</td>
</tr>
<tr>
<td></td>
<td>French Ministry of Agriculture, Agri-foods and Forestry</td>
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<td></td>
<td>French Ministry of Foreign Affairs and Int’l Dev.</td>
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<td>French Fund for the Global Environment</td>
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<td></td>
<td>French Fund for Worldwide Environment (FFEM)</td>
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<td></td>
<td>HUMUS Foundation</td>
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<tr>
<td>GGAHP</td>
<td>Swiss Agency for Development and Cooperation</td>
<td>Green Gold and Animal Health</td>
<td>2017-20</td>
<td>40,000,000</td>
</tr>
<tr>
<td>SFA</td>
<td>Member companies</td>
<td>Sustainable Cashmere</td>
<td>2015 onward</td>
<td>9,214,940</td>
</tr>
<tr>
<td>UNDP</td>
<td>UNDP</td>
<td>Sustainable Cashmere Value Chain Pilot</td>
<td>2018-19</td>
<td>1,232,256</td>
</tr>
<tr>
<td>WCS</td>
<td>A private sector firm operating in Mongolia</td>
<td>Sustainable Cashmere (new name upcoming)</td>
<td>2015 onward</td>
<td>199,197</td>
</tr>
<tr>
<td></td>
<td>A private sector int’l apparel firm</td>
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</tbody>
</table>

GGAHP consists of several phases. Phase 1 was implemented in 2005-2009; Phase 2 in 2010-2016; Phase 3 in 2017-2020.
Projects are implemented across Mongolia and the Green Gold Animal Health Project covers most of the country.
Each project offers a gamut of input activities to increase the capacity of suppliers.
The study attempted to capture the project output

Chart 3 – Project output parameters

- # of trainings conducted
- # of new cooperatives established
- Areas of pastureland included
- Linkages to banks, factories and buyers created
- Number of cooperatives certified
- Premium price provided to herders
- Codes of practices completed and published
- Traceability system established and functioning

Sustainably produced cashmere (in tons)
Training issue areas vary but most offer similar sets of issue areas

<table>
<thead>
<tr>
<th>Trainings</th>
<th>ADB</th>
<th>AVSF</th>
<th>GGAHP</th>
<th>SFA</th>
<th>UNDP</th>
<th>WCS</th>
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</thead>
<tbody>
<tr>
<td>Cooperative governance</td>
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<tr>
<td>Pastureland management</td>
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<td>Livestock breeding</td>
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<td>Livestock health</td>
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<td>Leadership</td>
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<tr>
<td>Revolving fund</td>
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<tr>
<td>Envt. /water mgmt. species diversity</td>
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<tr>
<td>Harvesting support and sorting</td>
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<tr>
<td>Livelihood enhancement</td>
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<tr>
<td>Young herder</td>
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<tr>
<td>Training of trainers</td>
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<tr>
<td>Animal welfare</td>
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<tr>
<td>Factory capacity</td>
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<tr>
<td>Mobile education</td>
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<tr>
<td>Trainings for government staff</td>
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</tbody>
</table>
Pastureland mgmt., livelihood enhancement and livestock health improvement are the three pillars of Sustainable Cashmere training.

<table>
<thead>
<tr>
<th>Issue Area</th>
<th>GGAHP</th>
<th>AVSF</th>
<th>SFA</th>
<th>WCS</th>
<th>UNDP</th>
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<td>Pastureland management</td>
<td>50</td>
<td>21</td>
<td>27</td>
<td>3</td>
<td></td>
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<tr>
<td>Livelihood enhancement</td>
<td>50</td>
<td>28</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revolving fund</td>
<td>30</td>
<td>21</td>
<td>27</td>
<td>4</td>
<td></td>
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<tr>
<td>Livestock health</td>
<td>30</td>
<td>14</td>
<td>24</td>
<td>3</td>
<td></td>
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<tr>
<td>Cooperative governance</td>
<td>10</td>
<td>21</td>
<td>27</td>
<td>21</td>
<td></td>
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<tr>
<td>Trainings for government staff</td>
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<tr>
<td>Leadership</td>
<td>5</td>
<td>21</td>
<td>27</td>
<td>2</td>
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<tr>
<td>Env. mgmt. species diversity, water mgmt.</td>
<td>30</td>
<td>21</td>
<td>3</td>
<td></td>
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</tr>
<tr>
<td>Livestock breeding</td>
<td>15</td>
<td>14</td>
<td>24</td>
<td>1</td>
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<tr>
<td>Animal welfare</td>
<td>15</td>
<td>21</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Harvesting support and sorting</td>
<td>28</td>
<td>33</td>
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<tr>
<td>Young herder</td>
<td>5</td>
<td>11</td>
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<tr>
<td>Training of trainers</td>
<td>5</td>
<td>5</td>
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<tr>
<td>Mobile education</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Factory capacity*</td>
<td>3</td>
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</tbody>
</table>
Frequency of trainings per soum also varies

Frequency of trainings per soum per annum (as of 2018)

- GGAHP: 1
- UNDP: 1
- SFA: 2
- WCS: 4
- AVSF: 6
Sustainable Cashmere projects already cover most of Mongolia

Potential market (in tons)

Total cashmere produced from project area (tons)

- UNDP: 42 tons
- WCS: 96 tons
- AVSF: 284 tons
- SFA: 566 tons
- ADB: 2,787 tons
- GGAHP: 8,128 tons
But the actual transaction is only beginning.

**Actual market for Sustainable Cashmere (in tons) in 2018**

- WCS: 7 tons
- UNDP: 0 tons
- AVSF: 50 tons
- GGAHP: 50 tons
- SFA: 169 tons

Total volume of Sustainable Cashmere purchased as such.
## Findings

<table>
<thead>
<tr>
<th>Findings</th>
<th>Conclusions</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significant geographical overlaps</td>
<td>▪ Overlaps in beneficiaries and partner organizations</td>
<td>▪ Developing collaboration roadmap</td>
</tr>
<tr>
<td></td>
<td>▪ Govt coordination burden</td>
<td>▪ Discuss Long-term sustainability of project impacts</td>
</tr>
<tr>
<td>All herder trainings entail most issue areas</td>
<td>▪ Overlaps in training program issue areas</td>
<td></td>
</tr>
<tr>
<td>Each project offers certain issue area trainings more deeply and broadly</td>
<td>▪ Some trainings are deeper and broader than others for each issue area</td>
<td>▪ Joint training based on issue areas of organizational competencies</td>
</tr>
<tr>
<td>Most provide buyer linkage support</td>
<td>▪ Approaches vary</td>
<td>▪ Jointly support the appropriate government policy</td>
</tr>
<tr>
<td></td>
<td>▪ All are in the initial stage</td>
<td>▪ Jointly explore the ways to disrupt the market shifting away from a quantity-focused market to a quality-focused alternative</td>
</tr>
</tbody>
</table>
Conclusions and Recommendations (cont.)

<table>
<thead>
<tr>
<th>Findings</th>
<th>Conclusions</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some work on advocacy (SFA, GGAHP and ADB)</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>• Not substantial coordination among the projects</td>
<td>• Continuous discussions and development of policy briefs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Develop jointly agreed solutions to reverse overgrazing and pasture degradation</td>
</tr>
<tr>
<td>SFA and ADB published a code of practice and made available to the public</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• There is no widely used code of practice that specifies ingredients of Sustainable Cashmere</td>
<td>• Come to a consensus on what constitutes Sustainable Cashmere</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If a consensus is unnecessary, discuss mechanisms to promote information transparency to reduce buyer confusion</td>
</tr>
<tr>
<td>All projects agree on the importance of record keeping at the herder and cooperative levels</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• ADB, SFA and WCS consider that challenges of data deficiency need to overcome before deploying a traceability system</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Come to the common vision for a traceability system (e.g. what information to be collected at what level)</td>
</tr>
<tr>
<td></td>
<td>• AVSF claims that the system is set and already working</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Share best practices and lessons learned from the projects focusing on record keeping</td>
</tr>
<tr>
<td></td>
<td>• GGHAP and UNDP are experimenting a traceability system that leverages digital technologies</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Leverage the traceability system experimented by AVSF, GGAHP and UNDP</td>
</tr>
</tbody>
</table>
Agenda

I. Pilot Project in Eastern Mongolia
II. Supplier Analysis – Comparative Analysis of Sustainable Cashmere Projects
III. Demand Analysis – Market Demand, Sustainability Standard and Investment
IV. Roundtable on June 12
2. Comparative Analysis: Market Demand

Demand for cashmere rising steadily, especially in high end and luxury markets. Increases in mid and mass market significant in last few years but dependent on price. But key requirement is always quality.

Is there an opportunity for sustainable Mongolian cashmere?

- Demand for sustainable cashmere: Quite a bit of interest, especially from higher end brands/suppliers, but not yet driven by consumer demand.
- Quality, consistency of specification and supply are key. Users will not switch if quality specs not met.

- Most mass/fast fashion companies using Chinese cashmere. Others use up to 50% of total demand from Mongolia, to complement supply from China (and Afghanistan). Although lack of traceability in the sector means some questions about how much cashmere labelled as Chinese is actually from Mongolia.

- Possibility to switch demand to Mongolian cashmere (IF get sustainability system in place) will be limited by colour and quality, when compared to Chinese supply.
2. Comparative Analysis: Sustainability standards

**Sustainability issues commonly identified as environmental, especially desertification of pasturelands. Other main concern raised is animal welfare. Need for common definitions and solutions of sustainability, based on expert input, with robust metrics.**

What are buyer requirements for sustainability standards?

- Need to establish a **common definition** of sustainability for cashmere
- Most companies have participated in development of (and now use) **sector standards** such as RWS
- Key to have all parts of supply chain **represented** in discussions, eg Chinese buyers/traders and government
- **Main issues** to be tackled: animal welfare, and environment. Few mentioned social (herders) and biodiversity.

- **Traceability** needed to help understand root causes and demonstrate positive impact. Many companies have public commitments on achieving traceability by xxxx.
- **SFA** were mentioned as the main convener helping advance in this space.
- Need robust **metrics** to show positive impact/reduced harm/regeneration
- Sustainability is complex - especially in trying to understand root causes, so **expert input** is needed.
- It will take time to achieve any changes, so will be limited in ability to make claims in short term - but having clear action plan with **realistic targets** will help.
2. Comparative Analysis: Investments

Some limited indications of additional investment being available to channel into work to make supply more sustainable, especially at a time of high prices. Some good examples of long term partnerships across supply chain sharing costs.

Will buyers invest to achieve sustainable cashmere?

• **Price is key**: needs to still be affordable or at least show demonstrable and traceable benefit, not just a marketing tagline

• Most companies are investing in the SFA process and their related projects.

• Some companies could support through sustainability or CSR budgets, but ultimately has to be in cost of goods. Need **long time lines** of action plans/roadmaps to work these price increases through

• Some long term relationships along supply chain jointly supporting - especially where cashmere key material. But a need for more commitment to **reduce risk** for intermediaries, and provide incentive to herders.
Agenda

I. Pilot Project in Eastern Mongolia
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IV. Roundtable on June 12
Multi-stakeholder Conference in Ulaanbaatar June 11-12

OBJECTIVES

• Take a deep dive together on “Multistakeholder Collaboration for Systemic Change in Mongolia” (building on SFA May Conference initial discussion)

• Build the Business Case for Collaboration at National Level in Mongolia / Potential benefits for each stakeholder group

• Sharing best practices from other commodity sector

• Discuss recommendations on corporate strategies for investment in sustainable cashmere

• Exploring options for multi-stakeholder engagement (what exists/ gaps/ potential institutional structure and mechanisms to accelerate current efforts)

• Discussion on respective vision for the future?

• Jointly identify priority areas/themes for aligning interest (e.g quality, traceability, incentives for herders, engaging with China, etc.)

• Commitment to Action: What can we all commit to increase collaboration in the short/medium term?

KEY OUTCOMES

• Roadmap for multistakeholder engagement on sustainable cashmere in Mongolia to accelerate current efforts

• Agree on high level principles for dialogue and collective action

+ Possibility of post Meeting field trip based on level of interests (13-16 June)
RCRT (Brands and Retailers – “International Buyers Group”)

Government (UN and Mongolia)

Processors (Supply chain in China and Mongolia)

Initiatives (SFA, WCS, AVSF, TNC, GGHAP, Aid byTrade, etc.)

National Commodity Platform (technical working groups: traceability, quality, etc.)

Donors

Collective Action Plan (with clear roles, timelines, deliverables, budget)
Online Brand Survey
UNDP Brand Survey

If you are sourcing cashmere for your company, please help us by participating in this survey so that we may develop a better understanding the market needs for more sustainable cashmere.

Due date: April 15th

Survey Link: https://form.jotform.me/90640744757464
Questions?

• Do we even need a Round Table?
• Do we want to be a Global or a Mongolian Round Table?
• Are we looking at cashmere or herding?
• Do we include farming systems?
• Do we address processing?
• Are we a Round Table for brands and retailers, or for all stakeholders?
• What roles do we want to play?
Next Steps
What’s Next?

• Confirm interest in RCRT and funding
• When the minimum funding amount is raised, launch the RCRT (webpage, charter)
• Participate in the UNDP “Assessment of Demand for Sustainable Cashmere from Mongolia” interviews or complete online survey
• Meeting in Ulanbaatar on June 12th
• Set up future RCRT calls
It is the sourcing of raw materials that is the direct interface between business and nature. Through sustainable sourcing and reconfiguring supply chains, we can help drive change in agriculture, mining and forestry, as examples, and promote regenerative, wildlife friendly approaches to production.

HELEN CROWLEY, KERING