



Draft Report

A Report On

## **ASSESSMENT OF CHYANGRA PASHMINA BUYERS IN NLSIP WORKING DISTRICTS**

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*Submitted to*  
Government of Nepal  
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**Nepal Livestock Sector Innovation Project**  
Harihar Bhavan, Lalitpur  
*by*  
**CMS-DVN-MDT-FB JV**  
Kathmandu



## FOREWORD

The Government of Nepal (GoN), Ministry of Agriculture and Livestock Development (MoALD) with assistance from the World Bank, is implementing **Nepal Livestock Sector Innovation Project (NLSIP)** in 28 districts, covering five provinces- province number-1, province number-2, Bagmati, Gandaki and province number-5. Given the importance of the livestock sector to rural livelihoods, food and nutrition security, as well as for the growth of the national economy, this project is expected to be a "**game changer**" project in the livestock sub-sector. The project aims to raise the productivity, production and income and lead to further investment for the overall development of the sector by improving service delivery, access to information, technology, market, financial resources and environmental and social safeguards measures.

The component C *Promoting Inclusive Value Chains for Selected Livestock Commodities* of the project aims to develop productive alliance in selected livestock sub-sectors and to contribute to import substitution (for dairy products and goat meat) and export promotion (for Chyangra pashmina) by improving the productivity and value addition within the targeted value chains namely- milk, goat meat and Chyangra pashmina. This project component will directly contribute to the project development objectives by supporting the integration of smallholder livestock farmers in these value chains. This component will also facilitate formation of productive alliance to ensure active engagement of the various active value chain actors including the bank and financial institutions. The productive partnership will be supported through a 50% (maximum Rs. 10 million) matching grant where, 20% cash contribution by the respective producer's organization and 30% loan from a bank or financial institution is mandatory.

This Chyangra pashmina sector buyers' assessment report has been prepared by the project value chain specialists to identify the potential buyers of Chyangra pashmina in the country in general, and in the project area in particular. This report includes general description of the Chyangra pashmina sector in the country and also all the major actors of the Chyangra pashmina operating currently in the country. Also included in the report is information on the business and contact details of the pashmina industries who are probable buyers of the locally produced pashmina. This report is prepared in order to help the probable grant applicants develop value chain linkages and create productive alliance while preparing sub-project concept notes for the project matching grant.

I believe, the Chyangra pashmina Producer Organizations interested to participate in the project matching grant through a functional productive alliance will find this report useful. I also take this opportunity to thank Meat Value Chain Specialists Dr. Bhim Nath Chaulagain and Dr Chatra Bahadur Chetry and Team Leader Dr Amar Bahadur Shah for their hard work in preparing this report.

Dr Dilli Ram Sedai  
Project Director  
7 June, 2020

| ABBREVIATIONS |   |
|---------------|---|
| ACAP          | Annapurna Conservation Area Project                   |
| ADB           | Asian Development Bank                                |
| AGDP          | Agricultural Gross Domestic Product                   |
| BFI           | Bank and Financial Institution                        |
| CP            | Chyangra Pashmina                                     |
| DLSU          | Decentralized Livestock Service Unit                  |
| DLS           | Department of Livestock Services                      |
| ECOP          | Environment Code of Practice                          |
| FY            | Fiscal Year   |
| FAO           | Food and Agriculture Organization                     |
| FPP           | Full Project Proposal                                 |
| GoN           | Government of Nepal                                   |
| GDP           | Gross Domestic Product                                |
| GHG           | Green House Gases                                     |
| GR            | Grant Recipient                                       |
| HIMALI        | High Mountain Agribusiness and Livelihood Improvement |
| Kg            | Kilogram  |
| MT            | Metric Ton  |
| MoALD         | Ministry of Agriculture and Livestock Development     |
| M&E           | Monitoring and Evaluation                             |
| MoF           | Ministry of Finance                                   |
| MG            | Matching Grant  |
| NARC          | Nepal Agriculture Research Council                    |
| NLSIP         | Nepal Livestock Sector Innovation Project             |
| NPIA          | Nepal Pashmina Industries Association                 |
| NTIS          | Nepal Trade Integration Strategy                      |

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|         |   |
|---------|---|
| PAD     | Project Appraisal Document                              |
| PA      | Productive Alliance                                     |
| PDO     | Project Development Objective                           |
| PCN     | Project Concept Note                                    |
| PETS    | Pashmina Enhancement and Trade Support                  |
| PMU     | Project Management Unit                                 |
| PIM     | Project Implementation Manual                           |
| PO      | Producer Organization                                   |
| Rs      | Rupees  |
| SM      | Social Mobilizer  |
| TA      | Technical Assistance                                    |
| TEPC    | Trade and Export Promotion Center                       |
| VC      | Value Chain   |
| VH&LSEC | Veterinary Hospital and Livestock Service Expert Center |

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## 1.Introduction

### 1.1 The Report

This buyers' assessment report on Chyangra pashmina<sup>1</sup> is prepared to identify the potential buyers of Chyangra pashmina in the country with an objective to link them to the Chyangra pashmina producer organizations (POs) in the Nepal Livestock Sector Innovation Project (NLSIP) working districts- Mustang and Manang. Attempt has been made to analyze and include in this report, all the probable major pashmina buyers such as manufacturers, exporters, raw material importers in the list, with their contact details. The NLSIP under its Component-C, plans to support development of about 500 eligible productive alliances (PA) on selected livestock value chains- dairy, goat meat and Chyangra pashmina, of which about 50 will be on Chyangra pashmina from the two project districts- Mustang and Manang. This report is expected to help the probable matching grant (MG) applicant Chyangra pashmina POs in developing productive alliances with the reliable buyers during preparation of their project concept note (PCN) and full project proposal (FPP).

This report is prepared primarily by analyzing the published secondary information collected from various sources. Presented below is the structure of the report:

- i. Introduction.
- ii. Objectives.
- iii. Methodologies.
- iv. Limitations.
- v. Chyangra pashmina sub-sector in Nepal.
- vi. Marketing of Chyangra pashmina.
- vii. Conclusion and recommendations.

### 1.2The Project- NLSIP

The Government of Nepal (GoN), Ministry of Agriculture and Livestock Development (MoALD) with assistance from the World Bank, is implementing NLSIP in 28 districts of Nepal, covering five provinces- province number-1, province number-2, Bagmati, Gandaki and province number-5. Given the importance of the livestock sector to rural livelihoods; food and nutrition security; as well as for growth of the national economy; this project is expected to be a *game changer* project in the livestock sub-sector. The project aims to raise the productivity, production and income and lead to further investment for the overall development of the sector, by improving service delivery, access to information, technology, market, financial resources and environmental and social safeguards measures.

NLSIP plans to adopt productive alliance development approach through a stronger and effective partnership between the buyers and producers to respond to the national demand for livestock and livestock products. The project will also work to strengthen the

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<sup>1</sup> **Chyangra Pashmina** is the trade mark for Nepalese pashmina.

dairy, goat meat and pashmina value chain linkages, and scale-up improved farm technologies and practices. The project covers all three eco-zones (Tarai, Hill and Mountain) of the country in four clusters, encompassing five provinces and three commodity specific value chains - dairy, goat meat and Chyangra pashmina.

The Project is being managed by a Project Management Unit (PMU) at the center, led by a Project Director and supported by four Decentralized Level Support Units (DLSUs) at four different locations namely: Biratnagar, Hetauda, Pokhara and Butwal which are led by Senior Livestock/Veterinary Officers.

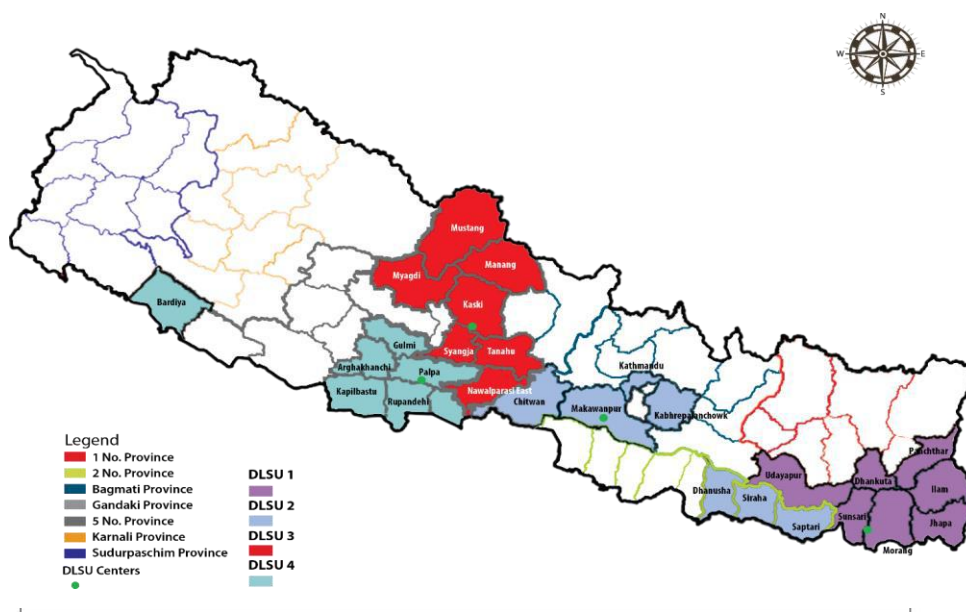


Figure 1: NLSIP Project Area

The project is being executed in 289 municipalities and rural municipalities of 28 districts covering five provinces (provinces number 1, 2, Bagmati, Gandaki & province number 5) of the country, reaching a population of 12.4 million (45% female). The project targeted primary beneficiaries are 200,000 people (45% female) who will be organized in 3,000 POs such as farmer groups and cooperatives.

### 1.2.1 Project Component

NLSIP has following four components:

**Component-A: Strengthening Critical Regulatory and Institutional Capacity:** This component consists of three sub-components: (i) policies and regulatory framework, (ii)



institutional capacity strengthening, and (iii) establishment of a livestock management information system. These interventions are expected to create conducive environment for the growth of livestock sector by strengthening the institutional capacity of government regulatory agencies.

Key activities proposed under this sub-component are:

- i. Preparation of Livestock Sector Policy, Strategy, and Plans.
- ii. Support in drafting necessary laws.
- iii. Improvement of existing policy, strategy, and laws.
- iv. Institutional capacity enhancement of Livestock Sector related Government agencies.
- v. Establishment of Livestock sector information system.

**Component-B: Promoting Livestock Sector Innovation and Modernizing Service Delivery:**

This component will enhance livestock productivity and climate resilience. The component aims to develop the capacity of key stakeholders along the selected livestock value chains to develop, disseminate, and adopt best improved practices. The activities under this component will also contribute to environmental sustainability, particularly Green House Gases (GHG) emission reduction through promotion of climate-smart technologies and practices to help achieve efficiency and increases in animal production, for example, through balanced animal nutrition, reduction in disease incidence, management of manure and urine and reduction in number and genetic improvement of animal stock.

The Component B includes the following sub components:

- i. Support to POs (including farmers' group and cooperatives) in formation and capacity strengthening.
- ii. Modernizing animal health and breeding services.
- iii. Strengthening farmers' training and extension services.

**Component-C: Promoting Inclusive Value Chains for Selected Livestock Commodities:**

This component seeks to develop a more commercial-oriented approach for selected livestock value chains- dairy, goat meat and Chyangra pashmina and contribute to import substitution (for dairy products and goat meat) and export promotion (for Chyangra pashmina) by improving the productivity and value addition. The component directly contributes to the project development objectives (PDO) by supporting the formation of productive alliances and integration of smallholder livestock producers in the selected

livestock value chains. The component focuses on improving smallholders' access to market through promotion of collective marketing and strengthening the backward and forward linkages among the value chain actors. The activities under this component target direct and indirect support to the actors involved in the PA, regulation and service delivery, and processing and value addition. The targeted beneficiaries under this component are farmer groups, cooperatives, traders, processors, and other private sector actors.

The component includes two sub-components:

- i. Development of productive partnerships (productive alliance, dialogue platform, entrepreneurial skills development, and bankable business plans).
- ii. Financing livestock value chains through a matching grant (MG), and linking the POs to markets, and financial institutions

**Component-D: Project Management and Knowledge Generation:**

This component of the project supports all aspects of project management and implementation, including-

- i. Strategic and operational planning, implementation, and monitoring and evaluation (M&E) of the project activities and appropriate use and optimization of project resources;
- ii. Compliance to safeguard policies;
- iii. Implementation of public awareness and outreach campaigns;
- iv. Verification and reporting on project execution and impacts thereof;
- v. Establishment, operation and management of the project management unit (PMU) at the central level and decentralized livestock support units (DLSUs) in the province level; and
- vi. Preparation and commissioning of project-related studies, workshops, and seminars, generating knowledge derived from the project implementation experiences, including but not limited to mainstreaming climate-smart livestock practices, to be communicated to various public and private sector entities on time and effectively.

## 1.2.2 Productive Alliances and Promotion of Inclusive Value Chains

### *1.2.2.1 Development of Productive Alliance*

The project, under component- C plans to support about 500 selected productive alliances (PA) based livestock enterprises of which 50 will be Chyangra pashmina enterprises (NLSIP 2020) through production and post-production value chain support. Salvo, C.P.D, (2010) defines the PA as "a formal agreement between a group of organized farmers and a buyer, for the provision of a certain good, in a specified quantity and quality" (Salvo C P D 2010).

Thus, the formation of the PA will strengthen the linkages among the producers, buyers, and the project through the provision of inputs, productive investments, technical assistance, marketing and business development services. Furthermore, the horizontal alliance of smallholder producers such as groups and cooperatives will strengthen the alliance members and provide them an opportunity to opt for collective marketing while the vertical alliance between the POs (including groups and cooperatives) and the buyers will ensure fair price and market for the produce. The PA is also expected to help the project in making the project investment more effective and deliver other technical and business development services more efficiently.

### *1.2.2.2 Promotion of Inclusive Value Chains*

The project plans to support the eligible business plans on selected livestock value chains, developed on productive alliance with 50% matching grant (maximum Rs 10,000,000) on the total investment. The remaining part of the investment will be from the contribution of the POs (minimum 20 % in cash), and loan (minimum 30% or more) from participating Banks and Financial Institutions (BFIs).

NLSIP investment support will be available to competitive eligible applicants, who will go through the process of submitting PCN and FPP screening, including the field verifications. Since NLSIP will follow an output-based financing, the grant installments will be released only upon field appraisal/verification of the performance of the sub-project against already agreed milestones. For example, the first installment grant transfer to the bank account of the Grant Recipient (GR) will be made subject to at least 50% investment by the GR in meeting agreed milestones from their equity and/or goods purchased on credit. As NLSIP will not provide grant to the proposals falling under negative list from the

perspective of environment and social safeguards, it would be mandatory that the GR fully complies with environmental code of practices (ECOP) and bears all costs of implementing environment and social safeguard measures recommended by the project during the sub-project implementation.

The project has prepared a Grant Operating Guidelines to facilitate grant management where, conditions for awarding grant are clearly explained. The project will follow these guidelines in implementing activities planned under component C

## 2. OBJECTIVES

The objectives of preparing this report are:

1. To collect information on the existing Chyangra pashmina buyers such as manufacturers, exporters, raw materials importers etc.
2. To prepare an inventory of potential buyers of Chyangra pashmina to be linked to the POs supported by the project under the component C (especially the POs interested to participate in Chyangra Pashmina sub-projects) to help them in developing productive alliances.

## 3. METHODOLOGY

Methodology followed while preparing this report are:

- a) **Desk Study**- Review of publications of the public and private sector organizations and past projects under the Department of Livestock Services (DLS) on Chyangra pashmina, such as *Study on Sheep and Chyangra Goat Systems and their Development Prospects in the High-altitude Districts of Nepal* (Paudel 2018), *Feasibility Study of Chyangra Fiber Production in Nepal* (NLSIP 2017) and *Statistical Information on Nepalese Agriculture* (MoALD 2019) etc. and surfing through internet and relevant websites.
- b) **Primary Data**- Collected by the Social Mobilizers (SMs) and Technical Assistance (TA) Specialists of the project from markets, office of the associations during the visits.
- c) **Secondary Data**- Collected from publications of organizations such as Trade and Export Promotion Center (TEPC), Ministry of Industry, Commerce and Supplies, and Nepal Pashmina Industries Association (NPPIA).

- d) **Buyers' Roaster**- prepared by the DLSU Pokhara through public call in newspapers a few months ago.

## 4. LIMITATIONS

The major limitations of this study are:

1. The study is based mainly on available limited secondary data.
2. The study was undertaken during nationwide lockdown and travel restrictions (starting from 23<sup>rd</sup> March, 2020) enforced due to COVID-19 outbreak when visits to the markets and individual value chain actors personally to interview them was not possible. So, data from secondary sources has been used and the concerned value chain actors were interviewed through telephone.

## 5. CHYANGRA PASHMINA SECTOR IN NEPAL

### 5.1 Background

Nepal is a land locked country with diversity in ecology and physiographic landscape situated in the central Himalayas between India and China. The agricultural sector is very important to the Nepalese economy as it contributes more than 27% to the national gross domestic product (GDP). In addition, agriculture in Nepal provides employment to more than 60% of the population (MoALD, 2019). Livestock, as an integral part of the agriculture, contributes 19.17% to the national agricultural gross domestic product (AGDP) and is thus, is a very important sub-sector for household income, nutrition and the national economy.

In Nepal, goat is recognized as one of the most important livestock commodities that has a significant role in poverty reduction, livelihood enhancement, and food and nutrition security. The Chyangra (*Capra hircus*) is a mountain goat of Chinese origin, usually raised in the northern part of the country, in areas above 2400 meter from the sea level. Chyangra in Nepal is generally grown for meat and transport of goods, and is popular due to high value for its meat and fine quality fiber known as cashmere, called pashmina in Nepal (FAO, 2010). Pashmina is the fine quality fiber produced from Chyangra which is one among the four indigenous goat breeds of Nepal. Pashmina is one of the main sources of livelihood for the people in the high mountain region of Asian countries such as China, Afghanistan, Pakistan, India and Mongolia including Nepal. Pashmina is also the finest, softest, warmest and lightest wool found in nature. The main raw materials used for producing pashmina products are 'pashmina yarn' and 'silk yarn' plus dyes and chemicals. In Nepal, Mustang is the only district where Chyangra pashmina is harvested. Almost all the raw pashmina produced in Mustang is collected by the local traders soon after primary processing

such as washing and separation of outer hairs and is supplied to Chinese market in Tibet. Hardly 5% of the production is estimated being sold in the local market in the country (Bhattarai 2017).

The pashmina is a key export commodity of Nepal. According to the Economic Survey (MoF 2020), of the total Rs. 80721.8 million country's export in FY 2018/19 Chyangra pashmina's share was 2.36% (Rs.1910.3 million). Nepalese possess traditional knowledge and skills and are known internationally for their exquisite hand-woven pashmina products and carpets. Thus, the pashmina has been the third largest export commodity of Nepal, after carpets and garments (Sankhi 2013). The British Queen Elizabeth-II and other big celebrities and movie stars abroad have probably played significant role in promotion of Nepalese pashmina products abroad (Tiwari et.al 2013). Nepalese pashmina products are considered as a kind of handicraft and are paid higher price in the international markets. The most demanded pashmina products in the market are- shawls, scarfs, stoles, sweaters, cardigans, caps, socks, mufflers, blankets etc.

## 5.2 Chyangra fiber Production and Marketing

### 5.2.1 Chyangra Population

The official data on the Chyangra population in Nepal is hard to get, however according to a crude estimate the Chyangra makes around 1% of the country's total goat population. It has been approximated that there are about 10.25 million heads of goats in the country of which Chyangra population is estimated to be around 1% or 0.1098 million heads (Paudel, 2018).

Though there are 16 districts in Nepal where Chyangra is farmed, only five districts- Mustang, Dhopla, Manang, Mugu and Humla have the substantial number of Chyangra. Other eleven potential districts where the Chyangra could be farmed are- Kalikot, Jumla, Rasuwa, Sindhupalchowk, Dolakha, Solukhumbu, Sankhuwasabha, Darchula, Bhajang, Bajura and Taplejung (Paudel 2018). But, the most favorable climatic conditions for the Chyangra raising exists in three districts- Mustang, Manang and Dolpa only. The study also revealed that the population of Chyangra in Mustang district alone is 42,711 which is about 39% of the total Chyangra population in the country. Even though Chyangra is raised in only few districts and the total Chyangra population in the country also is not large, its importance cannot be underestimated because of increasing demand for pashmina products and opportunity to expand pashmina export to the global market.

*Table 1: Chyangra population in 16 Chyangra farming potential districts*

| S.N   | District      | Population |
|-------|---------------|------------|
| 1     | Taplejung     | <200       |
| 2     | Sankhuwasabha | <500       |
| 3     | Solukhumbu    | <1,000     |
| 4     | Dolakha       | <200       |
| 5     | Sindhupalchok | <1,000     |
| 6     | Rasuwa        | <1,000     |
| 7     | Mustang       | 42,771     |
| 8     | Manang        | 5,765      |
| 9     | Mugu          | 23,000     |
| 10    | Humla         | 11,000     |
| 12    | Jumla         | 5,000      |
| 13    | Dolpa         | 9,528      |
| 14    | Bajura        | 1,000      |
| 15    | Bajhang       | <1,000     |
| 16    | Darchula      | <1,000     |
| Total |               | 109,861    |

**Source:** Study on Sheep and Chyangra Goat Systems and Their Development Prospects in the High-altitude Districts of Nepal (Paudel, 2018).

### 5.2.2 Chyangra Pocket Areas in the Project Districts

Among the major Chyangra producing districts, Mustang and Manang are the two districts where the NLSIP is being implemented. The major Chyangra farming areas in these two districts- Mustang and Manang as indicated by a study (Bhattarai 2017) are presented in the Table-2 below.

Table 2: Chyangra pockets in Mustang and Manang.

| S.N | Districts | Major Chyangra pockets  |
|-----|-----------|---|
| 1   | Mustang   | Khursang, Kagbeni, Chusang, Chosser, Ghami, Chonnup, Muktinath, Marpha, Charang, Lomanthang and Jhong |
| 2   | Manang    | Naar, Fu, Tanki Manang, Bhakhraka   |

### 5.2.3 Chyangra Meat

In addition to the pashmina, Chyangra are important for their meat as well. The demand for Chyangra meat in Nepal increases especially during the Hindu festival (Dashain and Tihar) seasons. The demand and price of Chyangra both go high during the festivals and Chyangra for meat are imported from Tibet also. The traders collect and bring Chyangra from Dolpa, Mustang, Manang and imported from Tibet down to Pokhara once a year during the festival season and sell from Pokhara or send to Kathmandu and other cities and towns for marketing. Thus except the Chyangra slaughtered and consumed locally; there is an established tradition of selling Chyangra for meat only once in a year. In Mustang district, there is primitive tradition of making dried meat (sukuti) from Chyangra and this sukuti is marketed to Pokhara, Kathmandu and other cities (FAO 2010).

### 5.2.4 Chyangra Fiber Production and Productivity

Livestock species in the highlands, including Chyangra are reared under transhumance system by the herders since ages. Migratory management of goat and sheep is an age-long tradition and means of livelihood across high mountain districts in Nepal also. The Chyangra in Nepal is also raised under migratory system (74.5%) followed by sedentary (24.5%) system (Paudel 2018).

The Chyangra fiber called pashmina refers to the very short inner coat of the mountain goat which is normally 12 to 17 micron in diameter. In Nepal, the farmers collect pashmina from the Chyangra only in certain areas of Mustang district bordering Tibet. While in the other districts the Chyangra are used for meat purpose. The pashmina production varies from 170 to 200 gram per animal per year. However, the pashmina production per animal is said to be decreasing due to various management constraints including improper breeding practice and nutritional deficiencies. This problem can be overcome and the pashmina production per animal per year can be enhanced up to 350 gram, if the integrated interventions regarding feeding, breeding and health management are practiced (Tiwari et al. 2012). Annually, around 15 MT of Chyangra fiber is produced in the country (MoAD, 2014) while Paudel (2018) sees possibility to produce up to 24 MT pashmina annually. This is very negligible (0.15%) quantity, while



compared to the world pashmina production which is estimated to be 16000 MT (Weijer 2008 as quoted by Paudel 2018). In this context, it has been realized that sustainable improvement in Chyangra fiber production and productivity through adoption of improved practices is necessary to substitute the import and promote export.

### 5.3 Global Chyangra Fiber Production

The major pashmina producing countries are China, Afghanistan, Mongolia, Iran, India, Nepal and Pakistan. The production of Chyangra fiber all over the world was estimated to be around 16,000 MT annually of which China alone produces an estimated 12,000 MT (75%) followed by Mongolia 3,000 MT (18.75%), Afghanistan around 1,000 MT (6.25%). The share of other countries such as Iran, India, Nepal, Pakistan, Tibet, Kazakhstan, Tajikistan and Kyrgyzstan in pashmina production is very small (Bhattarai 2017).

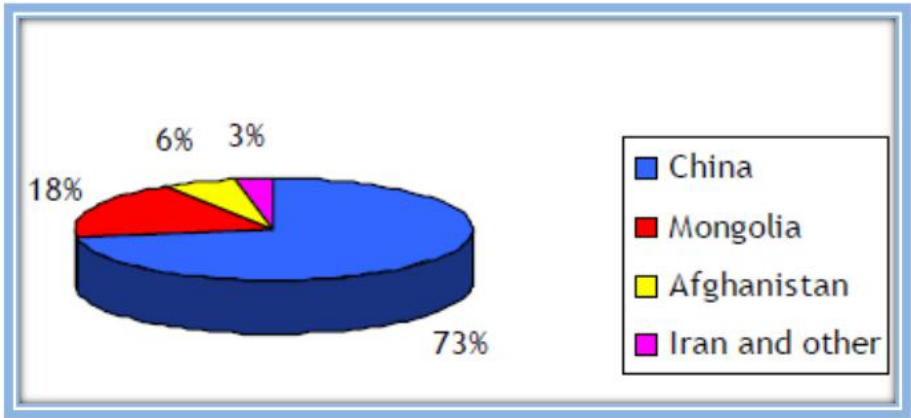


Figure 2: Global Production of raw Chyangra fiber (Bhattarai 2017)

### 5.4 Chyangra Fiber Demand and Supply

The pashmina products from Nepal are exported to over hundred countries across the globe. Thus, to fulfill the demand, above 400 MT pashmina yarn is imported annually by pashmina industries in Nepal. Around 70% of this import is from China, while 20% is from Mongolia and 10% from other countries (Tiwari et.al 2013). The demand for pashmina yarn changes according to the changes in demand for pashmina products in international market. So, 400 MT pashmina yarn seems to be the highest quantity the pashmina industries may need in Nepal.

To fulfill the pashmina industries' demand of 400 MT pashmina yarn, the country needs to produce about 1600 MT of raw pashmina (raw pashmina harvested is said

to yield about 25% pashmina). Fulfilling this demand by local production seems impossible as the country's current Chyangra population is 109,861 and various studies estimate possibility to produce about 15 MT only. Besides, there are no processing industries in Nepal currently in operation. Even if the processing industries are established and 15 MT pashmina (maximum potential) is produced, it will yield only about 4 MT of pashmina which is about just 1% of the total demand.

### 5.5 Trading of Pashmina and Pashmina Products

A study by the TEPC conducted in 2015 shows pashmina from Mustang being sold to Tibetan traders at Rs 2000 per Kg. While the pashmina yarn as reported by the FAO (2010) is imported back by the Nepalese industries paying four to five times higher price i.e. NRs 8,000-10,000 for a Kg. Main reasons attributed for this lower price and unusual trade chain are the trade tradition between the people of the two countries, unapproachability of the Chyangra production areas, absence of collection network and pashmina processing facilities in Nepal, no value chain linkages, lack of market information and lack of awareness and importance of pashmina among the pastoralists.

The NPIA has registered Chyangra pashmina as the trademark in 38 countries including Norway, Switzerland, the US, Canada, Japan, New Zealand and Australia. Similarly, the trade mark registration process is in progress in China, India, Thailand, Taiwan, the UAE, Russia, South Africa and Brazil.

Nepal saw a sharp fall in the Chyangra pashmina business during the last decade. The export of the pashmina products which was Rs. 7.5 billion during 1999-2000 plunged down to Rs 1.3 billion in 2009-2010 and increased slightly to 2.9 billion in 2016/17 (TEPC, 2016). Similarly, the number of pashmina factories in the country also dropped to 98 from 1,000 during its prime days. It has also been reported that investment on this sector has dropped down to Rs. 3 billion which was Rs. 15 billion once. The pashmina trade suffered mainly due to unfair pricing and unethical practices such as sale of low-quality pashmina mixed with viscose, wool and acrylic etc. by few traders. The government has included pashmina products in the list of 19 prioritized products which have high comparative advantage in international trade. According to the Nepal Trade Integration Strategy (NTIS), 2010 traders exported pashmina products worth Rs. 2.9 billion in 2016.

## 6. MARKETING OF CHYANGRA FIBER/PASHMINA

The raw or greasy Chyangra fiber collected from the goat undergoes at least following five processing stages before it is transformed into high value garments:

**Sorting:** The pashmina harvested is sorted as per color and quality.

**Scouring:** The dirt, grease and vegetable materials are removed.

**Dehairing:** The course outer hairs are removed firstly by hand and then by machine.

**Spinning:** The fiber is undergoes spinning and yarn is prepared.

**Knitting/Weaving:** Products are produced by weaving.

Pashmina is generally harvested once a year during late April or early May and the average yield in Nepal is about 150- 200 gm/adult Chyangra. The fiber is harvested from the Chyangra using a special harvesting comb and it takes almost one hour to collect about 150 to 200 gram fiber from a single Chyangra (Paudel 2018). There is no organized collection system for Chyangra fiber. Mostly the individual farmers themselves do the harvesting of the raw fiber in their herds. The fiber harvested by herders is sold to Chinese traders by the herders themselves directly or by local collectors when the Nepal-China border opens for local inhabitants twice a year in May-June and September-October each year. Though there are no concrete evidences, it is assumed that the same pashmina is part of the imported yarn brought back by the Nepalese industries at four to five times higher price (Rs16,000 - 20,000 per Kg).

In Nepal there are no pashmina processing units in operation till date<sup>2</sup>. The established pashmina industries in currently in operation are for preparing pashmina products from imported yarn and they are located mostly in Kathmandu valley, very far from the production area. So, there is no possibility of bringing the raw Chyangra fiber from the production sites and process further. Though the mountain districts are producing Chyangra fiber, almost all the raw materials for the production of high-grade pashmina products in Nepal is coming from abroad which shows a complete disconnect among the actors of the pashmina value chain (Paudel 2018). This also shows that there lie gaps throughout the value chain, starting from production to processing and marketing of pashmina. At the same time, there is no established formal network between the industries and the producers to collect and or process the raw pashmina produced locally.

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<sup>2</sup> Author's personal communication with president of PIA.

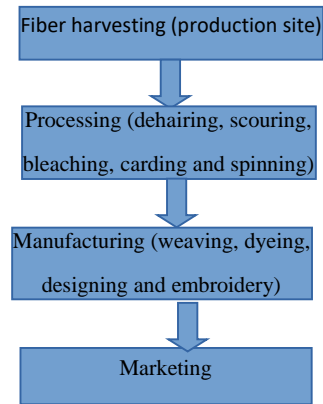


Figure 3: Process involved in Pashmina production (HIMALI 2018)

## 7. PASHMINA VALUE CHAIN ACTORS

### 7.1 The Actors

The remoteness of the production areas and lack of connectivity to the national market seem the two major constraints of pashmina marketing in Nepal. Road connectivity in both the pashmina producing districts Mustang and Manang has improved considerably in recent past. However, unavailability of the raw material (pashmina) in sufficient quantity seems to be the main reason behind the unwillingness of the private sector in establishing pashmina processing industry in Nepal. Private sector seems unwilling to invest in pashmina processing because even a smallest processing plant is said to require more than 30 MT raw pashmina to keep the machineries running, while according to the various studies, maximum pashmina Nepal can produce is 15-20 MT. This limited domestic pashmina production has also created inconsistent business relationship among actors of pashmina value chain. There is none or very weak linkage between collection network and market. Also, there is poor awareness among the farmers on pashmina harvesting and marketing technologies. So, there are gaps in the value chain such as in collection, primary processing and marketing. Majority of inputs for pashmina products including pashmina yarn, silk etc. are imported from abroad. There are traders importing pashmina from China and pashmina enterprises who import directly from China and other countries. The industry depends highly on the export market and hence the quality of pashmina products, including color and design, play very critical role in the revenues for the actors in the value chain (Rauniyar 2018).

The following are the actors of pashmina value chain in Nepal:

- i. **Producer farmers:** Are the herders who raise the Chyangra by tradition. Mostly are illiterate and unaware of improved technologies and practices and not linked to the other market actors.
- ii. **Pashmina collectors:** Are a few herders themselves, who resume the role of local pashmina traders by collecting pashmina from fellow herders around them and supply to the traders.
- iii. **Pashmina entrepreneurs:** Are the businesses in Kathmandu and Pokhara, who import Pashmina yarn, knit it and supply products to international traders. They are not connected to the pashmina producers.

Similarly, the federal and provincial government organizations including Ministry of Commerce, Veterinary Hospital and Livestock Service Expert Center (VH&LESC), Myagdi, Nepal Agriculture Research Council (NARC), I/NGOS, Annapurna Conservation Area Project (ACAP), BFI, Local governments etc. are the enablers working in pashmina sector. But, presence of most of these agencies in these pashmina producing areas is very thin.

## 7.2 Nepal Pashmina Industries Association (NPIA):

The pashmina entrepreneurs, including manufacturers, exporters, raw materials importers and dyers are organized under Nepal Pashmina Industries Association (NPIA) which is an autonomous, non-governmental, nonprofit making organization. The NPIA is a representative body under which all the Nepalese pashmina entrepreneurs are united together to sustain and develop the Nepali pashmina industry. It has a vision to establish the Chyangra Pashmina as Nepalese brand across the world.

## 7.3 Pashmina Buyers

Name list of a total 115 pashmina entrepreneurs with their contact details is presented in the Annex-1 of this report. They are the probable buyers of pashmina. But unfortunately none of these enterprises are engaged in pashmina processing. So, currently there seems no local buyer for the raw pashmina produced locally. Use of locally produced pashmina in the pashmina products is a must if i) the pashmina industry is to survive, and ii) Chyangra pashmina is to be established as a brand. There exists local demand for Chyangra fiber and international demand for Nepalese pashmina. So, need of the hour is to increase raw pashmina production in Nepal and to establish pashmina processing facility in the country.

## 8. CONCLUSION AND RECOMMENDATION

Though, Chyangra pashmina products are important export commodity, currently there are no buyers of Chyangra fiber produced locally. Past attempts to establish a pashmina processing industry have also failed<sup>3</sup>. There are only few districts where Chyangra goats can be farmed and public sector investment till date to develop this sub-sector is also has been very limited. In addition, the Chyangra sub-sector lacks proper institutional mechanism, research and development and other much needed promotional programmes.

Based on all above following measures can be suggested:

1. **Increase pashmina production:** Chyangra farming needs to be supported with improved breed, nutrition and technologies etc to increase domestic pashmina production through increased Chyangra number and productivity both. This has been suggested by the PETS project also (Rauniar G P, 2018) if the brand Chyangra Pashmina is to suatian and established.
2. **Expand Chyangra farming area:** Despite possibility of raising Chyangra in northern 16 districts the farmers in only six districts<sup>4</sup> are keeping Chyangra is substantial number. So, the Chyangra farming needs to be intensified in these six districts and expanded to other new districts.
3. **Develop white colored Chyangra breed:** Pashmina currently produced in Nepal consists of mixed colors such as brown, black and white; while the industry demands white colored pashmina. So, along with increase in pashmina production and productivity research needs to be done on developing white colored pashmina breeds of Chyangra.
4. **Develop value chain linkages:** The producers need to be linked to the industries and urban markets to enable them benefit from the business operations at national level. The recent improvements in connectivity will be favorable in the development of business linkages among value chain actors, especially in linking the city-based processors/manufacturers to the rural producers.
5. **Develop and strengthen Chyangra POs:** Organize the Chyangra farmers in to farmer groups leading to formation of farmer managed cooperatives. Work to strengthen their technical and managerial capacities.
6. **Establish cooperative managed pashmina collection centers:** As attracting private sector investment in pashmina processing does not seem

<sup>3</sup> The author's personal communication with Bishnu Prasad Dhakal proprietor Kamala Quality Pashmina Udhyog, Baluwataar, Kathmandu.

<sup>4</sup> Mustang (42,771), Mugu (23,000), Humla (11,000), Dolpa (9,528), Manang (5,765) and Jumla (5000).

possible in near future due to limited availability of the raw material; support establishment and operation of the cooperative managed pashmina collection centers at strategic locations around the production areas. This will increase farmers' bargaining power and help to increase the sales revenue even if the pashmina is sold to Tibetan traders.

7. **Support establishment and operation of facilities for pashmina processing:** Private sector investment to establish pashmina processing industry looks a distant reality in near future; as it will not be commercially viable. So, the NLIP needs to invest in establishing such processing facilities jointly with the pashmina yarn buyers. The NPIA could be one probable partner for such venture. This seems a must for the survival of the Nepalese pashmina industry.
8. **Form and strengthen producer and buyers' alliances:** The pashmina producer POs need to be linked to the buyers for guaranteed supply of their produce. Such alliances among the producer farmers and between the pashmina producer farmer groups and cooperatives and the pashmina buyers need to be strengthened.



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## ANNEXES

*Annex 1: List of Manufacturing and Marketing Industries of Pashmina in Nepal.*

| S. N | Name of Business                | Location                    | Name of Proprietor        | Mobile                   | E-mail ID                                 | Type of Business      |
|------|---------------------------------|-----------------------------|---------------------------|--------------------------|---|-----------------------|
| 1    | Aama Impex                      | Kaldhara, Kathmandu         | Ms. Rita Singh            | 98510 25629              | reeta.simha@mail.com                      | Manufacturer/Exporter |
| 2    | Alpine Pashmina House Pvt. Ltd. | Gongabu, Kathmandu          | Mr.Dinesh Kumar Shrestha  | 4701345                  | aphouse7@gmail.com, aphaouse@wlink.com.np | Manufacturer/Exporter |
| 3    | Apex Pashmina Industry          | Satungal, Kathmandu         | Mr.Tanka Bahadur Khharti  | 98510 04210              | apexpashmina@gmail.com                    | Manufacturer/Exporter |
| 4    | Ashirbad Pashmina Udhog         | Matathirtha, Kathmandu      | Mr.Ganesh Shrestha        | 98510 91354, 9813 471034 | asbpashmina@gmail.com                     | Manufacturer/Exporter |
| 5    | Asian Handicrafts               | Chabahil, Kathmandu         | Mr. Jit Bahadur Khadka/   | 4473775/4479007          | asianhandicrafts@gmail.com                | Manufacturer/Exporter |
| 6    | Bajra Yogini Pashmina Udhog     | Dhobighat, Kathmandu        | Mr. Bishnuraj Pandey      | 5546267/ 4273775         | bajrayogini@wlink.com.np                  | Manufacturer/Exporter |
| 7    | BFT Export Pvt. Ltd.            | Lal Colony Marga, kathmandu | Mr.Barbara Constantinescu | 4410520/ 4421760         | barbara@bajra.com                         | Manufacturer/Exporter |
| 8    | C.S. Cashmere Pvt. Ltd.         | Gongabu, Kathmandu          | Mr.Krishna Prasad Pangeni | 98510 71815              | cscashmere@gmail.com                      | Manufacturer/Exporter |
| 9    | Cachemire Parachute Proprietor  | Paknajole-16, Kathmandu     | Mr. Achut Bikram Rana     | 4251959                  | abr@mos.com.np                            | Manufacturer/Exporter |

| S. N | Name of Business                  | Location                 | Name of Proprietor      | Mobile                       | E-mail ID  | Type of Business      |
|------|-----------------------------------|--------------------------|-------------------------|------------------------------|--|-----------------------|
| 10   | Care and Craft Cashmere Udhog     | Baneshwar, Kathmandu     | Mr. Vijay Dugar         | 9841 314179                  | cnepal@wlink.com.np  | Manufacturer/Exporter |
| 11   | Chen Resic Pashmina Industries    | Durbar Marg, Kathmandu   | -                       | 9851003600,42722 72/4470826  | crpashmina@wlink.com.np                                      | Manufacturer/Exporter |
| 12   | Chui Se Textile Company Pvt. Ltd. | Mandikhatar, Kathmandu   | Mr. Himlal Kapri        | 98510 22380,4249444/42 53444 | Himal@mos.com.np   | Manufacturer/Exporter |
| 13   | Classic Cashmere Art Pvt.Ltd.     | Sainbu, Kathmandu        | Mr.Padam Pun            | 98510 94398,4427209          | info@nepalpashminastore.com                                  | Manufacturer/Exporter |
| 14   | Classic Pashmina and Handicrafts  | Patan, Kathmandu         | Mr. Pusker Nath Maskey/ | 5552139/ 5526537             | puskermaskey@hotmail.com                                     | Manufacturer/Exporter |
| 15   | Creative Nepal Exports Pvt. Ltd.  | Thamel, Kathmandu        | Mr. Hari Dhakal         | 4700565                      | info@creativenepalexports.com, hari@creationnepalexports.com | Manufacturer/Exporter |
| 16   | Deep Pashmina Industries          | Kathmandu                | Mr.Pradip Nepal         | 4271154                      | info@deeppashmina.com.np                                     | Manufacturer/Exporter |
| 17   | Dibya Pashmina Udhog              | Tiikhedeval, Lalitpur    | Mr. Upendra Giri        | 9851074180,55249 59/5546969  | dibya@wlink.com.np   | Manufacturer/Exporter |
| 18   | Euro Pashmina Pvt.Ltd             | 371-Swoyambhu, Kathmandu | -                       | 4276200/4279876              | info.europashmina@gmail.com,                                 | Manufacturer/Exporter |
| 19   | Everest Cashmere Industry         | Sankhamul Road, New      | -                       | 4783064                      | kcrafft@wlink.com.np   | Manufacturer/Exporter |

| S. N | Name of Business                             | Location                   | Name of Proprietor           | Mobile              | E-mail ID                     | Type of Business      |
|------|--|----------------------------|------------------------------|---------------------|-------------------------------|-----------------------|
|      |  | Baneshwor, Kathmandu       |                              |                     |                               |                       |
| 20   | Everest Export House                         | Nhyokha Tole, Kathmandu    | Mr. Jayendra Man Baniya      | 4438210             | everstexp@wlink.com.np        | Manufacturer/Exporter |
| 21   | Everest Knitting Industry                    | Taumadhi Square, Bhaktapur | -                            | 6610853/6612244     | srp@mos.com.np                | Manufacturer/Exporter |
| 22   | Everest Pashmina Knitting & Weaving Industry | Jharubarassi VDC, Lalitpur | Mr. Santosh Dev Singh Gurung | 6225399/6227738     | info@everestpashmina.com      | Manufacturer/Exporter |
| 23   | Exclusive Fabric Industry Pvt. Ltd.          | Pulchowk, Lalitpur         | Mr. Dinesh Tuladhar          | 5546076             | exclusive@fabric.wlink.com.np | Manufacturer/Exporter |
| 24   | Fewa Pashmina Company Pvt. Ltd.              | Kalanki, Kathmandu         | Mr. Jagadishwar Pokhrel      | 4285124/ 5547940    | fewapashmina@gmail.com        | Manufacturer/Exporter |
| 25   | Fine Weaves Pvt. Ltd.                        | Balaju, Kathmandu          | Mrs Lily Eren Tuladhar       | 4357366/4350230     | fineweaves@enet.com.np        | Manufacturer/Exporter |
| 26   | Ganadeep Pashmina Udhog                      | Kapan, Kathmandu           | Mr. Ganesh Kumar Khadka      | 98510 77179         | ganesh999@gmail.com           | Manufacturer/Exporter |
| 27   | Gandaki Pashmina Udyog                       | Gongabun, Kathmandu        | -                            | 4351093/4353258     | business@mail.com.np          | Manufacturer/Exporter |
| 28   | Garden Dhaka Pashmina udhyog                 | Dhapasi, Kathmandu         | Ms. Biddhya Devi Shrestha    | 98510 31226         | gdpashmina@wlink.com.np       | Manufacturer/Exporter |
| 29   | Guru Cashmere & Blends Pvt. Ltd.             | Jorpati, Kathmandu         | Mr. Tika Raj Baral           | 98510 15055,4913782 | info@gurupashmina.com         | Manufacturer/Exporter |

| S. N | Name of Business                          | Location                             | Name of Proprietor                      | Mobile              | E-mail ID                                   | Type of Business      |
|------|---|--------------------------------------|---|---------------------|---|-----------------------|
| 30   | Harati Woolens Knitwear (P.) Ltd.         | Swayambhu-15, Kathmandu              | Mr. Dipendra Shaky                      | 4288906             | info@haratiwear.com, dsrharati@wlink.com.np | Manufacturer/Exporter |
| 31   | Hastakala Nepal Pvt. Ltd.                 | Bharatpur-12, Chitwan                | Mr. Suman Dahal                         | 9855054541          | suman_dahal143@yahoo.com                    | Manufacturer/Exporter |
| 32   | High Himalaya Garment                     | Buddha Nagar, Kathmandu              | -                                       | 4780312             | netraraj@gmail.com                          | Manufacturer/Exporter |
| 33   | Himal Pashmina Udyog                      | Kalimati-13, Soaltee Mode, Kathmandu | -                                       | 4277924/4288672     | himali@mos.com.np                           | Manufacturer/Exporter |
| 34   | Impower International Export Group        | Samakhushi, Kathmandu                | Ms. Mohini Maharjan/ Ms. Geeta Shrestha | 4255940/4227279     | m_maharjan22@hotmail.com                    | Manufacturer/Exporter |
| 35   | Jashmi Handicrafts International (P) Ltd. | Jorpati, Kathmandu                   | Mr. jaya Ram Pandit,                    | 9851137131          | jashmihandicrafts@yahoo.com                 | Manufacturer/Exporter |
| 36   | Jasmine Handicraft                        | Thamel, Kathmandu                    | Mr. Janak Raj Basnet                    | 9851029692, 4701467 | jasminhandicraft@yahoo.com                  | Manufacturer/Exporter |
| 37   | J and S Fashion Center                    | Thamel, Kathmandu                    | Mr. Janak Raj Pandey                    | 9851081126, 4701227 | js.pashmina24@gmail.com                     | Manufacturer/Exporter |
| 38   | Kamala Quality Pashmina Udhayog           | Baluwatar, Kathmandu                 | Mr. Bishnu Prasad Dhakal                | 9851082766, 4426281 | kamalaqt@wlink.com.np                       | Manufacturer/Exporter |
| 39   | Kandel Enterprises                        | Kapan, Kathmandu                     | Mr. Nishan Kandel                       | 4810699             | nissankandel@gmail.com                      | Manufacturer/Exporter |

| S. N | Name of Business  | Location                          | Name of Proprietor   | Mobile                      | E-mail ID                         | Type of Business      |
|------|---|-----------------------------------|----------------------|-----------------------------|-----------------------------------|-----------------------|
| 40   | Kandel Pashmina Udhyog  | Kapan, Kathmandu                  | Mr. Kamal Kandel     | 4810699                     | Kandelpashmina@hotmail.com        | Manufacturer/Exporter |
| 41   | Kankeswori Woollens Knitwear Pvt. Ltd.                        | Marudhoka, Kathmandu              | Mr.Saroj Shahi       | 4262552                     | woollenknitwear@gmail.com         | Manufacturer/Exporter |
| 42   | Kiran Enterprises   | Swoyambhu, Kathmandu              | -                    | 4428426                     | kpashmina@ntc.net.np              | Manufacturer/Exporter |
| 43   | Krishna Pashmina Arts   | Satdobato, Lalitpur               | -                    | 9851030160, 5522733/5542815 | kpaktm@gmail.com                  | Manufacturer/Exporter |
| 44   | LHAPSA CONCERN  | Kamalpokhari, Kathmandu           | -                    | 4416399                     | kasa@lhapsa.wlink.com.np          | Manufacturer/Exporter |
| 45   | Listimai Pashmina Udhyog and International Business Pvt. Ltd. | Khusibu, Kathmandu                | Mr. Ang Dorje Sherpa | 98510 82615, 4244702        | angssherpa189@hotmail.com         | Manufacturer/Exporter |
| 46   | LR Enterprises  | Syuchatar, Kathmandu              | Mr.Ramesh Bhattarai  | 98510 50363                 | battarai.ramesh@hotmail.com       | Manufacturer/Exporter |
| 47   | Lumana Knit Craft   | Kupandol, Lalitpur                | Ms. Nasala Shakya    | 9851008521, 5550216         | arunas.lumanaknitcraft@ntc.net.np | Manufacturer/Exporter |
| 48   | M.K. Trade International                                      | Narayan Gopal Chowk-69, Kathmandu | Mr. Gopal Poudyal    | 4436554                     | mktradektm@gmail.com              | Manufacturer/Exporter |
| 49   | Manasalu Trading  | Dhapasi, Kathmandu                | Mr.Lila Nath Dhakal  | 9851068144                  | manaslu@pashmina.wlink.com.np     | Manufacturer/Exporter |

| S. N | Name of Business                   | Location                      | Name of Proprietor           | Mobile                       | E-mail ID                   | Type of Business      |
|------|------------------------------------|-------------------------------|------------------------------|------------------------------|-----------------------------|-----------------------|
| 50   | Mandala Pashmina & Handicrafts     | Khusibu, Kathmandu            | Mr. Lhakpa Sherpa            | 98510 22314, 9841 032016     | mandalapashmina@gmail.com   | Manufacturer/Exporter |
| 51   | Mandala Silk Design Pvt. Ltd.      | Lazimpat, Kathmandu           | Mr. Swoyambhu Ratna Tuladhar | 4413552/4410992              | yyexpo@mos.com.np           | Manufacturer/Exporter |
| 52   | MM International Pvt. Ltd.         | Kalimati, Kathmandu           | Mr. Bachu Gopalbanshi        | 4287825                      | bachugopali@wlink.com.np    | Manufacturer/Exporter |
| 53   | Modern Handicraft Pvt. Ltd.        | Chapali Bhadrakali, Kathmandu | Mr. Pralad Kandel            | 9851056729                   | modernhandicraft3@gmail.com | Manufacturer/Exporter |
| 54   | Moon Sun Trading Pvt. Ltd.         | Kapan, Kathmandu              | Mr. Shree Dhar Khanal        | 98510 30041, 4480078/4499875 | mstrading@wlink.com.np      | Manufacturer/Exporter |
| 55   | Mount manaslu Pashmina Udhyog      | Jorpati, Kathmandu            | Mr. Dhan Prasad Lamichhane   | 4912936                      | dhan@ntc.net.np             | Manufacturer/Exporter |
| 56   | Multiple Trading Concern           | Dhobighat, Lalitpur           | Mr. Laxmi Man Maharjan       | 5535569, 5549795             | lmm@multiple.wlink.com.np   | Manufacturer/Exporter |
| 57   | Nature Knit Pvt. Ltd.              | Chabahil, Kathmandu           | Mr. Bharat Prasad Adhikari   | 4483178/ 4479241             | natureknit@gmail.com        | Manufacturer/Exporter |
| 58   | Nava Natural Pashmina Udhyog       | Pepsikola, Bhaktapur          | Mr. Kalidas Devkota          | 98510 50283                  | navne@wlink.com.np          | Manufacturer/Exporter |
| 59   | Nepal Handicraft                   | Kalimati, Kathmandu           | Ms. Gokarna Devi Nepal       | 9841 288796, 4228981         | -                           | Manufacturer/Exporter |
| 60   | Nepal Star Fashion Impex Pvt. Ltd. | Chyasal, Lalitpur             | Mr. Pratik Singh Karki       | 9841311066, 5536514          | -                           | Manufacturer/Exporter |

| S. N | Name of Business                    | Location                             | Name of Proprietor                  | Mobile              | E-mail ID                     | Type of Business      |
|------|-------------------------------------|--------------------------------------|-------------------------------------|---------------------|-------------------------------|-----------------------|
| 61   | Novela Silky Wool                   | Patan Dhoka, Lalitpur                | Mrs Basundhara Acharya              | 5522332             | novsilky@wlink.com.np         | Manufacturer/Exporter |
| 62   | NP Cashmere House & Industries      | Thamel, Kathmandu                    | Mr. Pranit Shahi, Niresh Khadgi     | 9849002999, 4258322 | carpethouseintl@gmail.com     | Manufacturer/Exporter |
| 63   | Om Pashmina & Craft Udyog           | Kapan, Kathmandu                     | Mr. Vinod Kumar Sharma              | 4820056             | baishno@mos.com.np            | Manufacturer/Exporter |
| 64   | Palanchowk Bhagabati Pashmina Udyog | Kalopul, Kathmandu                   | Ms. Parvati Shrestha/Durga Shrestha | 9841178018, 4413978 | pbpashmina@yahoo.com          | Manufacturer/Exporter |
| 65   | Pashm Nepal                         | Bansbari, Kathmandu                  | Mr. Balkrishna Burlakoti            | 9851056099          | pashm1@hotmail.com            | Manufacturer/Exporter |
| 66   | Pashmina Image                      | Satdobato, Lalitpur                  | Ms. Kalyani Koirala                 | 5540861             | pasim@wlink.com.np            | Manufacturer/Exporter |
| 67   | Pashmina Avenue                     | Basantapur, Durbar Square, Kathmandu | Mr. Bhimnidhi Adhikari              | 9851087884, 6215623 | pashminaavenue@rediffmail.com | Manufacturer/Exporter |
| 68   | Perfect Exports (P)                 | Thamel-29, Kathmandu                 | Mr. Gokarna Raj Pokharel            | 9841586412          | nepalcargo@gmail.com          | Manufacturer/Exporter |
| 69   | Popular Pashmina Fashion            | Ratopul, Kathmandu                   | Mr. Balram Panta/Santosh Panta      | 9851097893          | santababu@hotmail.com         | Manufacturer/Exporter |
| 70   | Prasid Pashmina Industry            | Kathmandu                            | Mr. Ajay Karki                      | 4443580/4414253     | prasid@wlink.com.np           | Manufacturer/Exporter |

| S. N | Name of Business                   | Location                    | Name of Proprietor        | Mobile                      | E-mail ID  | Type of Business      |
|------|------------------------------------|-----------------------------|---------------------------|-----------------------------|--|-----------------------|
| 71   | Priya Handicraft                   | Lazimpat, Kathmandu         | Mr. Ramchandra basnet     | 9851032430                  | priyaktm@wlink.com.np                                  | Manufacturer/Exporter |
| 72   | Real Pashmina Export               | Thamel, Kathmandu           | Mr. Utsab Khanal          | 4441507                     | realpashmina@hotmail.com                               | Manufacturer/Exporter |
| 73   | Rijan & Shrijan Pashmina Udhog     | Battisputali, Kathmandu     | Mr. Rit Man Shrestha      | 4490167                     | rspashmina@yahoo.com                                   | Manufacturer/Exporter |
| 74   | RM Pashmina Exporter               | Naghal Tole, Kathmandu      | Ramesh Kumar Shrestha     | 4256880                     | royal@col.com.np                                       | Manufacturer/Exporter |
| 75   | Royal Silk & Pashmina              | Kathmandu, Kathmandu        | Mr. Ramesh Kumar Shrestha | 9851027581                  | royalpashmina22@yahoo.com                              | Manufacturer/Exporter |
| 76   | S.K. Pashmina Industries           | Basundhara, Kathmandu       | Mr. Nawadatta Kafle       | 4383716                     | info@skpashmina.com                                    | Manufacturer/Exporter |
| 77   | Sagarmatha Silks                   | Baneshwar, Kathmandu        | Mr. Shanker Prasad Pandey | 4107300                     | himal@silks.wlink.com.np                               | Manufacturer/Exporter |
| 78   | Samajik Sip Bikash Udyog           | Jorpati-4, Kathmandu        | -                         | 4914280/4914370             | maheelacoop@hotmail.com, womens_foundation@hotmail.com | Manufacturer/Exporter |
| 79   | Samanta Pashmina Craft             | Jorpati, Kathmandu          | -                         | 9831020106, 4911961/4912303 | pranjali@mos.com.np                                    | Manufacturer/Exporter |
| 80   | Shakya Pashmina Industry Pvt. Ltd. | Chhauni, Kathmandu          | Mr. Ramesh Kumar Shakya   | 4274398/ 4277846            | rshakya@wlink.com.np                                   | Manufacturer/Exporter |
| 81   | Shangrila Silk Pashmina Pvt. Ltd.  | Budhanilkantha-8, Kathmandu | -                         | 4370776                     | shangrilacashmere@gmail.com                            | Manufacturer/Exporter |



| S. N | Name of Business                  | Location                | Name of Proprietor     | Mobile               | E-mail ID                         | Type of Business      |
|------|-----------------------------------|-------------------------|------------------------|----------------------|-----------------------------------|-----------------------|
| 82   | Shree New Mahalaxmi Enterprises   | Kuleshwar, Kathmandu    | Ram Krishna Shrestha   | 9851033187           | mhl1@wlink.com.np                 | Manufacturer/Exporter |
| 83   | Shree Pashmina Udhog              | Battisputali, Kathmandu | Dr. Govinda Tondon     | 4474328/ 4470997     | nkbaset@mos.co.np                 | Manufacturer/Exporter |
| 84   | Siddhivinayak Pashmina Udhog      | Thaiba, Lalitpur        | Mrs Meena Agrawal      | 5560845/4443171      | nevatia@mos.com.np                | Manufacturer/Exporter |
| 85   | Sunkoshi Craft                    | Kapan, Kathmandu        | Durga Bikram Thapa     | 4811634              | thapadbt@gmail.com                | Manufacturer/Exporter |
| 86   | Sunmoon Pashmina Craft            | Kathmandu               | Mr.Savit Dongal        | 2013249              | info@sunmoonpashmina.com          | Manufacturer/Exporter |
| 87   | Surya Nepal Cashmere House        | Thamel, Kathmandu       | Ms. Shanti Agrawal     | 9851021823, 4700698  | suryanepalcashmere@gmail.com      | Manufacturer/Exporter |
| 88   | Surya Pashmina & Handicrafts      | Swoyambhu, Kathmandu    | Mr.Subarna Manandhar   | 98510 79855, 4276830 | surya-handicraftsubarna@yahoo.com | Manufacturer/Exporter |
| 90   | Symphony Handicraft International | Chapali, Kathmandu      | Mr.Manu Singh Tamang   | 4411510              | mbjmanu@yahoo.com                 | Manufacturer/Exporter |
| 91   | Tara Oriental                     | Lubhu, Lalitpur         | Mr.Anin Raj Bhandari   | 5250140              | taraoriental@gmail.com            | Manufacturer/Exporter |
| 92   | Trikot Industries Pvt. Ltd.       | Rabi Bhawan, Kathmandu  | Mr. Shakh Golyan       | 98511 05814, 4671200 | info@trikotnepal.com              | Manufacturer/Exporter |
| 93   | Weaves & Blends Pvt. Ltd.         | Jorpati, Kathmandu      | Ms. Sapana Bajracharya | 9851057157           | weavesb@mail.com.np;              | Manufacturer/Exporter |

| S. N | Name of Business          | Location                   | Name of Proprietor         | Mobile                       | E-mail ID  | Type of Business      |
|------|---------------------------|----------------------------|----------------------------|------------------------------|--|-----------------------|
|      |                           |                            | Lama & Meghana hapa        |                              |  |                       |
| 94   | Yankila Pashmina Udhog    | Ichangu Narayan, Kathmandu | Mr. Pasang Sherpa          | 6212411/ 4248701             | ypashmina@wlink.com.np   | Manufacturer/Exporter |
| 95   | Yeti Fashion & Design     | Dhobighat, Lalitpur        | Mr. Satrudhan Lal Shrestha | 98510 57335                  | yetiknit@gmail.com   | Manufacturer/Exporter |
| 96   | Yeti Fashion              | Thamel-29, Kathmandu       | Ms. Pema Dhokar            | 4420568/ 4412642             | muktinat@ntc.net.np  | Manufacturer/Exporter |
| 97   | Yuko Handicraft Pvt.Ltd   | Tripureshwor, Kathmandu    | Mr. Ramchandra Bhandari    | 9851023862                   | ram.yuko@gmail.com   | Manufacturer/Exporter |
| 98   | Zenith Export & Import    | Thamel, Kathmandu          | -                          | 4227512                      | zexim@wlink.com.np   | Manufacturer/Exporter |
| 99   | Aama Impex                | Paknajol, Kathmandu        | Ms. Reeta Simha            | 9851025629, 425079           | info@aamacraft.com   | Manufacturer/Exporter |
| 100  | Atri Collection P. Ltd.   | Sinamangal, Kathmandu      | Santosh Sah Kanu           | 9860021123, 4475055          | <a href="mailto:santoshsah153@yahoo.com">santoshsah153@yahoo.com</a> | Exporter              |
| 101  | Bentex Jewellery Center   | Chabahil, Kathmandu        | Rachana Shrestha           | 9851057244, 4480115/44822417 | <a href="mailto:bentex@wlink.com.np">bentex@wlink.com.np</a>         | Exporter/Manufacturer |
| 102  | Brave Gorkhas Enterprises | Thamel, Kathmandu          | Resham Bahadur Pokharel    | 9851022380, 4253444          | <a href="mailto:bge2045@gmail.com">bge2045@gmail.com</a>             | Exporter              |

| S. N | Name of Business                               | Location              | Name of Proprietor            | Mobile                      | E-mail ID   | Type of Business                          |
|------|--|-----------------------|-------------------------------|-----------------------------|---|---|
| 103  | Dil Traders                                    | Thamel, Kathmandu     | Jitendra Kumar Shrestha       | 9851049256, 4423175         | <a href="mailto:dilteje@enet.com.np">dilteje@enet.com.np</a>  | Exporter/ Manufacturer                    |
| 104  | Erisha International                           | Thamel, Kathmandu     | Ratna Shova Shrestha Maharjan | 9851022292, 4701507         | <a href="mailto:ranaratna@gmail.com">ranaratna@gmail.com</a>  | Exporter                                  |
| 105  | Lux Enterprises                                | Chabahil, Kathmandu   | Prem Lal Tamang               | 4496529                     | <a href="mailto:pl_tamang@yahoo.com">pl_tamang@yahoo.com</a>  | Exporter/Retailer                         |
| 106  | Mandala Handicraft Nepal                       | Boudha, Kathmandu     | Umesh Khadka                  | 9813708215 / 9851148490     | <a href="mailto:rajbhandaritin@hotmail.com">rajbhandaritin@hotmail.com</a>  | Exporter/Retailer                         |
| 107  | Monalisa Traders and Exports                   | Thamel, Kathmandu     | Ramesh Siwakoti               | 4410769                     | <a href="mailto:monalisa_siwakoti@yahoo.com">monalisa_siwakoti@yahoo.com</a> ; <a href="mailto:rameshsiwakoti@hotmail.com">rameshsiwakoti@hotmail.com</a> | Exporter/Manufacturer/Retailer/Wholesaler |
| 108  | Mountain Sherpa International Export Pvt. Ltd. | Jorpati, Kathmandu    | Tsering Youden Lama Tamang    | 9851161885                  | <a href="mailto:sonam_sherpa58@yahoo.com">sonam_sherpa58@yahoo.com</a>  | Exporter                                  |
| 109  | Nepa Handicraft Collection Center              | Dhobichaur, Kathmandu | Gita Shrestha                 | 9841249983, 4251263         | <a href="mailto:shgitu@hotmail.com">shgitu@hotmail.com</a>  | Exporter/Retailer                         |
| 110  | Nepal Craft Gallery                            | Chakupat, Lalitpur    | Yagya Ratna Dhakhwa           | 9851047678, 5260952/5260953 | <a href="mailto:amogh45@gmail.com">amogh45@gmail.com</a>  | Exporter/Manufacturer/Wholesaler          |

| S. N        | Name of Business                  | Location          | Name of Proprietor      | Mobile              | E-mail ID                      | Type of Business                          |
|-------------|-----------------------------------|-------------------|-------------------------|---------------------|--------------------------------|---|
| 1<br>1<br>1 | Om Shiva Classical Woolen Centre  | Thamel, Kathmandu | Dhurba Prasad Dulal     | 9851008253, 4256554 | dulalomshiva@hotmail.com       | Exporter/Retailer                         |
| 1<br>1<br>2 | Panchakanya Pashmina House        | Thamel, Kathmandu | Badri Prasad Timalisina | 9841220625          | bptimalisina29@hotmail.com     | Exporter/Retailer                         |
| 1<br>1<br>4 | Sweater & Pashmina House          | Thamel, Kathmandu | Sumitra Shrestha        | 4412907             | surendrashrestha1961@gmail.com | Exporter                                  |
| 1<br>1<br>5 | Woolen Trade Knitwear Enterprises | Thamel, Kathmandu | Sanjita Tiwari          | 9849044642, 4700565 | sanjita_parushi29@yahoo.com    | Exporter/Manufacturer/Retailer/Wholesaler |