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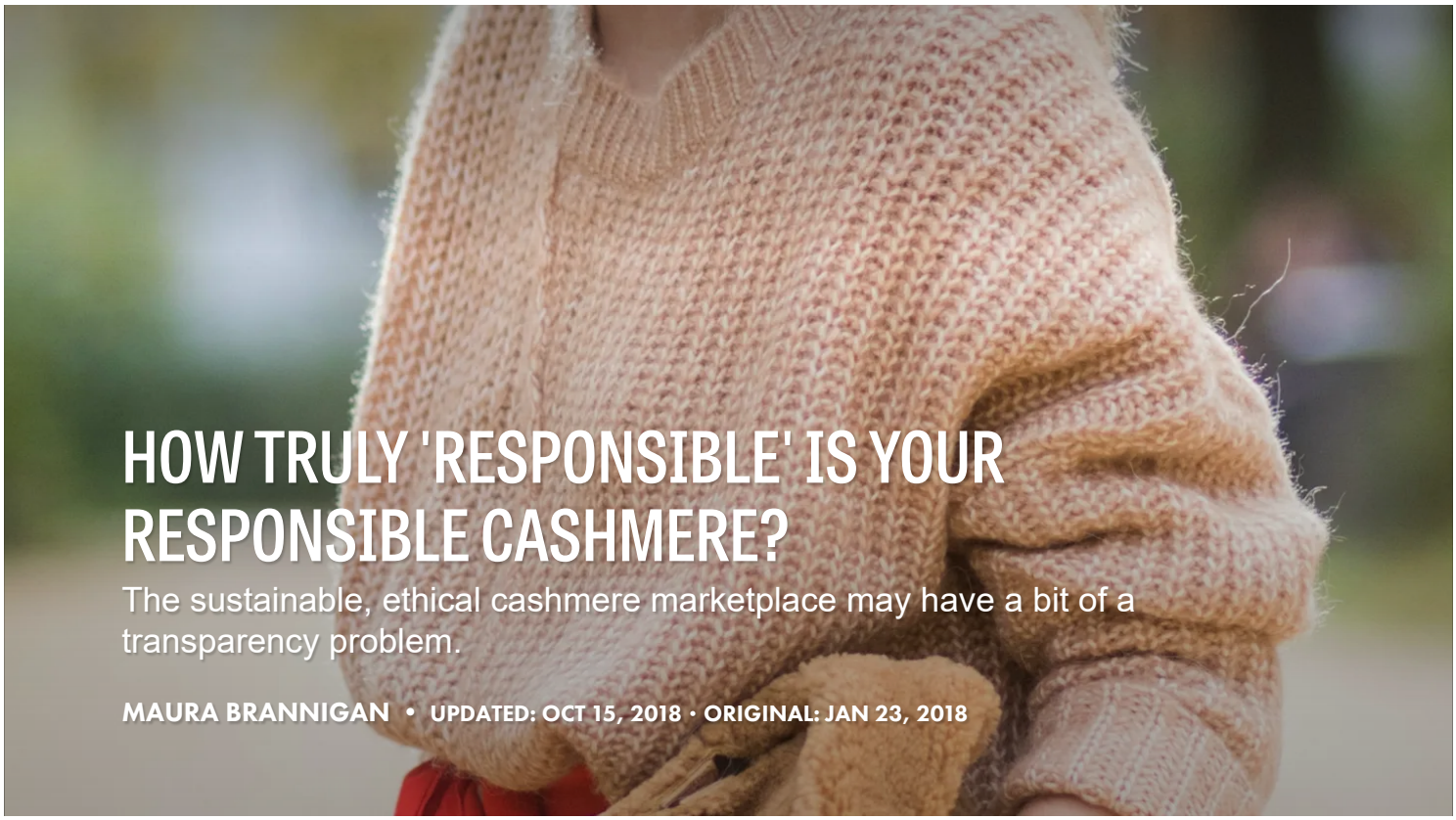

# HOW TRULY 'RESPONSIBLE' IS YOUR RESPONSIBLE CASHMERE?

The sustainable, ethical cashmere marketplace may have a bit of a transparency problem.

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Just for a moment, picture the most classic, elegant closet you can. What's in it? A camel trench coat, perhaps, or possibly a pair of buttery leather driving loafers. Regardless of the closet-haver's personal tastes, a perfect cashmere sweater fits in, too — maybe even more prominently than the trench or loafers.

Historically, cashmere has always been luxurious. Cashmere has been aspirational. Cashmere has been timeless. Cashmere has been an investment. But in the last decade, cashmere has been "disrupted" much in the same way that eyewear or fine jewelry or skin care have.

Not only are many of these cashmere disruptors direct-to-consumer businesses — a noted advantage for fledgling brands seeking that inimitable "cool" factor — but they're also embodying a trendy, yet well-intentioned buzzword that millennial- and Generation Z-aged shoppers find appealing: "sustainable," "ethical" or "responsible." And now with consumers putting more of their money where their mouth is, so to speak, "responsible" markets are blossoming in big ways. But with cashmere's centuries-old production practices and challenging environmental precautions, where, exactly, does it fit within the new direct-to-consumer market, and what do those brands owe their customers?

Not all retailers, it seems, would agree with each other.

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Cashmere has been in use since well before the 13th century, when Marco Polo allegedly encountered wild goats that had been domesticated by humans in caves in Mongolia. It wasn't until the 19th century that the fabric made its way to Europe, at which point it became known as "kashmir," named for the Kashmir Valley region of the Indian subcontinent the goats inhabited.

With temperatures hitting as low as -40 degrees Farenheit, the region's goats have developed undercoats that allow them to survive the six-month winters. This soft, downy wool comprises the fiber we know and love today, but its shearing process has evolved over time. To start, the quality of the fleece is evaluated by three factors, as stated by the U.S.-based Cashmere Goat Association: the hair's length, thickness (measured in microns) and degree of crimping, all of which are direct reflections of the animal's overall health.

While much of the world's raw cashmere is still sourced from pastures in Mongolia, cashmere began being processed, treated and produced in other corners of the world, like Scotland and Italy, in the early 1800s. Both nations have sustained heritage brands such as Pringle of Scotland and Brunello Cucinelli for decades; but in the early aughts, a spike in demand — paired with changes in World Trade Organization rules — brought more cashmere mass-production to China, which put the legacy businesses in jeopardy.

When Cuyana, a digital-first retailer for chic, high-quality essentials for women, began developing cashmere of its own, Scotland and Italy were the first places the brand turned. Co-founder Shilpa Shah explains that the traditional methods in which Scottish and Italian manufacturers treat the cashmere helps with the material's longevity. In short: They wash it less.

Shah says that most of the world's highest quality cashmere isn't actually soft to the touch, but because the American market buys "on hand-feel," manufacturers will run it through extra cycles. "Cashmere softens over time," says Shah. "They're making the sweaters that last, that really are passed down from generation to generation." For Shah, Scotland and Italy's meticulous techniques for spinning, knitting and weaving cannot be found elsewhere. "They also take a lot of pride," she says. "I know that's a really soft metric, but you can tell with factories when they're actually family-owned and they're working with their clients and they take very *few* clients."

At what point did the cashmere disruption begin in earnest? A *Chicago Tribune* article from January 2010 explored the seemingly sudden explosion of low-priced cashmere carried at retailers

as mass-market as Costco. "What it seems to boil down to is that there's been a huge increase in demand for cashmere and a decrease in price," says Sarah Hayes, Patagonia's senior manager of materials innovation and development. As the basic economics of supply and demand have unfolded over the years, the broader quality of cashmere has lowered significantly. "It's just led to more cashmere goats being raised than the land can handle."

The issue facing the market right now, explains Hayes, affects both the goats and the pastures on which they're raised. "We know that the goats have sharp hooves that can break through the topsoil. The way they eat is they eat the grass and the plants all the way from the roots up, so that it's really hard for the grass to regenerate," she says. "That combination of having so many goats that the land can't handle — and that [the land] doesn't really have a chance to recuperate — is a big issue, as well as concern for the herders' well-being and welfare."

Though Patagonia did carry cashmere inventory in the past, it put a pause on stocking the fiber three years ago when the Ventura, Calif.-based company realized it wasn't using cashmere in a manner that matched its notoriously high responsibility standards. But it re-incorporated cashmere in late 2017, this time working exclusively with recycled cashmere, or essentially, the deadstock of discarded cashmere bits. Hayes says that one day, perhaps, Patagonia will turn to virgin cashmere again, should it meet all of its sustainability criteria.

Patagonia has been keeping tabs on the cashmere industry and finds recent projects promising. One brand redefining the space is Naadam Cashmere, a New York-based ethical and sustainable cashmere label that supplements its retail arm with a Mongolian NGO it helped found, called the Gobi Revival Fund. Naadam, which was named after a traditional festival in Mongolia, works on the ground with Mongolian herders to both procure and sort all of its wool.

Naadam co-founder and CEO Matt Scanlan explains that they travel to Mongolia once a year, typically in May if the weather permits, to purchase material directly from roughly 1,000 herder families. (They initially did so with "literal bags" of cash. "We don't take as much cash anymore," he laughs. "We'll work with local banks at this point.") During these trips, the Naadam team will buy anywhere between 75 and 120 tons of cashmere. Scanlan says it's really as rough-and-tumble as you might think, with herders sometimes carrying the wool on the side of a horse. They then sort it on-site, breaking down the cashmere into different colors and qualities. Finally, it gets shipped to Mongolia's capital of Ulaanbaatar where the refinement process begins.

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All of this occurs in an area in the southwest region of Mongolia that's roughly the size of Rhode Island, an important distinction within the world of cashmere. "A lot of people say they're sourcing from Mongolia, but it's actually Inner Mongolia, and Inner Mongolia is China," says Scanlan. "Mongolia is its own country. And it's what people often refer to as Outer Mongolia, but if you go to Mongolia and call it Outer Mongolia, people get very upset."

Despite visiting Mongolia infrequently, Naadam maintains regular, year-round contact with the herders to get an understanding of the type of nonprofit work its communities want or need. Right now, strategic grasslands management takes top billing: In 2016, Naadam took out about 20 miles of decrepit fencing — "it would wrap around all of Manhattan" — and replaced it with heavy-duty wiring to better preserve the pasture so that goats can live on healthier land.

The Gobi Revival Fund has opened Scanlan's eyes to the rest of the market, but has also raised concerns about claims other brands are making about their own sustainable and ethical practices. "Knowing what I know and having spent the amount time around actually building nonprofit programs, securing raw material and processing raw material, I see a lot," he says. "There's gossip in the industry at every level. You know at the source if something isn't as legitimate as it's been pointed out to be."

A tenet of many sustainable or ethical direct-to-consumer brands, cashmere-focused or not, is transparency, a heightened relationship between the company and the customer. But has that accountability become more of a marketing technique than a business strategy? "I think where people fall down is by saying, 'Oh, well, consumers want transparency. What parts of our supply chain can we show transparency?', as opposed to building with that focus in mind," says Shah. "In a way, it comes off as more inauthentic because it wasn't the intention on which they built it to begin with."

Scanlan estimates that in the cashmere market specifically, 80 percent of brands operate with "a huge delta in transparency" that starts with where the wool is actually coming from. Materials will often get pulled from all over the world, only to be blended together all at once. "Unfortunately, when someone buys a sweater, they don't really know what they're getting. I would guess that if you tested — like *really* tested — a lot of the product in the marketplace, you would find that very rarely is it actually 100 percent cashmere," he says. If you don't know where your stuff comes from, he offers, how do you know if it's good?

So, has the cashmere market disillusioned customers? Scanlan notes that right now, we as consumers are all especially keen to buy into a brand's cult of personality, leading us to make assertions about products being something that, in actuality, they may or may not be.

Unfortunately, there's no official cashmere guidelines to help consumers gauge what's really, truly sustainable. Scanlan is part of an international group called the Cashmere and Camel Hair Manufacturers Institute (CCMI), which is effectively a governing body over camel hair, superfine wools and, of course, cashmere. But according to Scanlan, the CCMI doesn't have a stance on sustainability — yet. "There's really no governing body over what sustainability *is*. There's no calling

anyone out if it's not real," he says. "It's not possible that there's all this sustainable cashmere all of a sudden."

In December, policy-makers, press, brands and artisan leaders met at the U.N. to discuss similar economic, environmental and social implications within the artisanal apparel space. While no conclusive regulations were drawn, could a similar summit be of use to the major stakeholders in cashmere? Unlike the artisanal community, though, the largest concern facing cashmere is commoditization, the results of which have resulted in what both Shah and Scanlan refer to as a "bastardization" of the marketplace.

"The quality is not what it used to be, and a beautiful cashmere piece should be something you can have for a lifetime," says Hayes. Scanlan also worries that at a certain point, the language could become ineffectual and that "sustainable," "ethical" or "responsible" won't mean anything to the consumer.

But Shah believes that shoppers will always want to be able to discern what *is* sustainable and what isn't, and will continue to seek out ways to do so. Like most cashmere retailers, Cuyana sorts its wool into the categories mentioned earlier and labels it internally. (At Cuyana, Grade A cashmere is 14 to 15 microns and usually measures between 30 to 34 centimeters long.) Cuyana has discussed printing "Grade A cashmere" on the label to bring more of that jargon to its customers. This is what consumers *want*, after all, and Shah says that Cuyana is seeing that more than ever.

From a consumer standpoint, it can be frustrating to shill out your hard-earned cash for a piece of cashmere only to be disappointed in its quality. It can be even more frustrating, though, to learn that the wool in which you've invested isn't as responsibly sourced as you thought. "If we don't as a society start distinguishing the impact of our shopping choices, we're really going to suffer as a whole," says Shah. "Education has to be that first step."

Cashmere is still luxurious. It's still aspirational. It's still timeless. It still fits right into that classic, elegant closet of your dreams. Sustainable and ethical cashmere can be all of those things, too. But the ways in which it's raised and sourced and refined and marketed need work.

"I think in a perfect world, cashmere would be produced responsibly with the right amount of goats for the amount of land, reverting back to the way cashmere used to be sold as a true luxury item where it's very high-quality fiber, carefully raised, carefully produced and yielding in product that lasts forever," says Hayes. "That people treasure and take care of."

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