

RGICS BRIEF

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Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

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PART: I Key Messages

The slaughterhouse ecology is complex and supports diverse, rural and urban economic and social systems not just in UP but nationwide. The ban on illegal and mechanized slaughterhouses in Uttar Pradesh would adversely affect following three major labour intensive industries in India's most populated state.

Livestock

- Uttar Pradesh accounts for 10.24% of total livestock in the country.
- It has 28.27% of buffalo, 11.53% of goat and 12.96% of goat population of India.
- Unlike in many other states, Uttar Pradesh has recorded an increase in number of livestock in 2012 compared to 2007.
- Rural families with small land holdings and landless labourers maintain these animals for milk, draught and meat production.

Meat Industry:

- Uttar Pradesh is the highest meat producing state and in FY 2015-16, it has recorded highest export of buffalo meat. Data shows that the meat production is a thriving industry and contributing significantly in its economy.
- Uttar Pradesh houses 49 out of 75 APEDA approved slaughterhouses, 470 meat-processing units and uncounted millions of meat shops.
- This segment of the industry provides employment to more than 6.5 lakh people and is expected to create 18 lakh more jobs by 2022

Leather Industry:

- Uttar Pradesh is the third largest leather exporting state after Tamil Nadu and West Bengal and has 18% of total tanneries in India.
- Uttar Pradesh comprises of almost 28 per cent of the national exports of leather and leather products with an estimated export of Rs 5300 crore.
- Uttar Pradesh leather industry provides employment to 6.5 lakh people in Uttar Pradesh
- The NSDC report estimated nearly 2 million more jobs in leather industry till 2022 for peoples in Uttar Pradesh.

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

PART: II Introduction

Within hours of swearing in as Chief Minister of the state, Mr. Yogi Adityanath began a crack down on slaughterhouses and meat shops in various parts of Uttar Pradesh. He further clarified that this issue will continue to be a high priority subject for him and his government. After, randomly checking and seizing some slaughterhouses and meat shops in various parts of the State in the first three days, Yogi Adityanath's government on the fourth day issued a Government Order (GO) with specific plan to seize illegal slaughter houses and ban mechanized abattoirs. The GO dated 22 March 2017 also directed each district magistrate to form a committee in this regard and report within seven days period. A ban on slaughter houses was one of the electoral promises that the BJP has made during the assembly election campaign.. The fact that this decision was taken within a short frame of time without considering various other allied issues such as employment of worker, impact on farmer, impact in draught ridden areas and overall economic loss to the state and country is not only shocking but also threatening.

The issue of illegal operation of abattoirs in Uttar Pradesh is not new, the erstwhile Samajwadi Party government had also issued a government order in June 2014 to curb operations of such slaughter-houses in various parts of the state. In May 2015, the National Green Tribunal also ordered the Uttar Pradesh government to act against illegal operation of slaughter houses on the grounds of pollution. However, the current move of the BJP government goes a step further, it does not only intend to stop illegal slaughtering but also bans mechanical slaughter houses, most of which are legal and involved in meat export. It is apparent that the Adityanath government wants to ban all kind of slaughterhouses. It will not only affect meat production and consumption but will also adversely affect millions of people who are dependent on related occupations such as leather, farming and livestock for their livelihood. Meat Production, Livestock and Leather Industries are the three broad categories of labour intensive occupations that are going to be affected by this decision. Ironically, out of these three occupational segments, the National Skill Development Corporation (NSDC) was focusing on the meat and leather industry for employment generation for millions of Indian youth and enhancing India's export.

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

PART: III Impact on Livestock Industry

Livestock sector is an important component of India's economy and feeds millions of families. According to the Livestock Census Report, 2012 the overall contribution of Livestock Sector in total GDP is nearly 4.11% (at current prices during 2012-13). Moreover, it alone contributes nearly 25.6% of value of output at current prices of total value of output in agriculture, fishing and forestry sector¹. Among the livestock sector, cattle, buffalo, goat and sheep play a major role in India's economy. Rural families with small land holdings and landless labourers maintain these animals for milk, draught and meat production. In India, these livestock are primarily kept for milk production and secondarily for meat production. India is one of the countries in the world with high number of livestock (see table below).

India's Position in World Livestock in 2013

(Millions Number)

Livestock	India	World	% share of India	India's Position in the World
Livestock (Million Heads)				
Cattle	189	1468	12.9	Second
Buffaloes	109	194	56.1	First
Sheep	69	1163	5.9	Third
Goats	134	976	13.7	Second
Chicken	709	20387	3.5	Sixth

Source: Agricultural Statistics at a glance 2015

According to the Livestock census, 2012, India has 512 million livestock which includes Cattle, Buffalo, Sheep, Goat, Pig, Horses & Ponies, Mules, Donkeys, Camels, Mithun and Yak in the country. Uttar Pradesh and Madhya Pradesh together have more than 20% of the total livestock. Uttar Pradesh has a high number of Buffaloes, Goats and Pigs. (See table below)

UP's Position in India's Livestock, 2012

Livestock	% share of total livestock	Variation Compared to Livestock census 2007
Total Livestock	10.24	+14.01%
Buffalo	28.17	+28.61%
Sheep	2.08	+13.99%
Goat	11.53	+5.36%
Pig	12.96	-1.14%

Source: <http://dahd.nic.in/sites/default/files/Livestock%20%205.pdf>

¹ DAHD, '19 LIVESTOCK CENSUS-2012 ALL INDIA REPORT' retrieved from: <http://dahd.nic.in/sites/default/files/Livestock%20%205.pdf>

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

India shares the largest share of world's livestock population. A comparison of last two livestock censuses reveals that in 2012 the total population of livestock in the country decreased by 3.33% compared to 2007². However, Uttar Pradesh along with Gujarat and Assam has shown significant growth of livestock during this period. Uttar Pradesh has recorded 14.01% growth of livestock. This trend shows that Uttar Pradesh has greater dependency on livestock and allied businesses. It is an economic resource to a large number of people especially in rural areas. Milk, agriculture, traditional industries and transportation are some of the few ways in which owners of cows, bull and bullocks have been linked with. In the case of stray cattle, selling them to butchers is also a common trade, which helps the owner financially in difficult situations. In drought-affected areas such as parts of Maharashtra, Karnataka, Madhya Pradesh and Uttar Pradesh, even selling useful cattle in a severe drought year is common. Therefore, it has been one of crucial means of livelihood to millions of families in India.

PART: IV

Impact on Meat Production Industry

According to a report of Agriculture and Processed Food Product Export Development Authority (APEDA) for domestic market, there are 4000 slaughterhouses registered with local bodies and more than 25,000 unregistered slaughterhouses are operating in India³. These unregistered slaughterhouses can also be termed as illegal as they don't abide with laws pertaining to operate a slaughter house. However, most of the time, these unregistered slaughterhouses cater to the domestic demand of various types of meat. According to latest available data on the website of FSSAI (Food Safety and Standard Authority of India), there are 470 meat processing units in Uttar Pradesh. According to the same data, of the total number 228 are inactive or their license is expired and 142 units are active and producing meat products. The Agriculture Statistics Report, 2015 reveals that Uttar Pradesh is the largest producer of meat in India⁴. This leads to the chances of the state likely to have the large number of slaughter houses- both legal and illegal.

² DAHD, '19 LIVESTOCK CENSUS-2012 ALL INDIA REPORT' retrieved from: <http://dahd.nic.in/sites/default/files/Livestock%20%205.pdf>

³ Agriculture and Processed Food Product Export Development Authority, retrieved from: http://apeda.gov.in/apedawebsite/MEAT_MANUAL/Chap2/Chap2.pdf

⁴ State of Indian Agriculture, 2015-16, retrieved from: http://eands.dacnet.nic.in/PDF/State_of_Indian_Agriculture.2015-16.pdf

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

Meat Production in India
(Figures in 000 tonnes)

State	2011-12	2012-13	2013-14	2014-15
Uttar Pradesh	956	1137	1221	1397
West Bengal	611	648	649	657
Tamil Nadu	460	462	465	492
Andhra Pradesh	824	906	935	528
Karnataka	426	401	416	446
Maharashtra	585	591	605	631
India (Total)	5514	5948	6235	6691

Agricultural Statistics at a glance 2015

According to the Agriculture Statistics, 2015, Uttar Pradesh is highest meat producing state in India (see table above). In financial year 2014-15 it has produced 1397 thousand tones of different kinds of meat which accounts to nearly 21% of India's meat production.

Slaughterhouses of Uttar Pradesh have also been playing role in producing export quality meat. The Agriculture and Processed Food Product Export Development Authority (APEDA) issue licenses to slaughterhouses for meat export. There are 75 slaughterhouses in India registered with the APEDA for meat export and as many as 49 of them are located in Uttar Pradesh⁵. Realizing the potential of meat export, the government of India focused on modernizing and mechanizing existing slaughterhouses across the country to ensure globally competitive quality meat production. Under its pink revolution scheme, successive governments in last few years have been promoting export of buffalo meat. The central government has been providing financial aid to slaughterhouses to mechanize their operation in order to not only increase production but also to produce high quality meat for export. The high concentration on slaughterhouses and meat production units in Uttar Pradesh has further resulted in high growth of meat production in the state. The APEDA in its report acknowledges that both registered and un-registered slaughterhouses produce meat for domestic use and export⁶.

India exports buffalo meat to more than 40 countries across the globe. In the last financial year Uttar Pradesh recorded highest buffalo meat export followed by Maharashtra. In the financial year 2015-16 India exported 13.14 lakh MT

⁵ Agriculture and Processed Food Product Export Development Authority, retrieved from: <http://apeda.gov.in/apedawebsite/Announcements/PLANTS-1-APPROVED-INDIAN-ABATTOIRS.pdf>

⁶ Agriculture and Processed Food Product Export Development Authority, retrieved from: http://apeda.gov.in/apedawebsite/MEAT_MANUAL/Chap2/Chap2.pdf

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

buffalo meat of worth Rs. 26685.42 crore. The share of Uttar Pradesh in this export is substantial and accounts for nearly 43% of total export value in FY 2015-16 (see table below)

Buffalo Meat Export

Qty In MT ; Value in Rs. Crore

State	2014-15		2015-16		2016-17 (April - December)	
	Qty	Rs. Crore	Qty	Rs. Crore	Qty	Rs. Crore
Andhra Pradesh	3445.88	65.18	10973.92	209.86	10743.42	200.67
Delhi	9265.4	277.51	9021.76	282	6349.88	188.71
Gujarat	27	0.54	0	0	0	0
Haryana	129756.47	2677.8	114959.5	2425.49	117516.17	2400.23
Maharashtra	709754.16	13938.47	529674.25	10845.43	426098.9	8539.7
Punjab	255.91	3.08	154	2.19	430	6.12
Tamil Nadu	14700.75	269.01	81881.26	1534.18	64559.65	1122.83
Uttar Pradesh	608960.82	12055	565958.2	11350.81	375784.58	7284.78
West Bengal	143	2.53	1850	35.46		
Total (India)	14,76,309.39	29,289.12	13,14,472.89	26,685.42	10,01,482.60	19,743.04

Source: Compiled from APEDA Agri Exchange: <http://agriexchange.apeda.gov.in/IndExp/PortNew.aspx>

These data shows that Uttar Pradesh has a dominant role in India's meat production and export, therefore, seizing unauthorized slaughterhouses and banning mechanized abattoirs in Uttar Pradesh would grossly affect India's meat production and export. This action of the state government would affect nearly 50% of meat export of India.

Labour Intensity of the Meat Industry:

Meat and poultry processing industry in India provides employment to around 6.58 lakh people all across the country. People from Uttar Pradesh form a big part of this workforce, as the state is largest meat producing state in the country. Meat production is third largest industrial segment under food processing industry and accounts for nearly 14% of total revenue generation by the industry (NSDC, 2009). The NSDC report, 2009 estimated that amongst various segments under food processing industry, the meat and poultry would record highest growth till 2022. According to the report, the size of meat and poultry processing segment is expected to increase from Rs. 369 billion in 2008 to Rs. 3063 billion in 2022 (with an annual growth of 16.3%)⁷. NSDC had also found this sector with highest potential compared to other

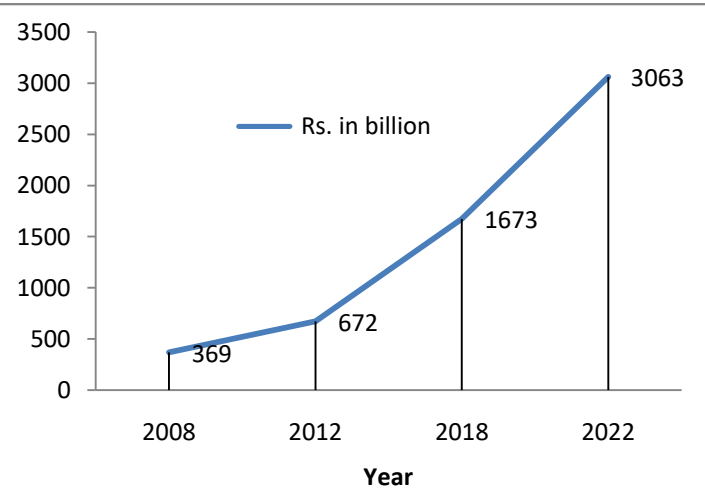
⁷ National Skill Development Corporation (NSDC), retrieved from: <http://www.nsdcindia.org/sites/default/files/files/food-processings-2009.pdf>

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

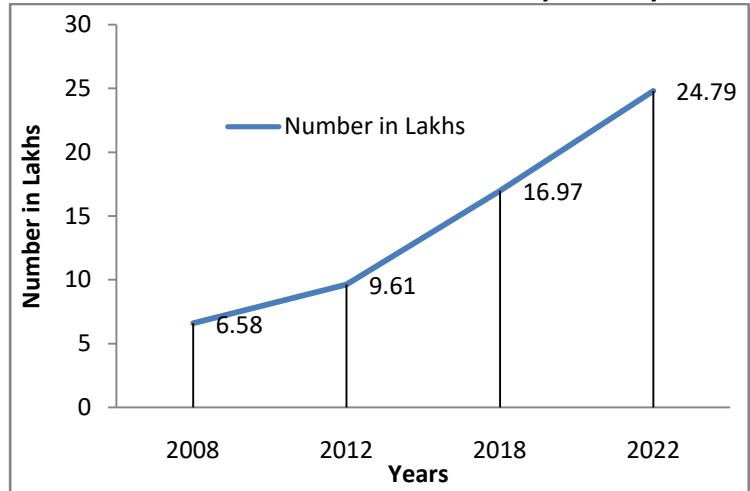
segments in the food processing sector. This estimated growth of the sector was expected to generate 18.21 lakh more jobs till 2022.

Projected Size of Meat and Poultry Industry

Projected Size of Meat and Poultry Industry



Projected Human Resource Requirement for Meat and Poultry Industry



Source: NSDC, 2009

The blanket ban on slaughterhouses in Uttar Pradesh is a step towards killing this labour intensive occupation. It would not only snatch employment of several lakhs people but also shut doors for generating new jobs for youth of Uttar Pradesh.

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

PART: V Impact on Leather Production Industry

According to data available on the website of Councils of Leather Export (CLE), the annual production of leather in India is 3 billion sq. ft. It accounts for 10% of world leather requirement. Leather industry of India is one among top export earning sector in India and ranks eighth in the list of India's top export earning industries. According to the Councils for Leather Exports (CLE), about 46 per cent of the production in the sector is exported. India shares the largest part of world's livestock population, and therefore, has huge potential of generating raw material for leather industry. India accounts 20% of world cattle and buffalo, 17% of world goat and 7% sheep. However, low recovery of hides has been a big concern in the industry. Meat shops and slaughterhouses are main sources of recovering skins and hides for Indian leather industry. The ban on slaughterhouses in largest meat producing state, Uttar Pradesh would adversely affect leather production in India.

India's Export of Leather and Leather products for Five years
(Value in Million US \$)

Leather Product	2011-12	2012-13	2013-14	2014-15	2015-16
Finished Leather	1024.69	1093.73	1284.57	1329.05	1046.44
Footwear	2079.14	2066.91	2557.66	2945.58	2737.85
Leather Garments	572.45	563.54	596.15	604.25	554.29
Leather Goods	1089.71	1180.82	1353.91	1453.26	1369.00
Saddlery & Harness	107.54	110.41	145.54	162.70	146.38
Total	4873.53	5015.41	5937.97	6494.84	5853.96
% Growth	22.80%	2.91%	18.39%	9.37%	-9.86%

Source: DGCI&S

In financial year 2014-15 India's leather export value was 6494.84 million US dollar and in 2015-16 it earned 5853.96 U.S. Dollar. According to National Skill Development Corporation, Uttar Pradesh comprises of almost 28 per cent of the national exports of leather and leather products with an estimated export of Rs 5300 crore. It is known for producing good export quality footwear, leather goods, leather garments and finished leather (NSDC, 2013). It has the third highest number of leather tanneries in the country after Tamil Nadu and West Bengal. Uttar Pradesh has 18% of total tanneries in the country (See table below).

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

State-wise Distribution of Tanneries in the Country

State	No. of Tanneries	Percentage Share of Tanneries
Tamil Nadu	934	44.60
West Bengal	538	25.70
Uttar Pradesh	378	18.00
Punjab	79	3.80
Andhra Pradesh	24	1.15
Maharashtra	33	1.60
Karnataka	16	0.80
Bihar	17	0.80
Haryana	18	0.80
Other States	54	2.75
Total	2091	100.00

Source: <http://italiaindia.com/images/uploads/pdf/leather-industry-in-india-2010.pdf>

Unlike the two top leather producing states, i.e. Tamil Nadu and West Bengal, where leather tanning industry was established and promoted by the British, Uttar Pradesh has largely developed this sector after independence. Kanpur, Noida, Agra and Unnao are few major clusters where most of leather tanneries of the state are located.

Labour Intensity and Future Growth of Leather Industry:

The leather industry has been providing formal and informal employment to a large number of people from socially and economically disadvantaged communities. According to the CLE, the Indian leather industry is a labour intensive sector. It employs around 2.5 million people across the country and most of them are from weaker sections of the society. Women form nearly 30% of the labour force in this sector⁸. A study of Labour Bureau, Chandigarh in 2009 reveals that

⁸ CLE, Council for Leather Exports, retrieved from: <http://leatherindia.org/industry-at-a-glance/>, accessed on 20.10.2016

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

nearly 40 per cent of workers in this industry belong to SCs and STs (MoLE, 2009). Centre for Education and communication (CEC) in its study of leather industry in various states has found that most of the workers in the industry are from traditional leather tanning communities. The study further reveals that apart from traditional leather tanning communities Muslim workers and people from poor agriculture families across caste and communities account for a large sum of total workforce in the leather industry. The concentration of Muslim workers is found in tanneries specially owned by Muslim entrepreneurs (CEC, 2008). The ban on slaughter houses in the largest meat producing state would further affect the leather industry. A large chunk of people (40%) employed in leather industry are self employed and engaged in activities such as flaying, curing, handling and transport of raw material⁹. According to the government, as many as 6.5 lakh people (26% of total work force of the industry) are employed in Uttar Pradesh.

State wise distribution of workforce in leather industry

S. No.	State	Percentage of Total People Employed
1.	Tamil Nadu	42%
2.	Uttar Pradesh	26%
3.	West Bengal	7%
4.	Haryana	5%
5.	Punjab	4%
6.	Delhi	3%
7.	Maharashtra	2%
8.	Karnataka	2%
9.	Rajasthan	2%
10.	Andhra Pradesh	1%
11.	Others	6%
	Total	100%

Source: PIB: <http://pib.nic.in/newsite/PrintRelease.aspx?relid=121413>

The NSDC in its report in 2009 estimated that by the year 2022, the planned growth of Indian leather industry would require 4.6 million more people. The report estimated that the footwear sector within the industry would grow significantly and employ nearly 40% of total workforce. It is also expected that till 2022 the export sector would continue to further grow in this industry.

⁹ <http://pib.nic.in/newsite/PrintRelease.aspx?relid=121413>

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

Incremental human resource requirement across different states (in '000s) till 2022 State Incremental requirement (in '000s)

State	Human Resource Requirement till 2022
Tamil Nadu	1,948
Uttar Pradesh	1,206
West Bengal	325
Haryana	232
Punjab	186
Delhi	139
Maharashtra	93
Karnataka	93
Rajasthan	93
Andhra Pradesh	46
Others	278
Total	4,639

Source: <http://www.nsdcindia.org/sites/default/files/files/Leather-2009.pdf>

The National Skill Development Corporation had expected faster growth of leather industry in Uttar Pradesh. The report of NSDC in 2009 estimated that the state would require nearly 2 million more people to work with this industry. Uttar Pradesh, where a consistent high rate of unemployment has been forcing people to migrate in other states these estimates bring some hopes. However, the ban on slaughter houses would not only adversely affect already employed people in leather industry but also stop further job creation in this thriving industry.

Slaughterhouse Ban in Uttar Pradesh: Striking at Revenue, Livelihood and Food

PART: VI Conclusion

There has been demand in various parts of country to ban illegal slaughterhouses on the ground of pollution. Slaughterhouses are accused of discharging untreated effluent contaminated with animal waste and blood of slaughtered animal into open drain¹⁰. Many of them are also accused of illegal extraction of groundwater. Some religious fundamental organizations have also been demanding for selective ban on animal slaughtering.. Considering pollution due to slaughter houses the government of India and various Courts have been in favour of regularizing and modernizing slaughterhouses in the country. However, the latest order of Uttar Pradesh government intends to have a blanket ban on slaughterhouses in the state. Though the government order of the Uttar Pradesh does not specify objectives of seizing illegal slaughterhouses, meat shops and mechanized slaughterhouses, but the language of the order indicates towards a moral assertion related to food preferences and habits.

The government's approval of this moral assertion has failed to study the multi level social, economical and cultural ramifications. Slaughterhouse is a small part of very complex and diversified economic, social and cultural system. These systems involves both rural and urban livelihood with huge number of people dependent on. The ignorance of this system by Uttar Pradesh government would grossly affect life and livelihood of millions of people.

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¹⁰ The Hindu, March 29, 2017: <http://www.thehindu.com/news/cities/Delhi/petition-in-ngt-against-illegal-slaughter-houses/article17713265.ece>