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Sub task 4.3

Halal and kosher supply chain development

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The broad aim of sub task 4.3

To examine transparency in, and relevant information on, the supply chains for halal and kosher meat in France, Germany, Norway, Turkey, and United Kingdom



What have we looked at?

- The markets for halal and kosher meat are expanding globally and a growing segment of these markets are being channeled through supermarkets
- There has also been an explosion of certification bodies and practices, but there is little or no official data available
- This subtask is exploratory and it set out to understand the markets for halal and kosher meat in the 5 countries listed
- In order to do this we have carried out case studies of certification bodies and significant retailers to examine and clarify relationships between religious authorities, market actors & consumers
- We did not cover the catering trade and restaurants, where demand is also increasing, but we are getting some data on these sectors



Helal

Halal
Helal

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The United Kingdom

- In the UK the market for halal is growing very quickly
- In 2001 it was estimated that the market had an 11% share of all meat sales in the UK, despite the fact that Muslims accounted for less than 3% of the UK population
- The market has been expanding ever since...
- In 2006 it was estimated that the market grew at a rate of 30%, despite the fact that the Muslim population was growing at a rate of only 3%

The United Kingdom

- This increase in demand has encouraged the segregation of halal production processes
- Many food processors and retailers – including ‘mainstream’ supermarkets like Tesco and Sainsbury – now have halal certification
- In 2009 the Halal Food Authority (HFA) – the oldest certification body in the UK – also initiated a trial at 8 Kentucky Fried Chicken outlets in areas of London where demand was high

Halal

This trial has since been extended to over 100 outlets, which are said to be completely halal...



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The United Kingdom

- Despite these trends, fresh meat is still bought from independent halal butchers
- Butchers are seen to offer trust in the face of growing concern about the authenticity of halal meat that has accompanied market growth
- In 2002 the UK Government estimated that around 70–80% of halal meat in the UK was ‘fake’
- These problems have encouraged the growth of new certification bodies

United Kingdom

- The Halal Monitoring Committee (HMC) came into being in 2003 because of concerns over *falsely labeled* halal meat
- They also have concerns about the certification of stunned and mechanically slaughtered meat as halal, which others like the HFA endorse
- The overall value of the halal market in the UK is currently estimated to be between £1–2 billion
- However, there is little transparency in the market, which was reflected in the attitudes of our UK research participants

France

- France has the largest Muslim population in Europe and the global expansion of the halal market is again evident
- Much like the UK, there has been a notable expansion of halal labels and product ranges in supermarkets
- A recent estimate put the annual value of the French halal market at around 5 billion Euro a year

France

- **However, the market is very fragmented and there are around 50 certification labels representing different groups and organisations**
- **As in the UK, there is no consensus within the Muslim community regarding definitions of halal practices**
- **There have been numerous scandals and there are widespread concerns about ‘fake’ halal meat and the conditions under which some halal meat is produced**
- **Many commentators claim that the growing value of the market is generating a resistance to regulation, which undermines trust and transparency**

From December 2009, halal burger's have been available in some QUICK fast food restaurants...

Helal

**Bienvenue
chez Quick**

Dans ce restaurant
de Roubaix,
les viandes proposées
sont certifiées **HALAL**
avec la garantie des instances compétentes,
dépositaires de l'agrément.



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Germany

- Although the market is relatively underdeveloped, Germany is experiencing similar trends to France and the UK
- And there are similar debates about stunning, mechanisation, and certification...
- The major certification body is the European Halal Certification Institute (EHZ) which depends on the opinions of Muslim scholars
- Significantly, as certified halal products have started to appear in supermarkets for the first time, questions are being raised about the authenticity of halal meat
- How the German market develops remains to be seen...

Norway

- In Norway there are a small number of halal products in supermarkets, but demand often outstrips supply
- Norwegian Muslims claim there is a lack of understanding about halal in Norway
- There is seen to be a a lack of information from the small private sector companies supplying the halal market
- Combined this generates worries about transparency and high levels of smuggling for personal use

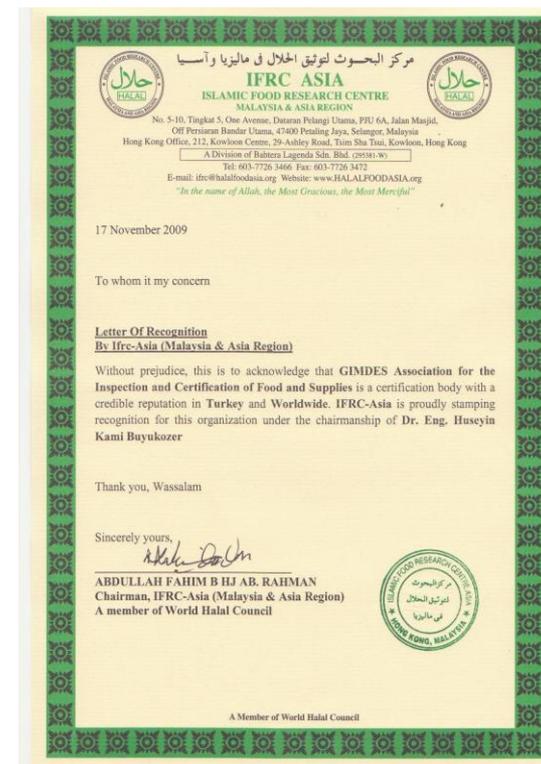
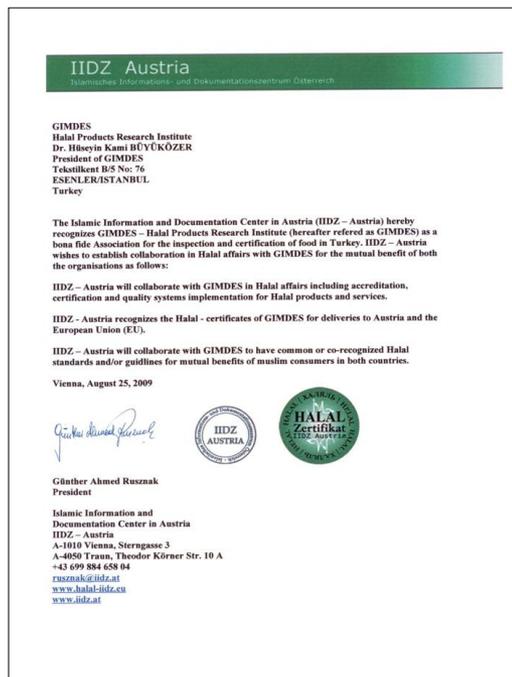
Turkey

- Turkey is not experiencing the same internal pressures as markets in the EU, BUT it is clear that global pressures are starting to have an impact in Turkey
- Over the last year the Food Auditing and Certification Research Association (GİMDES) has issued 28 export only licenses for Turkish companies
- Although there was a recognition that things will change, we found little urgency about these matters in our interviews with retailers, producers and processors
- Many companies are content to export to markets where the pressures are not so great...

Turkey

- **But many of our interviewees also recognised that Turkey has a problem with unrecorded slaughter**
- **And there has also been public concern about illegal meat in the supply chain**
- **The chairman of GİMDES recently claimed that there is a lack of transparency in the meat industry and that consumers should be more aware of these issues (Hava 2009)**
- **As in the EU, these developments are part of the wider emergence of a global halal market...**

Some recent certification letters from the GIMDES website...



Koşher

Kosher

Koşher

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France

- France is the most important European market for kosher
- The overall market in France is estimated to be worth around 400 million Euros
- And kosher meat sales are estimated to be worth around 50 million Euros
- There is a vast range of products/ labels available and over 70% of French supermarkets now have a kosher strategy

France

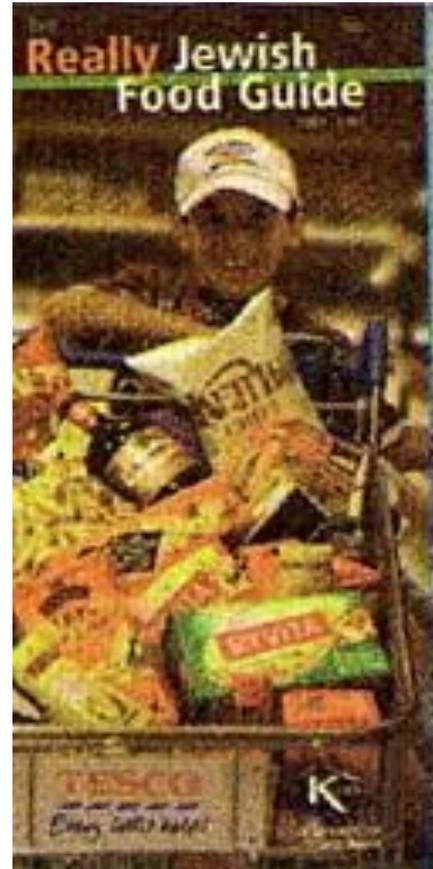
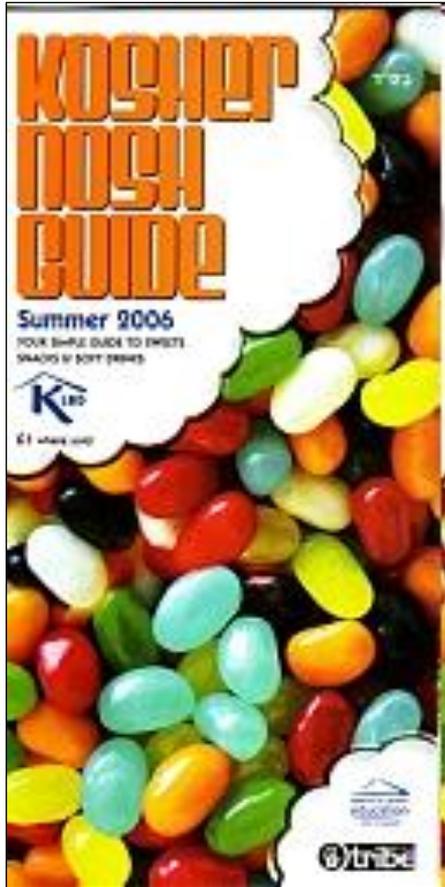
- **Kosher certification is overseen by religious authorities rather than by private commercial organisations**
- **Trust in kosher is generally higher than halal, but consumer organisations warn about fake labels**
- **Products are mostly targeted at the Jewish population, but Muslims also buy kosher because of a lack of confidence in halal**
- **Generally the growth in certification and labelling is seen as a crucial step in the organisation of the market**

United Kingdom

- As in France, the market for kosher meat is less dynamic than the halal market
- Although the market is not centralised, most kosher meat is certified by the London and Manchester Beth Dins (Jewish courts of law)
- Many UK companies have kosher brands and there are a growing number of product ranges and kosher labels in supermarkets
- As in France, there is generally less conflict and controversy around the qualification of products as kosher

Koşher

Some promotional material from the London Beth Din website



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Smaller kosher markets...

- There is a very small market for kosher meat in Turkey, the Jewish population is in decline and kosher meat is very expensive
- In Germany the population is made up of poor immigrant communities, often from eastern Europe, who want cheap meat, so prices and quality are often lower
- In Norway shechita is still banned, the market for kosher is import only, and market expansion is held back by lack of demand

Summing up

- Its clear that markets for halal and kosher meat are developing to different degrees in different contexts...
- If the halal market is growing because of a number of overlapping trends, including population growth and identity reinforcement in the face of global politics...
- ...it appears that the kosher market is differentiating in order to grow
- In the EU the underlying debates (about slaughter, mechanisation and certification) are symptomatic of larger concerns about what consumers put in their shopping baskets
- These debates are likely to intensify as the global demand for halal and kosher meat intensifies

**The final report for this sub-task 4.3
will be ready in May**

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Thank you
Teşekkür ederim

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