The development of halal and kosher meat markets in the UK

Dr. John Lever

Cardiff Univeristy, UK
LeverJB@Cardiff.ac.uk

Dr. M. Puig de la Bellacasa

Cardiff University, UK
puigm@cardiff.ac.uk

Over the last decade recognisable markets have emerged for halal and kosher meat in a number of European countries, notably in the UK. Growing segments of these markets are now channeled through product ranges in supermarkets, with the halal market in particular experiencing a rapid increase in demand. A number of factors underpin these developments, including an increase in the Muslim population, changes in consumer behaviour, identity reinforcement, and a general increase in meat consumption. Although the expansion of the kosher market is perceptibly smaller, and the Jewish population is more or less stable, the market is far from being extinct. Kosher products have an increasing presence in supermarkets and there are a growing number of kosher labels.

The expansion of these markets has been accompanied by a proliferation of certification bodies, each with their own standards and practices. These changes have occurred quickly and it is difficult to get a clear picture of the underlying trends; the markets are also fragmented and there is no official data or statistics. This fact sheet is an initial attempt to fill this gap. The data was collected through case studies of certification organisations and significant retailers in order to assess the relationships between religious authorities, market actors and consumers. We did not focus on the catering and restaurant industry – which are also experiencing a rapid increase in demand – but we did gather some data on these sectors.

The market for halal meat

The halal meat market in the UK is growing at a remarkable rate. In 2001 Mintel 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 Halal Food Authority (HFA)[1], one of the most influential and longstanding certification bodies, estimated a 30% growth of the market for halal food in 2006 alone, despite the fact that the Muslim population was growing at a rate of only 3%. The HFA now estimates that around 25% of the entire UK meat market is halal, of which 75% is certified by them.

Increasing demand has encouraged the segregation of halal production processes and over 100 food manufacturers and distributors (including 'mainstream' supermarkets like Tesco and Sainsbury) are now endorsed by the HFA. The HFA also licenses restaurants and fast food outlets; in 2009 they initiated a halal trial at eight Kentucky Fried Chicken outlets in areas where demand was high, which has since been extended to over 100 outlets.[2] However, despite the increase in halal product ranges in supermarkets, restaurants and fast food outlets – which are popular amongst younger generations – fresh meat is still mostly purchased from independent halal butchers. Significantly, while butcher's shops have been disappearing from the high street for some time, the number of halal butchers has continued to grow; for many they offer trust in the face of a growing concern about the authenticity of halal meat that has accompanied market growth. In 2002 Mintel referred to a Government estimate that around 70-80 % of halal meat was 'fake'.[3]

Such concerns have also facilitated the rise of new certifying bodies. The Halal Monitoring Committee (HMC)[4] came into being because of concerns over falsely labelled meat, with a stated remit is to assure *Muslims that they are eating genuine halal*. The major concerns of this organisation are with the misnaming of halal at all the stages of the production process for processed products, and with the existing certification of stunned and mechanically slaughtered meat as halal, which other organisations such as the HFA endorse. As these processes have advanced, non Muslim consumers have also become concerned about halal (and kosher) meat finding its way into the food chain.

There are no official statistics on religious slaughter, but in 2007 it was estimated that 114 million animals were slaughtered annually in the UK using halal methods.[5] According to Mintel, in 2001 there were 10 abattoirs licensed to supply halal meat (mainly poultry). The HFA claims that all the major poultry abattoirs are now under their control, yet the HMC claims a small but growing share of the halal market, including 5% of the poultry sector. The overall value of the halal market in the UK is estimated to be between £1bn and £2bn.

[1] www.halalfoodauthority.co.uk

[2] www.kfc.co.uk/about-kfc/halal

[3] Mintel International Group (2002), *Halal Foods*

[4] www.halalmc.co.uk

[5] The Independent, Monday 7th April 2008, *'Halal and kosher meat should not be slipped in to food chain', says minister*

The market for kosher meat

The market for kosher meat is less dynamic than the halal market, but it is also undergoing change. Although the market is not centralised, most kosher meat in the UK is certified by the kashrus sections of the London[6] and Manchester Beth Dins[7] (Jewish courts of law). It is a requirement of Jewish dietary law to mark meat to indicate its status as kosher. This needs to be done by independent rabbinical certification, hence the need for shechita boards to oversee Jewish slaughter practice (shechita), which is carried out without stunning. Consumer information about kashrus supervision is available on the London Board of Shechita (LBS) website,[8] where the superiority of licensed retailers and the problems associated with buying from unsupervised outlets are outlined. Because the market for kosher meat is smaller and more controlled than the halal market there is less conflict and controversy around the qualification of products as kosher.

Over recent years UK food manufacturers have displayed a growing interest in kosher certification. There has been an increase in kosher labels and there are a number of independent wholesalers and processors producing pre-packed kosher meat products for the major supermarkets; many of Tesco's stores now have a kosher section or sell kosher products.[9] At the same time, there has been a concurrent decrease in the number of kosher butchers,[10] which could be related to the increasing presence of kosher labels and products in supermarkets. Kosher is also starting to acquire the status of an ethnic food in restaurants and other food outlets amongst non Jewish consumers. In the face of mechanisation many Muslims also see kosher as an ethical choice (this was confirmed by the Dialrel consumer survey and focus groups).

As with halal, there are no official statistics on shechita slaughter, but it is estimated that 2.1 million animals are slaughtered for kosher meat each year. The LBS claim that they supervise the slaughter of 90,000 cattle, 90,000 sheep and 1.5 million poultry annually. There are no kosher-only abattoirs in the UK and wholesalers contract abattoirs for a specific number of animals. The LBS supervises 7 abattoirs (four cattle and three poultry) around the Midlands, which are used as distribution points to transport meat to small Jewish communities around the UK on a weekly basis. The value of the UK kosher market is unclear, but the European market is estimated to be worth around £4bn overall.

Differences and similarities

Though the distribution channels for halal and kosher meat are different there are some connections and similarities between the two markets. Both are witnessing 'generational' changes, as younger consumers turn away from independent outlets. The main difference between the two markets is the problem of trust and transparency, which in is more intense the halal market. While the halal market is experiencing growth because of a number of overlapping trends, it appears that the kosher market is differentiating in order to grow. The underlying debates about slaughter and certification are symptomatic of larger concerns about what consumers put in their shopping baskets. These debates are likely to intensify as global demand increases; we found similar trends, to lesser or greater degrees, in France, Germany, Norway and Turkey.

[6] www.kosher.org.uk

[7] www.mbd.org.uk

[8] www.shechita.co.uk

[9] Global Agriculture Information Network (GAIN)

[10] Manchester Beth Din and Kashrus Authority

The DIALREL project is funded by the European Commission and involves partners from 11 countries. It addresses issues relating to religious slaughter in order to encourage dialogue between stakeholders and interested parties. Religious slaughter has always been a controversial and emotive subject, caught between animal welfare considerations and cultural and human rights issues. There is considerable variation in current practices and the rules regarding religious requirements are confusing. Consumer demands and concerns also need to be addressed and the project is collecting and collating information relating to slaughter techniques, product ranges, consumer expectations, market share and socio-economic issues. The project is multidisciplinary and based on close cooperation between veterinarians, food scientists, sociologists, and jurists and other interested parties.

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Project Coordinator
Dr Mara Miele
School of City and Regional Planning
Cardiff University
Glamorgan Building, King Edward VII Avenue,
Cardiff, CF10 3WA
United Kingdom

Telephone: **+44 (0)29 20879121**
Fax: **+44 (0)29 20874845**
e-mail: **MieleM@Cardiff.ac.uk**
www.dialrel.eu