THE HALAL MEAT MARKET

Specialist supply chain structures and consumer purchase and consumption profiles in England

A Special Report
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Foreword

I am particularly pleased for a number of reasons to be able to write the Foreword to this report, not least because, by co-incidence, its publication comes at a time when certain sections of the national press have chosen to report the matter of Halal meat in somewhat pejorative terms.

What's important is that the initiative by EBLEX to publish what I believe is the first definitive and authoritative report into the Halal red meat industry in England will provide the basis for a proper understanding of the market as it exists, the potential it offers specialist abattoirs and butchers for further development and the prospects it holds to be brought into the mainstream.

It is right for EBLEX to publish this report. While there are around two million Muslims in the UK representing just 3% of the population, they consume around 20% of all the lamb sold in England and are increasing their consumption of beef. Halal meat consumption is clearly an important part of the Muslim diet: the Muslim community represents an important consumer base for beef and especially lamb.

The report is based on extensive qualitative and quantitative research; it is the most comprehensive attempt yet undertaken to quantify the Halal meat sector and outline its structure and practices. As such, it provides an unrivalled knowledge store for specialist Halal butchers and abattoirs to aid business decision-making and plan further development of the sector. It should also prove useful for mainstream retailers and processors considering expanding into this specialist area. A number of grocery multiple retailers, for example, now offer Halal meat either through a specialist Halal butcher operating in-store under a franchise model or with a range of pre-packed fresh product.

Above all this report offers a unique insight into the preferences, perceptions and motivations of Muslim consumers when buying meat. The report breaks new ground in presenting the demographic breakdown now available, the detail on purchasing and consumption behaviour and the information on the most popular cuts and preferences.

In particular, it explores the key issue of religious slaughter and the attitudes of Muslim consumers to stunning. What is clear from the report is that there is no universally agreed and accepted standard for meat to be Halal. This is a matter as much for the certification bodies responsible for Halal assurance schemes as it is for the supply chain itself, which may welcome a single, global Halal standard.

I should like to thank the Halal certification bodies concerned for the co-operation extended to EBLEX in connection with this report and to acknowledge the important role played by the invited representatives of the Muslim community for the part they played. Their advice and insight was generously given and proved invaluable on many occasions.

Finally, I should emphasise that while this report is the most comprehensive study available to date of the Halal meat market and which is to be commended to the whole of the supply chain, it is but a starting point. The Halal meat market in England will continue to develop and our intention is to re-visit the research and update this report in 2012, following next year's National Census which should provide a wealth of up-to-date statistical information on Muslim communities in Britain. The market deserves such investment in deepening our understanding of its continuing development and warrants our serious attention to ensure it delivers to its maximum potential.

Simon Warren
Chairman, Halal Steering Group

The Halal Steering Group was set up under the auspices of the EBLEX sector board, of which Simon Warren is a member.

Methodology

This report is based on a mix of qualitative and quantitative research projects supplemented by detailed desk research to provide the most comprehensive analysis of the Halal meat industry available to date.

To understand the size and demographic breakdown of the UK Muslim population, an extensive review of existing research data related to the composition of the Muslim community in the UK, background information on Islam and the concepts of Halal and Haram was undertaken.

A variety of sources of published data was examined, including:

- 2001 Census data
- Labour Force Survey data
- Other relevant government data e.g. population growth estimates
- Newspaper articles
- Specialist Muslim/Halal food websites
- Data from other published reports in relation to UK Muslims' lifestyle, religious practices and customs etc.

This exercise provided detailed information at both an overall population level and also by specific community on factors such as the age profile, household composition and geographical distribution of Muslim communities by ethnicity - Pakistanis, Bangladeshis, Turkish and so on.

The detail of that research is contained as Appendix I to this report

The desk research phase was followed by qualitative research with abattoirs, butchers and consumers.

Abattoirs
A qualitative research methodology was used for the abattoir sample, given that the research objectives for this audience required an in-depth exploratory approach.

A total of 41 Halal abattoirs were initially approached and 14 businesses agreed to take part, sufficient for a robust sample for the research intended. However, while that number represents a better than 1-in-3 strike rate and is very good for a business-to-business survey of this kind, we would ideally liked to have had more Halal abattoir businesses take part.

Interviews were conducted either face-to-face or over the telephone, each lasting between 30 and 90 minutes.

The profile of the abattoirs in terms of location and turnover was as shown below:

Location	No.
Wales/Scotland	4
North of England	2
East of England	2
Midlands	4
South of England	2
TOTAL	**14**

Annual Turnover	No.
£5-9m	3
£10-19m	0
£20-49m	2
£50-99m	1
£100-199m	0
£200-500m	1
Over £500m	1
Refused	6

Butchers
A large qualitative sample of 50 interviews with Halal butchers was also included in the project.

All of the butchers were interviewed at their business premises to provide better insight into how Halal meat is sold. The research team was able to observe the shop environment while conducting the interview to see what level of information was available to shoppers in respect of the slaughter process, Halal assurance/accreditation certificates, suppliers and so on. The interviews lasted approximately 30 minutes each.

The sample profile by location and by the ethnicity of the respondent is shown below.

Location	No.
Oldham	4
Bradford	12
Birmingham	8
Slough	3
Southall	4
South London	8
East London	6
North London	5
TOTAL	**50**

Respondents' Ethnicity	No.
Pakistani	33
Bangladeshi	7
Indian	2
Kurdish Iraqi	4
Turkish	4
TOTAL	**50**

Consumers

For the qualitative research with consumers, a series of 16 focus groups with Muslim respondents was undertaken, with a food diary pre-task. Each focus group comprised 7-8 respondents and lasted approximately 1½ hours. Each respondent was asked to keep a written record of their meat purchases and meat consumption over a 7-day period prior to the discussion. Respondents made a note of what types of meat they ate, which cuts and when, as well as noting down any cooked meat purchased from takeaways or restaurants.

Ethnicity	Gender	Age	Social class	Location
Pakistani	Men	18-30	BC1	London/SE
Pakistani	Women	18-30	C2DE	Birmingham
Pakistani	Men	31-45	C2DE	Bradford
Pakistani	Women	31-45	BC1	London/SE
Pakistani*	Women	46-65	C2DE	Bradford
Bangladeshi	Women	18-30	BC1	London/SE
Bangladeshi	Women	31-45	C2DE	Birmingham
Bangladeshi*	Men	46-65	C2DE	London/SE
Indian	Women	31-45	BC1	Birmingham
Indian	Men	18-30	C2DE	Manchester
Middle Eastern/Arab*	Women	31-45	BC1	London/SE
Middle Eastern/Arab	Men	18-30	C2DE	London/SE
Turkish/Turkish Cypriot	Women	18-30	BC1	London/SE
Turkish/Turkish Cypriot	Men	31-45	C2DE	London/SE
Somali*	Women	31-45	C2DE	Manchester
Somali*	Men	18-30	BC1	London

*Interviews conducted in mother tongue

The respondents were randomly recruited in-street and via community organisations. They ranged in age from 18-65 years old and as some did not speak English fluently, all of the focus groups had a bi-lingual moderator able to converse in the respondents' mother tongue. Only those who eat and buy meat and poultry regularly were invited to participate because of the subject matter.

The focus groups were divided by ethnicity, gender, age and social class. They took place in the North, Midlands and South of England, as shown in the table above.

Quantitative consumer research

The findings from the qualitative research shaped and guided a detailed questionnaire that was used to conduct 1,000 face-to-face, paper-based interviews in England, each lasting about 30 minutes. Around a quarter of the interviews (26%) were conducted in languages other than English. The sample base was recruited to reflect the range of ethnic origins of the Muslim population across England to ensure that that the widest range of views was reflected in the research.

The demographic profile of the 1,000 research sample is detailed in the table (right).

	No. (n=1000)	% Sample population
Gender		
Male	509	51%
Female	494	49%
Age		
16-24	230	23%
25-34	288	29%
35-44	214	21%
45-54	137	14%
55-64	89	9%
65-74	38	4%
75+	7	1%
Ethnicity		
Pakistani	431	43%
Bangladeshi	164	16%
Indian	95	9%
African	57	6%
Turkish	46	5%
Middle Eastern*	145	14%
Other	65	6%
Main language spoken at home		
English	203	20%
Urdu	237	24%
Punjabi	140	14%
Arabic	124	12%
Bangla	71	7%
Sylheti	62	6%
Turkish	51	5%
Somali	21	2%
Farsi	7	1%
Pashto	5	1%
French	2	0%
Other	80	8%

*For the purposes of this study this includes persons of North African origin

Executive Summary

The following Executive Summary seeks to capture the main elements of the findings from the research undertaken for this project. All of the statements are based on the responses given by those interviewed and represent their views and perceptions rather than what may in fact be the case.

The Muslim communities in the UK are estimated at around 2 million people – about 3% of the population. Muslims account for about 20% of lamb consumption in this country and a small but increasing amount of beef. The Halal meat market therefore is a multi-million pound contributor to the British economy.

Halal meat consumption is an important feature of life across Muslim communities in the UK with 90% indicating that they consume Halal meat. More than 8 out of 10 Muslims tend to consume meat regularly with almost 6 out of 10 indicating that they eat meat most of the time. There are no discernible generational differences.

Generally, around 9 in 10 respondents were satisfied with the availability of Halal meat from suppliers in England suggesting that their Halal requirements are currently being adequately met.

Muslims buy Halal meat mostly from Halal butchers and other specialist outlets. Although awareness of supermarket Halal offerings is high, loyalty towards specialist butchers outweighs the convenience of one-stop shopping for most Halal meat purchases.

Consumers perceive that Halal butchers have the advantage of:

- Trust – because they trust a fellow Muslim's word regarding whether or not a product is Halal
- Customer service – in terms of bespoke cutting of meat and chicken to a customer's exact requirements, home delivery and cooking advice
- Range of cuts available
- Price, especially when buying in bulk

Meat is almost always bought fresh (the exception being frozen Halal items aimed at children and other frozen convenience foods such as burgers, chicken nuggets and samosas).

This is driven by cultural norms: Muslim consumers prefer to buy meat fresh, wash it and freeze it in their own portion bags. They also harbour suspicions about the possible age and poor quality of shop-frozen meat.

Purchase patterns show around 70% who buy chicken, 60% lamb, 50% mutton and 28% beef; frequency of purchase ranges from once a week – 72% of consumers – to the 25% who shopped for meat several times a week.

It is a common practice to buy meat and chicken in bulk across all Muslim communities.

In this research, meat consumption was highest among Somali men and women and younger Middle Eastern men, who were eating meat-based meals at least three times a week. Typically, however, consumers were alternating between meat and chicken meals; thus, most ate red meat 2-3 times a week. Men tended to be the main meat eaters in their households.

Although mutton is purchased across all ethnic groups, the South Asian groups (Indian, Pakistani and Bangladeshi) display purchase frequency patterns that are markedly different from African, Turkish and Middle Eastern communities. Lamb purchase is a feature across all ethnic groups with regular purchase. Beef purchase is most frequently the domain of African, Turkish and Middle East respondents as contrasted with those from the Indian sub Continent (India, Pakistan and Bangladesh).

Muslims overwhelmingly do not consider Halal as being a redundant concept. For many consumers, particularly those from the South Asian community, it is very important to eat only meat and chicken that is Halal.

However, some consumers do eat non-Halal meat and chicken from time to time. In this research, the Turkish Cypriot women and younger Middle Eastern men were most likely to do so, while some Somalis, Turkish men and younger Pakistani men had done so occasionally (usually when Halal meat was not available).

There is strong evidence of continuity of Halal consumption across generations and across ethnicities, and compliance is high with the exception of those of Turkish origin, where adherence patterns are less strong.

The consumers who took part in the research perceived that the following is required for meat to be Halal:

- The animal must be slaughtered by a Muslim
- The animal must be blessed during the slaughtering process
- The blood of the animal must fully drain out
- The animal must be killed by a sharp cut across the throat

However, beyond this, interpretations of Halal meat slaughter varied.

The majority of respondents were familiar with and recognise some or most attributes of Halal meat slaughter procedures. 'Prayer offered at time using a sharp knife' (65%) and 'animal slaughtered in relation to Shariah Law' (62%) were the two most commonly cited views of Halal meat.

Interestingly, when prompted through a showcard, respondents did not focus just on traditional interpretations of Halal; they realised that Halal slaughter was also characterised by a range of methods that reflected the demands of modern society. For example, 20% suggested that the 'animal is stunned.' Almost 40% suggested 'mechanical knife slaughter', and almost 50% of responses mentioned 'prayer offer by tape.' This contrasted with around 40% responses pertaining to 'Knife slaughter across the throat made in person'.

A number of abattoir operators interviewed suggested some form of differentiation within the Halal meat sector might be applied. For example, product could be labelled according to the principles of Islamic law relating to Halal and indicating a hierarchy where the product concerned adhered to mandatory/required acts or permissible acts or allowable acts. Such tiering could facilitate pricing differentials as well.

Despite expressing varied interpretations of Halal meat slaughter, over 6 out of 10 Muslims expressed that 'if a person of Muslim faith says it is Halal, it is Halal' for the recipient. This suggests that the apparent complexities associated with determining Halal meat slaughter may well be secondary to the simple declaration of a Muslim.

Stunning versus non-stunning is an important consideration in determining Halal meat status. In exploring attitudes towards stunning, it was evident that stunning was not deemed to be appropriate by a large number of respondents. Around 50% of responses related to 'other animals in proximity to slaughter' rendering the process unlawful, whilst almost 50% of responses related to the fact that 'if the animal was stunned' the meat would be unacceptable.

However in practice, there was evidence that uncertainty exists within the Muslim community as to what technically constitutes the Halal slaughter process. Again, in practice, the word of the butcher is considered to be important. More than one-third of respondents (36%) believed they purchased only non-stunned meat from their current supplier with a further third (31%) indicated they did not know whether their supplier provided non-stunned meat. This uncertainty does not prevent stunned meat purchase, however.

Whilst over half the sample (55%) had a strong preference to see a logo certifying Halal status, 80% of these would be happy to take the butcher's word to confirm Halal.

Indeed, the influence of butchers in confirming Halal status is evidenced with over nine respondents in 10 expressing satisfaction with their butcher in meeting their Halal meat requirements. Analysis of the key drivers of both high satisfaction and high importance revealed the perceived relevance of cleanliness of shop, good quality meat, Halal sign and assurance, good price and wide range of meat.

The majority of the abattoir owners interviewed stun their animals before slaughter; only two do not. Most were against non-stunning for animal welfare reasons. Apart from this, there was little variation in the slaughtering process across the abattoirs. For example, all have a Muslim slaughterman, all reported that prayers are recited in person by the slaughterer and that animals are left to bleed out.

Halal butchers were more aware of the pros and cons of stunning than consumers, but were not entirely clear on whether or not the meat they sell is stunned or non-stunned. It emerged that a substantial number of them have never visited the slaughterhouse where they source their meat and several butchers claiming to sell non-stunned meat were buying from abattoirs who reported that they stun their animals.

Among the minority of consumers aware of the stun versus non-stun issue, there were concerns about whether or not stunning is Halal. The religious issues were more of a worry than the animal welfare issues. However, some perceived that stunning is painful and therefore cruel to animals (a view shared by some of the butchers).

Around half of the abattoirs in the sample and the vast majority of butchers were not members of any Halal assurance schemes. A key barrier was cost, but many also objected in principle with the way the various certification bodies operate.

There was a relatively low level of community awareness of Halal Food Authority (HFA) (37%) and Halal Monitoring Committee (HMC) (32%) certification bodies, despite the stated importance of Halal confirmation signs.

The HMC appeared to have more credibility because some were aware that the HFA accepts that animals may be stunned before slaughter. However, there was little in-depth knowledge of either of these bodies in terms of what each organisation stands for, how they work and who runs them.

None of the consumers appeared to check for certification in their usual Halal butcher shop since they had an inherent trust in the word of a fellow Muslim and (generally) a long standing relationship with the butcher they used. However, they said they would seek reassurance if purchasing from a non-Halal (mainstream) store by looking for Halal certificates, detailed on-pack labelling and the presence of Muslim staff.

Looking forward, some of the abattoir owners suggested that one alternative might be 'post stick stunning' as a way of bridging the gap between Halal requirements and animal welfare concerns. This means stunning animals immediately after their throat is cut in order to reduce any perceived suffering.

Abattoir owners interviewed would also like to see the development of a single, global Halal standard as a means of helping the industry to progress.

Halal Abattoirs

A PROFILE OF THE ABATTOIR BUSINESSES WHICH TOOK PART IN THE RESEARCH

Of the 14 abattoirs in the research sample, 11 employed between 15 and 65 people; three larger businesses took part which employed 250, 500 and 3,200 employees respectively with annual turnovers of £60 million, £200 million and £600 million. The companies which took part had been established for between three and 100 years; most of the owners/senior representatives interviewed were not Muslim (though all the abattoirs have a Muslim slaughterman, see below).

All of the abattoirs in the survey slaughter for the Halal meat market all year round: all slaughter sheep or lamb while six also slaughter cattle, although one of those does not use Halal methods for cattle slaughter. One of the abattoirs slaughters about 1,000 goats a year and another 5,000 pigs. Eight of the abattoirs contract slaughter for one or more customers.

Ten of the 14 abattoirs supply only Halal meat, although three of those sell their Halal meat to both Halal and non-Halal customers. Of the remaining four businesses, three reported that Halal meat represents less than 10% of their business while the remaining abattoir stated that Halal currently accounts for two-thirds of its business and is growing.

Five are involved in exporting Halal meat, principally to France and one is certified organic.

Half of them chill all carcases before distribution while a further two reported that they chill most of their carcases. The others hot load at least half of their carcases as most of their customer base is very local.

Most abattoirs interviewed supply mainly independent butchers and small shops while half also supply wholesalers in the UK and/or abroad. Half of the businesses supply private individuals who prefer to buy their fresh meat directly from an abattoir in order to avoid the food supply chain. The three largest businesses in the sample and two of the others supply major supermarkets and several abattoirs also supply restaurants and foodservice customers directly.

Most of the businesses interviewed said that their trade was based on consistent quality, reliability and competitive prices. Three report use of state-of-the-art technology to deliver a competitive advantage while other competitive points of difference mentioned included excellent standards of hygiene, location, longer shelf life of their meat and the profile/reputation of their business.

Of the 14 abattoirs interviewed, 11 stun their animals before slaughter, two do not stun at all. The remaining abattoir stuns before slaughter as a matter of routine, but will slaughter without stunning if a customer specifically requests it. One of the non-stun abattoirs slaughters cattle and has an annual throughput of 3,640 cattle.

Most of the businesses report a decline in slaughter numbers in recent years citing among the reasons a lack of supply, high prices, adverse exchange rates, declining consumption and a refusal by some customers to buy stunned meat. Of the few who reported an increase in business in recent years, the main reasons given were winning new customers and an increase in demand for Halal beef. There was little evidence that the recession has had an adverse impact on business, the perception being that Muslim consumers still like to eat meat even when finances are tight.

Slaughter numbers of the sample

	Lowest	Highest	Average
Lamb/sheep/ewes where slaughter involves stunning	57,000	1,000,000	379,470
Cattle where slaughter involves stunning	1,040	21,750	11,063
Lamb/sheep/ewes Where animals are not stunned	62,400	260,000	161,200

*One abattoir slaughters 3,640 cattle without stunning

THE SLAUGHTER PROCESS

It has to be said that a number of the abattoirs who agreed to take part in the research were nevertheless not initially forthcoming about the slaughter process employed other than to say their methods were Halal. However, after further probing and as the interviews progressed, some common themes emerged.

- All of the abattoirs surveyed employ a Muslim to carry out Halal slaughter. In some cases, they had been appointed through (or approved by) a local mosque or had come from a major Halal customer
- The prayers/blessing is always recited in person by the slaughterman: no tape recordings are used
- Most use electric tongs to stun; a couple use a gun to the back of the head
- All except two of those stunning have a stun monitor installed
- All but one say the animals are held in a restrainer (across both stun and non-stun abattoirs)

Most could not say precisely how long the animals are left to bleed since they generally have an automated line which the animals follow after slaughter. Estimates ranged from 20 seconds to 15 minutes.

STUNNING VERSUS NON-STUNNING

While it's worth repeating that 14 of the 41 abattoirs initially contacted agreed to be interviewed and that this represents an excellent 1-in-3 strike rate for business-to-business surveys, there remains a suspicion, supported by anecdotal evidence, that those abattoirs who do not stun animals before slaughter were more reluctant to take part in this research than abattoirs who do stun.

Most of the abattoirs which did take part in this research stun their animals before slaughter and the majority of owners did not approve of non-stunning for reasons of animal welfare. Indeed some expressed the view that it should be illegal not to stun animals before slaughter.

The owner of one of the abattoirs which did not stun would prefer to stun, but most of his customers insist that the animals should not be stunned. One abattoir trialled non-stunning but reverted to stunning, again for reasons of animal welfare.

There was a widely held view among the businesses concerned that they would need to stun animals if they wanted to supply the major supermarkets who, they felt, would not accept meat from animals that had not been stunned at slaughter.

The arguments for and against stunning were explored during the research and while there were practical advantages cited by those in favour of stunning, the issues centred around the interpretation of religious slaughter as described in the Koran weighed against the merits of animal welfare. The contrasting views can be summarised as follows:

In favour of stunning

- A number of abattoirs expressed the view that stunning per se is not forbidden in the Koran. Thus, they argued, this does not make the difference between the meat being Halal or non-Halal: what matters is that the slaughterman follows the rules which are required (Fardh) and avoids the acts which are prohibited (Haram) in Islam
- Stunning is better for animal welfare since it renders the animal insensitive to pain
- It was argued that non-stunning causes the animal unnecessary pain because it can take some time for an animal to die after its throat has been cut and it suffers throughout that time if it has not been stunned beforehand. This is a particular issue for cattle, which some believe can take up to two minutes to die after it has been cut
- Stunning makes the animals easier for the slaughterman to handle and as a result makes for a more efficient and safer slaughter process
- Stunning is also more efficient as a business process because since non-stunned animals are not supposed to be moved for 20 seconds after slaughter, it means that non-stun abattoirs are limited to a maximum slaughter rate of 180 animals an hour per line
- Stunning, using a method of recoverable stun does not render the meat Haram (forbidden) since the animal's heart is still beating at the point of slaughter
- The view was also expressed that non-stunning is cruel and outdated

Against stunning

- Stunned animals cannot be considered Halal because the animal is unconscious so one cannot be sure that it is still alive when it is slaughtered. If the animal has already died before the slaughterman cuts its throat, then it is considered to be carrion and it is forbidden for Muslims to eat it
- The animal is supposed to hear the prayer before it dies, which it cannot do if it is unconscious

HALAL CERTIFICATION

Only six of the 14 abattoirs interviewed were members of an Halal certification scheme: four being certified by the Halal Food Authority (HFA), one by the Halal Monitoring Committee (HMC) and the other by the European Halal Development Agency (EHDA). Most of the certified abattoirs saw certification as an acceptable business expense though a minority view was that participation was too costly.

Of those not currently in membership of any scheme, most cited the high costs involved, which would have to be passed on to customers. Others said that their customers did not require them to be certified and therefore saw no reason to subscribe.

A number of abattoirs expressed serious misgivings about all of the certification bodies, who they thought were more concerned with making money than with issues of faith as they impacted on Halal. They pointed to flaws in the position that each certification body had taken over the issue of stunning or non-stunning and urged the organisations concerned to work more closely together to establish a single Halal standard. One abattoir whose membership of a certification scheme had lapsed said it had declined to renew because the organisation had not been sufficiently vocal in defending the practice of stunning before slaughter.

The lack of official certification did not appear to be a barrier to business: prospective customers were more likely to ask about the method of slaughter and who carried out the slaughter process (though it was pointed out that only a minority of new customers ask specifically about stunning).

KEY TRENDS IDENTIFIED

The debate surrounding the issue of whether or not to stun, as outlined above, was universally mentioned by the abattoirs which took part in the research with consumers increasingly demanding to know whether animals are stunned or not before slaughter. Other key trends indentified by those interviewed included:

- The attempt by some of the major supermarkets to expand into the Halal market brought mixed views from the abattoirs interviewed: some think this is the inevitable future for the industry, while others feel supermarkets will not be able to gain a strong foothold in the market because Muslim consumers are wedded to using small, local, Muslim-run butcher shops
- Financial issues: in particular, abattoir owners mentioned high meat prices, late payments from their customers and the weakness of Sterling negatively impacting on the export trade (*sic*)
- Lack of supply - which the abattoirs reported was affecting the industry as a whole
- Consumers becoming more discerning in terms of quality
- Growth in demand for Halal beef, particularly within the food service sector
- Growth in demand for convenience foods and for added value such as Halal organic, Halal free range and Halal farm assured
- Lack of a single, global Halal standard – which some feel is holding back the development of the industry (see below)
- Excessive paperwork, regulation and red tape

LOOKING FORWARD

At the conclusion of the interviews, each abattoir was asked how they felt the Halal meat industry might develop: their views centred on the issue of stunning.

Two respondents suggested the introduction of post stick stunning – where the animal is slaughtered while conscious but stunned immediately afterwards to reduce any period of sensibility to a few seconds. It was felt this would appease those whose belief is that stunning is not Halal while at the same time addressing animal welfare concerns.

It would appear that such proposals had been taken to religious leaders for consultation.

Others felt that establishing some method of differentiation within the Halal meat sector could be introduced. For example, product could carry labelling based on the five principles of Islamic law relating to Halal:

- Mandatory/required acts
- Recommended acts
- Permissible acts
- Disapproved/disliked acts
- Forbidden acts

It was argued that where slaughter fulfilled mandatory acts – i.e. slaughtered in the Name of Allah – and avoided the forbidden – i.e. the meat is not carrion – then the meat is Halal. If the slaughter also fulfilled recommended acts – i.e. that the animal faced Mecca – and avoided the disapproved – i.e. slaughtering in front of other animals - then some form of higher status Halal could be considered as premium and priced accordingly.

A more straightforward view was taken by others who wanted Halal meat to be labelled stunned or not stunned so that consumers could make an informed choice.

Most, though, agreed the need for a single, global Halal standard so that the industry could move forward and develop further. Such a single acceptable standard would bring clarity to abattoirs and processors and would help reduce confusion among butchers and consumers. The abattoirs were uncertain, however, who should be responsible for developing such a standard nor, indeed, where it should originate – Mecca, Saudi Arabia and Malaysia all being mentioned.

Halal Butchers

A PROFILE OF THE BUTCHERS

Interviews, all of which took place on the butcher's premises, were conducted with 50 Halal butchers. All of them serve customers from across a wide age range, male and female and some estimated their customer base to be 50% Muslim, 50% non-Muslim. Again, recruitment of the butcher sample base ensured that they were from and representative of the various ethnic communities within the Muslim population to ensure the sample was as representative as possible.

The ethnicity of their customer base was very much dependent on the butcher's location. For example, Halal butchers in Bradford and Oldham reported a mostly Pakistani customer base while in Tower Hamlets in East London, customers were of Bangladeshi ethnic origin (as were the butchers themselves). In major metropolitan areas such as Birmingham, Southall and other London boroughs, customers were more diverse and included South Asian Muslims, Sri Lankans, Arab/Middle Eastern, Somalis and other Africans as well as those of a Caribbean background.

Butchers in Slough reported having Eastern European customers; Kurdish and Turkish butchers tended to attract a higher proportion of customers from their own ethnic background.

In all cases all of the meat (and chicken) sold by the butchers interviewed is fresh. All of them buy whole carcases which are cut in-store. In addition, most sell frozen Halal convenience foods containing meat and chicken and also burgers, kebabs, sausages and samosas.

It was universally pointed out that culturally, Halal customers prefer to buy their meat fresh and freeze it themselves, often in meal-portions, because they tend to be sceptical about the age of pre-frozen meat and concerned that it may not have been of good quality before freezing.

Typically, up to one-third of their customers buy in bulk – a whole or half sheep or a box of 12 chickens, with meat more often bought in bulk than chicken.

A common observation among all of the butchers interviewed was that consumers are buying less meat than before, mainly for reasons of price but also for health reasons. Butchers also believed that second generation families eat more chicken unlike first generations who preferred red meat.

TRAINING

A small number of respondents were not themselves butchers but owners of convenience stores who employ butchers to sell fresh meat as part of their business. Of the remainder, almost all their training was on-the-job either in a family-owned butcher shop or elsewhere. A small number had taken over the running of the business from their fathers and these second generation butchers claimed to have picked up their skills from an early age.

The feeling prevalent among those interviewed is that formal training courses are not particularly useful as Halal butchers need different skills from non-Halal butchers. For example, Halal butchers remove skin and fat and de-bone meat, they cut meat in a different way to cater for the cooking needs of Muslim customers – providing diced meat for use in a curry rather than a whole roast joint, for instance – and perceive that non-Halal butchers use more machinery and tools than Halal butchers.

Two of the respondents had been formally trained as butchers but they echoed the views of the majority, saying that their courses had not been particularly beneficial. However, a number of butchers had been formally trained in health and safety and in food hygiene and that training was often cascaded to other employees in the shop.

HALAL CERTIFICATION

About 25% of the sample interviewed is certified by the Halal Monitoring Committee (HMC); a small number use only HMC-certified suppliers though they are not themselves certified. HMC appeared to be particularly strong in East London, Southall and parts of Bradford. Many of those butchers reported that HMC had become synonymous with meat that is 100% Halal – a view shared by their customers.

That said, surprisingly few know what the initials HMC stand for, what the role of the organisation is and from where it originates. Such confusion is compounded by the fact that few butchers had heard of the Halal Food Authority (HFA) or that other certification bodies exist,

Those certified by the HMC cited the following benefits:

- It guarantees that suppliers provide meat that is 100% Halal
- It reassures consumers (some of whom enquire whether the meat is Halal or HMC)
- It devolves responsibility of the butcher to ensure meat is Halal to the supplier who is perceived to have taken on that obligation

Butchers do acknowledge that such certification is expensive. Some also revealed that they had found themselves short of stock when their usual supplier had failed to deliver and they were forbidden to source from non-HMC suppliers as an alternative.

HMC operates a 'three strikes and out' policy – butchers receive three warnings for any breach of certification requirements before certification is removed - and some butchers, feeling it would provide a competitive advantage, wanted those who had received warnings to be listed on the HMC website.

A small number of HMC-certified butchers highlight their certification and/or slaughter process with in-store material.

HMC members aside, however, most butchers dismissed certification schemes as money-making exercises. It became evident during the research that much business in the Halal meat sector is conducted on trust and personal relationships and few see the need for certification schemes. Butchers trust their suppliers and in turn are trusted by their consumers.

Therefore, while all of the butchers interviewed asserted that the slaughter process was important to them, most had never visited the slaughterhouse from which they source their meat. The research also discovered several cases where butchers who were claiming to sell non-stunned meat were sourcing from abattoirs which did stun all animals before slaughter.

It was evident that butchers take the word of their supplier regarding slaughter process and whether the meat is Halal and as most butchers were dealing predominantly with Muslim suppliers and middlemen, it was taken for granted that their word was sufficient guarantee. Similarly, most butchers reported that their regular customers never query whether their meat is Halal and that new customers, to whom they are often recommended by word of mouth, make only a cursory enquiry.

STUNNING VERSUS NON-STUNNING

A small majority of butchers were completely against stunning before slaughter; the rest were either not concerned or took the view that stunning is acceptable within Islam.

The issue was mentioned mostly spontaneously during the interviews. The strongest views against stunning were held by butchers of South Asian ethnicity; Kurdish and Turkish butchers were less engaged with the issue. There was also a regional difference with butchers in Bradford and Oldham more willing to accept that cattle and sheep should be stunned before slaughter than they were that chicken should be. The prevailing view was that chickens are more fragile and therefore more likely to die from stunning than a larger animal which they perceived could withstand an electric shock.

Many of the butchers referred to stunning as an electric shock or even electrocution, indicating that for some the perception is that animals are subjected to a life-threatening level of electricity. Others were aware that stunning does not kill the animal and went on to point out that stunning was the norm in the UK until relatively recently; they were confused as to why the matter has now become such a sensitive and controversial issue. They pointed out that if the Muslim community had previously accepted stunned meat, why have so many opinions now changed?

Overall, the arguments put forward by butchers either for or against stunning reflected those of abattoir owners reported above. There were those who took the view that sheep and cattle could not die from the level of electricity delivered by the stun, that stunning reflected better animal welfare standards and that stunning facilitated better handling by the slaughterman.

Those butchers against stunning believe it is not Halal to do so as they could not be sure that the animal is alive at the point of slaughter; a few mentioned that the animal should be sufficiently conscious as to hear the prayer delivered by the slaughterman; and some butchers expressed the view that stunning is painful and therefore more cruel than non-stun slaughter.

CONSUMER PREFERENCES AND POPULAR CUTS

Lamb/mutton

Throughout the sample of 50 butchers, more mutton was sold than lamb: it is cheaper than lamb and more suited to many Asian dishes. Butchers reported than mutton was particularly popular with Muslims of Pakistani, Bangladeshi, Caribbean, Sri Lankan and Somali ethnic origin. Middle Eastern, Arab and Turkish customers on the other hand preferred lamb despite its price premium over mutton.

Among the most popular cuts of lamb reported were shoulder, leg and mince (among all communities), back chops (Kurdish and Arab communities), neck (Pakistani and Turkish) and front and chump chops (Turkish customers).

Butchers reported that shoulder, leg and mince were among the most popular cuts of mutton among all communities, neck among Pakistani consumers, boneless among South Asian customers and ribs and chops especially among Bangladeshis.

Volumes of lamb and mutton sold varied between 150 kg and 2,500kg a week, though one large outlet catering for the foodservice trade sold 5,000kg a week.

Beef
Only a minority of the sample interviewed sell beef regularly while a small number of others sell it on special order. One of the main reasons cited for not selling beef was fear of alienating Hindu customers by having beef on display. More trade in beef was achieved by those selling to restaurants and caterers than by those catering only for retail customers, suggesting that beef may be enjoyed out-of-home more than cooked at home.

Muslims of Bangladeshi ethnic origin were identified as buying most beef, which is also popular with Somali and other African Muslims.

The most popular cuts of beef were steak/steak pieces, ribs, mince, boneless thigh/leg (particularly with South Asian and Middle Eastern customers) and cow's feet (among Pakistani customers).

Volumes of beef sold among the research sample of butchers ranged from 10kg to 100kg a month, with one large retailer also selling 1,000kg a week to the foodservice sector.

Poultry
The butchers reported that chicken was most often bought whole and then skinned and jointed by the butcher – but jointed in different ways depending on the ethnicity of the customer. For example, Pakistani customers wanted chicken cut into about 10 pieces, Kurdish consumers preferred four large pieces. South Asian and Somali consumers bought mainly small whole chickens.

Popular cuts included boneless thighs, legs, breast and wings.

Volumes sold varied between 200kg and 2,500 kg a week with two butchers selling more than 4,000kg a week to foodservice customers.

Other meats
A small number of butchers also sell goat meat, though they report this is difficult to source; turkeys are sold at Christmas to both Muslim and non-Muslim customers and there are occasional, special requests for veal and duck.

The Halal Consumer (1)

Shopping behaviour and consumptions patterns - a qualitative understanding

The primary objective of this qualitative research was to help shape the approach to the planned quantitative research and to ensure a sound basis on which to construct a meaningful and robust questionnaire for that quantitative work. This chapter outlines the results of that qualitative research which indeed provided a depth of understanding about the views and behaviour of Halal meat consumers and how this manifests itself in terms of purchase and consumption. Through the focus group research, it was possible to gain insights into the awareness, beliefs, attitudes and routines of Muslim shoppers that in turn helped to shape the questionnaire that was used to undertake quantitative research among a wider sample of Halal shoppers, the results of which are contained in the following chapter.

GENERAL SHOPPING BEHAVIOUR

Common to all participants in the focus group research was a split for food shopping between the major multiples and discounters for what can be described as mainstream goods and specialist ethnic outlets for ethnic foods and Halal meat purchases.

For the vast majority, the norm was a weekly supermarket/discounter shop with two or three top-up shopping trips in the week. Any variation in that reflected household size – larger households shopping more frequently. Only one person among the 120 who took part in the focus groups shopped for food on-line and then only occasionally; two men of Turkish ethnicity reported never using mainstream supermarkets and claimed to buy all their food from a local Turkish food centre.

The use of specialist outlets varied in frequency. While some shopped for ethnic goods once a week, many visited specialist shops between three and six times a week for fresh foods, especially fruit and vegetables.

Specialist shops used included:

- Independent Halal butcher shops (all respondents)
- Asian-owned corner shops and supermarkets (respondents of South Asian and Somali ethnicity)
- Turkish food centres (Turkish, Somali and Middle Eastern/Arabic)
- Somali shops (Somali respondents only)
- Arabic shops (Middle Eastern/Arabic respondents only)
- Cash and carry outlets for items bought in bulk, such as sacks of rice, drums of oil, sacks of onions etc.(South Asian and Somali respondents)

From the focus group research, it was possible to establish the typical shopping repertoire as shown below:

Major supermarkets Groceries, staples • English fruit and vegetables e.g. carrots • Halal meat - occasionally • Fish - mainstream • Frozen items for children e.g. oven chips, fish fingers • Household goods
Halal butchers/Asian convenience stores Halal meat • Halal chicken • Halal convenience foods e.g. kebabs, chicken nuggets, samosas • Spices and herbs • 'Ethnic' fruit and vegetables e.g. okra • Asian staples bought in bulk e.g. sacks of onions, rice, chapatti flour • Fish - more specifically 'ethnic' varieties e.g. hilsa
Outdoor markets (used by a few) Fresh fruit and vegetables • Fish

MEAT PURCHASING PATTERNS

At least one respondent in each of the focus group sessions bought their meat and chicken in bulk – a whole or half sheep or a box of chickens. First generation Muslims of Bengali ethnicity all bought meat, chicken and Bengali fish on a fortnightly basis. For most others, the preference was to buy meat as and when it was needed, not only because they wanted their meat to be as fresh as possible, but for the practical reasons that they lacked freezer space for storage or that they routinely passed the butcher shop and it was convenient to shop for meat more frequently.

Younger men (18 to 30 years of age) of Indian ethnicity were typical of those shopping two to three times a week for meat, chicken, fruit and vegetables to ensure optimum freshness. Overall, it was the men of household who took responsibility for buying meat – either because it was bought in bulk and therefore too heavy for the women in the household or simply because some of the women expressed a dislike of going to the butcher because they saw it as a male-dominated environment.

Universally among all the ethnic communities it was the norm to remain loyal to one particular Halal shop: consumers trusted these shops and felt they offered consistent quality. Almost all were buying from a shop that had originally been recommended by others or which is used by their wider families.

The key advantages of buying meat from an independent Halal butcher were reported to be:

- Customers can develop a long and loyal relationship with the butcher
- Customers trust that the meat is 100% Halal
- Halal butchers offer a personal service and cut meat to order, as well as skinning and/or de-boning it according to the customer's requirements

- Some butchers take telephone orders and will deliver the order to the customer's home
- Most independent Halal butchers employ staff who speak mother tongue languages which is good for elders
- Consumers feel they can negotiate discounts, which they cannot do in a supermarket
- Butchers give advice and cooking tips e.g. on the best cut of meat to use in a particular dish
- Many feel independents are cheaper
- Independent Halal butchers sell meat in bulk - e.g. a whole sheep

There were drawbacks, too, however:

- That the prices are not fixed, which means that sometimes butchers charge whatever they think the customer will pay
- There are no 'sell by' dates on the meat, which means that customers tend to find out the shop's delivery days to ensure they shop when the meat is freshest
- Hygiene issues i.e. shops can sometimes become messy and dusty, the butchers often wear bloody aprons
- As mentioned earlier, it was seen as a very male environment which can make some female customers feel uncomfortable – women of Bangladeshi origin in Birmingham, aged 31-45 years, reported feeling this way

All of the focus group participants were aware that major supermarkets also sell Halal meat (the in-store Halal butcher in selected Asda stores was frequently cited). Respondents were generally open to buying Halal meat from supermarkets and many do occasionally – for example when unexpected guests arrive and it would take too long to defrost meat from the freezer.

Those least likely to buy meat from supermarkets included new arrivals to the UK across all age groups who would not risk the possibility the meat was not Halal; those who did not want to change existing shopping routines or who were averse to buying pre-packed meat; and for those living in Bradford there was simply more than adequate provision of specialist butchers.

The perceived advantages of buying meat from supermarkets were the convenience of one-stop shopping, longer opening hours, lower prices, a range of special offers and loyalty cards on which to earn rewards. Practical considerations also included car parking facilities, a clean and hygienic environment, more appealing presentation and self service checkouts to facilitate speedier shopping.

Respondents also mentioned as an advantage that supermarket pre-packed meat always carried a sell-by date.

For those consumers who would not buy meat at supermarkets, many cited the reason that they could not trust the meat or chicken to be truly Halal. A number of younger women (particularly those of Bangladeshi ethnicity) perceived that supermarket meat is approved by the Halal Food Authority (HFA) while they would trust only Halal Monitoring Committee (HMC) approved suppliers. Other reasons included that supermarkets sell a narrower range of cuts than Halal butchers and that it is pre-packed and not cut to order.

A small number of respondents buy their meat and chicken directly from abattoirs expressly to ensure the meat is Halal and as fresh as possible – it also saves money. One participant reported buying chicken in bulk two or three times a year – buying directly from and slaughtering on the farm.

MEAT CONSUMPTION PATTERNS

All of the focus group participants bought fresh meat rather than frozen, even when buying in bulk, preferring to wash and freeze the meat themselves in portion bags because they had concerns about the possible age and poor quality of shop-frozen meat. The exceptions were frozen convenience foods containing meat and chicken such as Halal burgers, chicken nuggets, samosas and such products.

It was the norm across all the communities for people to cook from scratch, either daily or every other day. None of the respondents stored cooked meals (or leftovers) in the freezer. Other than a small number of students and single people, hardly any bought ready meals or 'ready to cook' products.

Little interest was expressed in picking up recipe cards from Halal butchers: most seemed content to cook favourite family meals, although a few do seek out new ideas by watching cookery programmes on a regular basis and/or searching for recipes on-line.

There appeared to be little demand for organic meat, mainly because the consumers were not aware of the existence of Halal organic meat. Generally, they assumed this would be very expensive and therefore out of their reach financially. Others were sceptical of the health benefits of buying organic, particularly as many believe that Halal meat is intrinsically healthier than non-Halal meat saying that the blood of the animal had drained away, taking any bacteria with it. However, some of the women of Turkish Cypriot origin bought organic and free-range non-Halal chicken from time to time.

The vast majority of those in the groups reported that their meat consumption increases at weekends - when they have more time to cook something special for the family - and during Ramadan and at Eid. During Ramadan, those in the groups were likely to eat meat early in the morning to sustain them until they ate again after dusk, whereas normally they would eat meat only for lunch or dinner. In addition, group members of Turkish origin reported eating more meat during the summer barbecue season.

The research team was able to explore the meat and poultry consumption habits of the focus group participants in sufficient detail to establish three distinct behavioural/attitudinal groupings toward red meat – occasional, typical and committed meat eaters.

Occasional meat eaters
Typical of this group were men and women of all ages from an Indian and Bangladeshi origin and younger women (18 to 30 years of age) from Pakistani origin. They ate meat less than twice a week on average. Some of these were married women who cooked separate meals for themselves, having prepared a red meat dish for their husbands.

Consumers in this group tended to prefer chicken to red meat, citing taste, affordability, speed of preparation and versatility, especially when preparing a dish that had to appeal to the whole family with a wide age range.

Some respondents of Indian ethnicity fell into this group because they eat a predominantly vegetarian diet while many from the Bangladeshi community eat more fish than meat. Added to these are those who cite health reasons for now eating less red meat than previously.

Typical meat eaters
This was the largest of the three groups made up of those who eat red meat two to three times a week. The group comprised men and women of Turkish origin, women aged 31 to 45 years of Middle Eastern origin and any of those consumers of Pakistani ethnicity.

Their normal routine would be to alternate their red meat meals with chicken and to include a fish or a vegetarian meal once a week. While they enjoyed eating red meat, respondents were concerned that it was becoming more expensive and speculated they might have to migrate to chicken as a more affordable alternative.

Committed meat eaters
This group comprised men and women of Somali ethnicity and younger men (18 to 30 years) of Middle Eastern origin who eat meals containing red meat at least three times a week, with some eating red meat daily.

Such diets were described by the respondents concerned as traditional of their country and they had continued that in the UK. Those of Somali origin ate mostly beef and lamb but also veal and camel meat which was imported from Australia and sold in Somali-owned shops; those of Middle Eastern/Arab origin also ate veal occasionally. Unlike other ethnic groups, both these cultures eat meat regularly at breakfast as well as at other meals during the day.

TYPES AND CUTS OF MEAT CONSUMED BY ETHNICITY
Focus group participants were asked what cuts of beef, lamb and poultry they typically buy and what sort of meat dishes they normally cook at home. The table on the facing page shows this information by ethnic group, describing the cuts and dishes in the respondents' own words and which may not, therefore, correspond with a butcher's usual description.

The groups were also asked to identify those cuts they would like to buy but currently find difficult to find in the shops they visit. The following were most frequently mentioned:

- Steak (by all groups)
- Lamb shanks (by those of Bangladeshi origin)
- Cow's and lamb's feet (Indian)
- Lamb's liver, organic liver and lamb neck (Somali)
- Ribs, rib chops and sweetbreads (Turkish)
- Veal shoulder, duck, turkey, poussin, rabbit, pigeon and game (Middle Eastern)

Perceived gaps in Halal product offerings
Consumers perceived that certain types of Halal products either do not exist or are not readily available and among those they would like to see become more available are:

- Halal ready made chicken and meat sandwiches (e.g. from major retailers)
- Halal versions of those products typically served in popular fast food outlets
- Halal snack items and crisps
- Gelatine-free desserts and cakes
- Halal ready meals e.g. shepherd's pie
- Halal rotisserie, particularly in supermarkets (roasted beef/lamb/chicken)
- Halal gelatine
- Halal chicken and lamb stock cubes
- Halal chicken sandwich fillers
- Halal cheese
- Halal bacon!

Types and Cuts of Meat Consumed

	Pakistani	Bangladeshi	Indian	Somali	Turkish	Middle Eastern Arabic
Lamb/mutton	Much more lamb consumed than beef. Most popular lamb cuts were: • Whole/half a sheep (cut up and frozen in portions) • Shoulder • Leg • Minced (by butcher) • Chops • Lamb neck • Sheep's stomach (Birmingham only)	Mainly eat lamb and mutton ie. • Whole/half a sheep (cut up and frozen in portions) • Shoulder • Leg • Mutton chops: front and back • Minced (by butcher) • Ribs	• Whole/half a sheep (cut up and frozen in portions) • Leg • Chops • Ribs • Neck • Boneless cubes • Minced (by butcher)	• Whole/half a sheep (cut up and frozen in portions) • Minced lamb • Shoulder • Leg/whole hind leg • Ribs • Chops • Liver, kidneys	Mainly lamb • Shoulder • Leg • Minced (by butcher) • Neck/ middle neck • Ribs • Front chops • Best end/chump chops • Diced lamb • Offal	• Whole lamb • Leg/leg pieces • Minced lamb (spiced and ready to make into kebabs) • Chops • Shoulder • Double back chops • Stuffed lamb (de-boned, stuffed and rolled)
Beef	• Steak pieces • Cow's feet (seen as a delicacy)	• Steak	• Steak	• Steak • Minced beef • Sughar (small cuts of beef)	• Steak • Minced beef	• Cubed, boneless beef pieces • Minced beef
Other meat	• Goat/mutton • Ready made samosas, lamb burgers, kebabs etc.	• Ready made lamb kebabs, tikka pieces, lamb sausages, samosas, burgers	• Ready made lamb burgers, kebabs, spring rolls, samosas	• Veal, camel meat • Frozen burgers, sausages (lamb and beef)	• Ready made lamb and beef burgers	• Veal • Frozen lamb burgers • Deli meats

Typical Meat Dishes Cooked

	Pakistani	Bangladeshi	Indian	Somali	Turkish	Middle Eastern Arabic
Typical meat dishes	**Traditional dishes:** • Meat curries • Keema • Kebabs • Biryani • Roast/ barbecued meat **Other:** • Shepherd's pie, spaghetti Bolognese	**Traditional dishes:** • Meat curries • Mutton chops – curried or grilled • Minced meat curry • Roast leg of lamb (Asian style) • Meat pulao • Lamb biryani • Kebabs **Other:** • Shepherd's pie, lasagne ,	**Traditional dishes:** • Lamb curry • Lamb korma • Tahari (rice and meat cooked together) • Grilled meat chops • Kebabs • Mince curry • Meat ball curry • Paya/nehari/ biryani (special occasions) **Other:** • Shepherd's pie	**Traditional dishes:** • Grilled lamb and steak • Beef or lamb stew • Lamb or beef cooked in broth or soup • Mince cooked as kebabs, burgers or samosas • Lamb cooked with rice • Roast lamb/beef **Other:** • Pizza • Pasta with meatballs	**Traditional dishes:** • Lamb and vegetable stews • Barbecues • Kebabs • Meatballs • Roast lamb • Dried beans cooked with meat **Other:** • Shepherd's pie • Lasagne	**Traditional dishes:** • Meat and vegetables (eg. okra) in a tomato-based sauce served with rice • Meat and peas • Grilled/fried/ roasted meat e.g. kofte/ kebab/steak (No mention of European dishes in either group)

Types and Cuts of Poultry Consumed

	Pakistani	Bangladeshi	Indian	Somali	Turkish	Middle Eastern Arabic
Fresh chicken	• Whole 'baby' chicken • Drumsticks • Breast • Boneless chicken • Chicken mince • Wings, chicken livers and offal were less popular • (One male buys hen because the meat is fresher)	• Whole rooster/'baby'/ spring chicken • Whole broiler • Drumsticks • Breast • Boneless chicken • Wings were less popular	• Whole birds • Boneless chicken • Drumsticks • Thighs • Breast	• Whole 'baby' chicken • Drumsticks • Breast • Thighs	• Whole birds • Thighs • Drumsticks • Wings • Breast • Chicken livers	• Whole 'baby' chicken • Drumsticks • Breast/breast fillet/breast steak • Thighs • Chicken quarters • Marinated chicken pieces • De-boned, stuffed and rolled chicken
Other chicken	• Frozen chicken nuggets, spicy chicken wings, chicken burgers (bought at a halal shop) • Chicken salami/ sausage	• Frozen chicken nuggets, kebabs and burgers (bought at a halal shop)	• Frozen chicken nuggets and burgers • Chicken salami and chicken palony (paté) from halal shops	• Frozen chicken nuggets and burgers (from halal shop or Morrison's) • Chicken sausage (for pizzas/ sandwiches)	• Frozen Southern Fried chicken steaks and chicken nuggets (from Turkish food centre)	• Frozen breaded chicken fillet, chicken burgers and chicken nuggets (from halal shops) • Chicken salami/ sausage
Other poultry	• Duck • Quail • Turkey • Capon	• None	• None	• Pigeon (from Turkish shops)	• Quail • Duck • Turkey	• Duck • Turkey • Quail • Pigeon

CONSUMER UNDERSTANDING OF HALAL MEAT

While there was some consensus concerning the key aspects of Halal meat, the group research revealed considerable differences in awareness and understanding of Halal. Differences in beliefs and variations in slaughter practice existed among the focus groups, indicating that ethnic groups from different countries may have developed different understanding of the mandatory aspects of Halal, having been taught different rules by their elders or religious leaders.

For example, there was consensus among all the groups on the following points which were cited spontaneously:

- A Muslim slaughterman must kill the animal
- The animal must be blessed before slaughter with the Slaughterman reciting a prayer
- The blood from the animal must fully drain out
- The animal should be killed with a sharp cut across the throat

Beyond these four common points, the different ethnic groups expressed different aspects of the slaughter process which ensured the meat is Halal. For example, in only six of the 16 groups did it emerge that the slaughter had to be by a sharp knife while men of Somali ethnicity maintained that the knife must be kept out of sight of the animal until the moment of slaughter. Somali women insisted that an animal should not be killed in front of other animals while men of Turkish descent believed the animals should be blindfolded to prevent them seeing others being killed.

Participants of Turkish and Bangladeshi origin insisted that the animal must be conscious at the time of slaughter and as a result these groups were generally opposed to stunning.

Women of Somali and Indian origin said the animals must face Mecca when they are killed. Younger men of Pakistani origin living in Bradford specified a prayer should be recited three times.

While those differences were expressed, there was broad agreement on what is not permissible within Islamic slaughter and among those key points were:

- Tape recorders should not be used for the obligatory prayer
- Each animal must be individually blessed – it is not acceptable merely to bless the knife used to slaughter
- Mechanical slaughter methods should not be used; this was especially the case for chicken where some believe feathers should be plucked manually as well as slaughter carried out manually

STUNNING OR NON-STUNNING

Interestingly, a number of respondents were unaware that there is an issue concerning stunning or non-stunning. Those least aware were women of Turkish Cypriot origin and men of both Turkish and Middle Eastern origin. Those most aware of the debate were those of South Asian ethnicity (Pakistani, Bangladeshi and Indian).

Nevertheless, the issue was raised spontaneously in several of the groups – but mainly in relation to the validity of the certification bodies. A number of focus group participants volunteered they had heard rumours that HFA approved meat was not Halal because the HFA accepts the practice of stunning before slaughter.

Of those who were aware of the debate on the issue, most believed that stunning is Haram – that is it renders the meat non-Halal. There was, however, a great deal of confusion and little engagement in the merits for or against stunning.

Most believed that non-stunning is what they regarded as the correct Islamic method of slaughter and so did not question it further. They tended also to believe that non-stun methods are less cruel to animals which would otherwise suffer pain from the stun process.

At the conclusion of the discussion, few of the group respondents were able to say with certainty whether their butcher sells meat that has been stunned or not stunned.

EATING NON-HALAL MEAT

When asked if they had ever eaten non-Halal meat, either at home or out-of-home, nearly all respondents of South Asian origin and women of Middle Eastern origin maintained they had never eaten non-Halal meat and that they had never cooked it at home. A few respondents did report they had eaten non-Halal meat on occasions, but only when it had been difficult to obtain Halal meat.

Women of Turkish Cypriot origin and men of Middle Eastern appeared to be the most relaxed about the matter: the women explaining they were not particularly religious, the men perceiving that saying their own prayer over the meat was sufficient.

When eating out, the majority of respondents ensure they eat only meat that is Halal, choosing Muslim-owned restaurants and take-aways. While most also eat from KFC and Nando's Halal dishes, some did express doubts about the authenticity of the meat given that certification was by HFA, in which they had less confidence (see Stunning or non-stunning above).

Most respondents reported that if Halal meat is not available on the menu, they would choose a vegetarian or fish dish.

A small number of individuals within the groups claimed to be very strict when eating out: this is not related to ethnicity but to the level of individual religious adherence. They had either never or rarely eaten out because they could not trust that the meat would be Halal. One respondent of Bangladeshi origin, for example, related that her mother, who had lived in the UK for 30 years had never eaten outside of her own or her relatives' home. If she needed to be away from home for any length of time, she would prepare food to take with her. Others who choose to adhere strictly to their religious beliefs would eat only in mosque restaurants.

At the other end of the spectrum, others from the groups admitted to eating non-Halal meat out-of-home; those being mainly from the Turkish Cypriot, Middle Eastern or Somali communities. Two younger men (18-30 year olds) of Pakistani origin reported they had eaten non-Halal meat or chicken in fast food restaurants.

In a later discussion on marketing communications and the information Muslim consumers wanted, there was a clear desire for the issues of stunning verses non-stunning and the merits of each to be clearly spelt out. Detailed information on the principles, constitution, structure and operations of the various certification bodies (outlined below in the next section) was also felt to be much needed.

SOURCES OF INFORMATION WHEN BUYING HALAL MEAT

The focus group participants reported that the primary source of information when buying Halal meat was members of their family, especially recommendations on which butcher to use. Second and third generation consumers were, therefore, using the same butcher as their parents and one who knows the family well.

Word of mouth within the Muslim communities is also an important source of information, with members of the community discussing which supermarkets, takeaways and products to use and whether they are Halal. Friends would also discuss where to shop for the cheapest deals on fresh meat.

Imams and other religious leaders have influence and give advice and make recommendations. Two members of different groups in London reported that their local Imam had declared that HFA-approved meat was not Halal because of the stunning issue and that both had stopped using HFA-certified sources. The internet was used as a source of information to check the validity of certification bodies and in this connection the HFA was again singled out.

Awareness of Halal certification bodies
To test awareness of the various certification bodies among the focus groups, logos were presented. There was universal awareness of the word Halal written in Arabic

Awareness and recognition of the logos of the certification bodies varied. Most had seen the HMC logo, recognised by two thirds of the groups; about half recognised the HFA logo.

The Halal Monitoring Committee Logo

The Halal Food Authority Logo

Knowledge of the organisation was, however, low: most perceived HMC to be the longest-established certification body and knew that businesses had to pay to be HMC-certified. Few people know what the initials stand for, where it based or who runs the organisation.

Even less is known about the HFA, other than it accepts stunning before slaughter; one respondent volunteered the organisation originated in Malaysia.

Two further logos were presented: those of the European Halal Development Agency and of the Muslim Judicial Council. A handful of people only thought they might have seen the EHDA logo previously, but could not be sure. No-one claimed to have seen the MJC logo before.

The European Halal Development Agency Logo

The Muslim Judicial Council Logo

Opinion was divided on whether the logo of a certification body carried more weight or inspired more trust than the word Halal in Arabic. While some felt it prudent to trust the stamp of a Muslim-run body because it implied that some form of audit had taken place to authenticate the products and were confident that Muslims would 'do the right thing', others felt that the word Halal is sufficient assurance. This may be due to the relatively low profile and lack of awareness of the certification bodies.

There was also some feedback that the word Halal in Arabic is over-used, with respondents claiming to have seen it on packets of corn flakes and on cucumbers.

Others were prepared to nominate other bodies or individuals they would trust to provide Halal certification, such as:

- Local Imams
- Respected Muslim clerics
  (Dr Zakir Naik was mentioned by name)
- The Food Standards Agency
- The Muslim Council of Britain
- The Council of Mosques

However, no-one in any of the focus groups named or mentioned any other Halal certification body.

Non-Muslim retailer assurances
Following the discussions on Halal certification bodies, the groups were asked to consider what reassurances they would look for when buying Halal products from a non-Muslim store such as a supermarket. Despite the fact that in research among butchers and in the quantitative research among consumers that people do not currently pay much attention to accreditation certificates, a majority of focus group respondents said they would look for those

accreditation certificates to be prominently displayed. Both HMC and HFA certification were mentioned spontaneously.

Positive word of mouth recommendation or assurance within the community would also be a factor: if other Muslims or family and friends give assurance that a store is selling authentic Halal products, that would be taken on trust.

When asked about on-pack labelling, respondents would prefer to see both Halal in Arabic and a certification stamp (despite their low awareness of the latter). They also suggested a list of ingredients would be useful to check there was no gelatine, pork or alcohol contained in the product and the country of origin or manufacture would be welcome.

A few respondents said they would like to see pre-packed meat and chicken state whether the meat was stunned or non-stunned, but this was not universally supported.

The presence of Muslim staff in-store would give reassurance for some respondents while others would prefer to shop in stores which did not sell pork or alcohol. A few questioned how it is possible for large multiple chains with central sourcing policies to have some branches which are Halal and others which are not and would want clarification before making a Halal purchase.

Halal butcher reassurance

By contrast to needing reassurances on Halal purchases from supermarkets and other non-Muslim stores, none of the focus group consumers felt the need to seek reassurance when buying meat from a Halal butcher since there was an inherent trust, established through custom over many years or by word-of-mouth recommendation. In any case, as the butchers are Muslim they would not be untruthful about the Halal status of their meat as this would be a sin.

Marketing Communications

When it comes to communicating with the Muslim community about Halal meat, the vast majority of focus group respondents felt the most trusted channel of communications would be a respected mosque leader or Muslim cleric. In addition, word of mouth is clearly a powerful channel. It was evident throughout the research that Muslim communities discuss among members of their families and friends what is Halal and what is Haram and where to buy the best quality or freshest Halal meat.

The respondents suggested the use of specialist media to convey messages and subsequently generate positive word of mouth. Ethnic and Islamic broadcast media such as Noor TV, Peace TV, Sunrise Radio and Radio Ramadan were mentioned. Halal butchers shops themselves and other Muslim-owned shops and restaurants were identified as communication channels.

In discussing marketing more fully, some respondents suggested in-store signage in supermarkets would be useful while special promotions on Halal meat and chicken on supermarket loyalty cards would be an attractive incentive. Door-to-door leafleting and accessing schools and community groups would also provide good communications channels.

Informational needs included listing which E-number food additives are Halal; where products such as organic Halal and free-range Halal are available and what they cost; and a definitive list of Halal companies and brands published by an independent and trustworthy organisation.

The Halal Consumer (2)

Purchase and consumption – a quantitative overview

ATTITUDES TO AND IMPORTANCE OF HALAL

The overwhelming majority of Muslims in England – 90% - eat only meat that is Halal, and the remaining 10% eat mostly Halal meat. There is some, but relatively little, difference between the generations in this adherence to eating Halal meat: 94% of first generation Muslims eat only Halal meat compared with 90% of second generation consumers and 81% of third generation family members (Chart 1).

What constitutes Halal meat continues to be subject to debate within the Muslim communities and validating Halal meat is determined by a number of attributes. For example, high levels of importance are attached to the fact the butcher is Muslim (Chart 2), registering 4.3 on a scale of 1 to 5 where 5 is very important. While consumers also indicate they look for a Halal certification logo (registering 4.2 on the importance scale), of almost equally high importance is if the shopkeeper testifies that the meat is Halal. In other respects, Muslim consumers are concerned about convenience and price, look for what they consider to be the best cuts and are moderately concerned about country of origin.

All of these factors are integral pre-requisites irrespective of how the meat is slaughtered. When it comes to the slaughter process itself, more than 80% of respondents hold the view that the animal should be conscious at the time of slaughter (Chart 3). A small number, less than 10%, take the view that the animal should be unconscious but alive at the time of slaughter. For nearly 40% of respondents, animal welfare is important: for a small percentage of respondents, animal welfare is more important than whether the meat is Halal while 5% hold the view that health and safety standards outweigh slaughter methods.

Chart 1
Proportion of meat/chicken consumption that is Halal (by generation)

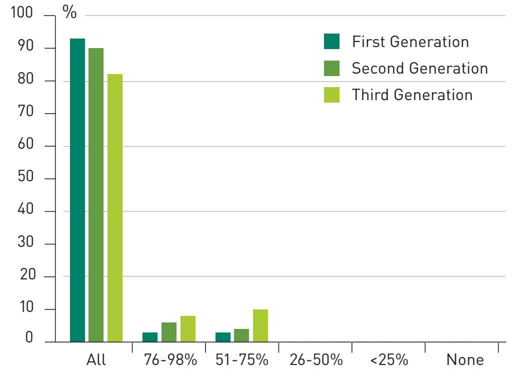
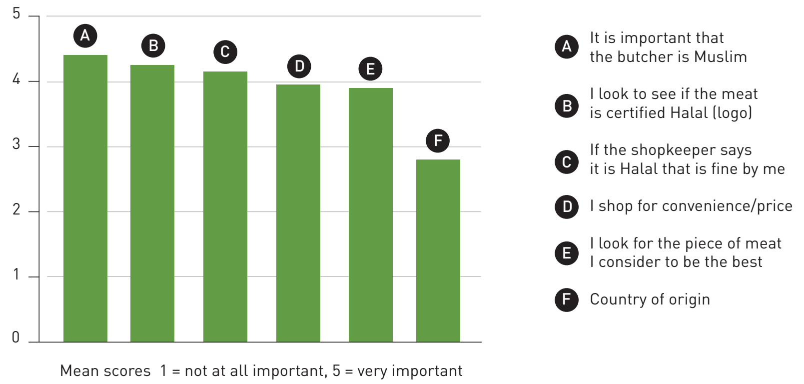
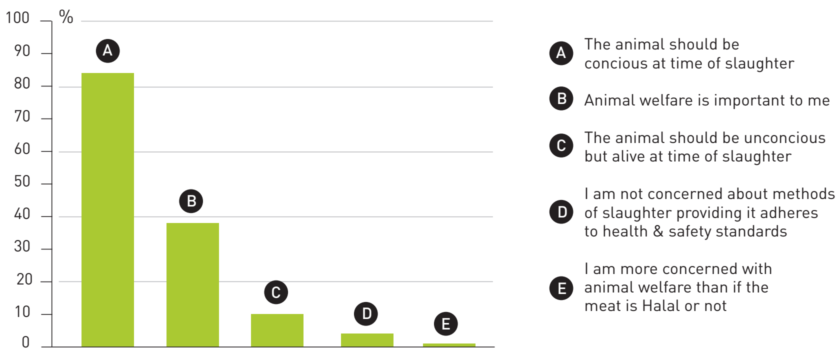


Chart 2
Attributes that validate meat is Halal



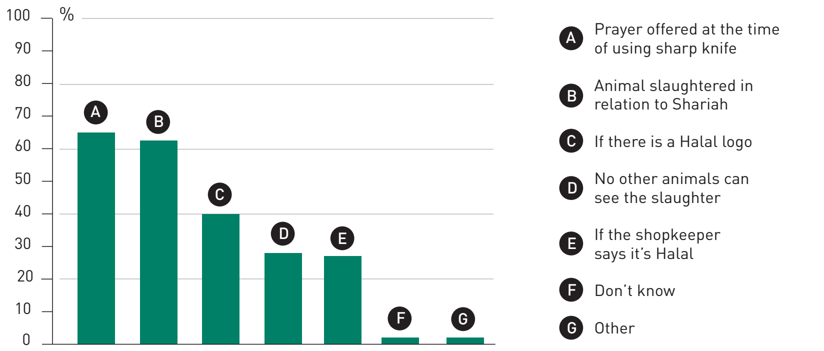
How important are these statements to you?

Chart 3
Halal slaughter process



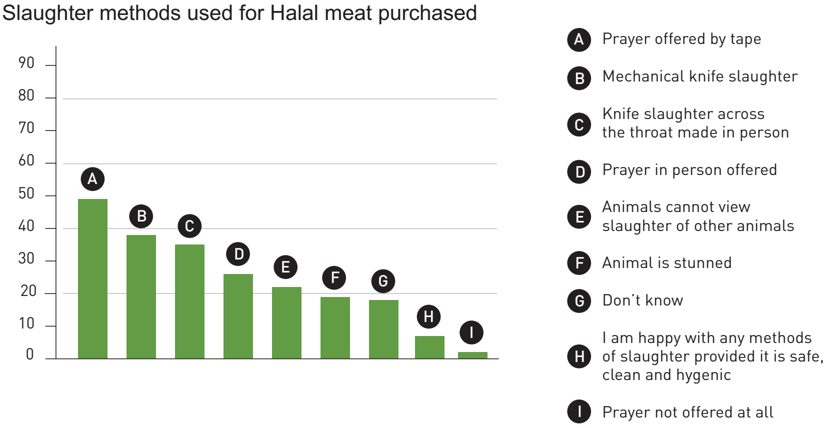
Which of these statements comes closest to your views?

Chart 4
Understanding of Halal meat



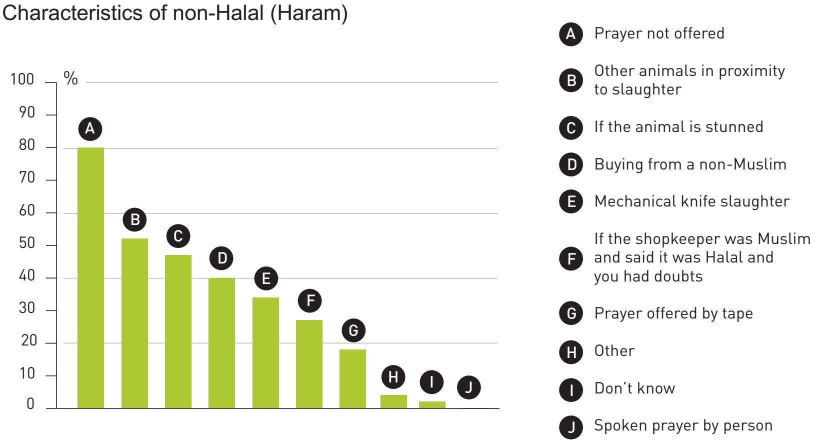
What is your understanding of Halal meat?

Chart 5
Slaughter methods used for Halal meat purchased



Which of the following methods is used on Halal meat you buy?

Chart 6
Characteristics of non-Halal (Haram)



What does not constitute Halal meat?

When asked to state spontaneously their understanding of Halal meat, 65% of respondents said that a prayer is offered at the time of using a sharp knife with almost as many saying that slaughter should be in accordance with Shariah law (Chart 4). While between a quarter and a third of respondents mentioned also that no other animals should see the slaughter and that the shopkeeper should confirm the meat is Halal, 40% stated they understood the meat to be Halal if there was a Halal logo in the retail premises.

However, when prompted with a series of showcards, respondents showed a degree of acceptability that Halal slaughter was also characterised by a range of methods that reflected the customs of a modern society. For example, when buying Halal meat, 19% of respondents believed that the animal is stunned prior to slaughter (Chart 5). More believe that their Halal meat has been slaughtered using a mechanical knife and that the prayer being offered was by tape than believe that the prayer was offered in person and knife slaughter was hand-delivered.

Given the overwhelming importance of Halal meat to the Muslim communities, the research also sought to understand what constituted non-Halal (Haram) meat. For most respondents (80%), this meant the absence of a prayer (Chart 6). While 50% of respondents believed that having other animals in proximity to the slaughter invalidated the meat as Halal, 45% believed that stunning the animal before slaughter rendered the meat Haram. Interestingly, 40% believed that buying meat from a non-Muslim would render the meat unacceptable.

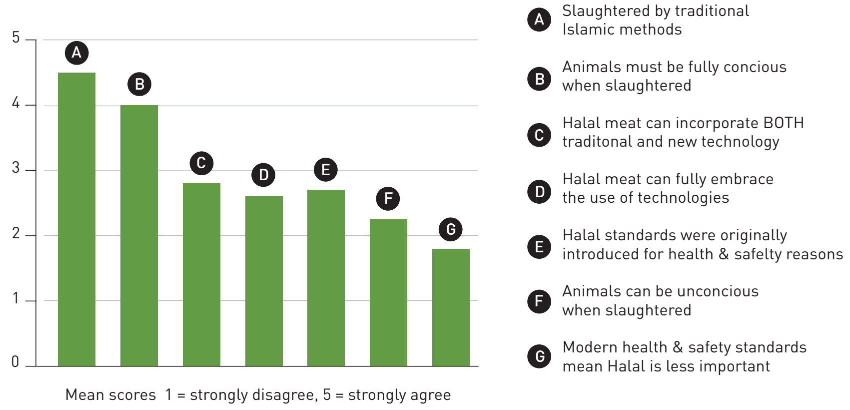
The strength of such views were explored further by means of a score analysis where a score of 1 indicated strong disagreement and 5 strong agreement. This showed (Chart 7) the strongest agreement was that Halal meat should be slaughtered by traditional methods and that animals must be fully conscious at slaughter. However, there was also a measure of acceptance that Halal meat can incorporate both traditional methods and those involving new technology. The lowest mean scores for attitudes such as animals can be unconscious when slaughtered and that modern health and safety standards outweigh the importance of Halal suggest a neutral stance on these views.

Despite the varied interpretations that are held for Halal slaughter, six out of 10 Muslims believe that if a person of Muslim faith says meat is Halal, then it is Halal for the purchaser (Chart 8). This suggests that the apparent complexities associated with determining whether meat is Halal may well be secondary to the simple declaration of a Muslim and reinforces the importance of the role of the butcher (as indicated in Chart 2).

STUNNING: ACCEPTORS AND REJECTERS

The research went on to explore attitudes to stunning before slaughter and how that compared with actual consumption practice. Respondents were able to be divided into two groups where the notion that animals could be stunned before slaughter and still be classified as Halal created stunning 'acceptors' and stunning 'rejecters'. The overwhelming majority - 76% - fell into the 'rejecter' category (Chart 9).

Chart 7
Attitudes on Halal slaughter



Which of the following general attitudes towards slaughter for Halal meat do you agree/disagree with?

Chart 8
Determining Halal meat slaughter

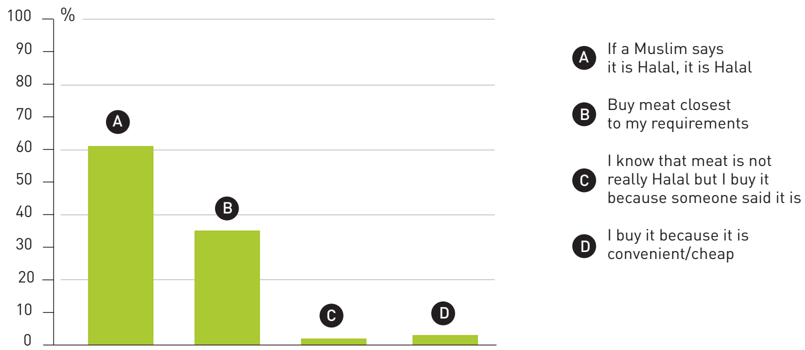
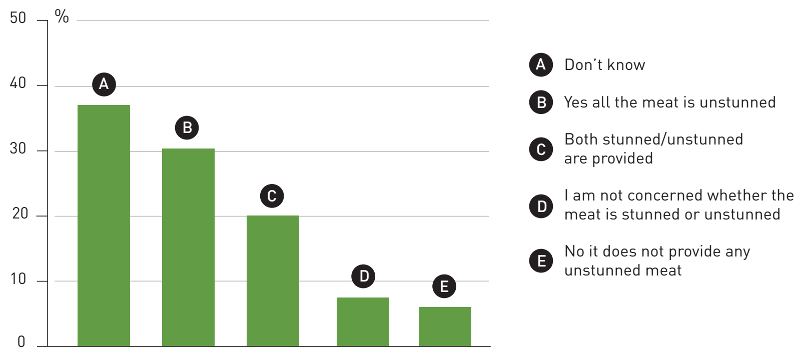


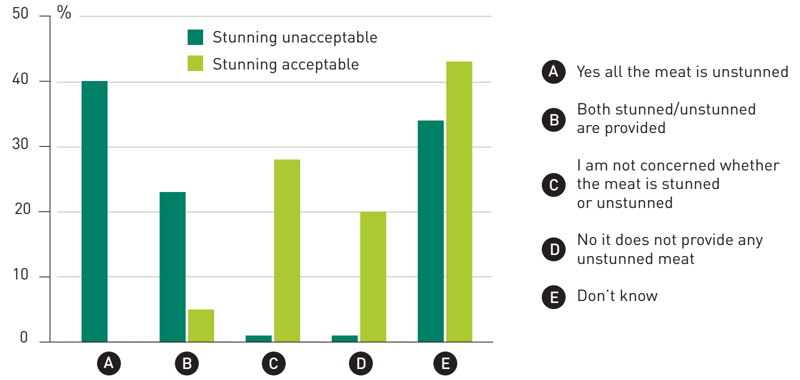
Chart 9
Acceptability of Halal classification using stunning techniques

Chart 10
Awareness of method of slaughter



Does your current butcher/supermarket/supplier provide meat that is unstunned?

Chart 11
Attitude to supply of unstunned meat

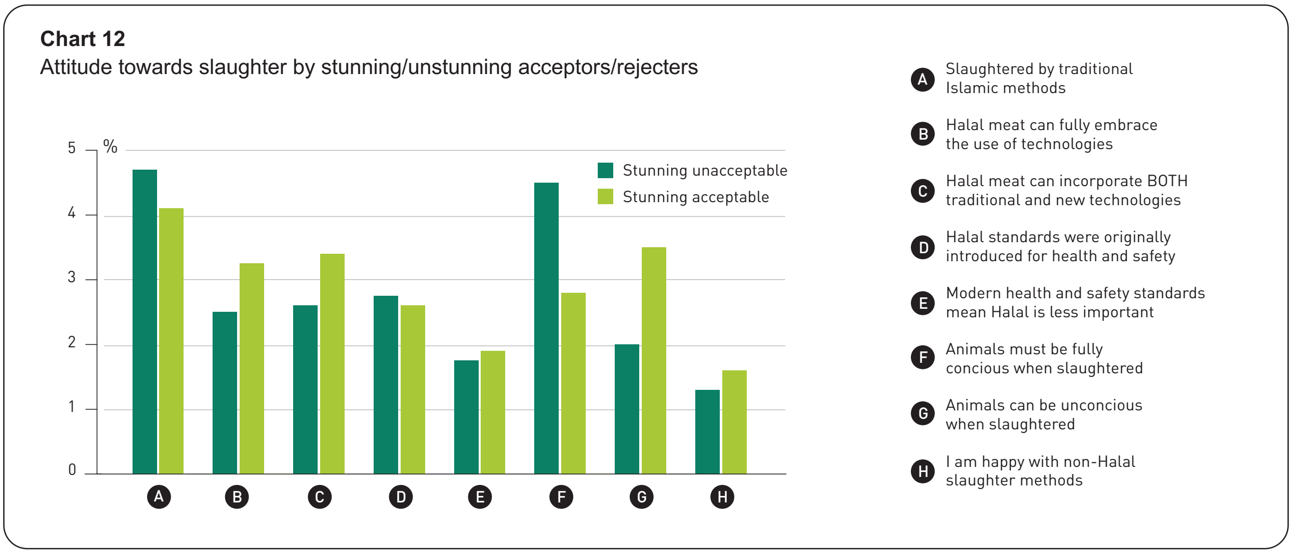


Does your current meat supplier provide unstunned meat?

A more detailed, demographic analysis of the two groups revealed no discernible statistical differences between them for gender, age, generation, social class and ethnicity except for Turkish Muslims (who were split 50/50 between acceptors and rejecters) and among AB social classes (showing a 40/60 acceptor/rejecter split), indicating more potential for stunning to be acceptable within these sub-groups.

Almost one third of respondents (31%) believed they bought only non-stunned meat from their current supplier (Chart 10) with slightly more (36%) claiming they did not know whether their retailer provided non-stunned meat. One respondent in five believed that their retailer provided both stunned and non-stunned meat; less than 10% were unconcerned whether the meat was stunned or not and even fewer believed their retailer sold only meat from animals that had been stunned.

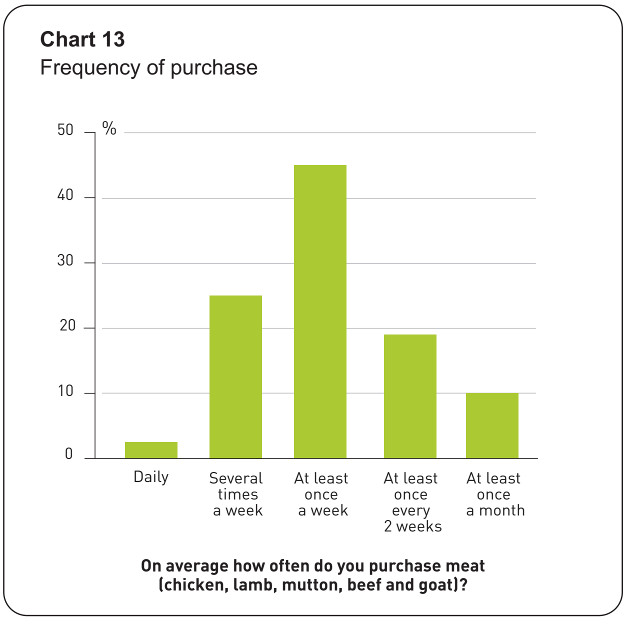
There was, however, a marked difference in attitude to buying between acceptors and rejecters: stunning rejecters are clearly more inclined to buy their meat from suppliers who sell only non-stunned or meat or both stunned and non-stunned (Chart 11). What is significant, though, is that nearly one in four of these rejecters (23%) did not know whether the meat from their supplier had been stunned or not. This would indicate that even for those who held the strong theological view that stunned meat was unacceptable, it nevertheless did not create an absolute barrier to purchase and consumption.



There are paradoxes within the views of acceptors and rejecters over their attitude to the Islamic law that deems all animals must be conscious at slaughter. For example, those who believe stunning is acceptable nevertheless believe that slaughter without stunning – described as traditional Islamic methods - is also acceptable (Chart 12). Equally, stunning rejecters also take the view that Halal can embrace the use of new technologies and can incorporate both traditional and new technology methods of slaughter. Any notion that Halal is an obsolete concept of diminishing importance, even among acceptors of stunning, is rejected as demonstrated by the lowest levels of agreement attached to the attitude that modern health and safety standards render Halal less important and to any perception that Muslims are happy with non-Halal slaughter methods.

MEAT PURCHASE AND CONSUMPTION

Most Muslim consumers – 72% - buy meat at least once a week with one in four buying several times a week (Chart 13). Across the generations, there is still high purchase frequency: while third generation Muslims buy once a week much more than first and second generations, more than 10% of them are buying meat several times a week (Chart 14).



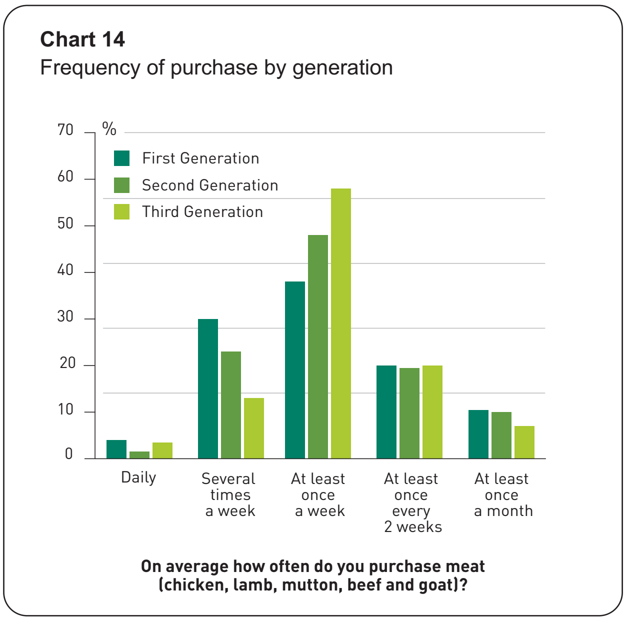


Chart 15

Frequency of lamb purchased by ethnicity

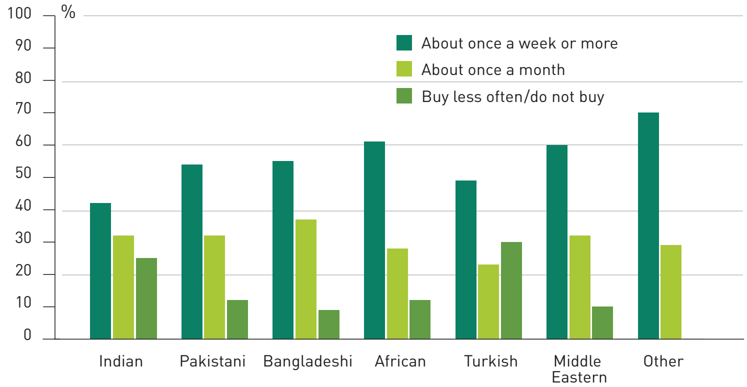


Chart 16

Frequency of beef purchased by ethnicity

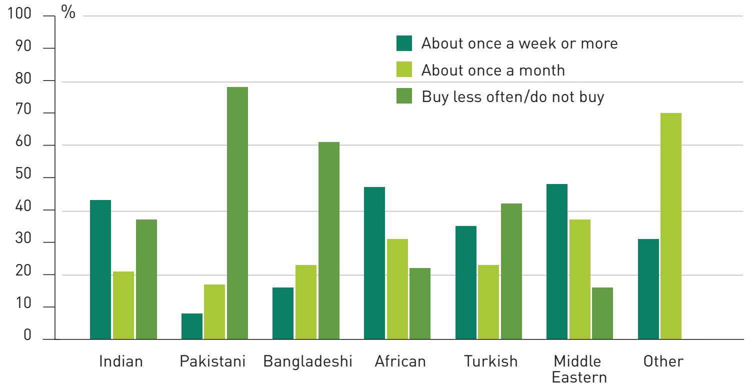
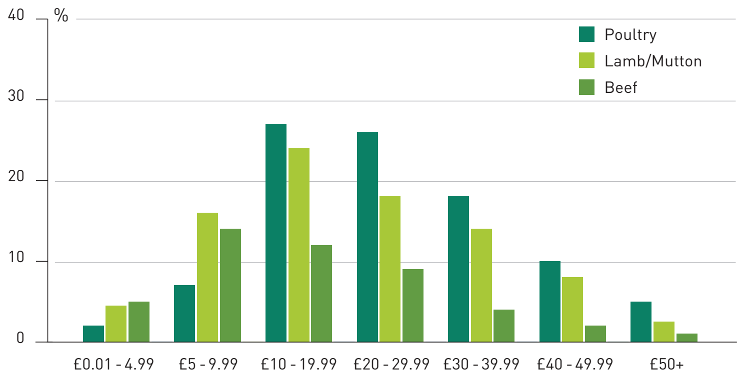


Chart 17

Monthly spend on meat



Lamb purchase is a feature across all ethnic groups (Chart 15) with half of consumers in most ethnic groups buying on a weekly basis; Muslims of Indian ethnicity buy lamb with less frequency than other groups.

Beef purchase is most frequently the domain of African, Indian, Middle Eastern and Turkish ethnic groups (Chart 16). Those ethnic groups from India and Pakistan buy less frequently by comparison.

Muslim families spend more on poultry than on other meat (Chart 17). Around half of consumers spend between £10 and £30 a month on poultry; 44% spend a similar amount on lamb/mutton.

Most Muslim consumers tend to eat meat regularly (Chart 18): eight out of 10 eat meat at least most of the time with almost one in three eating meat at every meal ('all the time'). There is no discernible difference between the generations. Lamb/mutton and chicken are most frequently consumed meats (Chart 19); half the respondents eat neither goat nor beef.

Beef consumption is highest among Muslims of African, Middle Eastern and 'other' ethnicity (Chart 20).

Chart 18
Frequency of meat consumption

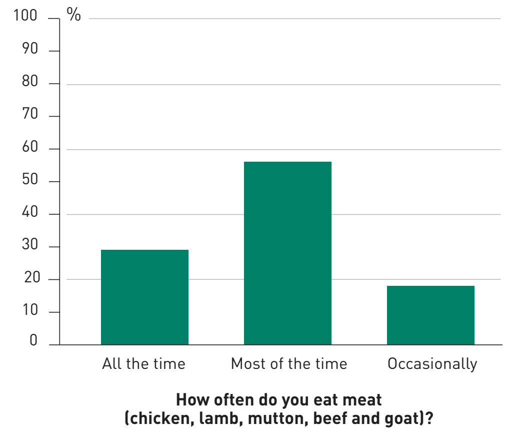


Chart 19
Frequency of meat consumption by type of meat

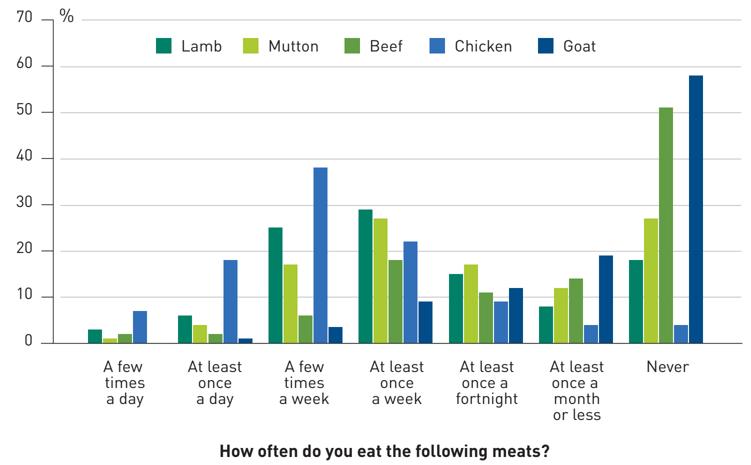


Chart 20
Frequency of beef consumption by ethnicity

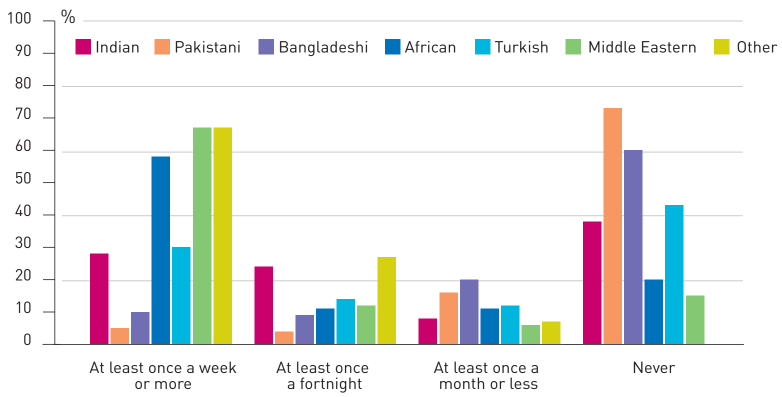


Chart 21
Frequency of mutton consumption by ethnicity

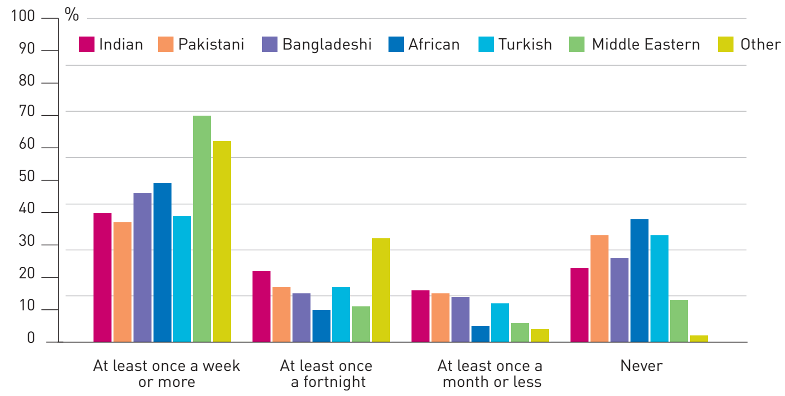
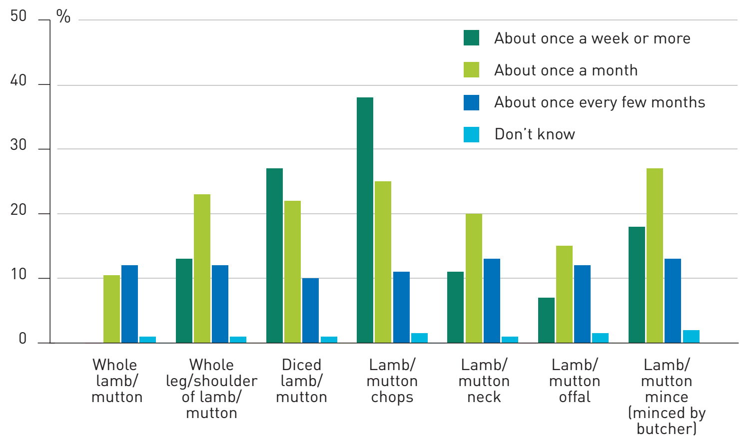


Chart 22
Frequency of lamb consumption by cut



There are ethnic differences apparent in mutton consumption with those Middle Eastern and other ethnic groups eating mutton more often than those from the Indian subcontinent, Africa and Turkey (Chart 21).

When it comes to lamb and mutton consumption, chops and diced are the most popular cuts, with minced lamb/mutton also featuring frequently (Chart 22).

Almost 80% of respondents buy meat fresh from the butcher's counter with little incidence of pre-packed/frozen purchase (Chart 23). This is a common feature across the generations, though second and third generation Muslims are more inclined to buy pre-packaged on occasions (Chart 24).

While respondents were inclined very much to buy fresh meat, they tend to freeze their purchases at home – 76% of respondents will freeze fresh meat purchases at least some of the time (Chart 25).

Chart 23
Fresh/packaged meat preferences

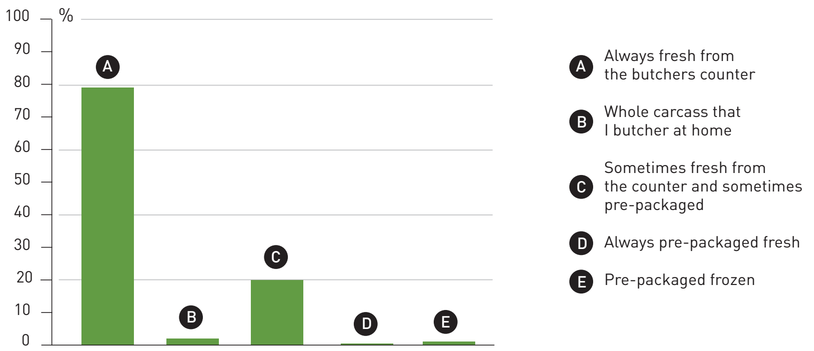


Chart 24
Fresh/packaged meat preferences by generation

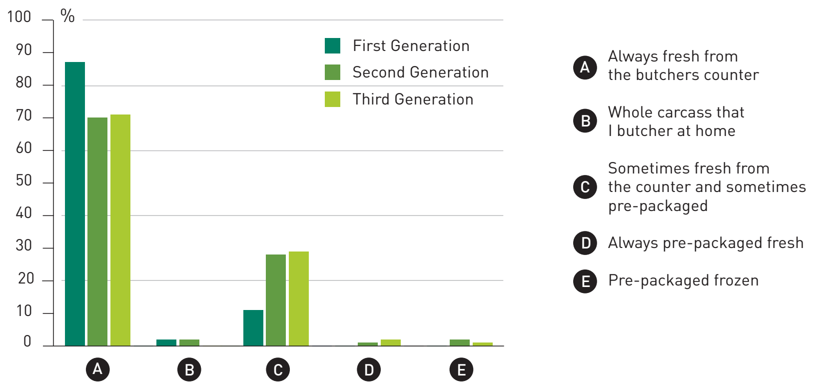


Chart 25
Proportion of fresh purchases that are frozen

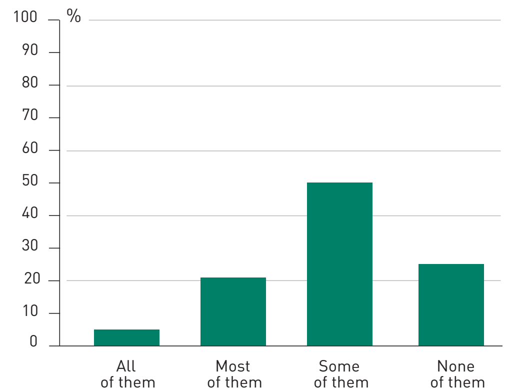


Chart 26
General attitude towards suppliers of Halal meat

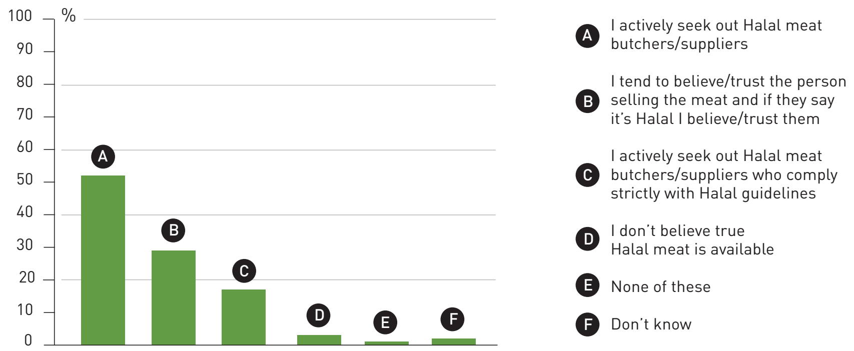
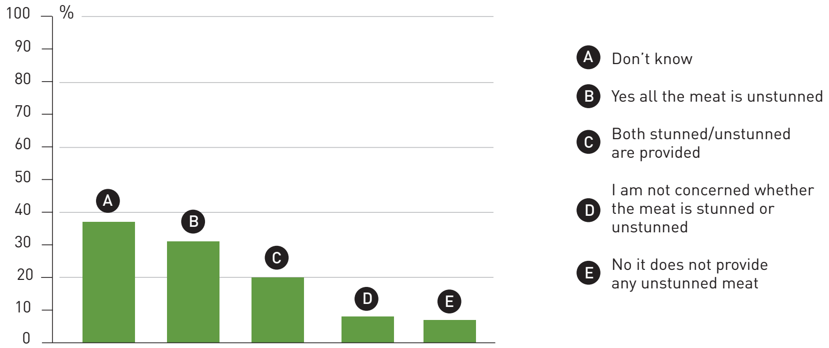
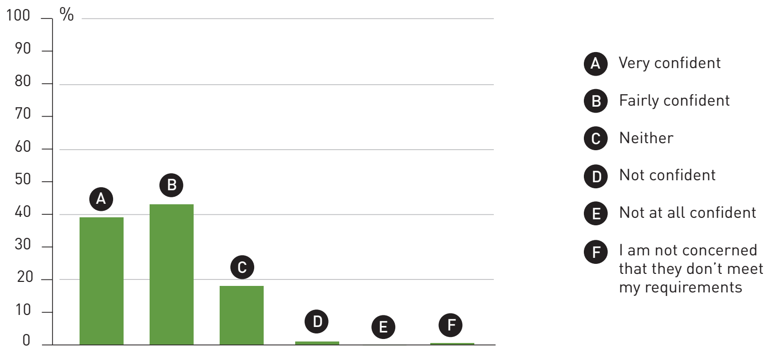


Chart 27
Knowledge of suppliers of stunned/unstunned meat



Does your current butcher/supermarket/supplier provide meat that is unstunned?

Chart 28
Confidence that retailer is meeting Halal requirements



How confident are you that your main meat butcher/supermarket/supplier meets your Halal standards?

MEAT PURCHASING OUTLETS

Given the perceived importance of Halal meat to Muslim consumers, it is little surprise that more than half actively seek out Halal meat butchers/suppliers to buy their meat (Chart 26) with a further 15% adding that they actively seek those who comply strictly with Halal guidelines. There is a high degree of trust among Muslim consumers in their butchers: almost one in three tend to believe and trust the person selling meat and believe/trust them when they say meat is Halal. There is a tiny minority who refuse to believe that true Halal meat is available.

Almost one-third of meat provided by butchers, supermarkets or other suppliers was perceived not to be stunned with a further 20% believing supply to be a combination of stunned and non-stunned meat (Chart 27).

That said, 82% of respondents expressed confidence that their current retailer met their Halal requirements (Chart 28). This would suggest that much of the onus for meeting Halal requirements is being divested to the butcher and, arguably, if the retailer took steps to preserve or promote their Halal credibility, consumers would be more likely to endorse them accordingly.

An analysis of the drivers of satisfaction (as expressed by mean scores on a scale of 1 to 10 with very good being 10) showed that quality of the meat sold followed closely by the level of assurance (in the form of a certificate or accreditation logo) ranked highest (Chart 29).

Most Muslim consumers are to some degree happy with the availability of Halal meat in the UK (Chart 30).

HALAL CERTIFICATION

Recognition of the logos of Halal certification bodies was generally low (Chart 31). That of the Halal Food Authority (HFA) was the most recognised logo (by 37% of respondents). Further aspects of the research showed it to be fairly important rather than very important.

Chart 29
Drivers of satisfaction of meat butcher/supermarket/supplier

Chart 30
Levels of satisfaction of availability of meat and Halal meat in the UK

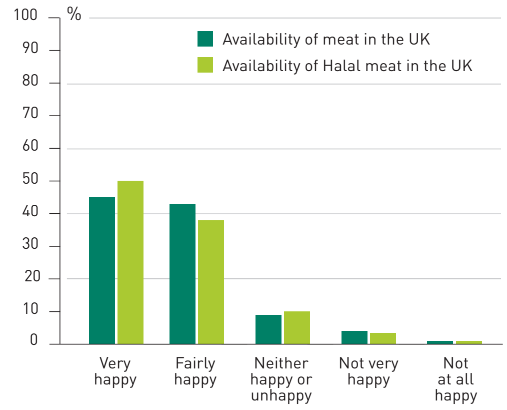


Chart 31
Recognition of accreditation logos

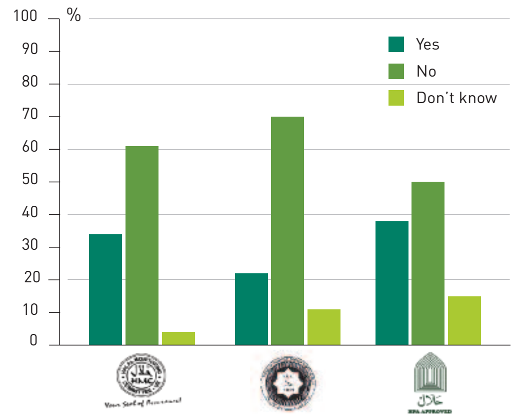


Chart 32
Attitudes to eating out

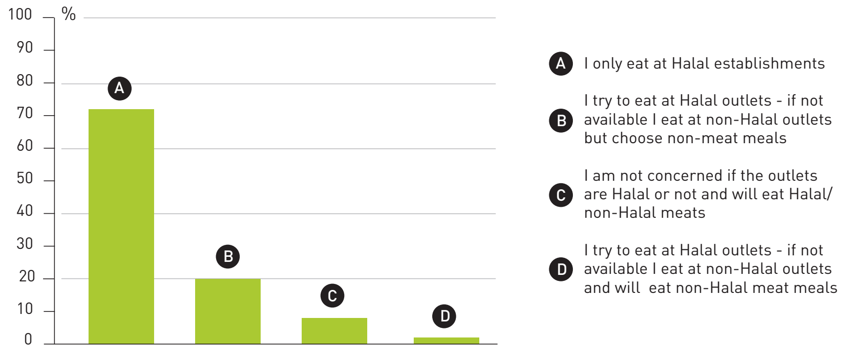
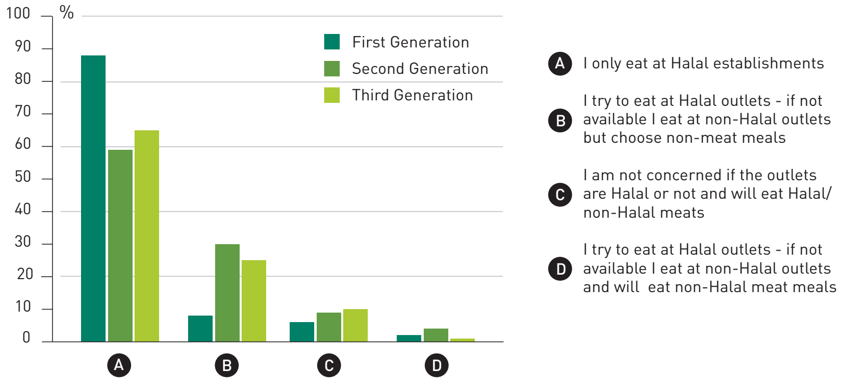


Chart 33
Attitudes to eating out by generation



EATING OUT

When eating out, 70% of Muslim consumers indicate they will only eat in Halal establishments (Chart 32). A further 18% of consumers will not eat meat if a Halal restaurant is not available. This response is relatively uniform across the generations (Chart 33) though second and third generation Muslims are more inclined than those of the first generation to eat at non-Halal establishments, albeit they are likely to choose non-meat meals.

IN CONCLUSION

Although this research establishes the views, knowledge and understanding of the Muslim community on issues such as certification organisations for Halal meat and the stunning of animals, these issues are by no means front-of-mind or spontaneously discussed by the Muslim community.

Our researchers had to probe to extract the views and observations contained in this report, indicating that for Muslims, buying Halal meat is a cultural norm and buying it from Halal suppliers is an accepted part of everyday, normal routine.

Opportunities to develop the market further may lie in appealing to younger Muslim consumers with a wider range of modern Halal products. There would appear to be a latent demand, for example, for convenience products such as ready meals and prepared sandwiches using Halal meats as well as a wider range of cuts.

Appendix 1

DESK RESEARCH
Prior to both the qualitative and quantitative research, the results of which are contained in this report, an intensive period of thorough desk research took place. The findings of that desk research can be presented under three main headings:

- Background to Halal meat in the UK
- Overview of the Muslim community in the UK
- Profiles of individual Muslim communities by ethnicity

HALAL MEAT IN THE UK
Muslim dietary rules are set out in the Koran, which lays down regulations relating specifically to meat consumption and what constitutes the meat to be Halal – or lawful. Meat becomes Halal only when the animal is slaughtered according to religious regulation. However, ambiguities on authentic slaughtering procedures have arisen as a result of Koranic guidelines being interpreted differently.

Muslims view the Koran, believing it to be the word of God, as the primary source of Islamic law. However, various schools of thought have emerged in different parts of the Islamic world, each interpreting the Koran in their own way, according to their geographical location. It is this which can sometimes lead to differences in opinion within Islam on the matter of the correct method of slaughter.

Leading a Halal lifestyle in the UK
Halal, of course, does not apply only to rules relating to food and alcohol but equally to matters of business, finance and indeed lifestyle in general. Many practising Muslims wish to ensure every aspect of their lifestyle is conducted in a manner which is Halal, i.e. permissible within Islam.

This has an impact on, for example, those mainstream fast food restaurant chains which have trialled Halal meat products in stores where there is a local demand for Halal products. The restaurant chains concerned have on the one hand attempted to reassure their non-Muslim customers that they are still adhering to animal welfare legislation while at the same time convincing their Muslim clientele that the meat and poultry they serve really is Halal.

Despite reassurances by the companies concerned that their menu items really are Halal, many Muslims have questioned this. Some argue that any environment which serves non-Halal meat, pork or alcohol must be avoided by Muslims since the environment itself is not Halal. Debates on internet forums also suggest there is some confusion among certain sections of the Muslim community about Halal slaughter methods. Such use of internet forums and interest in fast food chains suggests the confusion is likely to be among the younger generation of Muslims, and it is possible that this is fuelled by debate about the varying slaughter methods advocated by the different certification agencies.

Halal Meat Certification
Four UK organisations were identified during this research, all of which claim to monitor, inspect and certify Halal food and meat products. However, the organisations appear to be working in isolation, with each offering its own specific certification. This is not dissimilar to other sectors of the Muslim community, where it is often difficult to identify one organisation as the 'official' voice of Muslims.

The five UK organisations are:

Halal Food Authority (HFA)
www.halalfoodauthority.co.uk

HFA was established in 1994 as a voluntary, 'not for profit' organisation. It has a large web presence and claims to have introduced a unique system of identifying Halal meat from non-halal by tagging for authenticity of Halal on the carcasees, soon after slaughter at abattoirs.

The HFA position is that monitored stunning before slaughter is permissible. It encourages the hand-slaughtering method but says that mechanical slaughtering can be acceptable where the process of slaughtering is controlled by an adequate number of licensed Muslim slaughtermen.

Halal Monitoring Committee
www.halalmc.co.uk

Established in 2003, HMC aims to regulate and at every point inspect Halal products from the sources to the consumer. Its website claims an accessible database of HMC-certified butchers, restaurants and takeaways in Britain.

HMC has a blanket policy disallowing stunning in any form.

All Things Halal
www.athalal.com

All Things Halal certifies food products and food establishments, and claims to hold the largest up-to-date Halal food company information online.

No information is available about preferred slaughter methods.

The Muslim Food Board (UK)
www.tmfb.net

The Muslim Food Board (UK) claims to offer consultancy and research as well as authentication of products for Halaal (its spelling) consumption. Information on its website does not set out its preferred method of slaughter.

The European Halal Development Agency (EHDA)
www.ehda.co.uk
The EHDA claims to have produced an advanced European Halal Standard (EHS), compiled by leading technical and religious experts, to ensure all areas of Halal certification and auditing are covered from farm to plate and to deliver 100% Halal Assurance to the Muslim consumer. This standard is said to reflect British EN45011 requirements.

Internationally, there appears to be two key bodies:

The World Halal Council (WHC)
The WHC was established in 1999 as a federation of Halal certifying bodies worldwide with the aim to standardise the Halal certification and accreditation process among member organisations representing different countries and nationalities worldwide.

European Association of Halal Certifiers (AHC)
www.ahc-europe.org
This is an Islamic, independent, non-profit and non-governmental (NGO) institution with members from Belgium, Bosnia, France, Germany, Spain, the Netherlands, Turkey and the UK. It aims to create co-operation and facilitate activities amongst its member organisations and to be the referential institution for Halal affairs in Europe.

OVERVIEW OF THE MUSLIM COMMUNITY IN THE UK

Most of the body of research that currently exists about the Muslim community in the UK relates solely to the Pakistani and Bangladeshi communities, as these are the largest and best established of the Muslim groups. This is particularly true of any research conducted before the 2001 Census. In addition, given that Pakistanis and Bangladeshis account for 59% of the UK Muslim population, their profiles tend to drive the overall figures on the Muslim community.

For the purposes of this research, we have tried to unpick this where we can and have specifically referred to other Muslim groups where information relating to the smaller Muslim communities is available.

Population Size and Profile – 2001 Census
The 2001 Census found that Muslims were the second largest religious group in Britain, after Christians, with a population of 1.6 million, comprising 3% of the total population.

The profile of the Muslim population at that time was as shown below. The table shows that around three-quarters of British Muslims were from a South Asian background in 2001.

Origins of UK Muslims	% of Muslim Population	Nos.
Total Muslim Population	**100**	**1,591,000**
South Asian origin	74	1,172,886
- Indian	- 8	- 132,566
- Pakistani	- 43	- 686,179
- Bangladeshi	- 16	- 261,380
- Other Asian	- 6	- 92,761
White British origin	4	63,891
Other White origin *(Turkish, Cypriot, Arab & Eastern European)*	7	117,713
Black origin *(predominantly of Black African origin e.g. Nigeria, Somalia)*	7	107,431
Mixed origin	4	65,592
Chinese/other	4	60,471

Later Population Estimates – Labour Force Survey
The earliest suitable faith population estimates using the Labour Force Survey (LFS) date from 2004. While there are several methodological reasons why LFS data should not be directly compared with Census data, it is nevertheless useful to review these later figures.

Estimates based on LFS data suggest that the total Muslim population increased by half a million people (or 30%) between the third quarter of 2004 and the same period in 2008, to a total of 2.4 million. The LFS estimates that the total number of Muslims in Great Britain has increased steadily between 2004 and 2008, as follows:

Number of Muslims in Britain: Jul-Sept 2004 to 2008	Population nos (thousands)	% increase year on year
2004	1,870	n/a
2005	2,017	+7.9
2006	2,142	+6.2
2007	2,327	+8.6
2008	2,422	+4.1

The profile produced by the LFS in 2007-8 is similar to that of the 2001 Census, in that the Pakistani population remains by far the largest group within the Muslim community. Bangladeshis and other South Asians account for a considerable proportion of British Muslims in the LFS as they did in the 2001 Census. However, the LFS data shows a relatively high proportion of 'Other' ethnic groups within the Muslim population.

Origins of GB Muslims: July 2007 to June 2008	% of Muslim Population	Nos (thousands)
Total Muslim Population	100	2,379
British	- 4	- 95
Other White	- 4	- 97
Indian	- 8	- 189
Pakistani	- 40	- 953
Bangladeshi	-14	- 335
Other Asian	- 6	- 131
Black African	- 7	- 170
Other Black	- 1	- 17
White and Asian	- 1	- 23
Other Mixed	- 1	- 21
White and Black Caribbean	-	*
White and Black African	-	*
Black Caribbean	-	*
Chinese	-	*
Other	- 14	- 339

Population Distribution – 2001 Census figures
The highest areas of population concentration in 2001 – by absolute numbers and by percentage of population - are shown below.

Muslim Areas of Concentration	Number of People
1. Birmingham	140,017
2. Bradford	75,201
3. Tower Hamlets	71,383
4. Newham	59,290
5. Kirklees	39,323
6. Manchester	35,825
7. Waltham Forest	32,904
8. Brent	32,301
9. Ealing	31,028
10. Leicester	30,875

Muslim Areas of Concentration	% of Population
1. Tower Hamlets	36.40%
2. Newham	24.31%
3. Blackburn with Darwen	19.40%
4. Bradford	16.08%
5. Waltham Forest	15.07%
6. Luton	14.62%
7. Birmingham	14.33%
8. Hackney	13.76%
9. Pendle	13.43%
10. Slough	13.35%

Age Distribution – 2001 Census and 2008 LFS figures
Muslims had the youngest age profile of all the religious groups in Great Britain in 2001. About a third of Muslims (34%) were under 16 years of age in 2001, compared to 18% of Christians who fell within the same age bracket.

Age Group	Muslim %	Christian %	Sikh %	Hindu %
0-15	34	18	25	21
16-34	37	22	35	33
35-64	25	41	34	39
65 and over	4	19	6	7
TOTAL	100	100	100	100

Age Group	Buddhist%	Jewish %	Other %
0-15	12	17	10
16-34	34	22	32
35-64	49	39	49
65 and over	5	22	9
TOTAL	100	100	100

The LFS conducted between July and September 2008 produced very similar figures for the Muslim population (based on an estimated total population size of 2.42 million).

Age Group	Muslim %
0-15	33
16-34	37
35-64	27
65 and over	4
TOTAL	**100**

PROFILES OF INDIVIDUAL MUSLIM COMMUNITIES
The following tables are based on the 2001 Census figures

Afghans

Total Afghan Population in the UK
14,876 people living in the UK recorded their place of birth as Afghanistan in the 2001 census
10,526 or 70.78% are Muslims

Age Group	Population Size	% of Afghans
0 to 14	3,036	20%
15 to 44	10,262	69%
45 to 65	1,174	8%
65 and over	404	3%

Afghan Areas of Concentration	No. of People
1. Ealing	2,459
2. Hounslow	1,357
3. Brent	1,129
4. Harrow	1,021
5. West Midlands	1,019
6. Barnet	666
7. Hillingdon	551
8. Richmond Upon Thames	405
9. Greater Manchester	390
10. Newham	319

Community sources now estimate that there are between 40,000 and 50,000 Afghans in the UK. Most who have come to the UK have been refugees who came in the late 1990s following the emergence of the Taliban regime in 1996 and the USA air strikes in 1998. Even before the recent conflict, around 800,000 had lost their homes as a result of drought and the political situation.

Many people who came to the UK were from the professional classes and held moderate political views. With the easing of the political situation in Afghanistan, the UK government has introduced stricter controls on asylum applications from Afghans, a package of assistance for those people who choose to go home voluntarily, as well as enforced returns for failed asylum seekers. Despite this, however, Afghanistan was the fifth highest country of origin for asylum seekers in 2005.

Bangladeshis

Total Bangladeshi Population in the UK	283,063

Age Group	Population Size	% of Bangladeshis
0 to 15	107,945	38%
16 to 24	55,191	20%
25 to 49	90,688	32%
50 to 59	10,540	4%
60 to 64	7,398	3%
65 to 72	7,391	3%
75 and over	1,677	1%

Bangladeshi Areas of Concentration	No. of People
1. Tower Hamlets	65,558
2. Newham	21,462
3. Birmingham	20,812
4. Camden	12,574
5. Oldham	9,821
6. Luton	7,633
7. Hackney	5,963
8. Westminster	5,003
9. Bradford	4,957
10. Islington	4,237

Bangladeshi Areas of Concentration	% of Population
1. Tower Hamlets	33.43%
2. Newham	8.80%
3. Camden	6.35%
4. Oldham	4.52%
5. Luton	4.14%
6. City of London	3.84%
7. Hackney	2.94%
8. Westminster	2.76%
9. Islington	2.41%
10. Birmingham	2.13%

Bangladeshi migration was slightly different from Indian or Pakistani migration. While many Bangladeshi men came to Britain in the mid-1960s, they waited longer to bring their families to Britain. The result was that, while some older men have been in Britain for twenty or thirty years, their families may have arrived relatively recently, with the peak phase of migration in the 1980s. Most Bangladeshi people in Britain come from the rural area of Sylhet in North East Bangladesh. Their family backgrounds were in landholding or farming. Ninety two per cent of Bangladeshi people in Britain are Muslims.

According to research, Bangladeshi people had the lowest levels of fluency in English of all the ethnic groups surveyed, with 24% claiming it as their main language. Bengali is the national language of Bangladesh and is the main language read among non-English speakers. The most common spoken language is Sylheti, a dialect of Bengali spoken in the Sylhet region and which is not written.

Bangladeshis are one of the most deprived communities in socio-economic terms with over 73% of the population in the DE socio–economic group. The employment rate of the community as a whole is 39%, the lowest amongst all the established ethnic minority groups.

Bangladeshis have the largest average household size in Great Britain at 4.46 people and households are more likely to contain both dependent children and extended families.

Egyptians

Total Egyptian Population in the UK
24,705 people born in Egypt in 2001 census
8,317 or 33.67% were Muslims

Age Group	Population Size	% of Egyptians
0 to 14	1,542	6%
15 to 44	6,417	26%
45 to 65	11,031	45%
65 and over	5,715	23%

Egyptian Areas of Concentration	No. of People
1. Westminster	877
2. Surrey	760
3. Kensington and Chelsea	758
4. Greater Manchester	719
5. West Midlands	710
6. Ealing	674
7. Barnet	639
8. Brent	634
9. Hampshire	620
10. Kent	588

Indians

Total Gujarati Population in the UK
No official figures but estimated to be 300-350,000
13% of Indians identified themselves as Muslims in 2001

Country of Birth	India	Kenya	Tanzania	Uganda
2001 UK Population	1,053,411	129,635	32,635	55,207
1991 UK Population	-	112,422	-	-
% Increase since 1991	-	15%	-	-
Male : Female Ratio	50 : 50	50 : 50	51 : 49	51 : 49
Total Muslims	62,430	14,534	7,740	7,751
% Muslims	13.69%	11.21%	23.72%	14.04%

People of Indian origin in the UK mainly came from the regions of the Punjab and Gujarat, with migration reaching a peak in the late 1960s and early 1970s. Although there are high numbers of Indian Muslims in India, the majority of those who migrated to the UK were Hindu and Sikh. Indian Muslims in the UK mainly hail from Gujarat or East Africa (i.e. they or their families first migrated from the Indian sub-continent to East Africa, mainly Uganda and Kenya). This second group is sometimes referred to as 'East African Asians' and they tend to have a more urban and middle class background.

It is also worth bearing in mind that religious affiliation within the Indian community is very diverse, thus it is difficult to provide an accurate picture of the Indian Muslim community.

By the early 1990s, Asians (mostly Gujaratis or East African Asians) were thought to own over 90% of the independent grocers within the M25 and 65% nationally. These figures are now falling as second and third generations appear to have little enthusiasm for carrying on with the family business and there is increased competition from larger supermarkets. Anecdotal evidence suggests that independent pharmacies are now the preferred retail option within the Indian community.

Iranians

Total Iranian Population in the UK
42,495 people were registered as having been born in Iran in the 2001 Census - **25,722 or 60.53% were Muslims**

NB: Iran was the most popular country of origin for asylum seekers in 2004 and 2005, therefore many community leaders believe the size of Iranian community is much larger.

Age Group	Population Size	% of Iranians
0 to 14	2,867	7%
15 to 44	24,807	58%
45 to 65	11,816	28%
65 and over	3,005	7%

Iranian Areas of Concentration	No. of People
1. Barnet	3,039
2. Greater Manchester	2,399
3. Ealing	2,225
4. Westminster	1,616
5. Kensington and Chelsea	1,408
6. West Midlands	1,361
7. Brent	1,276
8. Camden	1,182
9. Tyne & Wear	1,150
10. Surrey	1,111

One recent study found that the Iranian community was the seventh most economically successful ethnic group in the country.

Iraqis

Total Iraqi Population in the UK
32,231 people registered as having been born in Iraq
21,961 or 68.13% were Muslims

Age Group	Population Size	% of Iraqis
0 to 14	3,115	10%
15 to 44	18,990	59%
45 to 65	7,764	24%
65 and over	2,362	7%

Iraqi Areas of Concentration	No. of People
1. Ealing	3,043
2. Westminster	2,026
3. West Midlands	1,865
4. Brent	1742
5. Greater Manchester	1,614
6. West Yorkshire	1,114
7. Kensington and Chelsea	1,007
8. Barnet	932
9. Kingston upon Thames	839
10. Hammersmith and Fulham	784

Pakistanis

Total Pakistani Population in the UK	747,285

Age Group	Population Size	% of Pakistanis
0 to 14	19,292	6%
15 to 44	191,956	60%
45 to 65	82,565	26%
65 and over	27,371	9%

Pakistani Areas of Concentration	% of Population
1. Bradford	14.54%
2. Pendle	13.42%
3. Slough	12.06%
4. Birmingham	10.65%
5. Luton	9.23%
6. Blackburn with Darwen	8.74%
7. Newham	8.46%
8. Waltham Forest	7.92%
9. Rochdale	7.71%
10. Kirklees	6.83%

Pakistani people came to the UK mainly from rural areas in Azad, Kashmir and Mirpur. The first generation were a fairly homogeneous population, typically holding few formal qualifications. Just under one in five migrants who arrived aged 16 or older had at least A level equivalent qualifications, while around two thirds had no formal qualifications. Many Pakistani people in Britain worked in mills and factories when they first arrived, and the community has been seriously affected by the decline of manufacturing industry in those areas. Just like the Bangladeshi community, 92% of Pakistanis in Britain are Muslims.

According to research conducted in 1994, over half of Pakistani people were confident reading and understanding English. Urdu is the national language of Pakistan and the most common language read among older Pakistanis. However, most Pakistanis speak Urdu and Punjabi/Mirpuri as Punjabi is the regional language in the area of Pakistan from which most British Pakistanis originate (Mirpuri is a local dialect of Punjabi). Indeed, those who have had less formal education may speak only Punjabi/Mirpuri and this is the case for some older women.

The Pakistani community is one of the most disadvantaged in the UK and suffers from high unemployment rates, poor housing conditions and related health problems. People are less likely to have academic qualifications. 40% of Pakistani women and 27% of Pakistani men had no qualifications in 2001. One in six (16%) of the population was unemployed. The Pakistani extended family often lives together and so families may be large and homes overcrowded.

In 2001, one in seven (14%) Pakistanis of working age were in a managerial or professional group but a larger proportion (23%) were in a routine or manual occupational group, the reverse of the pattern observed for most ethnic groups. There was also a significant gender difference, with Pakistani men of working age almost twice as likely as Pakistani women to be in a managerial or professional occupational group. The relatively small proportion of women classified to any occupational group reflected the large proportion of Pakistani women of working age who were economically inactive. More than two-fifths (44%) of Pakistani women of working age were classified as never having worked or being long-term unemployed.

Popular forms of employment for first and second generation Pakistanis are independent retailers or caterers serving the community, garment factories and minicab businesses. Muslim men are six times more likely than Christians or those with no religion to be taxi drivers. Self-employment is still very popular within the community. Around a fifth (22%) of Pakistani people in employment are self-employed.

Somalis

Total Somali Population in the UK
43,532 Somali born people were recorded in 2001 Census

Age Group	Population Size	% of Somali
0 to 14	12,196	28%
15 to 44	26,450	61%
45 to 65	3,349	8%
65 and over	1,537	4%

Somali Areas of Concentration	No. of People
1. Newham	3,163
2. Haringey	2,194
3. Camden	1,904
4. Greater Manchester	1,367
5. South Yorkshire	1,314
6. Islington	1,226
7. Hammersmith and Fulham	1,197
8. West Midlands	1,012
9. Lambeth	982
10. Southwark	981

The Somali community has been in the UK since the turn of the 20th century. Britain has historically been closely connected to Somalia through the colonisation of Somaliland in 1897. This led to seamen from the cities and rural areas of Somaliland migrating to the UK to work and live in the dockland areas of London, Cardiff and Liverpool in the early 20th century. Due to a shortage of jobs in this sector from the 1960s onwards, many Somali seamen went to work in the steel industry in the north of England as it expanded and they were later joined by their wives.

However, the latest phase of migration from Somalia has occurred as a result of the civil war period of 1980s and 1990s. Initially, these migrants were mainly women and children seeking asylum, but more men have since arrived. Somalis who have applied for asylum in the UK have tended to live in cities where they already had relatives e.g. London, Manchester, Sheffield and Birmingham. Others have lived in other cities and towns around the UK while awaiting their case decisions.

The precise socio-economic profile is not known, but this is likely to be a predominantly DE audience. Research shows that many are from professional and business backgrounds, yet there is little evidence to indicate the gradual integration of Somalis into the British labour force. There is more evidence of occupational and social downgrading.

Through restrictions on birth control and a cultural emphasis on female fertility, Somali Muslim families tend to be large - to have six or seven children is not unusual. New arrivals often have difficulty finding somewhere to live, and take advantage of norms of family or clan obligation to move in with relatives. This in turn can lead to overcrowding which in turn can result in ill health.

Turkish

Total Turkish Population in the UK
54,088 people born in Turkey living in UK today
40,397 or 74.7% are Muslims

Total Turkish Cypriot Population in the UK
78,000 people born in Cyprus living in UK today
17,949 or 23.11% are Muslims

These figures do not break down the number of Cypriots living in the UK who are of Greek or Turkish origin, although community leaders estimate the Greek : Turkish ratio to be 80:20.

Although there are no official figures, the total population who consider themselves to be of Turkish extraction is around 200,000 people.

Age Group	Population Size	% of Turkish born
0 to 14	6,010	11%
16 to 44	38,686	72%
45 to 64	7,733	14%
75 and over	1,659	3%

Age Group	Population Size	% of Cyprus born
0 to 14	4,148	5%
16 to 44	32,791	42%
45 to 64	27,995	36%
75 and over	12,738	16%

Turkish Areas of Concentration	No. of People
1. Haringey	8,589
2. Hackney	7,729
3. Enfield	6,176
4. Islington	3,123
5. Waltham Forest	1,730
6. Barnet	1,135
7. Croydon	931
8. Southwark	804
9. Hertfordshire	756
10 Lewisham	738

Cypriot Areas of Concentration	No. of People
1. Enfield	11,802
2. Haringey	6,036
3. Barnet	3,584
4. Islington	2,313
5. Hackney	2,283
6. Lewisham	1,941
7. Southwark	1,906
8. Waltham Forest	1,698
9. West Midlands	1,667
10. Hertfordshire	1,659

A survey of young Turks and Kurds carried out by the Joseph Rowntree Foundation in February 2005 found that most did not identify themselves with the broader Muslim community in the UK although, for some, religion was an important part of their ethnic identity.

Yemenis

Total Yemeni Population in the UK
12,500 people said their birth places were in Yemen
6,113 or 68.23% were Muslims

Age Group	Population Size	% of Yemenis
0 to 14	1,435	11%
15 to 44	6,967	56%
45 to 65	2,596	21%
65 and over	1,502	12%

Iraqi Areas of Concentration	No. of People
1. West Midlands	2,666
2. South Yorkshire	1,326
3. Merseyside	688
4. Cardiff	274
5. Barnet	273
6. Greater Manchester	235
7. Brent	231
8. Harrow	136
9. Westminster	128
10. Newport	125

EBLEX HALAL STEERING GROUP
Terms of Reference

Overall Aim

To ensure that EBLEX activity in the Halal sector is appropriate and relevant to the sector based on sound science and good understanding. This will be best achieved by ensuring that all parties involved in the sector's opinions are taken into account, issues are properly understood and the correct advice is passed on to the EBLEX board and staff. The highest quality information will always be used, duplication will be avoided and the advice will always take account of the conditions EBLEX operates to.

Role of the Group

- To identify gaps in knowledge and:
  - to determine whether the gap is sufficiently important to need filling
  - to determine if EBLEX resources should be used to research the gap
- To recommend to EBLEX areas of activity that will benefit the whole sector and be compatible with the overarching aims of EBLEX
- To identify opportunities and encourage co-operation in the Halal red meat sector
- To identify key issues which are obstacles to success and development in the Halal red meat sector

Members of the EBLEX Halal Steering Group:

Simon Warren, chairman (EBLEX sector board member)
Naved Syed (Janan Meat)
Ryan Williams (EBLEX sector board member)
Adam Quinney (NFU)
Rizvan Khalid (Euro Quality Lambs)
Norman Bagley (Association of Independent Meat Suppliers)
David Mainon (Asda)
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