

**From the Slaughterhouse
to the Consumer
Transparency and Information
in the Distribution of
Halal and Kosher Meat**



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Transparency and Information in the Distribution of Halal and Kosher Meat

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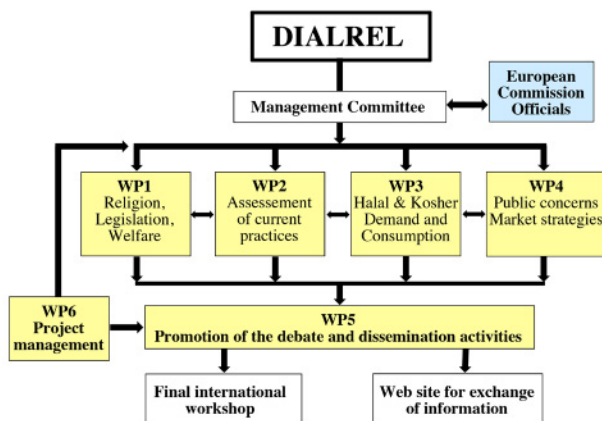
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PREFACE

The main aims of the DIALREL project (<<http://www.dialrel.eu>>) are to explore the conditions for promoting a dialogue between interested parties and stakeholders and facilitating the adoption of good religious slaughter practices. The additional aim is to review and propose a mechanism for implementation and monitoring of good practices.

A work plan consisting of six work packages has been developed (WP1 to WP6). Implementation was achieved through consultations, meetings, exchanging and reviewing of information and networking. Dissemination activities involve internet site(s) for networking and organised workshops that provide a platform for debate, exchange of information and consensus building.



Graphical presentation of the components showing their interdependencies.

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EXECUTIVE SUMMARY

This report provides an exploratory overview of the markets for halal and kosher meat in the United Kingdom, France, Germany, Norway and Turkey. The report draws on the concept of *qualification* to explore the ways in which meat becomes halal and kosher through processes of certification and retailing. The report starts off with an extended study of market developments in the United Kingdom, where we find a rapidly expanding and diversifying halal market emerging alongside the practices of certification bodies and retailers, and a diversifying kosher market. There is little trust and transparency in the halal market and consumers generally only display trust in the relations with neighbourhood butchers. While the kosher market is also undergoing a process of change, most kosher meat is also generally sold at the neighbourhood level. Although not centralised, the kosher market is more codified and controlled than the halal market and there is much less controversy about the *qualification* of products than there is in the halal market.

In France, we find the most extended kosher market and the largest Muslim population in Europe; both meat markets are significant. Kosher and halal products have become increasingly visible over the last decade, but certification has only recently emerged as an issue. Unlike the UK, we see that the halal market in France is mostly based on auto-‘certification’ procedures and that there are few independent certifiers. Although halal products have become increasingly available in mainstream outlets, much like the UK most halal meat is still sold through dedicated independent retailers. Kosher certification is mostly centralised in France, but as in the halal market, kosher meat is still mainly distributed through local butcheries and delicatessen; in both markets there are concerns over fraudulent practices and the process of qualification is not always clear. In Germany, we find a very small market for kosher meat and a young but expanding halal meat market experiencing some of the trends and debates evident in the UK and French markets. However, while the demand for halal certification is increasing, we see that the debates and controversies around transparency and trust are not as evident as they are in the UK and France; concerns have only recently started to emerge as the market has started to expand. Kosher products are also available in mainstream outlets in Germany, but certification is not really an issue and most Jewish consumers also prefer to buy from their local butcher.

In Norway, there have been positive signs of dialogue and debate between the community and the authorities in relation to both the halal and kosher meat markets. The kosher market is import only, as shechita is banned, but in the halal market we observe an ongoing debate that has facilitated high levels of consumer trust and market transparency. In the final case study, Turkey, we find a declining kosher market/ Jewish population and a mainstream meat market based on implicit Islamic practices. Although certification is not really an issue – as most meat is taken at face value to be halal – we see that things

are starting to change as the global markets provide increasing opportunities for export to the world's major halal markets. The final chapter provides a comparative summary of the report's main findings.

METHODOLOGY AND AIMS OF WP4.3

METHODOLOGY

The task was developed in the following ways.

- A brief review of the overall structure of the meat markets and characteristics of distribution channels for meat from religious slaughter.
- Research on certification organisations and significant retailers.
- Cases studies for each Halal and Kosher focusing on certification organisations that bring together religious authorities, market actors and consumers and interviews with strategic selected key informants.
- Research and interviews in retail points (supermarkets, butchers, market vendors.
- Comparative discussion on the question of qualification, trust and diversification.

AIMS

1. To address the role of halal/shechita products in various meat markets, in particular the degrees of transparency in different distribution channels.
2. To identify options for improving the provision of information about religious slaughter (labelling, educational materials and others) directed to consumers and non-consumers.
3. To characterise, if possible quantify, the role of various distribution channels (integrated chains/supermarkets vs. local butchers vs. alternative chains), differences between distribution channels for halal and shechita products.
4. To explore and discuss degrees of transparency in different distribution channels, both regarding the possibilities for fraud, precise information to consumers (stunning being one issue), and information for non-consumers (e.g. mixing meat from halal and conventional slaughter).
5. To identify relevant forms of information to consumers and non-consumers in different distribution systems for halal/shechita products (pre-packaged and labelled vs. other written information vs. personal exchange)

NB: Some of the aims where slightly modified along the way, notably:

Aims 1 and 5:

Because of the lack of available and coherent data with regards to the production and commercialisation of meat emerging from religious slaughter, it has not been possible to achieve a complete picture of the markets and distribution channels (1), nor of the different forms of information made available (2). Although the report is based on best available data, it nonetheless highlights the fact that these meat markets – especially the halal market – have become significant enough to require the acquisition of regular data and statistics in different national contexts.

Aim 2

In order to achieve the aim of identifying and improving the provision of information about religious slaughter, better transparency would have been needed at the heart of many of the control and certification organisations studied, not least about their own procedures. In this sense, the report does not improve information in the manner intended, though it does indicate a problem to be resolved through ongoing dialogue. In order to be able to provide better forms of information adapted to the needs of the actors involved, further research is needed.

INTRODUCTION

This comparative report provides an exploratory overview of the distribution chains for kosher and halal meat in the United Kingdom, France, Germany, Norway and Turkey. Despite the differences between national contexts, the uneven availability of information, and the lack of coherently gathered data at national levels it is possible to affirm that over the last 10 years a perceptible change has affected the market for meat products across Europe, targeting consumers from religious minorities. In different ways, small markets of halal and kosher meat have developed into highly recognisable markets, to lesser or greater extents in different contexts, bringing together and dividing numerous interests. It is in this context that certification has become a marketing issue as well as a matter of religious concern. This report thus focuses, when possible, on certification as the most extended mechanism of *qualification*¹ for products as ‘halal’ and ‘kosher’, and on its incidence in different production and distribution channels in relation to problems of transparency and consumer trust.

The halal meat market in particular has experienced an unprecedented increase in demand. This is not only due to increases in the Muslim population in most of the EU countries studied, but also because of the creation of a market aligned with changing patterns of consumer behaviour. Muslim people are consuming more halal meat because of a number of interrelated factors, including, most prominently, identity reinforcement in the face of global politics and the increase in meat consumption characteristic of vertical mobility in changes in social status.² The global market for halal food is estimated to be worth around \$547 billion a year; the European market is estimated to be worth around \$77 billion.³ Although the expansion of kosher markets is perceptibly smaller, even shrinking in some contexts, it is far from being extinct; Mintel (2009) claim that U.S. kosher food market increased in value by 64% in the five years to 2008 to around \$12.5bn; the European market is estimated to be worth around £4bn. While the will of Jewish communities and authorities is preserving the place of kosher food in the Jewish identity, kosher is also acquiring the quality of an ‘ethnic food’ amongst non Jewish consumers. It could be the case, as reported in the US, that a number of kosher consumers now ‘purchase food quality, not religion’; this process also occurs in relation to halal meat free foods, which attract vegetarians because of their strict exclusion of meat derived gelatine. For a large

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1. Callon, M., Méadel, C. and Rabeharisoa, V. (2002) The economy of qualities, *Economy and Society*, 31(2), pp. 194–217, see below for a discussion of this conceptual apparatus.
 2. See Bergeaud-Blackler (2004) ‘Social definitions of halal quality: the case of Maghrebi Muslims in France,’ in: M. Harvey, A. McMeekin and A. Warde (eds) *Qualities of Food*.
 3. See the report by the Malaysian Ministry of International Trade and Industry, <http://portaluat.miti.gov.my/cms/documentstorage/com.tms.cms.document.Document_81be2577-c0a81573-11c011c0-6bdb548f/chapter14_25.pdf>.

section of US consumers, it appears that kosher is now associated with healthier and safer foods independent of their religious beliefs (Mintel, 2009; GAIN, 2007).⁴ Reports on the halal market in the UK support this trend by highlighting the difference between the estimated number of Muslims living in the UK (3 million) and the estimated number of halal consumers (6 million) (Euromonitor, 2008). 'Market intelligence' organisations attract attention to these expanding markets and to the profitable possibilities they open,⁵ noting however that marketing towards non Muslim consumers involves different strategies.

The rapid increase in consumer demand has been accompanied by a proliferation of certification bodies, often with contradictory views and practices. Though many certification bodies are non profit organisations and some are registered as charities (in the UK), they are increasingly using arguments about market opportunities alongside religious arguments in order to stress the importance of trust in the certification process. Economic interests have now a central role, particularly in the case of Halal, and one could argue that the 2009 European Parliament derogation on religious slaughtering does not only confirm the protection of religious practices, but also preserves an important market.⁶ Certification is now increasingly necessary as a means of entry into expanding and emerging markets. At the end of the 4th World Halal Forum in 2009, a resolution was passed for the continuing support for the development – through the International Halal Integrity Alliance – of a single unified halal standard.⁷

The urge for better or stricter certification has been also fuelled by 'scandals' which have been widely publicized in some countries, more commonly for halal. Numerous forums discuss whether or not consumers should trust the halal labelled meat that is now sold in supermarkets and fast food restaurants like 'Kentucky Fried Chicken'⁸ (in the UK and France) and 'Quick Burger'⁹ (in France).¹⁰ Consumer organisations, both for halal and kosher, consistently highlight examples of 'fraud' (e.g. halal products including traces of pork meat) and warn against the emergence of 'fake' halal products and false certification schemes.¹¹ Novel certifying bodies have emerged with stated aims to solve the problem of whether these commercialised forms of halal meat are really halal.¹² However, the relatively unclear and complex certification procedures that have emerged have in turn facilitated a failure of trust on an international scale. But the problem of qualification and trust is far from being exclusively related to authentic certification procedures.

4. See also Mintel Press release 27 September 2005: 'Kosher Food Attracts Non-Jewish Consumers': 'The kosher segment is facing a major battle due to the shrinking U.S. Jewish population. This decline has been due to intermarriage, low-birth rates, and the aging population. However, in addition to the increase in health-conscious consumers, the growing Muslim population is anticipated to rejuvenate the kosher market since the dietary restrictions for Muslims are similar to those for kosher consumers.'

5. Spotlighting Europe's Muslim consumers, Euromonitor International, Sept. 2008, French Kosher Report, USDA Foreign Agricultural Service – GAIN (Global Agricultural Information Network) – July, 2009.

6. Economic actors have become a full part of the discussion, as this note of the consumer information website A1-Fazah acknowledges: 'European parliamentarians have required the maintenance of the derogation regarding religious slaughtering; The question was at the heart of a latent conflict between animal welfare organisations, religious organisations, and the agro lobbies for whom halal is often a matter of survival.'

7. See <<http://www.worldhalalforum.org/main.html>>.

8. <<http://www.kfc.co.uk/about-kfc/halal>>.

9. <<http://news.bbc.co.uk/1/hi/8524056.stm>>.

10. It has been reported that Quick experienced a 30% increase in sales in its stores that went halal: <<http://halalfocus.net/2010/04/13/opinion-mainstream-brands-see-increased-sales-after-going-halal>>.

11. In 2003 the BBC programme Panorama claimed that Dutch companies were shipping 1,000 tonnes of 'fake' halal chicken into the UK every week, <<http://news.bbc.co.uk/1/hi/programmes/panorama/3035139.stm>>.

12. See below for the case study on the HMC

We see for instance in the UK, that different organisations also play with different degrees of acceptance in the definition of what is or not ‘truly’ halal – e.g. meat from previously stunned animals. In addition to the socio-political and economic contexts favouring market expansion and increased visibility for kosher and halal foods, concerns about animal welfare have also put practices of religious slaughtering front stage as a material and symbolic act with significant consequences.

This particular aspect of the controversy about religious slaughtering, both for halal and kosher, is marked the question of stunning.¹³ Though this problem can be framed in terms of a balance between the respect for religious freedom and a concern for animal welfare, stunning is also an economic problem that draws attention to the fact that ‘labelling’ is not merely a religious issue. Under current EU regulations, the qualification of an abattoir as halal or kosher will exempt it from the requirement of pre-stunning, even if the meat produced is distributed in the mainstream market without providing information regarding the slaughtering method.¹⁴ This poses problems on a least two counts: 1) from an animal welfare perspective, the qualification of meat as halal or kosher can become a way of avoiding stunning regulations; and 2) from a consumer perspective and wider economic point of view, this can be seen as a fraudulent practice to reduce costs. This is a difficult issue to settle; in order to avoid the stigmatisation of religious slaughtering, religious authorities resist the labelling of non stunned halal and kosher meat in the mainstream market, arguing that if this were required then all non-stunned should be labelled as such.¹⁵

Most European countries still do not provide a distinct count of animal slaughter using religious methods; as one informant from the meat import office in Norway argued: ‘a cow is a cow and a pig is a pig’. However, our report shows that in a multicultural context meat is not just an identifiable uniform ‘good’; it differentiates in distinct ‘products’ through a process of ‘qualification’. The attribution of distinguishing qualities starts at the abattoir and only ends at retailers or outlets where, as Bergeaud-Blackler has shown for halal, the product is placed on the appropriate counter of a trusted retailer and gains its full *quality* as halal. Halal and kosher meats gain trust and consumer loyalty – or not, as the case may be – through a chain of successive qualifications that involves the process of slaughtering and the reputations of wholesalers and retailers. In this context, certification bodies have become crucial players, but they too are struggling for status as trustworthy organisations.

It is clear that the growing interest in the differentiation of meat produce is not simply an issue for religious food culture; the debates extend to questions of what consumers prefer to eat (organic, vegetarian, free range and even fair trade products) and the role of food in identity production. The intensification of problems concerning the certification of halal and kosher meat is thus symptomatic of a wider concern amongst many consumers about what they put in their shopping baskets. This trend intensifies the complexity of processes of co-construction of new markets for halal and kosher produced in interactions between consumers, certification organisations, and cultural, religious and economic in-

13. ‘Halal and Kosher slaughter “must end”’: recommendations of the Farm and Animal Welfare Council, <<http://news.bbc.co.uk/1/hi/uk/2977086.stm>>.

14. ‘Halal and kosher meat should not be slipped into food chain, says minister’, Monday 7 April 2008, <<http://www.independent.co.uk/news/uk/home-news/halal-and-kosher-meat-should-not-be-slipped-in-to-food-chain-says-minister-805396.html>>; in France: ‘Nous avons tous déjà mangé de la viande halal ou casher’ (We have all already eaten halal or kosher meat), *Le Figaro*, 25 February 2010.

15. An argument put forward by Shechita UK, <<http://www.shechitauk.org>>.

terests. With this report we contribute to furthering study on this particular pattern of consumption; if dialogue about halal and kosher slaughtering practices is to be enhanced, it is clear that better knowledge of the actual shape and nature of these markets is required.

UNDERSTANDING MARKETS

In work exploring how markets function, Callon et al (2002) raise the issue of the qualification of goods, how qualities are ‘attributed, stabilized, objectified and arranged’. They see this as far from a straightforward process, and one that is usually given little attention. In order to open up this process, Callon and his colleagues define two key terms – the good and the product:

‘Talking of a good means emphasizing the fact that the aim of any economic activity is to satisfy needs (what is good, sought after, wanted)... The concept of an economic good implies a degree of stabilization of the characteristics that are associated with it, which explain why it is in demand and why, being wanted as such, it is traded.’

Within the scope of this report, the *good* in question is meat and meat products labelled and sold as *halal* – or kosher – on the market.

‘A product, on the other hand, is an economic good seen from the point of view of its production, circulation and consumption. The concept (produttore: to bring forward) shows that it consists of a sequence of actions, a series of operations that transform it, move it and cause it to change hands, to cross a series of metamorphoses that end up putting it into a form judged useful by an economic agent who pays for it. During these transformations its characteristics change. The product is thus a process, whereas the good corresponds to a state, to a result or, more precisely, to a moment in that never-ending process.’

This report uses these insights to understand how goods become halal or kosher products in different contexts through different routes. It does so by:

- exploring how different certification bodies define halal and kosher in practice;
- examining processes of inspection and labelling;
- looking at how the organisations involved play with notions of authority and trust;
- and also how they label products and address consumer issues – as well as how consumers are responding to certification.

We also investigate the supply chains through which the certified products travel. We do this by examining the views of significant retailers. Here we cover:

- the extent of their business;
- the terms of choice of the certification scheme and processes;
- issues relating to consumer trust.

REPORT OUTLINE

Chapter 2 provides an extended case study of the United Kingdom, where the market for halal has expanded rapidly to generate debate and controversy over the *qualification* of products from stunned and non stunned meat as halal. There is little transparency in the market and consumers only display trust in face-to-face interactions with local neighbourhood butchers. Products *qualified* as halal from both stunned and non stunned meat have increasing visibility in the market, but supply chain integration is generally low. The kosher market in the UK is also undergoing distinct changes, though not to the same extent as the halal market. While this market also operates through neighbourhood retailers and butchers, there is less controversy around the qualification of products as kosher and the market is more controlled. While an increasing number of kosher products are available in mainstream outlets, they are often less visible because the debates are less controversial.

Chapter 3 looks at France, which has the most extended kosher market and the largest Muslim population in the EU; it also has an important meat market. In France, kosher and halal produce have gained increasing visibility over the last 5–10 years, but certification has only recently emerged as an issue. Most of the information about halal meat emerges through auto-‘certification’ and, compared to the extent of the market, there are very few independent certifiers. Kosher certification for meat is on the contrary mostly centralised. The question of the difference between stunning and non-stunning in animal slaughter is only starting to become a question amongst the public, certifiers, religious institutions and consumers. There is no consensus on the definition of halal and the procedures from the slaughter house to the consumer are not clear. In the case of shechita, though the religious rules do not provoke major disagreement within the community, and trust in kosher remains high, there are other issues that affect transparency, such as the concentration of certification. Halal meat has been integrated into mainstream outlets across France, but most halal meat is still distributed through individual dedicated retailers, much as it is in the UK. Kosher meat also remains distributed through local butcheries and delicatessen.

Chapter 4 looks at Germany. Here we find a very small market for kosher meat and a young but expanding halal meat market experiencing some of the trends and debates evident in the UK and French markets. Although kosher products are available in mainstream outlets in Germany, the certification of kosher meat is not really an issue and most Jewish consumers prefer to buy from their local butcher where trust remains high. The demand for halal certification is increasing in Germany, but debates and controversies around slaughter, transparency and trust are not at the same level as they are in the UK and France, though supermarkets and consumers are starting to voice some concerns. Chapter 5 provides a brief summary of the Norwegian market report for kosher and halal, which is appended in full (see Appendix 1). The Norwegian kosher market is small and totally dependent on exports, though relations with the authorities have improved. In the halal market there have been positive signs of dialogue and debate between the community and the meat industry and an ongoing debate has facilitated high levels of trust and transparency. Finally the report turns to Turkey, an associate member of the EU and a secular Muslim state. In this chapter, the report explores a declining kosher market and a mainstream meat market based on implicit Islamic practices. While the kosher market

is highly controlled and monitored as it is elsewhere, the mainstream market is starting to undergo a process of change as certification rises up the political agenda and increasing opportunities for export to the world's major halal markets emerge. The final chapter provides a comparative summary of the reports overall findings.

UNITED KINGDOM

This chapter provides an overview of the markets and supply chains for halal and kosher meat in the United Kingdom. The research for this chapter was conducted by Dr John Lever, Dr María Puig de la Bellacasa and Mr Marc Higgin at Cardiff University' it is based on interviews and conversations with key individuals at the Halal Food Authority, the Halal Monitoring Committee, Euro Quality Lambs, Shechita UK, ASDA, Tesco, two halal butchers, and two anonymous kosher butchers. Observations were also made at numerous project meetings and conferences.

SOCIO-ECONOMIC CONTEXT

The UK grocery and meat industry is vertically integrated and dominated by the four large retailers, Tesco, ASDA, Sainsburys and Morrisons. These retailers control more than two thirds of the market through narrow vertical supply chains that link agricultural producers with consumers.¹⁶ Although integration is starting to increase, the halal and kosher meat markets are still dominated by fragmented supply chains and by wide networks of independent processors and retailers at the neighbourhood level.

In the UK 167, 4 thousand of tec. (carcass tons) of cows and 101, 8 thousand tec. of young bovine were slaughtered in 2008. After France and Italy, the UK is the largest consumer of bovine meat in the EU at 1.168,3 thousand tec. The UK imports more than three times more bovine meat than it produces and exports. However, the UK is the primary slaughterer of poultry in the EU after France at 1.259 thousand tec. in 2008, and the first in consumption too, at 1.843 thousand tec. in the same year. It is also the number one

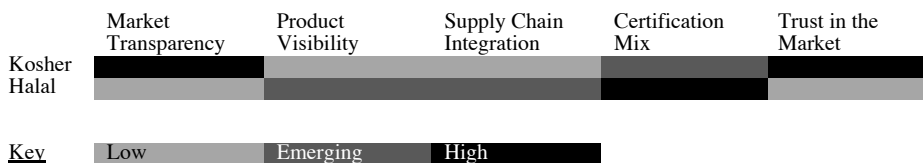


Figure 1. Snapshot of the halal and kosher markets in the UK.

16. Roex, J. and Miele, M. (eds) (2005) Farm Animal Welfare Concerns: Consumers, Retailers, and Producers, Welfare Quality Report No. 1.

slaughterer of ovine animals at 325,6 thousand tec. (followed by Spain with only 157,0 thousand tec.) and the number one consumer of ovine meat at 373,8 thousand tec., (followed by France with only 232,1 thousand tec.) and the second after Greece if we count consumption per capita.¹⁷ No statistics are kept on the number of animals slaughtered using religious methods, but it is estimated that Muslims consume about 20% of the meat sourced in the UK.¹⁸ Figures for 2004 estimate that 114 million animals are slaughtered for halal and 2.1 million for kosher each year.¹⁹

JEWISH POPULATION

Based on emigration from the UK and interfaith marriages, the Jewish population was predicted to decline slightly in the current period (Bunder, 2004). However, the USDA foreign agricultural service contradicts this thought. Quoting studies from Leeds University and Manchester University it affirms that for the first time since World War II the Jewish population in the UK is on the rise again; in 2007 it was estimated at 275 000 – around 0.5% of the population. The majority lives in London, approximately two thirds (around 219 000) and the rest in Manchester (30 000), Leeds, Liverpool, Glasgow and Birmingham (GAIN, 2007).

MUSLIM POPULATION

In the 2001 census, the Muslim population of Great Britain was given as 1 588 890, or around 2.78% of the general population. The 2002 Mintel Report on Halal foods gave a figure of 1.9 Million, which represents 3.2 % of the UK population.²⁰ However, the Muslim population is increasing and some estimates from 2004 number the Muslim population at around of 2 million.²¹ Between 2004 and 2008 the Office for National Statistics claimed that the Muslim population in the UK grew by more than 500 000 to 2.4 million, which is equivalent to a rate 10 times faster than the rest of society; while a high proportion of Christians are over 70 years of age, a large percentage of the Muslim population is under 4. It has been reported that this increase is linked to a number of related factors, including immigration, a higher birth rate amongst Muslims, conversions to Islam, and a growing enthusiasm for Muslim identity in the face of war and global politics.²²

The Muslim population in the UK is very diverse. In England, most are immigrants (or descendants of immigrants) from South Asia, particularly Pakistan, Bangladesh and India; many also have roots in the Middle East. English Muslims also have roots in Somalia, Malaysia and Indonesia and a smaller number come from African countries like Nigeria, Uganda and Sierra Leone. Many Scottish and Welsh Muslims also come from South Asia. Wales also has 3,000 'White' Muslims and 5,000 Muslims from diverse ethnic backgrounds. Muslims in Northern Ireland come from over 40 countries (Census 2001).²³

17. France AgriMer: EC data, 2009.

18. Aldi Supermarket Marketing Report 2009–2010.

19. 'Halal and kosher meat should not be slipped in to food chain, says minister', *The Independent*, Monday 7 April 2008.

20. Mintel Oxygen (2002) *Report on Halal Foods UK*.

21. Ansari, K.H. (2004) *The Infidel Within: Muslims in Britain since 1800*. London: Hurst.

22. Labour Force Survey, <<http://www.statistics.gov.uk/statbase/Source.asp?vlnk=358>>. See also <<http://www.timesonline.co.uk/tol/news/uk/article5621482.ece>>.

23. <http://en.wikipedia.org/wiki/Islam_in_the_United_Kingdom>.

MARKET OVERVIEW

KOSHER

Kosher is at different levels the most extended everyday religious practice amongst the contemporary Jewish UK population. As with any other religious practice, this can go from strict observances to the consumption of kosher food in selected rituals or particular weekdays, dates and celebrations. In that sense, kosher marketed foods can extend in consumer's lives without necessarily implying a strict following of the complex rules of kosher, as in the case of kosher cooking for instance. Moreover, in some European countries, kosher food has become an 'ethnic' option and some consumers believe that labels like kosher guarantee a healthier and more supervised (and even more humane in the case of slaughtering) product. In this way, 'Products that are not specifically ethnic can be marketed to the general population with the additional kosher niche' (GAIN, 2007, p. 3). Given the problem of trust that has emerged in the halal market over recent years, it appears that some consumers of halal foods buy kosher products and that kosher marketing strategies often consider Muslims as potential kosher consumers.

Although the kosher meat market is still generally represented – much like halal meat market – in independent neighbourhood retailers and community stores, it is also represented in mainstream supermarket chains. In 2003, GAIN (2003) found that 20% of Tesco's UK stores have a kosher section or sell kosher products; though they do not sell fresh kosher meat, many mainstream supermarkets now sell an increasing range of products certified and qualified as kosher. Despite a general perception that the market is shrinking, there is clearly a growing interest in securing kosher certification by food manufacturers, with firms such as Nestle, Mars, Kellogg and Heinz all having kosher brands. Although numbers appear globally smaller for kosher foods than for halal, the interest in the market is clearly increasing. In the US in 2009, Mintel Oxygen reported that one in four (28%) new food and drink products were launched with a kosher symbol.²⁴ In the UK too, it is clear that an increasing number of products are launched with kosher certification.²⁵ This is evident in the marketing literature of certification organisations, where claims are often made that certification can help to increase sales and exports.²⁶

A high percentage of kosher meat certification in the UK is carried out by the Kashrus Division of the London and Manchester Beth Din's; while there are other kosher certification bodies, most do not certify religious slaughter. The London Board of Shechita no longer deals in meat and no longer owns any slaughter houses; they provide specialist shechita services to approved independent abattoirs who wholesale approved, sealed and stamped meat to retailers. The value of the kosher meat market in the UK is unclear, but the European market for kosher foods is said to be worth around £4 billion a year. The London Board of Shechita prioritise UK meat over cheap imported imports, though kosher Veal is sometimes imported from Belgium and Holland; pre packed processed meat products are also imported from France. Manchester Beth Din has recently started providing shechita services in Europe for export to the US.

24. *Kosher Foods*, Mintel Oxygen Report, January 2009.

25. See <<http://www.kosher.org.uk/updates.htm>>.

26. See <<http://www.shefamehadrin.co.uk/rabbi-supervision.asp>>.

HALAL

The market for halal foods in the UK is growing at a remarkable rate; estimates vary from 10 to 30% in 2008 alone. The Halal Food Authority estimated a 30% growth of the market for halal food in 2006, even when the growth of the Muslim population was only of 3%.²⁷ Mintel confirms this trend affirming that in 2001, halal meat has an 11% share of all meat sales in the UK, despite the fact that Muslims account for only 3% of the population. Some markets are particularly interested in this sector: Muslims consume 40% of all poultry sold in the UK and 27% of all beef and lamb.²⁸ In 2001, the value the UK halal meat market was estimated at around £400 million, £700 million if restaurants and takeaways are added; it has been growing ever since. Today the market is estimated to be worth around £600 Million.²⁹

Major supermarkets and retailers are expanding into the halal market; growth has encouraged the segregation of halal production processes at mainstream companies like ASDA, Sainsbury, Safeway, and Tesco.³⁰ Over 100 mainstream food manufacturers and distributors, including ASDA and Tesco, now have HFA (Halal Food Authority) approval or endorsement. The HFA estimates that there has also been a significant increase in the number of halal restaurants/ fast food restaurants in the UK – which now total more than 14,000. The life-styles of younger Muslims are similar to the wider population, and they are increasingly interested in fast food and niche food items and brands. However, there is still resistance to buying fresh halal meat at large supermarkets and supporting ‘the local butcher’ is popular within Muslim communities; the market for the sale of fresh meat is still mostly occupied by independent halal butchers. In 2001, Mintel estimated the number of halal butchers in the UK to be more than 900; if we add butcher counters in large retailers this figure goes up to around 2000.³¹ While the number of UK mainstream butchers declined between 1990 and 2001, the number of halal butchers has continued to increase (Mintel, 2002, p. 24).

For many Muslims, local butchers offer trust in the face of highly publicised scandals about the authenticity of halal meat. As the market has expanded, the major UK certifier of halal meat from stunned animals, the HFA, has been the subject of much criticism, mostly by the HMC (the Halal Monitoring Committee), the major certifier of non stunned halal meat. These debates are now reflected in the retail strategies of some of the UK’s major retailers. ASDA and Tesco first started selling pre-stunned halal meat certified by the HFA in 2000, and both continue to do so. However, ASDA also has an expanding number of in-store concessions and specialist food outlets (including its first World Food Store in Hounslow, London), where from 2007 they have been selling non-stunned meat endorsed by the National Halal Food Group.³² In April 2010, Tesco also started to sell non stunned meat in concessions.³³

There are no official slaughter figures for religious slaughter in the UK, but in 2001 Mintel estimated that 10 abattoirs were licensed to supply halal meat (mostly for poultry). The HFA now claims that all the major poultry abattoirs are under their control;

27. Halal Food in the UK, Scotland of food and drink, 2008

28. <http://www.thegrocer.co.uk/articles.aspx?page=articles&ID=207904>

29. Ministry of International Trade and Industry in Malaysia, <http://portaluit.miti.gov.my/cms/genArticlePdf?id=com.tms.cms.article.Article_81cde187-c0a81573-11c011c0-5bae8b76>. Summary at <<http://halalfocus.net/2009/07/09/halal-market>>.

30. Chomka, S. (2003) ‘Muslim community is recognised’, *Food Manufacture*, December.

31. Meat and Livestock Commission, <<http://www.mlc.org.uk>>.

this includes the 2 Sisters Food Group,³⁴ one of the UK's largest poultry producers and processors in the UK. HFA also estimate that around 25% of the entire UK meat market is halal, of which 75% is certified by them. However, it is clear that other bodies, including the HMC, have a growing share of the market, particularly for poultry.

In the UK, as elsewhere, the halal food market is advertised as a field of potential market expansion. Certification plays an important role in this process and certification organisations are the key tool in opening up market possibilities. The potential for exports beyond core UK operations is an argument frequently advanced by organisations promoting certification as a means of access to the global halal market.³⁵ The level of halal imports into the UK, including meat, is significant.³⁶ The major European importers of halal products into the UK are Netherlands Ireland, France, Germany, and Spain. The major Asian importers of halal products into the UK are Malaysia, Thailand, China and Indonesia. Many halal products are imported and controlled by small specialist ethnic minority distributors, including Oriental Supermarket chains like Wing Yip, but mainstream supermarkets like Tesco and ASDA are also active in this area; so are Tahira³⁷ – Europe's major halal specialist.³⁸ Although some halal meat is imported, strict EU import regulations mean that a high proportion of halal meat is produced by Muslim retailers and processors (Pakistani, Indian, and Turkish) based in the UK, whose production costs are lower.³⁹

However, the UK import and export market for halal meat is currently undergoing a process of significant change. Until quite recently, most lamb sold in the major halal markets around the globe, including the UK, was imported from Australia and New Zealand. In 2004, the HFA approved the import of meat from pre-stunned animals from these countries as acceptable to Muslims, 'provided the religious rites are observed'.⁴⁰ Exports of certified halal red meat from Australia are reportedly increasing 17 percent year-on-year and the trade is valued at \$673 million, or more than 10% of Australia's red meat exports. In New Zealand, however, lamb production has become uneconomic and many producers have turned towards milk production instead, with lamb production dropping by around 60%.⁴¹ Consequently, there is now a world wide shortage of red meat, which has resulted in significantly increased prices over the last 12 months. These developments have opened up a potentially massive export opportunity for UK producers; if they can satisfy the needs of consumers in markets in the East and Middle East and produce to the Malaysian standard⁴² they will be well placed to take advantage. The Halal Industries Group Plc – a private equity firm established to explore various market segments through its subsidiaries in Islamic and non Islamic countries – recently proposed South Wales as

32. <<http://www.nationalhalal.com>>.

33. <<http://halalfocus.net/2010/04/15/uk-hodge-hill-tesco-opens-halal-meat-counter>>.

34. See <<http://www.2sfg.co.uk>>.

35. Astronomic figures are invoked: 'With more than 1.8bn Muslims globally, the total size of global halal food and non-food (such as financial services, pharmaceuticals and cosmetics) industries are estimated at €1.5 trillion with an expected growth rate of 10 to 20 per cent each year. Though the global market for halal food has never been measured, industry estimates of its value range from \$150bn (€110bn) to \$500bn (€368bn)' (Neil Merret, 2007).

36. Halal Foods: Mintel (2002).

37. <<http://www.tahira.com>>.

38. The total value of halal food imports into the UK is estimated to be worth about £18 billion, see <<http://halalfocus.net/2009/07/09/halal-market>>.

39. <<http://halalfocus.net/2009/07/09/halal-market>>.

40. <<http://news.bbc.co.uk/1/hi/uk/3604675.stm>>

41. Food Programme BBC 4, 21 February 2010, <<http://www.bbc.co.uk/programmes/b00qs4zv>>.

the site for a £150 Million Halal Trade Park. According to the chairman of Halal Industries, South Wales was chosen ‘as the project’s site for its meat industries and affordable land prices.’⁴³ The issues involved remerge throughout this report.

UK CASE STUDY: KOSHER CERTIFICATION ORGANISATIONS AND THE DISTRIBUTION CHAIN

It is a kashrut (Jewish dietary law) requirement to mark meat to indicate its status as kosher. This needs to be done by independent rabbinical certification, which is now overseen by Shechita UK,⁴⁴ a coalition of organisations that was set up to defend the practice of Shechita and the organisations involved. As Shechita UK state on their website: ‘Shechita UK is a communal body that unites representatives from the Board of Deputies of British Jews, the National Council of Shechita Boards, the Union of Orthodox Hebrew Congregations and the Campaign for the Protection of Shechita. It incorporates representatives from all the Kashrus Authorities in the UK’.⁴⁵

There are Kashrus Authorities/ Jewish Courts of Law in London (3), Manchester, Leeds, Liverpool, Brighton and Hove and Southend; all certify products, shops, restaurants, food manufacturers and caterers as kosher. Jewish Europe⁴⁶ lists 9 kosher certification organisations in the UK, though it is not clear how many of these organisations actually oversee shechita (kosher slaughtering). Of the Jewish courts of law, only the Kashrus Division of the London and Manchester Beth Dins certify shechita. In this report we focus on two of the UK’s major certification organisations, the London Board of Shechita and the Kashrus division of the Manchester Beth Din, as well as some of their supply chain actors they certify.

THE LONDON BOARD OF SHECHITA

The London Board of Shechita⁴⁷ traces its origins back to 1804. In the past it owned abattoirs and marketed meat, but today it focuses on providing Shechita services for Jewish religious slaughter: ‘The Board no longer owns any abattoirs nor does it deal in meat. Instead, its expert Shechita services are provided to approved independent - and competing - abattoir operators who wholesale securely sealed and labelled carcasses to retailers’.⁴⁸

The Board functions on a non profit basis and is registered as a charity. Members of the board cannot be employed by the meat trade or the Board itself.

One of the main functions of the Board is to train and licence *shochets* – Jewish slaughter men. This process of religious and technical training takes at least five years. Shochets are employed directly by the Board, and their services are bought by competing

42. <<http://www.standardsmalaysia.gov.my/v2/images2/strategic/S%20&%20H%20JAKIM.pdf>>.

43. Halal industrial park proposed for South Wales: <<http://news.bbc.co.uk/1/hi/wales/8518739.stm>>.

44. <<http://www.shechitauk.org>>.

45. <<http://www.shechitauk.org/about-us/who-we-are.html>>.

46. <<http://www.jewisheurope.org/city.asp?Country=United%20Kingdom&Type=18>>.

47. <<http://www.shechita.co.uk/index.htm>>.

48. <<http://www.shechita.co.uk/index.htm>>.



abattoir operators and wholesalers. As such, they are not paid directly by the abattoir, in contrast to 'conventional' slaughter men, and they thus have a degree of autonomy unusual in the slaughter industry. Shochets certify directly at the abattoir, but the Board also inspects wholesalers, processors and retail premises; they also issue licences, for which each organisation pays the Board.

Although processed products certified by the LBS can be found in non kosher shops, certified fresh meat and poultry cut at the counter is only available from butchers that have direct license from the Board. The Boards' licence is displayed to the customer at *all* retail outlets. A list of licensed butchers is available on their web site, but the abattoirs where they carry out shechita are not listed. Information for the consumer about the details of kashrus supervision is also available on the Board's website. Here they insist on the reliance of their licensed retailers and on

the difference with products bought from unsupervised outlets, which consumers are only advised to purchase in sealed packages. The Board strongly cautions the public against buying 'loose raw or cooked meat products and unpacked sausages' from unsupervised outlets, where kosher meat could be mixed with non kosher meat. As they state on their web site:

'The integrity of our kashrus supervision is maintained for all of the products and daily procedures at the premises of our licensees. The public can safely rely on the vigilance of our Shomerim and Inspectors at the above premises so that they may buy any goods, cut, loose-packed and unsealed with the assurance that the Licence granted to these establishments is a Seal of Approval - Hechsher - which covers all the items on the premises and including the kashrus of each establishment.'

The LBS claims that their Hechsher kosher label is recognised internationally.

Definition of Kosher

The LBS grounds its standards on the integrity of its Rabbinical Authority. They claim compliance with the Jewish law of humane slaughtering and the detailed examination of carcasses. LBS also states that, according to contemporary scientific understanding, shechita's millenary methods (dating from Moses) are in alignment with the modern requirements of 'civil legislation covering animal welfare, food and hygiene standards'.⁴⁹

The Board provides certification for 'Glatt' (smooth) Kosher. This involves an internal examination of the internal organs of animals (not poultry or fish) being examined, including checks for abrasions to the lungs surfaces ('Glatt' is a Yiddish word meaning 'smooth'). However, according to LBS, the 'Glatt' qualification was historically a concession about the highest possible standards during moments of economic hardship in Europe in the sixteenth century, and they therefore espouse what their norms qualify as a higher standard of fitness and kashrus quality for meat that developed in parallel to Glatt, as originally defined by Chalak Beit Yosef. As the Board now states on its website: 'It is

49. <<http://www.shechita.co.uk/index.htm>> (accessed September 2009).

now economically viable for the Board – uniquely in the UK – to license ‘Glatt’ butchers because their products are, in fact, Chalak Beit Yosef’.⁵⁰

Meat that does not achieve the highest standards cannot be certified as ‘Glatt’, but as long as it is completely free of any adhesions, it can still be kosher; otherwise it is *treifa* – non-kosher and prohibited. The LBS states that it is against stunning because it makes meat *treifa*.⁵¹

Place in the General Market

According to the LBS, every year they supervise the slaughter of:

- 90 000 cattle;
- 90 000 sheep;
- 1.5 million poultry.

As there are no kosher-only abattoirs in the UK, wholesalers contract abattoirs for a specific number of animals, which are then slaughtered by the Board’s shochets. The LBS supervises seven abattoirs (four cattle, three poultry) which are regularly used by wholesalers. These are mainly around the Midlands, from where kosher meat is distributed across the UK on a weekly basis.

The hindquarters of cattle (which are rendered *treifa* by the sciatic nerve) are sold by the abattoir into the conventional market. The LBS is against labelling this non-kosher meat as they claim such practice would unfairly discriminate against Shechita. Many organisations defending Shechita believe that if religious slaughter is not to be stigmatised, all meat coming from animals that have not been properly stunned at the moment of slaughter should be labelled as such.

Preserving the Practice of Non-stunning

The Board is member of Shechita UK, a platform that has proved very effective notably in protecting the right of Jewish communities to undertake slaughtering without stunning. Shechita UK was established in 2003 ‘to promote awareness of and education about the Jewish religious humane method of dispatching animals for food, and to dispel the myths and falsehoods that have all too often been used as means to attack Jews and their religion’.⁵²

In the same year the organisation responded vigorously to a report by the Farm Animal Welfare Council (FAWC),⁵³ reacting in particular against the Government’s positive response to a recommendation that all animals should be stunned prior to slaughter. In a letter to DEFRA, Shechita UK expressed their concern that the report by the FAWC ‘could invite antagonism on the part of extremists against Jews, Jewish communal buildings and Jewish businesses’. The report reinforced a defensive stance on the part of the Jewish community, as the chairman of the organisation stated: ‘Shechita UK is an unprecedented, successful example of communal unity’. The organisation also ‘asked the Government for the first time to state unequivocally that it recognises shechita as the

50. Ibid.

51. <http://www.shechitauk.org/uploads/tx_resources/A_GUIDE_To_SHECHITA__2009_.pdf>.

52. <<http://www.shechita.uk>>.

53. Farm Animal Welfare Council (2003) *Report on the Welfare of Farmed Animals at Slaughter or Killing*, June.

Jewish religious humane method of animal slaughter'.⁵⁴ As a result of this action, the UK Government retracted their endorsement of the FAWC's recommendation to ban non stunning slaughtering.⁵⁵

*Following the LSB Distribution Chain*⁵⁶

On their web site the LSB lists 20 licensed butchers, most of whom are in London and the surrounding area.⁵⁷ As they state on their website: 'The London Board licenses manufacturing wholesalers and kosher food producers, and arranges reciprocal supervisory arrangements with suppliers supervised by other Kashrus authorities for products of approved shechita services and foodstuffs'.

As a matter of principle, the Board supports locally produced meat with a competitive price over cheap imported meat, though it appears that some of their meat comes from animals slaughtered in Ireland. Veal from Belgium and Holland and pre-packed processed products from France are also imported.

Trust and Transparency

There is no doubt that the London kosher market is tightly controlled and monitored. The butchers we spoke too were all supplied by wholesalers certified and overseen by the LSB; butchers choose certification bodies and wholesalers because they represent a particular tradition of rabbinical authority. Both butchers were inspected by shomer⁵⁸ from the LSB on a regular basis, sometimes as often as two or three times a week. When meat arrives from the wholesaler an internal shomer at the butchers shop oversees the unloading of the meat and the subsequent inspection of the label and seal; if no shomer is present, only the licensee can perform these duties and the subsequent removal of non kosher items, including veins and fats. While a butcher could sell non kosher meat through his shop this was said to be very unlikely, very rare and very difficult to do in practice. While 'in the old days' inspectors we sometimes 'told off' if they called unexpectedly, today they turn up whenever they want; as one of butcher put it, today 'there is no hiding place'.

Changes in Consumer Behaviour

These high levels of control are reflected in very high levels of consumer trust and an impression of transparency in production processes; only very rarely do customers ask detailed questions about certification and the origins of meat. While there was a recognition that the number of kosher butchers may be declining this was seen to be more a consequence of the new demands placed on butchers by customers than of an increase in kosher products in supermarkets. While kosher consumers have always been demanding, it appears that kosher butchers now provide more specialist services if they are to survive; one example was the increasing number of requests to provide 'kosher gravy' to go with kosher beef. Although more kosher products are now available in mainstream supermarkets, it was pointed out that many Hasidic and Ultra Orthodox Jews will not go near a

54. <http://www.somethingjewish.co.uk/articles/1040_shechita_uk_responds.htm>.

55. <<http://www.shechita.co.uk/news-resources/newspress-releases/news-resources/article/government-commitment-to-continued-practice-of-shechita.html>>.

56. It was extremely difficult to get butchers certified by LSB to take part in the project. After 18 months we did manage to get two butchers involved, but they did not want to be identified.

57. <<http://www.shechita.co.uk/licensed.htm>>.

58. In Jewish Law, a shomer is defined as someone who watches an item in exchange for payment or compensation.

supermarket or a pre-packed or processed product. At the same time, butchers identified customers who consume kosher for health reasons and those (Muslims) who consume it because they do not trust halal.

THE KASHRUS DIVISION OF MANCHESTER BETH DIN

History and Role of the Organisation

The Manchester Beth Din (MBD)⁵⁹ is as an important certifier of kosher foods in the UK outside the London area. The ancestor of the MBD is the Manchester Shechita Board (1892), which was initially dedicated exclusively to shechita before gradually taking charge of kashrus – licensing outlets and carrying out other tasks not related to food. It later became the Manchester Beth Din – a rabbinical court of judgement – but its more important section remains the Kashrut Division.



The Kashrut Authority of the Manchester Beth Din certifies a large number of products, factories and retailers. They currently certify six butchers, seven hoteliers and restaurants, as well grocers, delicatessens, bakers, and confectioners. A regular update and list of products *qualified* as kosher is available on the organisation's web site. The organisation: 'views the provision of Kashrus as a partnership between itself and its licensees united in the aim of providing products which are both kosher to the highest standard whilst being affordable and easily available.'

The organisation oversees shechita, providing kosher meat and poultry for butchers and manufacturers. As they state on their website, MBD is: 'committed to employing personnel to carry out Shechita and Kashrus activities, who are well qualified to do so, supported by efficient and professional administrative staff'.

All MBD's shochet's hold a local authority licence and a licence from the Office of the Chief Rabbi, which combined are seen to act as a guarantee of religious knowledge and technical ability.

Although independent butchers provide meat throughout the Manchester area, Tovah Meat⁶⁰ provides most of Manchester Beth Din's red meat; Tovah also delivers kosher across Europe. This organisation does not provide a list of abattoirs where they carry out shechita, stating only that cattle and lamb shechita is carried out in Stoke. All MBD poultry is processed at a dedicated purpose-built abattoir in Manchester – Kosher Poultry Ltd.

Place in the General Market

It has been difficult to get an overall picture of the operations of the Manchester Beth Din, their place in the market, and the number of animals slaughtered. However, it is clear that this organisation is expanding, both in the UK and beyond. The kashrus authority recently began to carry out shechita in Poland and Hungary and the meat from this project is sold in non-processed and manufactured forms to a number of European countries. It is hoped that some of the processed meats will also be sold in the American market.

59. <<http://www.mbd.org.uk>>.

60. <<http://www.tovah.co.uk>>.

Following the MBD Distribution Chain

The Kashrus Authority of the Manchester Beth Din notes a decrease in the number of kosher butchers. This could be related to the analysis offered by some reports that attribute the decline of independent retailers to the increasing presence of the kosher label in supermarkets offering cheaper and easier access to kosher foods (GAIN, 2007). However there are a number of intermediary wholesalers and processors, such as Gilbert Kosher Foods,⁶¹ and Hyman's Titanics who produce pre-packed kosher meat products under the supervision of the Manchester (and London) Beth Din.

Gilbert Kosher Foods is run from a 23000 square foot factory in Milton Keynes, which also contains a meat cutting plant; they have been trading since 1995. Gilberts produce a wide range of pre-packed kosher meat products, which are bought by all the major supermarkets – including Tesco, ASDA, Sainsbury's, Waitrose, Costco Wholesale, Morrison's, Somerfield, Harrods and Selfridges – and a number of leading food service operatives, including Bass, Compass, Food Partners, Scottish and Newcastle, South Western Trains, Whitbread. Gilbert's sister company, Great Food, at the same site, manufactures a range of vegetarian products, delicatessen, fried fish, and frozen meals. Overall, Gilbert's employ over 50 people and have an annual turnover of around £6.5 million.

Although the kosher market is more regulated and controlled than the halal market, it has not been without its problems. In the late 1990s, Gilbert's were themselves embroiled in controversy when they decided to move away from the London Board of Shechita to the Manchester board (now the Manchester Beth Din). Gilbert's were reportedly paying an annual fee of 100000 a year for certification from the London body, which the Manchester organisation agreed to lower considerably.⁶² Gilberts are now certified by both organisations.

Another retailer certified by the Kashrus Authority of the Manchester Beth Din is the online store of Hyman's *Titanics*,⁶³ which is based in Cheetham in North Manchester. Hyman's have been selling kosher food in the North West for over 90 years; they recently launched an on-line home delivery service. The company was established by Joseph Abraham Hyman, a year after he survived the sinking of the Titanic in 1913. During his time in America after the disaster, Hyman bought food in specialist kosher shops that he had not seen in England and when he returned he opened a small delicatessen based on what he had seen. The business, which is now run by Joseph's great grandson, is an integral part of Manchester Jewish community. It sells a wide range of kosher food, including raw meat and poultry and pre packed kosher ready meals.

UK CASE STUDY: HALAL CERTIFICATION ORGANISATIONS AND THE DISTRIBUTION CHAIN

In general terms, the problem of trust is more acute in the halal market than it is in the kosher market. In the UK, as in other countries like France, there have been numerous

61. See <<http://www.greatfoodonline.co.uk> and <http://www.greatfood.org.uk/meat.htm>>.

62. See <<http://www.independent.co.uk/news/sausage-dispute-just-isnt-kosher-say-london-jews-1197893.html>>.

63. See <<http://www.titanics.co.uk>>.

food ‘scandals’ regarding halal that have attracted media attention. Mintel refers to Government estimates that ‘at one point, 70–80 % of meat claimed as halal was ‘fake’’ (2002, p. 10). However, the market is very fragmented and some brands only operate regionally. Seven years ago Mintel listed a number of suppliers and noted that the development of ‘nationally recognised brands’ could be crucial for ‘gaining consumer confidence and mainstream distribution’ (Mintel, 2002, p. 28). In other words, they focus their analysis on a ‘lack of unification in product offering’ (Mintel, 2002, p. 47). This marketing report did not focus much attention on the certification of brands, noting only that in some cases products are audited or carry a halal symbol. However, if we are to understand this market more fully, both its fragmentation and its attempts to improve consumer trust, we need to consider certification more seriously; this also makes sense from the perspective of the Muslim consumer.

The general principles governing Islamic slaughter, as laid out in the Qur’an, distinguish between food that is permissible to eat (halal) and food that is forbidden (haram). The Qur’an discusses; 1) what substances/animals are halal or haram and; 2) the lawful method or processes by which they can become food. How these principles are to be followed in everyday life, and what halal food means in a Muslim community within a predominately non-Muslim country is a far from settled matter. While the Qur’an lays out general principles, what these principles mean in practice is constantly being negotiated, as a matter of interpretation and precedence, by scholars and imams. As with Judaism, there is no one centralized authoritative interpretation or interpreter. However, over the last few years it is clear that the qualification of meat as halal has become more visible as matters of marketing and sometimes of religious contention.

There are a number of halal certification agencies in the UK today, but the number lessons significantly if we consider those that certify religious slaughter. The major certifiers of halal meat are the Halal Food Authority (HFA),⁶⁴ the Halal Monitoring Committee (HMC),⁶⁵ the UK Halal Food Corporation,⁶⁶ and the National Halal Food Group.⁶⁷ As we noted earlier, the global halal market is developing rapidly; the UK is no exception and it is now perhaps the most developed halal market in the world. Companies are seeking halal certification to expand their market opportunities, both internally and for export.

In what follows, we put forward two case studies of certifying bodies that supervise slaughtering; we also provide examples of their suppliers and one of a self-certified meat production company, Euro Quality Lambs. The two case study organisations, the Halal Food Authority (HFA) and the Halal Monitoring Committee (HMC) share the biggest part of the UK market. Significantly, the HFA and HMC have different working definitions of what can constitute halal, which focuses principally on the questions of pre-stunning and mechanical methods of slaughter. These case studies, including Euro Quality Lambs, which is both a meat producer and a provider of ‘auto certification’ services,⁶⁸ clearly illustrate the fractures within the halal market.

64. <<http://www.halalfoodauthority.co.uk>>.

65. <<http://www.halalmc.net>>.

66. <<http://www.ukhalalcorporation.co.uk>>.

67. <<http://www.nationalhalal.com>>.

68. A discussion of auto-certification is provided in the French chapter.

THE HALAL FOOD AUTHORITY

History and Role of Organisation

The Halal Food Authority is a voluntary, non profit-making organisation. It was set up in 1994 to monitor and regulate halal red meat and poultry through the licensing of slaughterhouses, food processors and retailers; they also claim to regulate, endorse and authenticate foodstuffs, confectionary, flavourings, pharmaceuticals and additives. It was the first halal certification body in the UK and it granted licenses to businesses on a contractual basis annually. The organisations inspectors audit and monitor red meat and poultry in order to assess compliance to Islamic principles and to UK and EU regulation.



One of HFA's early innovations was the proposal for a reliable system to tag carcasses before they left the slaughterhouse. However, it soon became apparent that carrying out halal slaughter in segregated slaughter houses was problematic, and that it was difficult to know how best to separate halal from non-halal and all the associated problems. Over time, the HFA has developed and adapted its practice in line with changing times; over the years they have faced many problems with the owners/management of non-Muslim slaughterhouses, where they fought hard to explain what halal actually means to Muslims.⁶⁹ The president claims that over recent years the HFA has also taken an international stance as the market has developed, and that they have joined many international bodies to see how animals are slaughtered overseas and to assess the quality of halal meat being imported into the UK; the HFA is currently a member of the World Halal Council (WHC) and the Association of Halal Certifiers, Europe (AHC).

It is worth noting at this juncture that the creation and expansion of HFA almost mirrors the development of the halal meat market itself, and that the organisation now has an estimated market share of the UK halal meat market of around 75%.

The HFA has collaborated with UK authorities about the regulation of halal meat *on* behalf of the Muslim Community for over a decade and half. The claim membership of the Beef Labelling Scheme of the Ministry of Agriculture Fisheries and Food, and to have assisted DEFRA as a consultative body for the implementation of law on issues such as BSE, CDJ and of water content in poultry; they have also worked with the Foods Standards Agency (FSA) on a consultation basis, working on, amongst other things, issues relating to animal feed, gelatine and other health and hygiene food manufacture issues that directly concern Muslims and Islamic dietary laws. As a result, the HFA often uses language compatible with mainstream regulations.

The HFA web site also claims the organisation is the only body 'authorised to authenticate halal beef and validate traceability and movement of beef from the farm to table'.⁷⁰

69. Interview with Mashood Khawaja, 2009.

70. <<http://www.halalfoodauthority.co.uk/achieve.html>>.

However, we pushed on the matter HFA President, Mashood Khawaja, affirmed that the word 'Authority' was used mistakenly by those who set up the group, with little knowledge of what the future implications of this would be. Fischer refers to this as *claiming authority through halal*.⁷¹

The HFA is self funded. The President is 'very proud' of this fact and wants to keep it this way, claiming that if the HFA took a contribution from an outside body or organisation 'they'd have to sing their song' and perhaps 'compromise our principles'. In many ways it appears that the HFA sees itself as the guardian of the halal meat trade, with a role to monitor and provide guidance to everyone involved. When questioned on any aspect of their work, Mashood Khawaja emphasises the self regulating role of the operations. For instance, he claims that Muslim slaughter men are the organisations 'eyes and ears' in the slaughter process and that the HFA operates with a strong emphasis on trust. This somewhat idealistic and light handed approach, which is reflected in many aspects of HFA's operations, has created many problems for the organisation. As we have seen already, a characteristic of this organisation is that it claims accountability *not* only to the Muslim consumer as the HMC does (see below), but to the UK authorities as well.

Certification Services and Processes

The HFA certifies an increasing number of food producers, processors and retailers; all organisations certified by HFA are members by default. The evolution of the organisation, the services it provides, and market developments are evident in the following statement found on the organisations web site:

'The HFA is imploring, entreating, liaising, co-ordinating and inviting all concerned who provide, trade, manufacture or supply to be cognizant of the fact that if their product is obtained and manufactured in accordance to the Islamic Shari'ah, there is an infinite opportunity to trade in halal. Prior to ratification, endorsement and certification of halal, the Islamic covenants of honesty, cleanliness, virtuous conduct, good business codes as well as adherence to relevant health, food and hygiene laws is of paramount importance. Cohesion and compliance of Islamic requisites and provisions is also of similar significance.'⁷²

This statement clearly shows how much the appeal of certification is based on a combination of religious observance, cultural legitimacy and honesty combined with marketing opportunities and compliance to mainstream requirements such as health and hygiene. To validate their products as Halal, the HFA provides food retailers and buyers of agricultural products with farm and agricultural audits. These aim to guaranty transparency and traceability and comply with industry and legal requirements, thus maintaining food safety from farm to the processor; under the beef labelling scheme, HFA provide a service to allow beef to be labelled as Halal British Beef.⁷³

The procedure for licensing is quite straightforward. Once an application is received HFA undertake an inspection and audit of the plant and the ingredients, they check if they have admissible methods of manufacture and labelling systems and comply with health and hygiene requirements (sanitation, cleaning of equipment). It is the manufacturer who

71. Fischer, J. (2005) *Feeding secularism: consuming Halal among the Malays in London, Diaspora*, 14(2/3).

72. <<http://www.halalfoodauthority.co.uk>>.

73. <<http://www.halalfoodauthority.co.uk/HFA%20Brief%20Guidelines%20for%20slaughtering.pdf>>.

pays for this. When the contract is signed the applicants receive an annual license that entitles to use the HFA logo. The agreement includes that HFA can make at least three unannounced inspections and they require that any change in the manufacture (or processing, patenting, marketing) process is communicated to the HFA. A bond of confidentiality is also signed if necessary. Unless a problem appears the licenses are annually renewed automatically. HFA standards have evolved over time in line with the market and it appears that they will continue to do so.

Definition of Halal

HFA has an extended and detailed section in its website dedicated to expose their views regarding what is and not halal.⁷⁴ Halal meat has to be slaughtered in a traditional way and the HFA states the well known Islamic principles that the animal has to be alive and healthy – thus stunning can not be used to kill the animal or the bird. The animal is previously cleaned also from skin, fur, feathers or anything unhygienic. Jugular vein, carotid artery and windpipe have to be severed by a razor sharp knife by a single swipe in order to reduce pain as much possible. The slaughterer has to be carried out by a ‘sane (mentally competent) adult Muslim’. There has to be a licensed Muslim slaughter man to pronounce the tasmiya: *Bismillah Allahu Akbar* (in the name of God, God is the Greatest) and all flowing blood should be drained by natural convulsion. If an animal is strangled, killed by a violent blow or if its flesh has suffered a dorsal cut it is declared haram (forbidden for Muslim consumption). And of course, swine flesh being haram, pigs should not be slaughtered in same premises.

On their web site, HFA argue that all religions allow consumption of meat, and they make reference to a cycle of nature of which humans are a part. This declaration is symptomatic of the fact that the HFA also considers animal welfare as a part of what they understand to be halal. They note that prior to slaughter animals should be fed as usual and given water, and that they shouldn’t see other animals being slaughtered. The knife should be ‘four times the size of the neck and razor sharp, and if possible the slaughter man and animal should face Mecca; animals should not be suffering from ailments or lacerations.

The HFA also state that animals should not be fed with animal derivatives (cf. BSE). They also rely on UK established HACCP (Hazard Analysis and Critical Control Point Systems) systems. Clearly, this organisation is aware of, or feels more exposed to, the requirements of animal welfare. As such, they insist that an ethics of animal welfare ‘goes without saying’ alongside a commitment to high hygiene standards.

Stunning

As we have seen, HFA affirms that stunning is not used to kill the animal or the bird, but this doesn’t mean that they completely reject all stunning methods. On the contrary they hold an interesting position, here again we can see their dialogic ways at play. The issues of stunning and mechanisation of slaughtering are intrinsically related. For both, we can see that the HFA holds a flexible position and how it has evolved over time.

The HFA agree that animals should be alive at the moment of slaughter. In a talk given by Mashood Khawaja, the HFA is presented as having a critical approach to stunning and to methods that are now considered ‘aids’ to slaughter, including:

74. <http://www.halalfoodauthority.co.uk/main_zibah.htm>.

- captive bolt system, which is used mainly on cattle;
- gas system for asphyxiation;
- electrical stunning for ovine animals; and/or
- electric-water stunning baths for poultry.

While the HFA believe non stunning methods are more humane, they agree that this is a ‘bone of contention’. They state that Islam is a ‘religion of science’ there should be a wider consideration of scientific evidence regarding stunning and mechanisation: ‘We Muslims have to be positive and should not appear to pre-typify technology and at the same time ensure that we do not change or seem to be changing the dietary laws as commanded by the Scripture, the Holy Qur’an and the Shari’ah, the Islamic jurisprudence.’⁷⁵

In its early days, the HFA prohibited stunning because of the uncertainty surrounding it. But in negotiation with abattoirs, this prohibition was eventually lifted, with the proviso that only reversible methods of stunning should be used. The HFA was actually involved in the development a stunning apparatus with the Meat and Livestock Commission, University of Bristol and Hellenic Company, which met both the HFA requirements for a light, reversible stun and which conformed to EU law. The HFA asserts to have developed this stunning technology:

- to comply with EU standards covering abattoir safety and animal welfare;
- to make slaughter commercially more viable, as stunning allows for much greater throughput;
- to conform with Islamic (Qibah) principles.

In relation to the last point, the HFA are quick to point out that although they see ‘traditional’, non-stunning approaches to slaughter as more humane, they believe a balance of interest’s means that stunning is sometimes preferable. It should be noted at this point that during a recent interview Mashood Khawaja repeatedly stressed that he is categorically against irreversible stunning methods like the captive bolt.⁷⁶

It appears that the HFA is caught between two competing discourses. The first is the discourse of animal welfare science, the meat industry, DEFRA and FAWC, which insists that stunning is the most humane, safe and efficient method of slaughter, and that although non-stunning is tolerated because of human rights legislation and its implications for religious freedom, it does not constitute a ‘humane’ method of slaughter. The second discourse emerges from proponents of both Jewish and Muslim slaughter, which see the slaughter of animals without stunning as humane, if not more humane than conventional. This difficult balancing act has made of HFA the target of sustained criticism from some voices in UK Muslim communities. Critics claim that stunning and increased mechanisation of the slaughter process endorsed by HFA go against the principles laid out in the Qur’an. However, the HFA clearly believes that because the rate of the situation we find ourselves in today, some form of mechanisation is necessary in some situations: ‘[T]he Halal Food Authority accepts that, in greater numbers as we do the slaughtering now, especially with the poultry, we cannot do one by one. So what we have to do is we have to use some kind of mechanisation, some kind of stunning to immobilise the animal.’⁷⁷

The HFA claim that it is possible for slaughter to be carried out in line with Muslim

75. <<http://www.halalfoodauthority.co.uk>>.

76. Interview with Mashood Khawaja, 2009.

principles and that it is possible for a Muslim to carry out slaughter in this way in the name of Allah.

When slaughtering is carried out in a mechanised plant, as in the case of poultry slaughtering, the HFA requires a licensed Muslim slaughter man to be present to do the rendition of shahada. Here the HFA claim that the:

‘Number of slaughter men depends on the speed of the machine/line. Generally it is accepted that a healthy young male can recite shahada approximately fifteen hundred times per hour. It is therefore, suggested that we have 2–3 Muslim slaughter men at the slaughtering station/s of medium abattoirs. These slaughter men would also slaughter with full recitation of shahada any bird/animal that are missed by the machine.’

Place in the General Market

It was extremely difficult to get information on HFA’s market presence; the HFA is the longest standing halal certification body in the UK and as the market has expanded they have been subjected to wide ranging criticisms about their practices and the practices of the abattoirs and retailers they certify. However, it is not clear whether or not the HFA actually certifies many of these organisations; for many years there was no competition and it appears that HFA certification was the symbol of halal certification in the UK. Not surprisingly, the HFA claim that there are many examples of the illegitimate use of their logo.⁷⁸

Because of the growing criticism that has accompanied their expansion the HFA is reluctant to talk about its operations in any detail. We do, however, have some indicators of HFA’s position and their standing in the wider market. The HFA estimates that around 25% of the entire UK meat market is halal, of which 75% is certified by them. They claim that all the major poultry abattoirs are now under their ‘control’, including the 2 Sisters Food Group Poultry,⁷⁹ one of the largest poultry producers and processors in the UK.⁸⁰ Well over 100 food manufacturers and distributors, including ‘mainstream’ companies such as ASDA and Tesco, and a number of fast food chains, including KFC, also have HFA approval or endorsement.

Following the HFA Distribution Chain

Kentucky Fried Chicken

In some parts of London, particularly East London, there are many fast food outlets offering chicken products that show a certain resemblance to KFC, but which identify with halal under banners such as ‘Al Halal Fried Chicken’. In order to enter this market, Kentucky Fried Chicken (KFC) recently began to convert some of their outlets to ‘halal only’. In May 2009, the fast food chain announced that eight of its London restaurants were to provide a halal-only menu, which would use meat certified by HFA. As a trial the move was justified as a way to cater for ‘a growing demand for halal products’. All halal

77. Ibid.

78. See <[http://www.islamchannel.tv/newsvideo/\\$2Features/Is%20Halal%20meat%20really%20Halal.wmv](http://www.islamchannel.tv/newsvideo/$2Features/Is%20Halal%20meat%20really%20Halal.wmv)>.

79. See <<http://www.2sfg.co.uk>>.

80. <<http://www.halalfoodauthority.co.uk/members-slaughterhouses.html>>.

branches of KFC have removed products that contain pork meat from their menus. The trial has now been extended to almost 90 outlets.⁸¹

KFC's decision has led to two very different controversies, which clearly illustrate the debates that have been fostered by the practices of the HFA and HMC. While non-Muslim groups have questioned KFC's move to sell halal-only products,⁸² Muslims have questioned whether the poultry being sold in these outlets is really halal.⁸³ Across the UK, non-Muslim consumers have displayed a mixture of concern for animal welfare and a blatant anti-Muslim attitude, often declaring they'll never buy from KFC again. In negotiations with the Lancashire Council of Mosques (LCM), KFC was admonished for using stunned and mechanically slaughtered halal products certified by the HFA in its Lancashire outlets. In line with the Muslim Council of Britain, the LCM claims that they now follow the HMC's definition of halal and that they will advise the local community to stop buying from KFC unless they follow suit;⁸⁴ such controversies have been repeated across the UK.

ASDA

In 2009, ASDA sold over £1.2bn of lamb, mutton and poultry. They are experiencing a growing demand for halal meat and they now provide outlets for both stunned and non stunned meat.⁸⁵ In store, ASDA sells its own label, pre packed 'British Halal' chicken, lamb and mutton; it sells well over 100 ton of these products every week; all is certified by the HFA. Significantly, while all the halal meat sold in ASDA stores comes from stunned animals, their concessions are allowed to sell non-stunned halal meat, which consists mainly of chicken and mutton; products are provided by the National Halal Food Group under the 'Mr. Halal' and 'Halal2go' brands.⁸⁶

ASDA first allowed this practice in their Small Heath store in Birmingham in 2007 (*The Grocer*, 2007). From the start, they were aware that its decision to sell non stunned meat was likely to cause controversy, but they argue that they want to get things right for all their customers. While ASDA have been subjected to the same anti-Muslim criticisms as KFC, they have also been criticized by a number of animal welfare organisations, including the RSPCA.⁸⁷ Sales of are increasing in some of these concessions, it is argued, not solely because the meat is stunned or non-stunned, but because customers trust the butcher running the concession.⁸⁸ ASDA's concessions have a combined annual and growing turnover of circa £10 Million.⁸⁹ In early 2010, Tesco followed ASDA's lead, opening its first in-store halal concession selling meat from non stunned animals.⁹⁰

81. See <<http://www.kfc.co.uk/about-kfc/halal>>.

82. <<http://www.dailymail.co.uk/news/article-1260286/KFC-diner-told-bacon-burger-halal.html>>.

83. <<http://halalfocus.net/search/kfc+halal+stores>>.

84. <<http://halalfocus.net/2010/04/11/uk-kfc-face-halal-muslim-boycott-threat>>.

85. Information provided by ASDA, April 2010.

86. <<http://www.nationalhalal.com>>.

87. <http://www.telegraph.co.uk/news/uknews/1568440/Asda-under-fire-over-plan-to-sell-halal-meat.html>>.

88. Interview at ASDA Head Office, April 2010.

89. Sales information provided by ASDA, 2010.

90. <http://www.meatradenewsdaily.co.uk/news/150410/uk___official_opening_national_halal_in_tesco_hodge_hil_birmingham_uk.aspx>.

THE HALAL MONITORING COMMITTEE

History and Role of the Organisation

The Halal Monitoring Committee (HMC)⁹¹ is a relatively new certification body. It was created in 2003 by a group of Ulama (knowledgeable individuals), including Muslim scholars, leaders and jurists. HMC is a non-profit making organisation dedicated to serving the interests of Muslim consumers, retailers and suppliers. It was set up and is based in Leicester, but they now claim to have a presence in 25 UK cities.⁹² They affirm that they are currently experiencing a year on year 100% increase in the number of retail outlets certified by them, which now totals over 300.



The organisation was created out of concern about falsely labelled halal meat, as they state on their web site: 'HMC was born essentially out of one concern and one concern only; to be able to produce assurance that we are eating genuine Halal, not just "because it says Halal... it must be Halal"'.⁹³

HMC exemplifies the emergence of organisations dedicated to clarify the certification of halal meat by appealing to the necessity of assuring Muslim consumers' trust. The consumer appears either as 'unsuspecting' or 'doubtful' in the face of corrupt practices, 'deceit', 'treachery', and the violation of slaughtering conditions. HMC's aim is to assure confidence at the moment of choice in a market characterised by a situation of 'extreme' distrust,⁹⁴ generally seen to affect the entire UK meat industry. As well as the growth of the market, HMC believe that the problem of understanding what is or is not really halal is linked directly to the profiting seeking motives of individuals and corporations.

HMC thus aims to monitor, inspect and certify halal products with the objective of playing a regulatory role. They do this through the inspection, regular checking, labelling and sealing of products, and the overall aim is to become a uniform verification and certification body to implement the Shari'ah regarding halal. Their initial target was the market of raw halal meat and the poultry sector, but they did not exclude extending their operations to other products, and it appears that they have now started down this path. Their stated commitment is towards the Muslim community through a strategy of self-sufficiency. They do not want to be dependent on donations or allied with a particular sect, and they consider themselves to be a 'universal service'. Although they have not yet achieved their overall aims outright, HMC claim to be pursuing them steadfastly. While they recognise the presence of other certification bodies, they do not see them as competitors, not least because they do not recognise their legitimacy.

HMC encourage Muslim consumers and consumers to do their own research and work out whether they consider the meat they buy is halal on the basis of what they know about where it comes from.⁹⁵ They believe that the major reason for the current high consump-

91. <<http://www.halalmc.co.uk>>.

92. Interview with HMC executive and scholar, 2010.

93. <<http://www.halalmc.co.uk>>.

94. See *The Fiqh of Halal Meat*, based on a verbal Fatwa by Mufti Rafi Usmani, raised by Shaykh Faraz Rab-bani, <http://www.halalmc.net/resources/other_slaughter_articles/001_fiqh_of_halal_meat.html>.

95. Interview with HMC executive and scholar, 2010.

tion of stunned and mechanically slaughtered meat is that people just don't really know about – or have the knowledge to make an informed decision about – what they are eating. Their wider approach was summed up during an interview in the following way(s):

'I think the biggest achievement of HMC is to make people aware. The awareness of the Muslim community about what is happening in industry comparative to their view before [the HMC emerged] is 1000% more than what we've achieved in the shops.'⁹⁶

Certification Services and Processes

HMC have made the processes or the product behind halal goods an explicit concern. This process of making visible uses *qualification* as a marketing strategy; by making the *qualities* of their competitor's products explicit and placing this in contrast to their own, they establish their good, their processes, and products as more trustworthy and genuine than their competitors. They divide the market into four areas: slaughter houses, processing plants, outlets (butchers, restaurants, takeaways, etc), and certification processes (labelling). They have identified problems with the misnaming of halal at all stages and with existing certification schemes, particularly those that certify stunned and mechanically slaughtered meat as halal.

The HMC has established its own criteria for certification based on religious authority, which includes inspection of abattoirs, processors and outlets for both red meat and poultry. They encourage certification to help marketing and ensure the confidence of consumers and they base all their operations on the control, functioning and harnessing of the supply chain with their own label. HMC describe their overall system on their website in the following way:

'The Halal Monitoring Committee realises the complications of the meat trade and thus have devised a three part inspection plan that covers the entire meat route; from the source (abattoirs/slaughterhouses), the middle men (processors and distributors) and finally the retailers (butchers and food outlets). The procedure adopted by HMC, involves inspection of poultry and meat from the source to the point of being slaughtered through to its packaging and up to the point of delivery. HMC labelling & certification is there to assist you in making the Halal choice.'⁹⁷

As they do not have the resources to approach everyone, they usually only visit a slaughterhouse if they are invited to do so, and it is often community based shops that provide the link between slaughterhouses and HMC.⁹⁸ HMC currently employs around 100 people to carry out all these aspects of their operations.

Slaughterhouses

HMC use a number of slaughter houses. Their current list includes five that only carry out red meat slaughter; three that carry out 'part' (segregated) red meat halal slaughter; three that only carry out poultry slaughter; and three that carry out 'part' poultry slaughter. HMC insists on a personal and physical inspection at all slaughterhouses and they require and demand access at all time, to all areas and to all aspects of the process.

96. Ibid.

97. <http://www.halalmc.net/about_hmc/hmc_system.html>.

98. Interview with HMC executive and scholar, 2010.

An initial visit is usually followed by an audit to see if the processes are compatible with HMC's certification standard. This involves an examination of their levels of production, what are the risk is, how many inspectors/inspections will be necessary: HMC not simply certify on the basis of information provided by a slaughterhouse. They employ third party independent inspectors within each slaughter house, who work full time under contract; and it is these inspectors who label meat as halal on behalf of HMC. These inspectors check if all the requirements of halal slaughter are met – that slaughter is carried out by a Muslim, that no stunning equipment is used, that water temperature (for poultry) is not above 60c, and that there is no cross contamination; HMC does not oversee slaughter and the saying of prayers, as they do not think this is appropriate. At the end of the chain another inspector stamps the certification mark on carcasses.

Slaughterhouses are charged for the cost of the hours of the inspectors, plus a fee for travel expenses, equipment, and administration. Alternatively, a flat rate per item fee may also be applied based on levels of production. Certified abattoirs and slaughter plants – and the products certified – are listed on HMC's website detailing. These lists are also distributed to suppliers, processing plants, butchers, retailers, restaurants and fast food outlets – on request – in order to direct their business to HMC certified products.⁹⁹

Processing Plants and Retail Outlets

When it leaves the slaughterhouse all HMC certified meat goes either to a processing plant or a retail outlet, who can only stock and deal with poultry, lamb and beef certified by HMC. HMC currently lists nine food processing plants, eight third-party manufacturers and over 300 retail outlets. Processors and retailers are monitored for the first two to three weeks to ensure they can comply with HMC standards.

Once a business has an agreement contract they receive a certificate to display, which is then renewed monthly. Shops must allow regular monitoring and access to storage and fridge facilities, and HMC insist that retailers must be aware that in signing up with HMC they will have to change suppliers. All this is carried out: '[T]o ensure that the products which they have agreed to sell are the ones that they are selling and they are not cheating the consumer. So we act on behalf of the consumer to give them confidence that this shop is definitely HMC certified.'

If a shop accepts non-HMC products their certificate is withdrawn and the price of certification goes up; delisted shops are listed on the HMC website.¹⁰⁰ Restaurants are also checked for non meat products and ingredients, which are all traced accordingly.

Labelling

HMC has a label for red meat and another for poultry, and they also provide tape and ties with the logo for sealing boxes and bags. HMC claim that their logo is increasingly recognised by consumers and that it communicates to the general public what its standards are.¹⁰¹

Definition of Halal

HMC claims to adopt a definition of halal that has the possibility of being accepted by all Muslim groups, not least because their definition is the most 'stringent;' this appears

99. <http://www.halalmc.net/pdf/hmc_certified_product_supplier_list.pdf>.

100. See <http://www.halalmc.net/certified_outlets/certified_butchers.html>.

101. Interview with HMC executive and scholar, 2010.

strange, as the more restricted criteria are, the less HHC appears to allow them. For instance, because stunning is controversial they believe that it is better to ban it. They explain this in the following way: 'In theory the method to adopt ... would be all inclusive... to accommodate only those decisions that are permissible for all, not just those that create lee-ways for a specific group.'¹⁰²

The HMC believes the word 'halal' is abused by both Muslims and non Muslims alike. They claim to understand the difficulties of keeping up with increasing demand whilst respecting halal rules and coping with the problem of trust amongst halal consumers. They argue that the major characteristics of 'false' halal revolve around the use of 'mechanical slaughter methods', 'fatal stunning techniques' and a disregard of Islamic prerequisites by slaughterers and processors. HMC bases its alternative definition of halal on religious authority and the need to improve consumer trust. Their discourse manifests a combination of religious compliance – e.g. their website states the reasons why it is important for Muslims to consume halal, and pragmatism – offering and reassuring transparency about the technicalities of the procedures of certification.

While they consider the views of and talk to international certification bodies and standards, HMC express similar criticisms. Discussing the global Malaysian standard, a HMC scholar suggested that: '[M]y criticisms are very singular in terms of it was very industry-led and I think we need to get scholarly opinion on board, consumer opinion on board.'¹⁰³

Stunning

Stunning is a practice that HMC is clear about rejecting and they base part of their identity as an organisation on the fact that the meat they certify is not from stunned animals. The organisation recognises this is a delicate issue, but they consider it destructive both for reasons of animal welfare – unnecessary suffering and deprivation from the effects of the tasmiyyah (blessing) – and also because of the unfit character of the meat obtained. HMC specifies that the UK government has put no pressure on Muslims 'to adopt such inhumane methods of slaughter' and on their website they list documents providing arguments against stunning. They claim not to be against science and that they would like better scientific evidence if they were to accept stunning in some form:

'Muslims are not against science... HMC is not against science. It's against science that might contradict the rules of Islam. If... I don't have proof in front of me to say that animals do not die from stunning, I'm not going to allow stunning. But if proof is put in front of me and proof which is objective, non-biased and it's been done in a way which includes the Muslim community rather than excludes them.'

Place on General Market and Consumer Demand

HMC certifies butchers in 27 localities (mostly in England) and one in Ireland. They certify take-away and restaurants in 23 localities in England and two caterers. They certify four brands of halal products and one Islam girl's school. From the middle of 2008 until the start of 2010 they claim to have seen a 300% increase in growth, 150% per annum,

102. See <http://www.halalmc.net/about_hmc/slaughter_criteria.html>.

103. Interview with HMC executive and scholar, 2010.

104. Ibid.

and the currently slaughter and process around 1.2 million chickens a month, about 5% of the UK market.

In relation to consumer demand, HMC focuses on what they consider the most important problem, the contemporary difficulty of achieving and maintaining trust. They also believe that there are misunderstandings about the industrialised processing of meat. For instance, they state that Muslims originating from communities in countries in which the slaughtering is done in a 'simple' way do not realise that in the UK (and the West) the extension of the market in combination with the mode of production means that companies are constantly seeking to increase the production, which means that the quality of the halal process is decreasing in many contexts.

Following the HMC Distribution Chain

HMC supplies a big number of independent butchers, restaurants and takeaways, and caterers.¹⁰⁵ An increasing number of food products are also certified by HMC. One of HMC's butchers is Dial Halal of Walthamstow in Greater London.¹⁰⁶ Dial Halal supplies un-stunned halal meat and poultry; they specialise in fresh lamb/sheep, fresh poultry and fresh beef, but they also sell fish, groceries and frozen foods. Dial Halal assert that because their meat and poultry is all HMC certified customers can be assured that it is without doubt 100% halal. Dial Halal offer free home delivery throughout London and the surrounding area.

HMC now certify 'Petit Gems' baby food.¹⁰⁷ Petit Gems were launched by Global Enterprise Management (GEM) of Coventry in June 2006 at the World Food Market Exhibition in Paris. Within a year 'Petit Gems' had become the number one selling Halal baby food in France, sold in all the major supermarkets. From 2007, Petit Gems has been sold in 60 ASDA stores across the UK. On the company website, the product is qualified as a halal meat product in the following way.¹⁰⁸

'The Petit Gems range caters for your baby's Health, Faith, Growth and Well-being. In an ever changing world, Petit Gems aim to help you maintain your responsibilities as parents - the nurturing of your baby – giving your child the best possible start in life. A new range of baby food which contains only Halal ingredients. Your baby requires essential nutrients such as irons and proteins to aid their growth and development. The meat based (iron and protein rich) baby foods up till now haven't been Halal. This means many Muslim babies have been eating a mainly vegetable or egg based diet.'

EURO QUALITY LAMBS

Euro Quality Lambs¹⁰⁹ is a lamb and ewe abattoir/wholesaler based in Shropshire. Although only 30% of the lamb is sold as halal, they slaughter their animals according to Muslim requirements.

105.<http://www.halalmc.net/certified_outlets/certified_butchers.html>.

106.<<http://www.dialhalal.com>>.

107.<<http://www.petitgems.com>>.

108.<<http://www.petitgems.com>>.

109.<<http://www.euroqualitylambs.co.uk>>.

Slaughter

Their definition of halal prioritises animal welfare at the time of slaughter. Animals must be alive at the time of slaughter and slaughter must be carried out by a Muslim slaughter man humanely, while pronouncing the name of God. Furthermore, the blood has to be duly drained and the meat has to avoid cross contamination with non forbidden products.¹¹⁰ EQL's slaughter men are all Muslim; all are licensed by Meat Hygiene Service. During slaughter, the slaughter men recite the Bismillah as they 'stick' the lambs. EQL currently slaughters up to 15000 lambs a week, 90% of which are exported to EU; their main market is France, particularly Paris region; only 10% is for UK halal market. Their major clients are other wholesalers.

Certification

At present EQL do not use third party certification agents for halal slaughter; they self-certify and if asked they provide clients with their own certificate. Their business is built on trust. As a Muslim owned business for 17 years, EQL have built up a reputation for good practice and transparency and they regularly invite clients to visit and view their operations.¹¹¹

EQL believe that halal certification in the UK is currently too fragmented and that this does not provide what the market needs – a transparent, reliable standard agreed by everyone. Though they admit it will be difficult to bring together Muslim scholars, industry representatives, Muslim organisations and consumers to agree on one standard with direct and transparent link to Qu'ran and Sunna, they stress the need for a single halal standard developed by a central authority. They highlight the potential in having a two-tier halal standard, a basic level and top-tier; the basic level would incorporate obligations to both what is *fard* (obligatory under Islamic law) and *haram* (forbidden under Islamic Law), while the top-tier would adhere to these laws as well as complying with the *Mustahabb* (what is recommended under Islamic Law) and avoiding *Makruh* (that which is disliked under Islamic Law); Management is in the process of developing a more thorough religious guide to responsibilities as laid out in the QU'ran and Hadiths, as well as technical training and monitoring procedures. But again EQL believe the real debate lies in the interpretation of the Qu'ran, Hadith and Sunnah, as to what falls into each of these categories. EQL As some processes are not generally accepted as halal at the current time, EQL argue that the establishment of standards for a 'basic' halal that would give confidence to the industry i.e. basic halal = the minimum generally accepted criteria and processes. The assumption here is that the market will develop in a way where certain certifying bodies/ marks will be seen as 'premium' halal and others will be seen as 'basic' halal, perhaps as happens with other 'quality' food products.

The Changing Market

In order to respond to market pressure and changes, EQL has refitted their slaughter hall so that it can accommodate stunning as well as non stunning slaughter; EQL use electrical stunning. Until recently, non stunned lambs were manually handled and restrained, but this has now changed and at the time of completing this report EQL was fitting restraining equipment to accommodate the increasing demand for non stunned meat.

110. <<http://www.euroqualitylambs.co.uk/en/whatishalal.htm>>.

111. The researchers involved in the compilation of the report were invited to witness all aspects of the EQL's operations at times to suit them.

Box 2.1. The certification mix: halal window-shopping in east London (September 2009).

East London is a highly multicultural area of London. We plunge into its streets to measure the presence of halal certification in an area where high numbers of Muslim Londoners live. We draw a paradigmatic rectangular trajectory on the map, starting at the tube station Bethnal Green, walking up Bethnal Green Rd, turning onto the famous Brick Lane – the paragon of multicultural London, today fairly gentrified without losing its feel of an amiable mix. We end the tour around Whitechapel station.

Bethnal Green Road is a very animated street, its restaurants and pubs are also quite busy at lunchtime. Along the way a number of fast food outlets offer halal chicken. Among these is the popular KFC, which was at the centre of a controversy during the past year because it launched halal certified products (see page 35/6 in this report). The Bethnal green KFC restaurant is full, lines of people wait to order; the public is very diverse. A brand new, quite big, HFA logo shines at the front window: 'HFA Approved'.

This is a significant difference in terms of marketing when compared to other fast food restaurants along Bethnal Green Road. Most of them claim they offer Halal Chicken, but do not apparently carry a certification mark. Some do show an HFA certificate, however only visible if you walk in, which consists of a old, yellowing printed sheet of paper by the counter, with no visible date on it that would allow customers to know when the last inspection took place. In Brick Lane, we find two halal chicken restaurants which again claim to be HFA certified; these too do not show any signs of certification, displaying only a paper labelled HFA with no date. Two other halal chicken fast foods, while not showing a certificate, display and advertise a 'Wrap & Roll' with HMC as the certification agent; while the rest of the menu is advertised more traditionally, this product is heavily marketed, appearing in a big shiny picture on the window.

Bethnal Green is peppered with grocery stores, and many have a halal meat counter. The major certification presence here is HMC, displayed either through a certificate or through hand written signs worded along the lines of: 'HMC meat sold here'. In another large grocery store, several fridges offer a wide assortment of frozen packaged meat and sausages labelled by HMC.

While this is clearly the certification territory of the HFA and HMC, the HMC has a stronger presence, both in terms of visibility and by distinguishing itself with a specific 'quality': the claim of assuring 'non stunned' meat – which as we have seen elsewhere in this report is a mark of distinction for the HMC

It seems clear that in this part of London HMC has become a marketing brand in itself. We interviewed a butcher at the brand new Halal Meat Corner – whose acronym corresponds to HMC! Situated at a street corner on Bethnal Green Road, the large butcher's shop window gives an impression of transparency and cleanliness. The shop sign is a brand new flashy and stylish banner, clearly stating the 'non stunned' quality of its meat. We learn that the butchers opened in June 2009, the biggest part of their market being chicken. The butcher at the counter is confident that people are slowly starting to recognise their product as 'HMC chicken'. People are, he claims, more and more aware of the brand. This butcher chose the HMC because of their methods of certification and, in particular, their commitment to non stunning. We asked how many times they were inspected and they told us that the HMC comes twice a week to check if everything is in order. We also wanted to know if the consumers enquired about certification, and we were assured that if people see an HMC sign this is enough to gain their confidence and trust. When asked to evaluate the level of trust in the certification

Box 2.1. The certification mix: halal window-shopping in east London (September 2009).
 scheme from 1 to 10, we were told that HMC assured a 10 level of trust.

At the end of the interview, we tell the HMC butcher that the contents of the interview will be included in pieces of academic research. And we are told: ‘We are halal, we have nothing to hide.’

EQL believe the halal market has great potential and will grow and diversify hugely – into processed goods and so on – if the standards issue gets rectified. However, they recognise that the market is in a dynamic state of development and that the certification issues that confront it will not be resolved for some time. They note a growing market for ‘non-stunned’ halal meat in a number of countries, including the UK and France. The Executive Director of EQL¹¹² believes that most Muslims will always choose non-stunned meat over stunned meat when given the choice. This does not mean, however, that non stunned meat should be dismissed out of hand, more that there needs to be a sustained dialogue and debate between scholars and the industry that mirrors debates in the industry more generally, and which considers animal welfare and developments in scientific understandings of slaughter in their entirety. EQL believe there is currently a lack of relevant and accurate information on many aspects of halal production for consumers, in both pre-stun and non stun production, and that those involved in the industry should make more of an effort to fill this gap and lesson the controversies on both sides. If consumers want non stunned meat, EQL argue that they need to be more aware about all the issues involved, including animal welfare at the time of slaughter. Noting the problems that have emerged in relation to pre-stunned halal meat, they point out that non-stunning is also done for the wrong reasons. They argue that many of those carrying out non stun production currently justify it simply on the grounds that they are allowed to do it, without giving due attention to important issues like handling. This is important for EQL, not least because it mirrors developments in the wider market where education is also needed.

EQL’s Executive Director notes that these debates are also mirrored in the ongoing development of the Malaysian halal standard,¹¹³ where non- stunning is the preferred method but where stunning is also allowed. Malaysia issued their standard in 2004 and revised it in 2009 to reflect market developments. EQL’s Executive Director argues that they will continue to update the standard over the coming years as the halal markets in Europe and beyond continue to develop and research and dialogue attempt to address the concerns of all those involved.

SUMMARY

Though the distribution channels for halal and kosher qualified products in the UK are somewhat different, there are also some connections and shared contexts. While both

112. Rizvan Khalid was interviewed twice, once in May 2009 and again in June 2010.

113. <<http://www.standardsmalaysia.gov.my/v2/images2/strategic/S%20&%20H%20JAKIM.pdf>>.

markets are still embedded in networks of community based, neighbourhood retailers, both are witnessing changes related to the emergence of different patterns of shopping and life-style, which are turning some consumers towards mainstream retailers. The main difference between them is the variation in their certification processes and the extent of problems of trust and transparency, which are more acute in the halal market.

In stark contrast to the 'conventional' meat market, which is for the most part shared amongst 'big four' retailers, the UK halal meat market is still dominated by a fragmented supply chain and wide network of independent processors and retailers. While supply chain integration is evident, in terms of the wider expansion of the market it is not significant; even so, products qualified as halal are increasingly visible. Most importantly, at least for the purposes of this report, there is no consensus on what halal means or how it is defined in practice, which means that general data on 'halal' cannot be said to refer definitively to what halal might actually mean in any given context. Competition between certification bodies is high and the certification mix is growing rather than declining. The problems this situation creates are evident in the competing practices and objectives of the HFA and HMC.

The differences between these organisations cannot be reduced to a question of pre-dominance or profitable interest, as both are ostensibly non-profit organisations. Yet their operations expose large diversification tendencies in the changing perceptions of halal foods and the identity of the UK Muslim population. The HFA was the first organisation of its kind in the UK and its operational discourse straddles the line between tradition and modernity. While it uses the language of the mainstream meat industry, DEFRA and FAWC to stress the necessity of pre stunning in some instances, it also reflects aspects of a more traditional discourse that emphasises the validity of non-stunning. This has made the HFA a target for those who say they ignore the views of highly qualified scholars within the Muslim community. The main protagonists of this argument are the HMC, with their strong scholarly backing, who are against all aspects of mechanical stunning. HMC work at the grass-roots level, holding talks and seminars with the Muslim community to raise awareness of the issues involved; their discourse epitomizes the emergence of organisations dedicated to clarify the certification of halal meat by assuring the trust of Muslim consumers. Their use of qualification as a marketing strategy to make the qualities of their products explicit establishes their good, their processes and their products as superior to those of their competitors, particularly the HFA's.

Just as it is difficult to get a picture of the extent of HFA's operations, so it is difficult to judge whether HMC's concerns come from doubting and mistrustful consumers, or if the organisation – in pushing its strict norms – is attempting to convince Muslim consumers that they should not trust mainstream organisations. Their 'marketing' strategy sets out to propagate the feeling that it is not possible, in the current climate, to be confident about much of the meat that is sold as halal. They recognise the problems of increasing production to keep up with increasing consumer demand, but insist that this can be done in the way they put forward, though not perhaps as quickly as many would like.

Dialrel's work with consumers of halal in UK found that as well as highlighting the general characteristics of a business (i.e. do they sell alcohol or pork products, is run by Muslims, is it clean), a certifying logo is a key indicator or qualifier of halal status for consumers. As well as communicating to consumers whether or not a business has been certified to sell halal products, a logo also appears to enhance the reliability of the

products themselves. All this, of course, depends on the reputation of the certifier, and a symptomatic factor of the expansion of the market and its reorganisation is the proliferation of organisations claiming exclusivity, or better procedures, to certify and label products as halal. Certification in the UK is decentralised and we do not see centralised Mosques playing this role as they do in France; there are many different and contradictory interpretations of Islamic law. The overriding source of tension within the market is over the qualification of stunned and non stunned meat as halal. As we have seen, mainstream retailers like ASDA and Tesco are starting to straddle this divide in order to cover all aspects of emerging internal and export markets. As the UK experience demonstrates, certification is the key entry point into halal markets.

Because the market for kosher meat is smaller and more controlled than the halal market there is less conflict and controversy around the qualification of products as kosher, as a result, the problem of trust is less acute and there is some transparency. However, while the kosher meat market is less dynamic than the halal market, it is nonetheless undergoing a process of change. The market is not centralised to any significant extent and there are a number of competing certification bodies; however, these bodies are more likely to work with each other than in opposition. An increasing number of products are launched with kosher certification and many certification bodies claim that kosher certification can benefit businesses and boost sales. Consequently, while the UK halal market is experiencing growth because of a number of overlapping socio-economic trends, one could argue that the UK kosher market is differentiating in order to grow.

FRANCE

This chapter provides an overview of the markets and supply chains for halal and kosher meat in France. The research for this chapter was conducted by Dr María Puig de la Bel-lacasa of Cardiff University. Interviews with actors in the halal market were conducted by Dr. Florence Bergeaud-Blackler of IREMAM (CNRS) and Université de la Méditerranée, Aix-Marseille. Interviews were carried out with key individuals at the Grand Consistory of Paris, the Kosher consumer blog K.acher, Haladom and Groupe Doux.

SOCIO-ECONOMIC CONTEXT

France's grocery industry is vertically integrated and dominated by supermarket and hypermarket chains; the most well known are Casino, Carrefour, Auchan and Intermarché, who have gained increasing market shares since the early 1990s (since 2008 they have accounted for two-thirds of the French food market in 2008) at the expense of small butchers and grocery stores (16% of market). Although integration is starting to increase, the halal and kosher meat markets are still dominated by fragmented supply chains and by wide networks of independent processors and retailers at the neighbourhood level.

France is an important meat market in the EU. An idea of the volume of meat consumption in France can be given by the following numbers. In 2005, France produced 125,0 thousand tec (tec=carcass tons) of ovine meat (84 % lamb and 16% ewe).¹¹⁴ Data from 2008 shows that 4.2 million lambs and 634000 ewes were slaughtered that year in the country. France is the first producer of poultry in the EU and 25 percent of EU cows are slaughtered in France – 609,5 thousand (tec) in 2008. France is the third country (after Italy and Germany – in producing beef – 431,5 thousands (tec) – and produces a

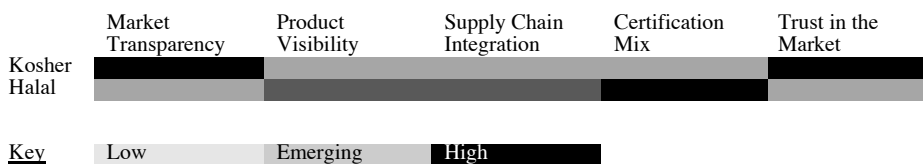


Figure 2.1. Snapshot of the halal and kosher markets in France

114. <<http://www.civ-viande.org/uk/ebn.ebn?pid=50>>.

fourth of veal slaughtered in Europe – 231, 1 thousands (tec) in 2008.¹¹⁵ France is also the first consumer of bovine meat and second of ovine and poultry (after the UK). There are no official figures recording the total number of animals killed by religious slaughter in France. No statistics are kept on the number of animals slaughtered using religious methods. Because of the absence of coherent data, we have gathered data from marketing intelligence, certifiers, and consumer networks and indications of the scale and nature of demand based on cultural visibility.

JEWISH POPULATION

France has the third largest Jewish community of the Diaspora and the biggest in the EU. Though several sources estimate the French Jewish community at about 600 000,¹¹⁶ others put forward a figure of around 488 000 and diagnose a decline.¹¹⁷ Around half of French Jews live in Paris and its suburbs (350 000) – representing 5.7% of the Parisian population. About 40% of French Jews are religiously unaffiliated, but it is estimated that of 25% of French Jews observe Kashrut dietary laws and the number of kosher butchers, restaurants and shops is growing.¹¹⁸

MUSLIM POPULATION

France has the largest Muslim population in Europe, although the numbers put forward vary. While ministry sources estimated a figure of around 4 million French Muslims in 2000, others have recently suggested numbers closer to 7 million.¹¹⁹ Muslims represent a higher percent of the population in France than in any other EU country, including the Netherlands, Austria, Belgium and Greece. Islam is France's second religion (10%) behind Catholicism (85%). The Muslim population is predominately Arab and North African of origin, followed by Turkish and West African populations.¹²⁰

MARKET OVERVIEW

KOSHER

As France has the biggest Jewish and Muslim populations in Europe, it is not surprising that the markets for kosher and halal meat are expanding. This change is particularly

115. France AgriMer, EC data, 2009.

116. European Monitoring Centre on Racism and Xenophobia (2003) *Manifestations of Antisemitism in the EU 2002–2003* (08/02/2007).

117. The Jewish People Policy Planning Institute, Annual Assessment 2008, *The American Jewish Year Book* in 2006 counted 495 100.

118. Doris Bensimon (1986) *La population juive de France: socio-démographie et identité*. Paris: Institute of Contemporary Jewry-CNRS, pp. 35–38.

119. *L'islam dans la République*, Haut Conseil à L'intégration, Ministère de l'Intérieur, 2006.

120. These numbers are extracted from: Stéphane Papi (2004) *Les statuts juridiques de l'islam dans l'Union européenne*. Marseille: l'Institut de Recherche sur le Monde arabe et Musulman (I.R.E.M.A.M), C.N.R.S Aix-en-Provence, <<http://www.iehei.org/bibliotheque/PapiISLAM.pdf>>. For more detail see Dialrel, WP 4.1. France, Religious slaughter: the public debate and market transparency.

evident in supermarkets, where the expansion of kosher and halal sections offering meat has been extensive. The online press review 'Islam in France' suggests that Muslim meat consumers represent between 10 and 15% of national beef, lamb and chicken consumption – around 400 000 tons per year – and that they consume twice as much meat as the average consumer.¹²¹ The trend has not escaped media attention: an important mainstream newspaper, *Le Figaro*, quotes figures estimating that from all animals slaughtered in France in 2007 around 32% were sacrificed using halal or shechita methods.¹²²

Like the UK, the increasing number of people seeking halal and kosher responds to religious convictions, culture and custom, but also to other consumer preoccupations. Among those who opt for halal and kosher meats, religious reasons coexist alongside a general perception that the meat labelled as such is produced under better sanitary conditions, is healthier, and that it emerges from a form of slaughtering more in line with animal welfare concerns.

THE HALAL MARKET

Certification has only relatively recently become an issue in the French halal and kosher landscapes. Calls from all sides have intensified over the last ten years for better certification procedures for meat products. We found that when certification is discussed as a favourable move for consumers, labels are presented as a means to guarantee the transparency of meat provenance and to assure consumer trust. When presented as an asset to producers and industrial interests they are presented as paths to business opportunities in expanding 'world food' markets. Another argument for certification, this time addressed to the general public, is also gaining weight in France; mainstream consumers are increasingly 'warned' by the media that they may be buying unlabelled halal and kosher meat:¹²³ until recently this line of argument was limited to specialist circles and animal welfare organisations.¹²⁴ This situation could increase pressure for certification and labelling; however, as we observe below, these demands come from quite different perspectives and expectations. In a context favourable to certification we observe a proliferation of labels and organisations that are, particularly for halal, linked to commercial and private as well as religious institutions.

FRANCE CASE STUDY: KOSHER CERTIFICATION ORGANISATIONS AND THE DISTRIBUTION CHAIN

France is the most important market for kosher foods in Europe. Marketing reports calculate a €400 million market with an estimated 16% annual growth rate for the past 20 years. The market is made up of: wholesalers (31%); supermarket chains, retail stores (49%) and food service (20%). Moreover, 71% of French supermarkets now have a ko-

121. Islam en France, <http://www.islamenfrance.fr/regions/a-7-350-Centre-Le_Marche_du_Halal>.

122. Nous avons tous déjà mangé de la viande halal ou casher (We have all already eaten halal or kosher meat), *Le Figaro*, 25 February 2010.

123. Ibid.

124. See Florence Bergeaud-Blackler (2008) *L'Etat, le culte musulman et le halal business*, in *Annuaire Droit et Religions 2008–2009*. Aix en Provence: Presses Universitaires d'Aix-Marseille.

sher strategy. There are more than 50 000 kosher products on the market and between 500 and 600 companies only handle kosher products; of these, 18% are meat and dairy processors with annual sales of €45 million.¹²⁵ According to the Paris Consistoire, the most dynamic part of the market today is the catering and restaurant industry, which has grown considerably.¹²⁶

Though the kosher market is much smaller than the halal market, the market is growing and it is widely argued that certification and labelling are a crucial step for its organisation. However, contrary to halal, the production of kosher meat, particularly at the level of its supervision at the level of the actual performance of shechita, remains under the control of the Jewish religious community. In this context, most religious certification labels claim to be the guarantor of rabbinical affiliation and concerns about kosher certification are thus mostly religious. Organisations introducing a more commercial language around kosher labels and certification streams are rare and the promotion of an emerging market is not restrained to Jewish consumers. An example is the European Bureau of Kosher Certification located in Lyon,¹²⁷ which offers the 'kosher label'.



The religious aspect of this label is guaranteed by the supervision of a Rabbi who oversees the production. Their logo, they claim: '[A]ttests of the qualities and the following of particular production rules. The controls are organised by private and independent organisations, impartial, efficient and competent authorised by the competent rabbinic authorities. These independent quality signs correspond to a strong consumer demand'.

GRAND CONSISTORY OF PARIS

Though kosher certification is diversifying in France, the most important religious Jewish authority remains the *Grand Consistoire de Paris* – also significantly called the Central Consistory – which certifies around 60% of the market¹²⁸ and around 2,500 products for export worldwide (mostly to the US and Israel). For a long time, shechita in France was completely controlled by the *Grand Consistoire* and the organisation remains the most important religious organisation in terms of control – and the only one authorised by the State to distribute 'access cards' to the abattoirs. However, today shechita is also organised by Consistories in other cities such as Lyon, Marseille, and Strasbourg. Further change and diversification could emerge from the increasing delocalisation of shechita and a concurrent increase in demand. There are also labels that are not linked to rabbinic authorities and a particular geographic area, for example, the Loubavitch rabbinat and other orthodox Paris rabbinate.¹²⁹ Loubavitch (a Hassidic rabbinat) offers the second most well known procedure of control and guarantees 'Glatt' Kosher. With a sphere of influence much smaller than that of the Consistory, from the start it represented a chal-

125. GAIN (Global Agricultural Information Network) (2009) *French Kosher Report*. USDA Foreign Agricultural Service.

126. Interview, certification service of the Paris Consistory, September 2009.

127. <<http://www.kosherlabel.com>>.

128. According to GAIN report on Kosher foods, 2009, op.cit.

129. Interview, consumer organisation K.Acher, September, 2009.



lenge to the monopoly of the Consistory. The Consistory's monopoly has been contested for a long time, notably because its tax is considered too high.¹³⁰ Rabbinate not based in France are also operating in the kosher market; notably, those located in the UK have influence, occupying increasing market shares in orthodox environments. Moreover, due to recent economic constraints, some foreign rabbinate are making use of delocalised slaughtering campaigns, notably in Eastern Europe.¹³¹

Slaughter

When asked about the principles of shechita behind their label, a Rabbi in charge of the certification services at the *Consistoire* tells us that there is not much to say, the norms are recognised and accepted and they are followed. The principles ('the law') are common to all, even if in practice slaughtering is decentralised. This assurance testifies to the fact that there is no major disagreement within the Jewish community in France about the rules of religious slaughter; even if orthodox rabbinates such as Louvabitch apply 'Glatt' Kosher rules, there is no conflict over what constitutes 'real' and 'fake' kosher. Moreover, the Consistory's central position and legitimacy has been supported by the state. This support to centralisation has contributed to preserve a tight relation between the power to slaughter ritually and the power to certify.¹³² The Paris Consistory trains its own shochets – i.e. rabbis who bleed the animals according to rabbinic requirements and authorised by the government. The consistory counts with around 30 shochets who control the slaughtering directly at abattoirs and processing plants. The animals are slaughtered in French abattoirs, then stamped as kosher and transported to retailers and wholesalers; this is the first crucial step in the *qualification* of meat and products defined as kosher. In principle, slaughter is carried out in areas in the abattoir reserved for kosher and a 'supervisor' follows animals through the chain. When animals are refused, they pass into the mainstream line. As we noted earlier, this has only recently become a public matter beyond animal welfare associations and specialist discussions.¹³³

Processing

Supervisors are also present in processing plants; on site at the moment of production they 'kosherise' the workshop and follow the processes; *qualification* continues at this moment as another stamp is imprinted on the processed meat products. The director of the kosher service studies the applications of producers to verify that the specifications of the producer conform to the required religious principles. A team of two people work for the kashrut certification section of the Consistoire and chemical engineers are available to analyse the processed produce. This is financed through a 'tax' that the Consistory collects from producers.

130. Please refer to report Dialrel 4.1. France by Florence-Bergeaud Blackler for more details on the history of shechita control in France.

131. Ibid.

132. See WP 4.1. op.cit.

133. Nous avons tous déjà mangé de la viande halal ou casher (We have all already eaten halal or kosher meat), *Le Figaro*, 25 February 2010.

Distribution

After the animals are slaughtered by an authorised *shochet* – ideally in a national abattoir – the meat is followed by the supervisor (*machgiah*) from the cut throughout the transport and to the processors and/or retailer. As we have seen, at each stage this surveillance involves the posing of a stamp on the meat in order not to lose track of it in the distribution chain. A *machgiah* is also present in the processing plants.

The French kosher market is still generally more represented in independent neighbourhood retailers and community stores. However, kosher is also gradually gaining a presence in mainstream supermarket chains. Although numbers appear globally smaller for kosher foods than for halal, the interest in the market is clearly increasing. To be *qualified* as kosher meat products also depend on the reputation of wholesalers and retailers, and in France there is a longstanding tradition of trusting neighbourhood commerce and local retailers.

Fresh meat is mostly available from butchers and kosher grocery stores with a meat counter. According to market intelligence data from 2005,¹³⁴ the largest concentration of retailers selling kosher products is situated in Paris and the Parisian region, followed by Marseille and a smaller number in Strasbourg and Lyon. The Paris Consistory certifies meat for more than 60 butchers and delicatessen stores in the Paris administrative area (37 butchers in the city area) but also across France, including 17 butchers in Marseille and three in Strasbourg. On their websites, the consistories of Nice, Marseille and Strasbourg provide lists of kosher products developed by the Paris consistory.

Kosher products in important chains like Auchan, which declared in 2001 an annual increase of 15–20% in the turnover of the kosher sales,¹³⁵ and Carrefour, remain limited to ‘ethnic food’ corners, and do not include fresh meat and mainstream supermarkets only account for around ten percent of kosher retail sales.¹³⁶ Some small supermarket chains in Paris have a more dedicated kosher selection that can include fresh meat. Kosher has also conquered the online home delivery sector and there are a number of companies offering online catalogues of fresh meat.

Consumer Trust

The Consistoire argues that there is a high level of confidence in kosher products. Although they recognise that non Jewish consumers buy kosher products, particularly Muslims who do not fully trust in halal, the products *qualified* as kosher through the practices of the Consistory are mainly targeted at the Jewish population.¹³⁷

K.ACHER.FR

Although the Grand Consistory of Paris claims that consumer trust in kosher remains strong, some warn against fraud and fake labels and even ‘fake rabbis’. The online magazine K.Acher.fr,¹³⁸ that claims to be a ‘European journal about Kashrut independent of any rabbinic authority and producer’, provides regular updates and comments on fraudulent or suspicious labels; they provide a forum which is read by around 50 people every month and to which consumers address their queries. The queries are answered online,

134.GAIN, 2005, 2009.

135.Le nouveau succès du rayon casher, *Le Monde*, 23 June 2001.

136.GAIN, 2002.

137.Interview, September 2009.

138.<<http://www.kacher.fr>>.

sometimes referring to one or the other rabbinate with the assurance that: 'No member of our team is linked to any interest or obedience in the chain of certification or distribution'.¹³⁹ The aim of the journal is to defend kosher as the 'search for a rigorous certification of quality according to the traditional exigencies of Judaism'. It provides the public with information about kashrut rules and the availability of certified kosher products, focussing on the 'actualities of kashrut'. K.Acher.fr attempts to examine 'the diverse obstacles that a consumer of kosher products could face'.¹⁴⁰ Their on-line magazine is read by rabbis and producers, who are concerned by the 'perception we have of their products and those of the concurrence'.

The group is reluctant to use the word 'market'. When we inquired about their views on the extent of the market for kosher meat they affirmed that they do not consider 'the observance of kashrut as a market'. This shows a resistant attitude to the marketisation of kosher, that we can also more generally verify and that maintains a tension with the increasing visibility of kosher as a source for profit. If the overall impression of the interest in kosher is that of a growing market raising profit expectations, and in spite of some necessity to defend the label, kosher remains mostly publicised as a guarantor of value and even a sign of 'purity' and 'quality' to the wider public. Another sign of this is a return to the reputedly more strict form of kosher, 'Glatt', which, according to K.acher, could soon become a norm in the entire Paris region.

It appears that the attraction of marketing kosher certification in this way is, paradoxically, to gain the trust of a non-market oriented product. As an interviewee put it, despite 'the excess of some showmen and entertainers from the commercial or rabbinic worlds', there is a relatively high level of trust in the Jewish community with regards to kosher.

Finally, it is important to note that the monopoly of the Paris consistory over the certification of kosher meat remains contested. In particular, there are consumers who consider its tax unfair for less privileged consumers, not least because it increases the price of their meat. They see business made in the name of quality and control and accuse the Consistory of lacking transparency regarding its accounts and procedures.¹⁴¹ However, the claim here is not for a stronger centralisation of labels, but for an opening of the certification market and imports in order to challenge this monopoly and thus lower the price of meat.

At the time of writing, the issue of 'fake' meat was being discussed in the French Jewish community. During an inspection by the Central Consistory, a popular and reputed meat retailer was found with a batch of 'merguez sausages' that could not be assured as kosher because they did not have the appropriate stamp. The consistory issued a notice on its website immediately announcing a sanction of 150 000 Euros to this butcher and dismissed the inspector in charge. The firm – a pioneer of online sales – admitting the 'extreme gravity' of the incident suspended production in the processing site.¹⁴² It remains to be seen whether this type of affair fosters mistrust or is taken to indicate the effectiveness of control procedures.

139. Interview with one of the webmasters of K.acher online magazine, <<http://www.kacher.fr>>.

140. Ibid.

141. A series of articles in JSS, an independent Jewish news blog in French edited in Israel but mostly dedicated to French news and read by French jews, develops this point. The blog also denounced the presence of a toxic colorant in merguez sausages widely distributed and present in butcheries that are validated by the Central Consistory. See <<http://jssnews.com/2010/03/21/le-casher-nest-pas-cher>>.

142. <http://www.consistoire.org/agenda,522.html?i_id=584&PHPSESSID=80bbb8ee082705ebaed6d140c19d7659>.

DISCUSSION

The emergence of a commercial-oriented approach to kosher certification in France does not yet affect the certification of meat. Shechita requires heavy infrastructure and follows its own particular track within the certification of kosher goods and produce. The *qualification* of kosher meat involves a complex process that directs producers toward specialised rabbinic authority. The power to slaughter religiously and certify thus remain tightly related in the case of kosher. Despite the voices against the Central Consistory's monopoly, there is no sign that this situation will change in the near future and it appears that the diversification of certification organisations will remain limited to the kosherisation of other products. While economic constraints are favouring new situations such as the delocalisation of shechita, the relative transparency of the kosher certification market could be negatively affected in the future.

SUMMARY

The market of kosher meat is still relatively a small part of a larger kosher market that is growing steadily in France. The level of clarity is high with regards to the knowledge and agreement around shechita rules. Control is relatively good and stable throughout the process of commercialisation and distribution of kosher meat, due to good control of the production chain and the clarity of rules. However, transparency concerning the actual procedures and how do they take place could be improved. Most of the information available to consumers is limited to a description of the rules and procedure for shechita and a list of the authorised products. Information is not easily available about what happens in the abattoir and immediately after during the industrial part of the production. Kosher remains a vertical market with a short supply chain, but with a potential to expand its reach. Integrated supply chains and supermarkets still do not play an important role in the distribution of kosher fresh meat, and most fresh kosher meat is sold in local butchers and grocery stores. Fraud could increase as the market grows, thus making control the of the supply change chain more difficult, especially with control being in the hands of only one organisation with limited means.

The practice of transferring into the mainstream market meat obtained through shechita, but not fully *qualified* as kosher (e.g. hindquarters), is only starting to become an issue amongst the French public. However, some Jewish voices already object to the supply of information about such meat because of the possibility of the stigmatisation of shechita. All kosher meat emerges from non stunning slaughter and kosher labels do not indicate this fact clearly. Consumer appears high; however, while kosher is often identified with 'purity', this feeling increasingly coexists with concerns about the possibilities of fraud.

HALAL CERTIFICATION ORGANISATIONS AND THE DISTRIBUTION CHAIN

Figures regarding the size of the halal market in France are explosive. In 2009, the most quoted figure in media and market reports estimated the value of the market at €3 billion,

a recent figure in the mainstream press affirms that the value of French halal market (including food products and restaurants) could attain €5 billion in 2010.¹⁴³ Other figures are even more ambitious and point to a market value of €12.2 billion.¹⁴⁴ Growth is estimated to be around 15% annually.

The market has developed steadily in France since the 1970s, even before discussions emerged about a religious consensus on the nature of 'halal'.¹⁴⁵ Today, products *qualified* as halal are a common feature in supermarkets and amongst younger Muslims halal meat is increasingly seen as part of their religious and cultural identity; a highly publicised 'Salon Halal' (Halal food show) has taken place every year in France since 2004. While meat labelled halal is mostly produced through an industrial circuit, a traditional circuit of neighbourhood halal butchers still represents around 80% of this market. Although traditional and modern markets coexist, the production and commercialisation of halal is far from being under the absolute monopoly of Muslim organisations.¹⁴⁶ Nevertheless, if the traditional idea of halal commerce in France, much like the UK, revolves around the importance of local butchers, halal products are also widely available in supermarkets; much like the UK, some retailers have created meat counters that only sell halal meat.



A traditional French supermarket chain Casino has also introduced a halal line, Wassila, which came about as a result of 'consumer demand' and which is said to 'respect traditional rules.'¹⁴⁷ Casino declares that in response to confusion in the market they have a halal scheme that emphasises industrial production, certification and retail commercialisation. They have even created a special website to support their halal brand, where they provide the public with information on the halal certification labels they use (7 French, 1 UK

(HMC) and one Spanish).¹⁴⁸ They also give brief details about the labels and links, notably their position on the stunning debate.¹⁴⁹ Casino are keen to point out that certification 'really exists' and that it comes from an 'official' organisation registered with the State.¹⁵⁰ However, the consumer blog Al-Kanz dismissed the first version of this operation, arguing that the large number of certifiers was amateurish, disrespectful to Muslims, lacked transparency and did not guarantee halal. As Al-Kanz state; 'To invest in a market without studying the codes and constraints is to risk the loss of all credibility.'¹⁵¹ Al-Kanz has thus welcomed the efforts of the chain to improve and wider their approach to halal.¹⁵²

In general, the visibility of halal meat is greater today than it has ever been and the notion of halal has extended to cover all kind of products, such as frozen pizzas, and not

143.SOLIS, marketing organisation focused on ethnic markets, <<http://www.solisfrance.com>>.

144.World Halal Forum 2009 (Malaysia), figure quoted in *Le Monde*, 1 March 2010.

145.Bergeaud-Blackler, F. (2008), op. cit.

146.Bergeaud-Blackler, F. (2005) De la viande halal à l'halal food. Comment le halal s'est développé en France?, *Revue Européenne des migrations internationales*, 21(3), pp. 125–147.

147.See <<http://www.wassila.fr/Dispositif-de-qualite.html>>.

148.<<http://institutohalal.wordpress.com>>.

149.Wassila refers information about the HMC UK on their pages <<http://www.wassila.fr/HMC-Halal-Monitoring-Committee.html>>.

150.Tribunal de commerce; Préfecture.

151.<<http://www.al-kanz.org/2008/08/29/ramadan-intermarche/>>.

152.See <<http://www.al-kanz.org/2009/08/05/casino-wassila>>.

only those considered 'ethnic'. In four years, since the first fast food halal outlet was opened in 2005, the presence of halal in mass fast food retailing has grown rapidly. In December 2009, the most paradigmatic French fast food chain Quick (the French equivalent of McDonalds) announced that it was launching a 'halal burger' and that some of its restaurants would have a halal only menu.¹⁵³ On the windows of the outlets offering a halal menu a sign reads: 'Welcome to Quick. In this restaurant the meats sold are certified halal, with a guarantee of competent practices'.

Much like the KFC in the UK, the chain presents this halal line as a 'trial', and as such it was not initially publicised. Nonetheless, in the press and other media spaces, such as the animated halal 'blogosphere', the issue has become widely discussed, often drawing upon debates about 'national identity' and public declarations on the topic by figures associated with 'far right' politics. Polemic confrontations continue, with the Mayor of one city claiming that the local Quick outlet was 'discriminating' against non Muslims, first pressing charges against the chain and then withdrawing them after the chain engaged with the idea of finding a 'technical' solution to the reintroduction of non halal menus.¹⁵⁴ However, the confusion is not only related to cultural politics and polemical discrimination, it also relates to certification. An article in an online tabloid from November 2009 quotes the Quick consumer office, who claimed that Socopa, the provider of Quick halal meat,¹⁵⁵ is certified by the respected Evry Mosque. However, Evry claims that while this is the case, they do not certify Quick and have never had any contact with them. AVS certification has also posted warnings on their website affirming that, despite rumours, they have never certified Quick.¹⁵⁶

CERTIFICATION

No single religious institution controls the market for halal products.¹⁵⁷ The French halal market is huge and remains particularly obscure in terms of regulation, certification practices and definition, and there is widespread perception that the market is in a 'mess'. Several rumours and scandals have been publicised over recent years; these concern only fake halal, but the sanitary conditions of production.¹⁵⁸ Though certification is sometimes presented as a remedy to these problems, the current state of the market does not offer a reliable guarantee and it is estimated that there are around 50 halal labels in operation across France. Only some of these are independent – the others are stamps that companies use for auto-certification. At one end of the continuum of independent certifiers are the halal services in important mosques in Paris, Evry and Lyon; at the other end are recently

153. *Le Figaro*, 16 December 2009; the journal frames the event as happening 'in the midst of a debate about national identity'.

154. See <http://article.wn.com/view/2010/02/19/French_fast_food_chain_Quick_sparks_halal_burger_appeal> and <http://www.lemonde.fr/politique/article/2010/02/26/quick-halal-le-maire-de-roubaix-retire-sa-plainte_1311910_823448.html>.

155. SOCOPA is a major meat producer in France and one of the main meat export companies in France. It has three pork and 15 beef plants across the country.

156. Thibaud Vadjoux, 16 December 2009, <<http://www.e24.fr/economie/article164173.ece/Hamburger-halal-Quick-veut-le-beurre-et-l-argent-des-beurs.html>>.

157. See report Dialrel 4.1. France by Florence Bergeaud-Blackler.

158. A recent example of bad press regarding halal was the discovery of rotten meat cleaned with sulphuric acid http://www.saphirnews.com/Affaire-de-la-viande-halal-nettoyee-a-l-acide-une-mise-en-examen_a9967.html. Unverifiable numbers such as that 90% of meat commercialised as halal is not halal is an example of the rumours surrounding this market: <http://www.islamefrance.fr/regions/actu.php?idregion=19&idactu=633>.



funded Muslim cultural and religious organisations, the most famous being AVS (an acronym for 'A Votre Service' (to serve you)).¹⁵⁹ Active since 1991, AVS is dedicated to the certification of halal meat and promoting transparency and 'strict' control of the process according to religious rigor. This organisation is comparable to the HMC in the UK and it is gaining a reputation for a strict application of halal rules, professionalism and transparency; their website has a regularly

updated list of products, butchers, retailers as well as the abattoirs they control.¹⁶⁰

With regards to enhancing certification we observe two conflicting tendencies. On the one hand, there is widespread affirmation of the need to put the market in order, for instance by centralising and regulating certification; this is difficult to do as there is no consensus within the Muslim community regarding the rules of halal slaughtering. On the other hand, there is an underlying resistance to regulation and to the centralisation of certification; the reputed value of the halal market is huge and some believe that regulation could restrict the possibilities for further development.

HALALDOM

A good example of 'auto-certified' business is Halaldom,¹⁶¹ a company dedicated to the home delivery of halal meat – particularly lamb. This service operates through a website where consumers can place orders. It started out in 2008 with a 'pilot' selling operation at the Eid al-Adha celebration. Halaldom's aim at this point was to become the first home delivery for halal meat in Ile de France in the Paris region. The two young entrepreneurs who started it surprised the abattoirs by stating that they did not 'want naked carcasses in the trucks,' but rather a marketed package that they could deliver to homes'.¹⁶² At the start, nine out of ten abattoirs didn't take them seriously, and it was only after a year or that they were recognised as a serious market actor.

This small company reflects a generational shift in the approach to selling halal meat. Alongside the presence of religious conviction and tradition they insist in the importance of doing business well, having a 'business model', and creating the 'buzz'. Halaldom has tried to produce a characteristic product, the 'AgneauBox', which consists of a polystyrene box in which a 25 kg lamb can fit.¹⁶³ They launched their product and website ten days before the 2008 Eid celebrations and were 'submerged' by calls 'not necessarily of people willing to order but people wondering what on earth this was'.¹⁶⁴ Brand making is particularly crucial for Halaldom. While the idea is new, they also borrow from traditional representations and symbols to indicate immediately that they are targeting Muslim consumers; their flyer shows a veiled Muslim woman, who is portrayed as confused about how best to find a lamb for the celebration of a newborn. In this sense, Halaldom presents their drive and knowledge as anchored in the community and they purport to share the

159. See <<http://www.halal-avs.com>>.

160. <<http://www.halal-avs.com>>.

161. <<http://www.halaldom.com>>.

162. Interview with Halaldom founder and partner, December 2009.

163. <www.halaldom.com/agneaubox.php>.

164. Ibid.

desire of the halal consumer to find out *whether the corner butcher really is providing halal meat*.

AUTO-‘CERTIFICATION’

As a young business with an atypical profile, certification was meant to be an asset and Halaldom first explored certification with AVS. AVS studied their case as something both innovative and ambitious that needed a particular approach. Particularly different was the fact that their role was that of an ‘intermediary’; this meant that the moment of delivery couldn’t be controlled, which resulted in a proposal from AVS that not only did their meat had to come from AVS certified providers, but that the deliverer also had to be also an AVS controller. This required the company to hire an AVS controller, something this ‘artisan’ company could not afford.

Halaldom thus initiated a process of auto-certification. They describe this as consisting of good communication with the consumer and having a discourse that suggest ‘our abattoir is 100% halal’. To guarantee this claim, Halaldom found an abattoir with a slaughter line exclusively dedicated to halal lamb, and which has its own certification scheme. The strategy of gaining consumer trust is thus based on communication and claiming a ‘commitment’ to halal rather than simply on a label. When consumers ask about certification they explain the absence of an external label by the particularity of their business. When we asked about the certification scheme at the abattoir, they explained that because the association that certifies their main abattoir is not visible – they have no website, no public phone number – they have not advertised its name in their own website. Because the halal seal – which only reads ‘halal’ – is marked only once on each carcass and because the lamb is provided in cuts, the seal is not always visible to the consumer. The promotion flyer of the ‘AgneauBox’ does not affirm that the lamb is certified halal but that it is ‘halal guaranteed’. Surprisingly, it also adds a quality label affirming the meat comes from ‘organic agriculture’.

Halaldom’s success is based on the originality of their project and on their communication strategy. The two associates said they realised that traditional butchers were not responding to the needs of new generations. In their discourse, they have managed to create a new product that is not incompatible with tradition and the religious concerns of the elder. For instance, the Halaldom service complies with the Eid tradition of donating a third of the lamb to a neighbour. The consumer can, at the moment of placing their order, choose to give a percentage of their order to a Muslim charity, which will be in charge of redistributing the donated meat.

Slaughter

With regards to the method of slaughter, Halaldom’s position reflects wider tensions and the lack of consensus in the market. In recognising a number of specifications in different industrial settings, Halaldom nevertheless think that there is today in France a ‘core’ standard of halal that is common to all. This includes bleeding the animal with a knife, pronouncing the meat slaughtered ‘in the name of God’, and carried out by a Muslim. In their view, the religious texts are far simpler than most of the available specifications provided by producers.

Halaldom argue that more transparency in the market would be beneficial, as they find that they have to constantly reassure consumers; in this sense, auto-certification often

appears unsatisfactory. Nonetheless, if there were to be an intervention from above, that is, if the authorities would implement a standard, they believe it should correspond to the religious texts, and they claim that they would be happy to accept such a standard if it would be done in this way. In spite of the novelty value of their business, and the lack of third party certification, their 2008 Eid campaign obtained 400 orders in ten days; Halaldom compare this to the 100 lambs that a butcher would sell after six years in a neighbourhood. They expected this number to double in 2009. In some ways, the success of Halaldom contradicts the idea that transparency is necessary to create a market and assure trust. While there is never a 100% assurance about the halal 'quality' of commercialised meat, it could be argued in this instance that community commitment plays an important role in the possibility of consumer trust. If the local butchery is the space in which a product goes through its final stage of halal *qualification*, despite the lack of transparency of the upward chain, it may be important for new types of businesses to produce a similar form of reassurance.

ASIDCOM

ASIDCOM is a non profit information and consumer advocate organisation for Muslims. Though rejecting any form of auto-certification, they show that the landscape of organised certification is far from trustworthy. Though it is not clear if this organisation is particularly representative, its blog is very active. It is interesting for our purposes to note that in 2009 ASIDCOM presented a report based on questionnaires with a number of certifying organisations operating in France (they also included some organisations outside France, such as the HMC in the UK). They identified a number of organisations that have no official status to act as a controller for halal certification and their advice to consumers was to seek 'serious' certifiers. Signs of seriousness are indicated by the presence of a good number of controllers and the absence of stunning. There should also be separation between the roles of the slaughter man and the supervisor; from their perspective, when a 'controller' is hired by an abattoir confusion can affect the independence of the controller and their ability to dismiss defective carcasses, as it often means economic loss.

Interestingly, this group considers that certifying organisations often use animal welfare as a 'pretext' for justifying stunning – while they claim animal welfare is not unanimously proved by science. Their recommendation, in this sense, is to 'enhance the mechanisms and the training of the ritual slaughterers'. They have also identified the absence of systematic controls, the use of 'sur-certification', when an organisation uses the label of another organisation while not necessarily sharing the same principles or procedures. Moreover, they claim that procedures are often not very precise; here they focus on AVS, as an example of an organisation that states that their slaughter practice do not include stunning, yet practices stunning 'after' the bleeding. ASIDCOM sees the fact that only six certifiers answered to their questionnaire as a symptom that the consumer is the 'forgotten actor of halal', that the market is 'doubtful' and that certification has become a real business. In other words, their judgement is a regrettable lack of transparency in the market.

GROUPE DOUX

As we have already noted, certification is a relatively new concern in France. The following example shows how a large size business producing and commercialising halal

meat is involved in certification. This case is symptomatic of a relative unease among producers regarding halal certification in the context of the industrialised mass production of meat.

Groupe Doux started as a small family business in the 1930s, steadily developing into a star of the European agribusiness. The group presents itself as the first European producer of poultry and its derivatives with 1 million tons of exports per annum.¹⁶⁵ The history of their halal production line is itself one of market opportunism. In the 1950s the company decided to bet on producing frozen chicken which they thought the French would soon be increasingly consuming, as was the case in neighbouring countries. This never happened; the French still prefer 'fresh' poultry.¹⁶⁶ This production initiative was then reoriented towards exports, notably to the Middle East and Doux thus claims long-standing experience with Muslim consumers.

When we asked Groupe Doux about certification the matter seemed relatively simple at first. The group started considering certification in the 1990s. They appealed to AFCAI,¹⁶⁷ a non-profit association for Arab-Islamic culture to provide certification. This Brittany based association was chosen for convenience reasons, because there was no mosque in the region where most of the group's activities are located. The definition of halal provided by our interlocutor is based on 'the grand principles of halal': the presence of the slaughterer (*sacrificateur*), orientation towards Mecca, and 'reversible stunning. At the abattoir, the halal and non halal planning are segregated and if the animals are not slaughtered in the presence of the 'sacrificateur' they cannot be considered halal. To these requirements, Groupe Doux's adds its own procedures of quality control.

In 2008, the company's turnover was of €1.7 billion, 28% of which is composed of exports of halal frozen chicken to the Middle East. In our interview we inquired about their part of their halal production that targets the French public. Here our respondent only considered one product, 'Dar Al Mazak', a small range of cordon bleu and nuggets that are quite marginal in terms of the company's turnover. We were told this is not a market they invest in, that there is no real promotion, and that this range was mainly developed to respond to a demand from supermarkets to be present a varied range of products. Doux is not present in the catering sector and they insist that for them 'halal is the export market'.

All this seems quite straight forward. However, we are aware that Groupe Doux is one of the main providers of KFC in France. The fast food chain launched a halal test line that has been at the heart of a heated controversy in France over the past two years. KFC's halal policy was questioned from all sides, by pro and anti halal consumers, and by consequence Groupe Doux came under scrutiny. During the interview this issue was not initially discussed in relations to our questions about halal production and certification in France. However a second interviewee did finally address the question directly, drawing attention to a 'third market' of restaurant chains and fast food outlets. This part of their market has become visible, we were told, precisely because the brand provides meat for chains such as KFC, McDonalds and Quick.

KFC has been directly questioned about the 'halalness' of their meat by French consumers, some of whom called for a boycott of the chain as in the UK. As a result, KFC

165. <<http://www.doux.com/-Le-Groupe-.html>>.

166. See the article by Jacqueline Coignard in *Libération* (27/11/1999), <<http://www.liberation.fr/economie/0109196579-la-breve-histoire-d-un-poulet-standard-premier-producteur-europeen-doux-revendique-sa-methode-industrielle>>.

167. <<http://www.afcai.com>>.

referred consumers to Groupe Doux as a certified producer, and the consumers then challenged Groupe Doux. Despite 50 years of export experience to the Middle East and their relationship with a certification organisation recognised by state authorities since 1990s doubt persists. As in the UK, this is a direct result of concerns over stunning.¹⁶⁸ When we questioned about Groupe Doux's communication of the KFC issue – that is, the issue of transparency – an interviewee argued that there are 'embarrassing questions' emerging for businesses, notably concerning 'religious interpretation', which communication strategists are not well prepared for. Companies discover that:

'New questions emerge, there is confusion amongst certifiers... there is no norm... we have this thing, where is the user manual? Who do I pay for it? How do I get the stamp? And here we open a Pandora box, we realise that there is not one process, that this is history still in the making.'

From the perspective of this company their procedures are clear and transparent because the organisations they work with are legally authorised with their own quality specifications and control procedures, notably for animal welfare. One of our interviewees argued that new problems are being created by contradictory tendencies. On the one hand, are the concerns of Muslim consumers about the origin of meat, which are coupled by a 'hardening' of interpretations of halal towards the absence of stunning and a mythology of individualised slaughter. On the other hand, there is a sensibility amongst consumers about animal welfare. We see here that animal welfare is becoming an argument to defend industrialised mechanised slaughter; more generally, however, this case shows how the traditional meat industry benefits from the boom of the halal market in Europe, but is unprepared for the troubles emerging for these developments. Only 10 years ago labels were random and trust in individual retailers was the norm. Today the halal consumer in France, especially in the supermarket and restaurant sectors, expects certification labels and procedures of identification as guarantors of halal meat. Meanwhile, producers seek certification to secure a market in the context of industrialised meat and mass production and commercialisation.

DISCUSSION

The tensions in the French halal market are reflected in the competing definitions of halal. On the one hand, there is an often nonchalant affirmation that *halal is just halal*, in other words – there are no problematic issues. On the other hand, when market actors come to define what they mean by halal, the criteria of *qualification* are far from clear. Confusion reigns: competition is open and it is not clear what warrants 'real' halal and what does not.

168. Groupe Doux was strongly criticised following the suspicions around KFC chicken. A consumer forum also pointed out in 2009 that the supermarket chain Casino removed the Dar Al Mazak products from its shop: <<http://www.al-kanz.org/2009/11/16/dar-al-mazak>>. A post in the same forum blames the passivity of the Muslim consumer to the fact that both KFC and Groupe Doux continue their affairs in the same way. The scandal continues with a documentary filming the slaughtering of chicken in one of their abattoirs. The documentary movie was retreated before its broadcasting but was watched by journalists who made public its contents online, signalling silences and obscurity around the processes – certification included – by which Doux produces halal chicken, notably including mechanic slaughtering. Their certifier was also put into question mainly because it is a very small office that seemingly incapable of supervising the production of mass production of halal chicken such as that of the Groupe Doux: <<http://eco.rue89.com/2010/02/05/kfc-affirme-que-son-poulet-est-halal-mais-ne-convainc-pas-137050>>.

Any organisation can pretend to be a certifier and any business can proclaim itself to be a guarantor of halal through auto-certification. However, as far as many consumer groups are concerned, certification is no guarantor of halal quality; trust in halal is far from certain. The diversification of brands, which are mostly auto-certified, adds to the confusion. Nevertheless, the market continues to grow. A possible reason for this is that identity and cultures, rather than strict adherence to religious practice, are important factors for the younger generations consume halal meat.

SUMMARY

Meat *qualified* as halal constitutes an important share of the meat market in France, yet there is no official data or reliable figures available. There are few independent certification organisations and those that exist cannot cover the entire market. Because there are many halal stamps, the level of clarity about knowledge and agreement around the standard rules of halal slaughter is low; this is symptomatic of a lack of religious consensus; control is neither homogeneous nor stable throughout the entire process of commercialisation. The production and supply chains are very diversified and the rules remain confusing; transparency about the actual procedures and how they do take place is low. Information about what goes on in the abattoir and the industrial aspects of production is not clear or easy to understand. Even the market often puts over an image of vertical integration, and although integrated chains and supermarkets are starting to play an important role in the distribution of halal fresh and frozen meat produce, halal is an extended horizontal market, where most unprocessed fresh halal meat is still sold in local butchers and groceries.

The possibility of fraud is high and could increase as the market grows, thus adding to the difficulties of market control. The availability in the mainstream market of meat obtained through halal slaughter is only starting to become an issue amongst the general public. Halal meat is qualified through practices of stunned and non stunned slaughter, but the labels rarely specify this, though some certification organisations are starting to profile themselves as offering certification based on non-stunning. As in the UK, the outcome of this process might be the establishment of a double certification channel that will allow two types of product to be *qualified* as halal. Because of the tension between contradictory interests identified in this chapter, it is difficult to imagine that a centralised and standardised rule would be welcomed, and that resistance would come from both religious and market actors.

GERMANY

This chapter provides an overview of the markets and supply chains for halal and kosher meat in Germany. The research for this chapter was conducted by researchers at Bsi-Schwarzenbek.¹⁶⁹ Interviews were carried out with key individuals at the European Halal Certification Institute (EHZ),¹⁷⁰ the 'Lindenbazar' supermarket in Hamburg,¹⁷¹ an anonymous interview with the manager of a poultry company linked to the biggest poultry producer in Germany, and the manager of Aviv, a kosher butchers and grocery market in Frankfurt.¹⁷² For means of comparison, a brief overview of Germany's second largest halal certification body, Halal Control, is also provided; this information was gathered from secondary sources only.¹⁷³

SOCIO-ECONOMIC CONTEXT

The German food industry is vertically integrated and the top 10 food retailers have a market share approaching 90%. Aldi and Lidl are the driving force in retail competition and the dominant strategy is based on price discounting.¹⁷⁴ Aldi and Lidl have significant red meat and poultry sales and they have recently started to stock products *qualified* as halal.

Germany is an important EU meat market. Average meat production in 1999–2001 was 6,496 (000 metric tons), a decrease of 7% since 1979–1981. Since 1970, average per

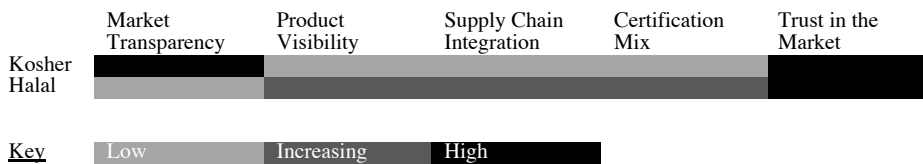


Figure 4.1. Snapshot of the halal and kosher markets in Germany.

169. <<http://www.bsi-schwarzenbek.de>>.

170. <<http://www.eurohalal.eu>>.

171. <<http://www.lindenbazar.de>>.

172. <<http://www.aviv.de>>.

173. <<http://www.halalcontrol.de>>.

174. <<http://www.entrepreneur.com/tradejournals/article/189596793.html>>.

capita meat consumption has risen from 81.5 to 82.1 kg, compared to an average of 56 to 89 kg in Europe. Between 1970 and 2006, the number of livestock in Germany rose from 5,489 to 6,868 thousand head.¹⁷⁵ In 2008 423, 2 thousand tec. (carcass tons) cows were slaughtered in Germany (second only to France with 609, 5 thousand tec.) and 599, 0 thousand tec. of young bovines (second only to Italy with 633, 5 thousand tec.) and 40,1 thousands tec. of veal. 42, 9 thousand tec. ovine were slaughtered in Germany in 2008. With regards to poultry, 877 thousands tec. of chicken were slaughtered in Germany in 2008.¹⁷⁶ In terms of consumption, Germany is sixth in the league of meat consuming countries. There are no available figures for halal and kosher slaughter in Germany.

MUSLIM AND JEWISH POPULATION

Germany has a population of more than 82 Million. Around 4% is Muslim, approximately 3.5 to 4 Million; a large percentage of the Muslim population in Germany is of Turkish origin; this population is dispersed around the country. The Jewish population in Germany is on the rise again after years of decline. During the decade to 2003 the population tripled and it is now estimated to be somewhere between 100 000 and 120 000, though there is a very high number of unregistered Jews, perhaps as many as 80 000.¹⁷⁷ Major centers of the Jewish population are Berlin, Dusseldorf, Frankfurt-Main and Munich.

MARKET OVERVIEW

KOSHER

The market for kosher meat in Germany is small and can be considered a niche market.¹⁷⁸ Although the Jewish population in Germany is on the rise again, the market for kosher products is less developed than it is the United Kingdom and France and very few Jews eat kosher regularly (Gain, 2003). There is, however, a growing demand for kosher products as a result of the efforts made 'by Jewish organizations to re-cultivate the Jewish life/traditions in Germany'.¹⁷⁹ In Germany there are only three shops selling kosher meat; the Deli Kosher in Berlin,¹⁸⁰ Danel in Munich¹⁸¹ and Aviv in Frankfurt.¹⁸²

Most of the Jews living in Germany today originated in Russia. As it was forbidden for them to live according to their religious rules in Russia, only a few now live according to kosher rules in Germany. In Frankfurt, the percentage of Russian Jews is very high. They are mostly poor and uneducated, have little money and rarely eat kosher (only about 15%);¹⁸³ they want meat with a lot of fat and for them price is more important than the

175. Earth Trends (2010), *Country Profiles, Agriculture and Food: Germany*, <<http://earthtrends.wri.org/index.php>>.

176. France AgriMer: EC data, 2009.

177. <<http://www.fas.usda.gov/gainfiles/200310/145986260.pdf>>.

178. <<http://www.fas.usda.gov/gainfiles/200310/145986260.pdf>>.

179. Ibid.

180. <<http://www.kosher-deli.de>>.

181. <<http://www.koscher.net/danel>>.

182. <<http://www.aviv.de>>.

183. Interview with the manager of Aviv, a kosher butchers and grocery market in Frankfurt.

quality. However, a higher number of younger Jews aged between 20–35 years eat kosher (about 35%). Younger people now look for more ‘exotic’ foods and they are generally not interested in old traditional Jewish food; e.g. for weddings and other events. Contemporary dishes have new names and have to be innovative and extraordinary but still kosher, and the trend is directed more and more towards convenience products. Young people also want high quality meat with as little fat as possible. Of middle aged Jews (35–70 years) it is estimated that about 10% eat kosher. Of first generation Jews (70+ years) around 70–80% eat kosher; this includes a big percentage of old Polish and German Jews.¹⁸⁴

Not many consumers are interested in the stamp. Only about 10% of Jewish customers ask about the shochet or the Jewish community where the meat comes from. There is no discussion on slaughter and stunning methods going on between the customers and most of them do not want to know where the meat comes from, how the animals are housed, fattened and slaughtered. They do not want to think about these issues because like most of the normal German consumers they do not want to deal with the (ethical) issues involved. However, the trust to the butcher is very important and controls have to be very strict.¹⁸⁵

HALAL

Compared to countries like the UK and France, the certification of halal products in Germany is in still its infancy. Much like these countries, there is no overall monitoring body and no common method of certification, only a large group of organisations controlling raw materials, production processes, hygiene standards and supplies for a wide range of halal products. The largest certification body in Germany is the European Halal Certification Institute (EHZ),¹⁸⁶ which depends on the opinions of Muslim scholars. EHZ works with the food industry and allows industrial and mechanical stunning and slaughter to vary degrees in different parts of the industry. The other major German certification body is Halal Control¹⁸⁷ in Russelsheim, who don’t work with the meat industry and are against mechanisation per se. There are numerous smaller one man certification bodies in Kiel, Bremen¹⁸⁸ and Aachen. Some big food companies also certify their own products, and there are a small number of certification companies supported by a single Muslim community.

As in the UK, halal certification for poultry¹⁸⁹ is widespread and it gives poultry companies a big advantage in the market place. There is not really a debate about the merits of pre stunned and non stunned meat at present. EHZ argue that labelling products as stunned or non stunned would create a ‘two-class halal standard’, as is the case in the UK and France. At the moment, however, it appears that most consumers are not concerned about this issue, but if such a system was implemented EHZ claim that consumers would probably start to question stunning more and thus demand more un-stunned meat. The EHZ certified poultry company we spoke with were clearly aware of this, claiming that it would be counterproductive to promote market their products and their halal certification

184.Ibid.

185.Ibid.

186.<<http://www.eurohalal.eu>>.

187.<<http://www.halalcontrol.de>>.

188.<<http://www.mhaditec.de>>.

189.There are fewer regulations for halal poultry in Germany than there are for halal red meat.

more widely to non Muslims; they argue that non Muslims do not really care whether their sausages are halal or not. Many meat products are also labelled 'halal' without any certification. 'Egetürk',¹⁹⁰ a company founded by a Turkish group, claim that they do not certify their products because it is expensive to do so and they can keep prices lower without certification; a large percentage of halal meat is also bought by non-Muslim consumers.

Two out of three Muslim consumers still buy their meat in Muslim supermarkets and butchers, at least in the Hamburg region.¹⁹¹ While big retailers like Lidl and Aldi have started to sell halal products over the last 3–4 years, Muslim consumers do not generally trust these companies; debates have emerged on consumer forums, much as they have in France, regarding the authenticity of the meat sold by these retailers.¹⁹² One of our respondents claimed that it is only Muslims consumers who bought their meat in Muslim supermarkets/butchers before this period continue to do so; in particular, it appears that sales of lamb still take place through small butcher's shops where trust is sufficiently high to retain customers. As halal products certified by the major certification body EHZ have started to appear in larger supermarkets for the first time, questions are being raised about the authenticity of the halal meat being used. Some supermarkets are also not sure whether they should sell halal-meat and many are worried about getting into trouble with animal protection groups.¹⁹³ Increasing public debate about animal welfare and concerns about slaughter without stunning are significant and many supermarkets are said to be worried that they will lose customers if they sell halal meat.

Nevertheless, the halal market is starting to expand and there is great potential for the larger supermarkets to diversify. According to the Halal Control, around 400 companies in Germany already offer halal products.¹⁹⁴ At the Cologne Trade Fair in the summer of 2009, 700 of the 8,000 stalls were halal food producers.¹⁹⁵ Most of these were foreign companies that have exported into Germany over many years. While most of the products produced by these companies are still confined to Turkish shops in German cities, the Federal Association of German Food Retailers claims that the halal market is increasingly important. Turkish people in Germany have an estimated €20 billion of purchasing power; Nestle already earns more from halal products in Germany than it does from organic food.¹⁹⁶ The German Federation of Turkish Wholesalers and Retailers claimed likewise that German companies would be well advised to embrace the halal market,¹⁹⁷ while the Malaysian National New Agency 'Bernama' has also drawn attention to the potential in the market.¹⁹⁸ The total value of the halal market in Germany is estimated to be worth around €4 billion.¹⁹⁹ The kebab is now officially Germany's favourite fast food²⁰⁰ and

190.<<http://www.egetuerk-gmbh.de>>.

191.Interview with the manager of the 'Lindenbazar' supermarket.

192.<<http://www.open-speech.com/threads/237968-ist-das-fleisch-bei-Aldi-HALAL>>.

193.Schröder, D. (2009) Halal is big business: Germany waking up to growing market for Muslim food, *Spiegel Online International*, <<http://www.spiegel.de/international/germany/0,1518,653585,00.html>>.

194.Meat Trade News Daily, *Germany – Halal Food Industry*, 4 January 2010, see <http://www.meatradenews.daily.co.uk/news/040110/germany___halal_food_industry.aspx>.

195.Schröder, *ibid*.

196.*Ibid*.

197.*Ibid*.

198.Mehta, M, (2009) *Germany's Halal Market Unleashes Opportunities for Malaysian Suppliers*, <<http://www.bernama.com/bernama/v5/newsbusiness.php?id=441480>>.

199.<<http://www.business-wissen.de>>.

200.Döner kebab becomes Germany's favourite fast food, *Today's Zaman* (2010), <<http://www.todayzaman.com/tz-web/news-206881-doner-kebab-becomes-germanys-favorite-fast-food.html>>.

kebab meat currently accounts for about 70% of this total.²⁰¹ However, most of the meat used in kebabs is imported because of the lack of halal red meat sourced in Germany.

GERMANY CASE STUDY: KOSHER

AVIV

History and role of the organisation

Aviv was founded 30 years ago by the father of the current owner, Mr Heller.²⁰² It is situated in Frankfurt with a kosher butchers and grocery market. The Jewish community in Frankfurt is about 8,500 and Aviv sell their own red meat, poultry and sausages, which is koshered and processed in the shop. They also sell dry kosher products and fresh Israeli products like Hummus and Tehini, plus religious equipment. Products are sold to private consumers, institutions and other companies; Aviv has customers across Europe. Aviv also provides catering for government events and at hotels for weddings and barmitzwaahs. Aviv only sells 'Glatt' kosher meat, which is considered the highest level of kosher. Mr Heller is a skilled butcher; he did his apprenticeship and his skilled crafts examination in Germany; additionally he has a certificate for koshering food, which he received in Rotterdam where he was examined by the Rabbi of the Jewish Community of Amsterdam. Mr Heller has worked at Aviv since its foundation, but he has also worked also for other meat producing companies (non-kosher) as a purchasing agent for meat. Mr Heller claims that slaughterhouses are happy to supply Jews because they can sell the cheaper forequarters expansively to the Jews and still have to more expansive hindquarters for the mainstream or halal markets; the combination of Jewish and Muslim customers is thus very profitable.

Some large supermarkets now sell kosher products, but the number of items is very small. As the largest retailer of kosher meat and meat products in Germany, Aviv sells per week about 1 ton of meat (inclusive of poultry) every week, but there are big fluctuations around Jewish holidays. The biggest seller is beef; veal and poultry combined have the same volume as beef; his sales of lamb are smaller than beef or poultry. At the moment the market in Frankfurt is oversupplied and most of Aviv's meat is sent to other German cities or abroad.

Definition of Kosher

Kosher is defined according to the Halacha, a collective body of Jewish religious law that includes biblical law, Talmudic law and rabbinic law, as well as Jewish customs and traditions. The controls for 'glatt' kosher meats are very strict and slaughter capacity is small to ensure that each animal and each carcass can be controlled 100%. Only a few rabbis and shochets are allowed to certify meat as 'glatt' kosher.

201. <<http://www.themeatsite.com/meatnews/10867/german-market-potential-for-halal-meat>>.

202. <<http://www.aviv.de>>.

Shechita

Shechita is carried out for the shop by commissioned shochets, usually by one shochet and his assistant. During shechita the knife is controlled on its sharpness and intactness before slaughter. Animals must not show any abnormalities (illnesses, injuries) and the throat must be cut completely with only one cut; the animal has to exsanguinate completely. The thorax and the abdomen are then opened and they must not have any abnormalities. The lungs are taken out and all this waste is blown up in a sealed container from where there is no leakage). Only the front part of an animal, up to the 11th rib, is considered kosher. Injured or ill animals are not kosher; animals that have been hit or mistreated prior to slaughter are not kosher. All parts of the carcass used as kosher must be stamped by a rabbi and all parts must be traceable to the animal they came from. The stamp does not need to show the name of the shochet, but it can show the name of the rabbi, who ordered the slaughtering.

In years gone by, shechita was conducted in a slaughterhouse in Bad Hersfeld in Germany, but this does not happen any more. Shechita can only be carried out at an EU approved slaughterhouse, which has to use a 'Weinberg – Apparatus' to turn the animals. The slaughterhouses can slaughter different animal species, including pigs, but this must take place on a different slaughter line. Shochets are educated over several years and it takes up to five years before they are allowed to conduct shechita themselves.

The Koshering Process

Products have to be kosher from the first production step to the sale to the consumer. The forequarters are delivered fresh; all vessels are removed and the meat is cut into pieces. The meat is then soaked in a water bath for 30 minutes, before it is put on rough rock salt for one hour, until all the blood is fully drained; meat has to be washed three times overall. A person trusted by the Rabbi is always present at the shop; he or she controls all the products and is also responsible for koshering the meat. Although Mr. Heller has a certificate himself, he is not allowed to kosher the meat, as this has to be done by an independent person. If the shop only sold shrink-wrapped products no person of trust would be necessary.

Red meat and poultry sold in the shop comes from Belgium, Austria and France. Kosher products and ingredients are imported from several countries, e.g. intestines are imported from Australia. Sausage and other meat products are produced in the shop and they are only rarely imported. Meat is ordered from meat suppliers in the exporting countries; sometimes there are shortcuts due to high the percentage of treife carcasses. When meat is stamped and labelled, a rabbi or member of the competent Jewish Community has to be present. In Belgium, the assistant of the shochet places a lead seal with a number on each piece of meat; the meat is accompanied by papers, showing the numbers of the seals. Different methods are used in different countries to identify meat as kosher, but in most places safeguards are provided by stamps, numbers, seals and by accompanying documents.

Treife

The percentage of *treife* carcasses depends on several factors. The season is important: in spring the percentage of treife carcasses is higher, as more animals have to cope with infections of the respiratory system due to the cold and wet weather; therefore more longs are rejected. Some animal breeds are also more prone to illnesses than others and

more robust breeds have less treife carcasses; darker cattle are suspicious and do not get regularly koshered because illnesses. The housing and handling of animals can also cause problems, as can injuries during transportation, and stress. Some shochets are paid per hour, some are paid per head (only for the kosher carcasses); some shochets/rabbis are also stricter than others.

GERNAMY CASE STUDY: HALAL

EUROPEAN HALAL CERTIFICATION INSTITUTE (EHZ)

History and Role of the Organisation

The major certification body in Germany – the European Halal Certification Institute (EHZ)²⁰³ – covers the entire meat industry. This organisation was founded by the Alliance of the Islamic Communities of Northern Germany²⁰⁴ and the Islamic Council for the Federal Republic of Germany (Islamrat der Bundesrepublik Deutschland) as a non-profit organisation in the late 1990s. EHZ specialise in the inspection and certification of products and production methods in line with Islamic halal regulations. All the communities in the Alliance support the institute and EHZ scholars have studied in Turkey, Egypt and Syria. The institute certifies all kind of products, including meat, spices, sugar, and products from the chemical industry. Certification depends on the guidelines laid down by EHZ's Muslim scholars.



EHZ's origins can be traced back to the founding of a Mosque in Hamburg in 1977. There are now 48 Mosques in Hamburg, nine of which are aligned with the Alliance. In the late 1970s halal meat was initially obtained from small Muslim butchers who slaughtered either at their own facilities or in rented slaughterhouses. During this period, halal slaughter could also be carried out on farms if the meat was for private consumption. The first certificates for the export of halal meat to Islamic countries (Iran, Algeria and Saudi Arabia) were issued during the 1980s (in Germany, meat for export can only come from animals that are stunned before slaughter); these certificates were issued by Imams in Muslim communities.

During the late 1980s and early 1990s, there were several meat scandals within the Muslim community, with several butchers selling meat they claimed was halal, but which contained pork and was not always slaughtered by a Muslim. It also became clear during this period that different Muslim groups had different rules and practices. As a result of these problems, Mosques in the alliance started to recommend reliable butchers to their members, and Imams started examining slaughter and production conditions in greater detail. As the Muslim population grew and demand increased during the 1990s, slaughterhouses grew in size and there were several court decisions about slaughter without stun-

203.<<http://www.eurohalal.eu>>

204.<<http://www.big-nord.de>>.

ning, which now requires a certificate of exemption. Smaller butchers could no longer supply the market completely and supply chains began to extend. New animal welfare legislation, concerning slaughter without stunning, was also passed and as Imams started to lose control of the market, consumers started to lose trust in slaughterhouses, butchers and retailers; as a result, the first certification bodies began to emerge. As these processes intensified, and need for halal specialists grew, communities started to cede responsibility to a number of umbrella organisations. In 2000, EHZ was founded by these umbrella organisations to secure the supply of halal products for Muslim communities.

The Managing Director of EHZ estimated that around 50% of the poultry industry in Germany is now certified and labelled as halal using the EHZ logo. This includes the slaughterhouses and processing plants of big poultry companies such as Wiesenhof,²⁰⁵ Stolle²⁰⁶ and Heidemark.²⁰⁷ However, only about 25% of these halal certified poultry products produced are actually bought by Muslim consumers.

Stunning

Some scholars allow stunning, some only in special situations, others forbid it absolutely. EHZ claim that around 95% of the scholars allow poultry stunning, 50% allow lamb, while for cattle stunning is denied because of the use of the captive bolt method, which many scholars believe is irreversible. Stunning is generally becoming more acceptable in Germany and 15 years ago scholars did not even allow the stunning of poultry. EHZ currently certifies no slaughterhouses for lamb, as there is little of no demand; sales of lamb generally take place through small butchers where trust is sufficiently high. Lamb from Australia and New Zealand (electrically stunned) is accepted as halal by the Hamburg community, but it is not certified. Captive bolt meat is not accepted by the scholars, so EHZ can not certify German beef. There are no plants slaughtering enough cattle using appropriate methods such as short-time electrical stunning for this to become viable. It possible to receive a certificate of exemption that allows slaughter without stunning. However, a butcher has to prove that his clients only eat meat from non-stunned animals and very few of these certificates are given for the slaughter of cattle.

Westfleisch is one of Germany's biggest slaughter companies. It has a 9% share of the beef market in Germany and it wanted its beef certificated to be as halal. However, because the Muslim scholars at EHZ did not accept the captive bolt method the slaughterhouse was not certified; there is an agreement that this beef can be consumed in emergency situations (when there is no other meat) but not regularly.

Certification

As EHZ Certification is based on the opinion of Muslim scholars, only when a majority of scholars are agree upon a stunning method can it be authorised by EHZ; this necessary to ensure trust amongst Muslim consumers. EHZ have a basic yearly rate of €3,000 to €4,000 a year for certification. There are two options: if a slaughterhouse is certificated all the products going though it will be *qualified* as 'halal'; alternatively, a retailer can get his products certificated, which means that only the products of this retailer going through a slaughterhouse qualify as 'halal'.

205.<http://www.wiesenhof-online.de>.

206.<<http://www.stolle.de>>.

207.<<http://www.heidemark.de>>.

After the accreditation is completed, a company gets regular visits 3 to 4 times a year; if problems arise the company gets visited more often. Slaughterhouses that slaughter pigs can not be certificated, even if they slaughter poultry, cattle or sheep on separate days and in separate rooms; a slaughterhouse can produce halal meat and non halal meat, but not pork. Only products of certificated slaughterhouses, processors or suppliers can be labelled with the EHZ-logo; certification is valid for one year. So far, EHZ has not certificated any cattle or sheep slaughterhouses in Germany, but competitors do.

EHZ Certification Requirements for Suppliers and Processors

- Meat has to be produced in a slaughterhouse certificated by a halal certification institute accredited by the Islamic Council; the meat has to be accompanied by a certificate; a competent employee has to check the halal meat by comparing the veterinary control numbers on the meat with the numbers on the certification document.
- The production line of halal products or , according to the situation, certain parts of the factory have to be completely separate.
- The machines have to be cleaned and dry to avoid any contact with non-halal products.
- Also all the equipments used for the production of halal food have to be cleaned.
- The workers of the halal production line must not be in contact with non-halal food.
- Halal meat must not get in contact with pork or non-halal food at any time: not in the abattoir, during storage in cooling chambers or freezing rooms, during loading and unloading or during transport.
- The used ingredients, additives and artificial colours must comply with halal guidelines.
- During wrapping and storage it must be guaranteed that there is no contact with haram products.

EHZ Requirements at Slaughter

- Animal species must not be forbidden according to Islamic law (Haram).
- The slaughter has to be carried out by a Muslim slaughterman.
- At the time of slaughter the animals have to be alive.
- Stunning methods which protect the animals from pain and suffering should be used. Concerning the method of stunning the most recent scientific findings according to animal welfare should be applied. The animals must not die before the throat is cut.
- The phrase 'Bismillah' (In the Name of Allah) should be invoked immediately before the slaughter of each animal.
- For the mechanic slaughter of poultry it is sufficiently to invoke the name of Allah before starting the process. The repetition for each animal is not applicable. After breaks or reboots the responsible Muslim employee has to invoke the name of Allah again. The animals which have not been cut by the automatic system have to be cut by hand by a Muslim worker. In this case the name of Allah has to be invoked for each animal.
- The animals must not be exposed to stress or ordeal. The conveyance to the halal slaughter must be done as gentle as possible. The slaughter instruments have to be sharp enough to guarantee a fast and stress-free halal slaughter.
- A halal slaughter is completed when trachea, oesophagus and both carotid arteries are cut fast beneath the larynx; at least three of the four must be severed.

- It is not desirable that the neck is broken during slaughter. Exsanguination of the animals has to be safeguarded.
- Machines and equipment which had been used for regular slaughter must be cleaned thoroughly before they can be used for halal slaughter. The place of halal slaughter must be absolutely free from pork meat or not-halal-meat.
- The guidelines for slaughter of poultry, sheep and cattle according to animal welfare legislation written down in the Annex must be complied with as they are part of the certification conditions.

Following the EHZ Supply Chain

At the Lindenbazar supermarket,²⁰⁸ which is certified by EHZ, not all the products sold are certified as halal. Most of the beef sold at the supermarket is imported from companies in France and Belgium who slaughter without stunning. Lindenbazar is the biggest Muslim retailer of beef and lamb, but it is rare that beef comes from Germany. Lindenbazar's lamb is not certified as halal; it comes from regional butchers from stunned animals.

HALAL CONTROL

Halal Control in Russelsheim²⁰⁹ is the second largest halal certification body in Germany. Much like the HMC in the UK, they are against mechanisation and they do not work with the meat industry. They argue that *industrially processed meat can never be halal*²¹⁰ and that it will only be possible to certify meat as halal if small local slaughterhouses are set up in Muslim communities, which is currently not the case, they argue.

Halal Control's mission statement is: 'To guide, facilitate and committed to ensure that Halal food consumed by Muslims are lawful and good.' *Despite their stance against the meat industry*, Halal Control do work with food companies, particularly in the milk industry.



The organisation has been around since 1998, but they were only fully recognized in 2001. They were founded by a German born Muslim of Syrian origin and there are several staff members with competence in science and technology, including food chemistry, bio chemistry, quality assurance and Islamic shari'ah. As a certification body, Halal Control has received recognition from Indonesian, Malaysian and Thai institutes,²¹¹ which allows them to export to these countries. Their certification standard is based on criteria stipulated by guidelines from the Indone-

sian Council of Ulama on Food, general guidelines for use of the term 'halal' issued by Codex Alimentarius, as well as the Malaysian standard. They provide audits in several European countries, including the UK, Ireland, the Netherlands, Belgium, Italy and Germany. By 2007, Halal Control had issued 1300 certificates, mainly for export.

208. Interview with the manager of the 'Lindenbazar' supermarket.

209. <<http://www.halalcontrol.de>>.

210. <Schröder, D. (2009) Halal is big business: Germany waking up to growing market for Muslim food, *Spiegel Online International*, <<http://www.spiegel.de/international/germany/0,1518,653585,00.html>>.

211. *Halal Journal* (2007), <<http://www.halalcontrol.de/JUNE2007HalalJurnal.pdf>>.

In terms of certification, Halal Control claims that economic values, though important, are secondary concerns behind responsibility and spiritually.²¹² Although they get many enquiries about certifying meat from within Germany, they not currently certify meat or meat based products as they believe that for Muslims halal is of the same importance as daily worship and that it far exceeds the commitment to things like organic food (meat). How long it takes for local slaughter houses to emerge depends, it appears, on the wider development of the market.

SUMMARY

Although the German halal market is relatively underdeveloped in comparison to the UK and French markets there are emerging debates about slaughter, mechanisation and certification; there are organisations like the EHZ who believe that mechanization is necessary and that companies should not blindly follow traditional rules, and there are others like Halal Control that follow stricter guidelines and do not certify meat. Debate about the merits of halal meat as it emerges through different modes of *qualification* has not emerged amongst German consumers to any significant extent, though supermarkets appear to be concerned about the emergence of the market and its impact on public attitudes. While stunning has become more acceptable over the last 15 years, the non-stunning discourse evident in other parts of the EU has not emerged; there is concern that when it does a two tier certification scheme similar to that emerging in the UK may emerge. Trust in the market remains relatively high compared to the UK and France, though as meat certified by the EHZ has started to appear in supermarkets such as Lidl and Aldi for the first time, questions are starting to emerge about its authenticity. While concerns over the transparency of the market are not yet a major concern, product visibility and supply chain integration is increasing; however, so far, these issues get comparatively low levels of attention in a young and emerging market. Although EHZ dominate certification, the mix is starting to increase. An increasing number of public and private sector organisations are now drawing attention to the potential in the German market; how the market develops in light of these pressure remains to be seen.

Kosher is a niche market in Germany. There is little debate on slaughter practice; much like the average German consumer most kosher consumers not interested in where their meat comes from. A high number of German Jews are poor immigrants from the former Soviet Union and their major concerns are over price; most do not care whether their meat has a stamp that qualifies it as kosher. Nevertheless, much as in other kosher meat markets, trust in the local butcher is important and many consumers assume that controls are strict. In this sense, the market is transparent but supply chain integration and product visibility are low.

212.Ibid.

NORWAY

This chapter is based on a report ('The Norwegian Market for Halal and Shechita Meat Products', see Appendix) compiled by Lill M. Vramo from SIFO – National Institute for Consumer Research, Oslo in 2009. This chapter summarises the major findings of the report.

SOCIO-ECONOMIC CONTEXT

Norwegian grocery retailing is highly concentrated on the horizontal level, with four groups accounting for around 99% of the market. Norwegian retailers' lack of power regarding fresh produce is reflected in the power of manufacturers and the strength of farmers' cooperatives', who control milk, meat, poultry and egg production. The distribution channels for kosher meat and halal meat differ greatly. According to Norwegian law, all animals have to be stunned before slaughtering (Animal act § 9, 1974 – and previous). Some form of compromise related to the practice of religious slaughtering has been reached with large parts of the Muslim community in Norway, but no solution is found in relations to the Jewish community; shechita is banned and kosher meat is imported from countries that allow religious slaughtering without pre-stunning. The fact that Jews have a common international system for the codification of kosher, while Muslims do not, also structures the halal and kosher markets in different ways.

Data on halal and kosher meat are not available from Statistics Norway (SSB) or from the Norwegian Agricultural Authority (SLF).²¹³ These two organisations gather statistics on animal *species* but not on the method of slaughtering. At SLF they explain: 'For us a

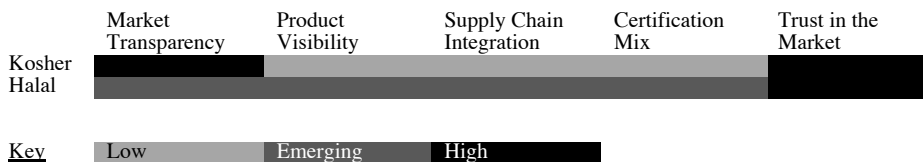


Figure 5.1. Snapshot of the halal and kosher markets in Norway.

213. <<https://www.slf.dep.no/no>>.

cow is a cow and a pig is a pig. The method of slaughtering is not relevant'. Animalia²¹⁴ Meat and Poultry Research Centre estimates that around 21 000 individual animals are halal slaughtered in Norway each year (bull, cow, lamb, goat). The report also gives figures for imports of kosher meat in 2007 and 2008, including, 1,745 kilo (just 2008) processed products of chicken and turkey, 1,011 kilo minced meat, 755 kilo beef, 273 kilo veal and 202 lambs.

MUSLIM AND JEWISH POPULATION

Data from Statistics Norway²¹⁵ indicates that there are 72 000 Muslims living in Norway, of which most are living in the capital city Oslo. Pakistanis were prominent in the first wave of immigration and still represent the largest Muslim community in Norway. In recent years there has been a growth of immigrants of Somali origin. According to Vogt, about 500 ethnic Norwegians have converted to Islam. The first was Mosque opened in Oslo in 1974 by the Islamic Cultural Centre. The Muslim community has a diverse range of organisations, partially reflecting the ethnic background and their specific faith (Vogt, 2000). The Islamic Council (Muslimsk råd)²¹⁶ serves as an umbrella organisation and is one of the most prominent voices of the Muslim community in Norway. Today there are about 2,000 Jews in Norway. Most Norwegian Jews live in Oslo. The Jewish Community (Det Mosaiske Trossamfund)²¹⁷ was established in Norway in 1892 and is the largest and most important Jewish community in Norway.

KOSHER IN THE NORWEGIAN MARKET²¹⁸

The Jewish community in Oslo is the largest Jewish community in Norway. The community is located in central Oslo and consists of a synagogue, a community centre with a kindergarten, an old people's home, and kitchens for the preparation of kosher food for special occasions, kosher catering, and a shop selling only kosher food. The religious community consists of both liberal and orthodox Jews, but the synagogue is orthodox. Inside the community's buildings only kosher is served. All food served for religious festivals, in the old people's home, to the children in the kindergarten and/ or for other occasions is prepared in the community's kitchens in order to secure kosher quality. This we can understand as an *institutional demand* for kosher, where the kosher food is part of sustaining the Jewish Orthodox Synagogue.

The community has about 800 members, but only about 150 members are keeping the orthodox tradition of kosher food. This means that around 150 consumers have a total need for kosher products including kosher meat, while the rest of the community has a more liberal approach. In food terms this means that the liberals eat both kosher meat and conventional meat; the demand for kosher increases around religious festivals and other

214.<<http://www.animalia.no>>.

215.<<http://www.ssb.no/en>>.

216.<<http://irn.no/old>>.

217.<<http://www.dmt.oslo.no>>.

218.The data on the kosher market is based on interviews with two representatives of the Jewish Community in Oslo.

festive occasions.

The only official kosher shop in Norway is 'The Kosher Outlet' which literally is located inside the buildings of the Jewish community. The outlet is open two days a week, one day and one evening, as well as in connection with religious festivals. Due to the location inside the guarded building of the Jewish community, the outlet is in practice exclusively for the members of the Jewish community. Before, the outlet had various locations outside the building and customers 'from the street' and Christian consumers were served. However, due to a large financial loss the outlet was moved to a small room inside the building in 2005–2006. The move has led to a loss of customers and a smaller assortment of kosher products for sale. The meat products for sale are all frozen and are imported from one supplier in France. Chicken, which is the most important and a traditional product for Jews, is imported from France via Sweden. The products in the Kosher Outlets' deep freezer are labelled 'kosher' and the name of the rabbi who has certified it is stamped on the product.

As the market of kosher meat is dependant on imports, kosher meat has to be declared to Customs and it must conform to laws and regulations set by the Norwegian Authorities; these laws and regulations are enforced by The Food Safety Authority. From 2005 onwards, the import situation has turned from being *difficult* to one in which solution have been arrived at. The problem with imports in the past, besides a strict Agricultural Policy, is seen to be a consequence of how the Food Safety Authority has historically reacted insensitively to minorities with different demands and needs; this often led to a time consuming and frustrating process of kosher getting products through the customs. Today the problems with imports are related to the fact that the demand for kosher is small, which gives no market-power towards suppliers of kosher and little power towards Norwegian authorities.

HALAL IN THE NORWEGIAN MARKET²¹⁹

In the Norwegian market there are three suppliers of halal meat; Nortura,²²⁰ a farmers' cooperative, two private sector actors, Fatland AS²²¹ and Furuseth AS.²²² Nortura is the largest actor and the only actor dealing in halal processed meat at the moment. Furuseth AS is a family owned abattoir with only *one customer* of halal.

In Norway, meat slaughtered as halal is typically found in 'Immigrant shops' and in retail chains located in areas with a considerable immigrant population. The halal meat market consists of branded and unbranded halal meat, illegal halal meat and also 'conventional' meat sold as halal. All figures provided in the halal section of the report are from the industry and must be treated as uncertain. The report also provides an example of dialogue through which trust and transparency have been enhanced between market actors and large parts of the Muslim community.

219. This data on the halal market is based on field studies in the retail market and interviews with key individuals.

220. <<http://www.nortura.no>>.

221. <<http://www.fatland.no>>.

222. <<http://www.furuseth.no>>.

NORTURA BA AND ALFATHI

Nortura is the largest supplier of halal meat in the Norwegian market, providing 200 tonnes halal raw material, and 110 ton processed halal products annually. As well as selling carcasses or cuts of halal meat in the market, Nortura is a large sales cooperative with its own processed halal meat products and its own halal brand called 'Alfathi'. In early 2009, Alfathi was the only processed and certified halal meat product range in Norway. The Norwegian report discusses the process behind the Alfathi brand in detail in order to illustrate the dynamic between the Food Safety Authority, the Islamic Council, Nortura and consumers.

From 2002 to 2004 the 'Alfathi' increased its turnover of halal meat from 40-5- ton to 110 ton. This can be explained by resources given for a project where a professional product developer moved Alfathi from a 'homemade to a professional' product. The project was funded by SPIN (centre for product development in the food industry), whose aim was to professionalize the brand and develop five new products. The sales of Alfathi products have been increasing steadily since this process began. The idea behind the Alfathi products came from a Somali man who had a vision 'to produce real and serious halal products which customers could trust'. At the start, Ibrahim focussed on 'Immigrant Shops', travelling around and also trying to sell in halal products by telephone. This was very difficult because the profit on processed products is less than on carcass and cut meat. In the early days of the project Ibrahim and the Islamic Council bought shares in 'Alfathi', but in 2006 Nortura wanted to have total ownership of Alfathi and



Ibrahim and the Islamic Council sold their shares the same year. Alfathi then merged with Nortura and Alfathi is now a wholly owned subsidiary of Nortura BA and an independent brand. Today the products in the Alfathi product series are: 'Alfathi Halal Pizza', 'Alfathi Halal Hot dogs', 'Alfathi Halal Meat', 'Alfathi Halal pâté', 'Alfathi Halal spread' and 'Alfathi Halal Hamburger'.

At the start, in order to be able to produce and create halal products, the Alfathi partners had to find a slaughtering method which the different Muslim groups/ communities could agree upon and which the Food Safety Authority would validate. This was very difficult and the start no one thought they would succeed, the report argues, not least because the Food Safety Authority was not interested in dialogue. At the start Ibrahim spent long evenings with different Imams in Norway in order to explain, create and convince them that Alfathi halal was trustworthy. At one stage, Ibrahim managed to get four or five Imams to travel to Nortura's abattoir at Gol and validate the activity and the slaughtering of halal. As a result of this trip the Imams signed a letter on behalf of some of The Islamic Councils representatives and ongoing validations have been carried out in an informal way. The Imams have thus been operating as certifiers for their own community. In this way, the report illustrates how trust has been steadily built between parts of the Muslim community in Norway and Nortura BA. This process is continuing through dialogue over the introduction of chicken into the Norwegian market and through discussions about appropriate methods of slaughter.

By way of comparison, the small abattoir Furuseth AS has never had an Imam visit their premises. A Muslim shop owner carries out halal slaughter on Furuseth AS's prem-

ises every morning, before transporting the meat to his own 'Immigrant shop', Pak Mat-senter at Grønland-Tøyen in Oslo. In this case, trust is built between the shop owner and his customers in a similar way to the UK.

SUMMARY

While the kosher market in Norway remains import only, there has been some dialogue between the Jewish community and the authorities. The Norwegian market for halal is in an early phase of certification and standardisation. There are different practices related to communicating and ensuring trust, transparency and standards; supply chain integration and product visibility are both increasing. The market includes both trust based on formal networks (face to face) and trust in informal relationships expressed through the use of standardised procedures and brands (Alfathi). While this is to be welcomed, the Norwegian report concludes that the process of standardisation may lead to a certification monopoly which might be challenged by identity politics and a more mixed Muslim population in the future.

TURKEY

This chapter provides an overview of the markets and supply chains for halal and kosher meat in Turkey. The research for the chapter was conducted by Haluk Anil in Istanbul in late 2009 and early 2010. Interviews were conducted with key individuals at the Kosher Shop in Istanbul, Carrefour,²²³ Maret Meat,²²⁴ Mudurno Pak (Poultry)²²⁵ and Apikoglu Meat Food Industries PLC.²²⁶

SOCIO-ECONOMIC CONTEXT

The republic of Turkey, founded in 1923, is a secular Muslim state. It has been an associate member of the European Economic Community since 1963. The country has a population of around 70 million.²²⁷ The current Jewish population is about 20000, with 75% of this total in Istanbul and the rest in Izmir. Jews are still emigrating (especially to Israel) and the Jewish population is in decline.

Turkish agriculture is an important part of the economy and almost 30% of the population which work in agriculture. Although things are starting to improve as modernisation occurs, there is insufficient supply chain integration and little cooperation between agriculture and industry. There are problems relating to quality and safety in agriculture, where technology is under utilized; there is also a need to improve the food control system in line with the EU legislation.²²⁸

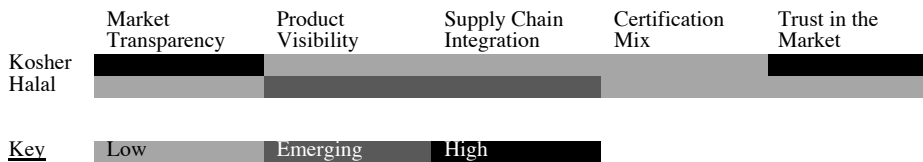


Figure 6.1. Snapshot of the halal and kosher markets in Turkey.

223. <<http://www.carrefour.com>>.

224. <<http://www.maret.com.tr>>.

225. <<http://mudurnupilic.com.tr>>.

226. <<http://www.apikoglu.com.tr>>.

227. FAO (2005) *Livestock Sector Brief Turkey*, <<http://www.fao.org>>.

228. <<http://ekutup.dpt.gov.tr/imalatsa/2004.pdf>>.

As a Muslim country, the production of meat according to Islamic principles is standard practice, though with so many people working in agriculture there is extensive public concern about the extent of illegal meat production. Average meat production in Turkey in 1999–2001 was 1,330 (thousand tons), an 86% increase since 1979–1981. Average per capita meat consumption has risen from 15.7 to 19.3 kg since 1970, compared to 56 to 89 kg on average in Europe. Between 1970 and 2006, the number of livestock in Turkey rose from 2,023 to 3,697 thousand head.²²⁹ Twenty-five percent of meat production is beef and buffalo. Less than 25% is mutton and goat and the remaining 50% is made up of poultry, which is the only sector to have experienced sustained growth in the current period.²³⁰ Every year in Turkey 2 million bovines, 15 million ovines, 8.5 million pigs and 800 million poultry are slaughtered.²³¹ The market for kosher meat is very small and the Jewish population is in decline; about 100 000 poultry and around 5,000 cattle and sheep are slaughtered using shechita methods annually.

MARKET OVERVIEW

Slaughter according to Islamic rules is the norm in Turkey and meat is halal. However, despite widespread adherence to Islamic practice within the meat industry, many Turkish producers and processors appear concerned about unrecorded – ‘under the staircase’ – slaughter, which is estimated to account for as much as 60% of all meat production in Turkey. There are very few pigs in Istanbul, but it appears that some consumers are concerned about pig meat finding its ways into the supply chain and there are many popular stories claiming that pork has been found in salami and sausages. Some supermarkets admit that they have experienced this problem in the past, though they argue it not as much of a problem as it once was. Hotels are seen as the major recipients of illegal meat, including wild boar.

At the present time, halal certification is not really an issue in Turkey and most companies only need a letter from the local Mufti (or cleric) to operate. Although some meat does arrive at supermarkets with a label on saying ‘this is halal’, most companies are not overly concerned about certification at the present time, though they realize that it will soon be more important. There is a small but growing number of companies seeking certification from international certification bodies in order to gain entry to halal markets in the Middle East and East. However, it appears that most companies are waiting to see what the Government does before they make a move towards implementing any more towards halal standards. A national halal standard along the lines of that used in Malaysia has been on the cards since 2006,²³² when the ruling Justice and Development Party (AKP) started pushing for a legislative initiative to protect and control halal products through the Turkish Standards Institute.²³³

229. Earth Trends (2010) *Country Profiles, Agriculture and Food: Turkey*, <<http://earthtrends.wri.org/index.php>>.

230. Ibid.

231. Figures provided by Tashin Yesildere of the Veterinary School, Istanbul University.

232. Cagaptay, S and Yegenoglu, D. (2006) Halal Turkey, *Bitterlemons International*, 9 March, <<http://www.cagaptay.com/723/halal-turkey>>.

233. <<http://www.tse.org.tr/English/tseDefault1.asp>>.

This debate is now starting to intensify. The chairman of GİMDES (the Food Auditing and Certification Research Association),²³⁴ Dr. Hüseyin Kami Büyüközer, recently claimed that producers in Turkey will often not disclose what ingredients are in their products and that they often mislead the public. He argued that this lack of transparency creates a lot of mistrust and cynicism, citing the example of a German drug firm that listed gelatine in the ingredients of a product in Germany only for it to be erased from the list by the company that imported the product into Turkey. He claimed that consumers should pay more attention to these issues, the government should do more to make the public aware of them, and that a common halal certification scheme is needed. Dr. Büyüközer claimed that in 2008 only 15000 of 40000 available import products were investigated by the Agriculture Ministry.²³⁵

TURKEY CASE STUDIES

CARREFOUR

Carrefour,²³⁶ the French supermarket chain, opened its first branch in Turkey in 1993 and there are now around 20 retail outlets in Istanbul. There are now also hundreds of Carrefour SA Express stores across Turkey. Each supermarket sends daily requests for meat to the company's chief vet, who talks with suppliers and arranges the supply. Carcasses are initially checked by the supermarket manager and if they are not acceptable he returns them to the supplier. If they pass this initial inspection they are then checked for quality. Across Turkey Carrefour sells around 100 tonnes of beef and 25 tonnes of sheep meat per month. Carrefour has experienced consumer concerns about pork in the past, often in the case of large cuts/pieces of meat, but it is not seen to be an issue now.

MARET MEAT

Maret Meat²³⁷ was established in January 1984 and production started in April 1987. At the time there was no proper system for modern meat production and distribution in Turkey, and the company set out with to improve modern stock breeding knowledge and production. Maret slaughters 500000 sheep and 80000 cattle every year in line with EU standards and Islamic regulations. In 1999 the company received a TS-EN-ISO 9002 Quality Certificate from the Turkish Standards Institute.²³⁸ Its main products are delicatessen, frozen food, ready-made meat meals, salami, sausages, pepperoni, sucuk, pastirma and sauces.

Maret's aim is to meet 12% of the fresh meat and 20% of delicatessen markets in Istanbul and they now estimate that they have somewhere between 15–20 % of both these

234. <<http://www.gimdes.org/en>>.

235. Hava, E., (2009) Exports constitute Turkey's first venture into halal food market, *Today's Zaman*, 24 May, <<http://www.todayszaman.com/tz-web/news-176181-exports-constitute-turkeys-first-venture-into-halal-food-market.html>>.

236. <<http://www.carrefour.com>>.

237. <<http://www.maret.com.tr>>.

238. <<http://www.tse.org.tr/English/tseDefault1.asp>>.

markets; they currently have a 5% share of the national market. In view of the problem of unrecorded slaughter, our interviewees claimed that it was difficult to give good estimates of the overall market, and that as much as 60% of meat in Turkey may be illegally slaughtered. Maret supplies a number of supermarkets with meat, including 50% of the fresh meat for Migros; they also supply a few restaurants in Istanbul. All their meat is produced and slaughtered in Urfa, an agricultural region in south east Turkey; prior to this it came from the east of the country. Maret currently have 12 000 livestock in Urfa, but they a project to increase production to 25 000. They slaughter 400 cattle a day and 1,500 sheep. Maret recognises that Turkey has a problem with unrecorded slaughter.

Maret follow Islamic rules regarding slaughter. During slaughter animals face Mecca and the slaughter man recites the tasmiyah (Allahu ekber bismillah) before cutting the carotid arteries under the chin with a knife and making sure the animal is bled out properly. Maret has letters of approval from local Mufti's (cleric) to allow them to carry out slaughter, but it has never had certificates of authentication. Interviewees at Maret recognised that the demand for certification is not far away. However, while they have plans for Halal standards at some future point, Maret is waiting to see what the authorities decide before moving forward.

APIKOGLU MEAT FOOD INDUSTRIES PLC

Apikoglu²³⁹ meat was first established as a family business in 1910. The family originally started production for their own consumption only, making fermented sausages (sucuk), before deciding to market their produce. They eventually moved from Kayseri to Istanbul and the business is now in its third generation as a family business. Initially Apikoglu only produced sucuk, but they now make other products as well. Their best customers are Carrefour and Migros, but they also have their own outlets. As supermarkets like Carrefour now trace products, the company provides information on DO production, animal type, origin, additives etc. They do not have a very big market share, focussing on quality products in a niche market. They only sell around 100–120 tonnes per month.

The company follows Islamic rules governing slaughter. The slaughter man recites the words 'Bismillah, Allahu ekber' (God is great) and uses a knife for the first cut. There are no other procedures and from this point onwards everything is technical. The company has a letter from the local Muftu, but no Halal certificate, although there is a feeling that certification is coming and that there will soon be labels saying their meat is halal.

MUDURNU PAK

Until quite recently Mudurnu²⁴⁰ was a separate poultry company, but it has now been bought by PAK, though the product brand is still called Mudurnu. The company breed birds and slaughters and processes them. The company, which has been in Istanbul operating since 1950, expanded their chick/breeder facilities in the 1990s. Their bird production is in Thrace in the European part of Istanbul, where breeder eggs are produced. Hatched chicks are sent to Tuzla in the Asian part of the city for broiler production and finishing with contracted broiler houses, which takes around 45 days from start to finish.

239.<<http://www.apikoglu.com.tr>>.

240.<<http://mudurnupilic.com.tr>>.

They slaughter 90 000 birds per day. This figure was higher in the past, but declined after 1998 because of a recession in the poultry sector.

Mudurnu have a 5% share of the national market. They distribute poultry to every region in Turkey and they also supply to butchers and small supermarkets; they do not like to supply the big supermarkets, who often impose too many conditions and do not pay good prices. Mudurnu products have coded labels that allow everything to be traced back to them. They do not export to Europe yet, preferring the Iraqi market where markets conditions are not as demanding, but they do have plans to apply for permission to export to Europe. Other companies have started to export to Europe, but they are only allowed to export cooked poultry meat and licensing costs are high, around 7,000 Euros. Mudurnu recognise that they will have to get certification in the future if they are to make the most of market opportunities around the globe. However, there is little sense of urgency and the company currently gets a better price from markets where the pressures for certification are not great: 'To be honest with you we are not that interested in exporting to Europe at present. We export to Iraq and get a good price and there are not so many conditions' (Interview with Plant Manager and Company Director at Mudurnu Pak, 20 October 2009).

The company indicated that there were also no pressures towards implementing higher animal welfare standards, and that this won't be the case unless they start exporting to the EU.

Although Mudurnu follow many Islamic practices (birds must be healthy and alive when slaughtered, and all the blood must be drained from the body) they slaughter birds using an electrical stunning bath of 50 Amps and automatic neck cutters. The plant manager recognised that are some consumers that will not eat the meat if they have been killed in these ways and that such people will pay more for manually killed birds. Mudurnu use the latest technology and they claim that manually slaughtered birds are often produced in places with poor hygiene standards. The only certification Mudurnu have comes in the form of a letter from the local Mufti, who visits the plant regularly, particularly when they have new clients from the Middle East and Africa. However, there is a feeling that official certification will become a reality in the not so distant future.

THE KOSHER SHOP

In Turkey, the rules surrounding kosher are very strict and only a very small number of religiously committed people eat kosher regularly in the home, maybe around 100 people in Istanbul. The slaughter figures for cattle, sheep and poultry listed below give an indication of market size:

- cattle: between 50 and 100 (weekly);
- sheep: between 70 and 120 (weekly);
- poultry: around 8,500 (monthly).

Practices around kosher are very complex and carcasses and meat have to be acceptable according to Torah rules. Knives are checked and sharpened in the days preceding slaughter, and they are also checked after slaughter. Sochetim can cut an animal as many times as is required, but there must be no interruptions of more than 1 second; no pressure should be applied and the application of the knife edge and the knife should not be lifted. Animals must be healthy prior to slaughter. Reflexes are checked after slaughter, and if

there is no leg extension the meat is not acceptable, as the animal may have been close to death before slaughter.

After shechita carcasses are initially checked for disease and signs of trefa (forbidden meat). Out of every 110 cattle slaughtered in Turkey using the shechita method only 15 are deemed acceptable, the rest is trefa; even in a good week, the percentage of trefa can be almost 90%. Lesions in the lungs and rumen cause many losses. And lesions and trauma may also make a carcass unacceptable. If any of the 16 nerves in the legs are snapped, or if there are haemorrhages in the lungs, the meat is trefa. In chickens the main causes of trefa are hip dislocations and haemorrhages in joints. Porging is time consuming and for this reason it is not a common practice in Turkey. Most abdominal meat is also excluded and the shop does not use meat taken from the last rib backwards; and because so many nerves and meat come into contact with abdominal fat it has to be dissected out. The liver also has to be cleared of membranes and nerves. And even if these things are done effectively, the meat still has to be salted before sale. In the UK the meat is salted in the abattoir, but in Turkey, they do not have the facilities to do salting in abattoirs and it must be done within three days if it is not to become trefa.

Poultry slaughter is very laborious and there are often not enough people to do the job. The shop owner in charge of slaughter in Istanbul goes to Eskisehir every month (which is two hours away) and slaughters around 8,500 birds. Every slaughter man needs two other operatives, one to hold the bird on table by holding the wings, and the other to put it on the line. The heads of birds are not cut off as this would make them trefa. The water used for scalding non kosher birds would be too hot for kosher as it would make salting impossible. The water used is around 37–38 degrees, which leaves a lot more feathers on carcasses and creates extra work before salting can take place.

Checks continue until products reach the consumer and there are 5 different kosher levels from least strict to most strict. The religious rules (bektin acedik) determined by Chief Rabbis only needs one check, while those overseen by other people require many checks. The rules are the same but the application is often very different. Because of the high number of trefa carcasses kosher meat is very expensive. One kilogram of kosher mince costs around 40 TL (15 pounds). It is also very expensive to eat in a Kosher restaurant; soup and bread for two people costs around 120 TL (50 GBP).

SUMMARY

As a Muslim country, all meat in Turkey is taken at face value to be halal and the practices associated with meat production – including slaughter – are embedded in Islamic practice. Supply chain integration is starting to increase, but there are wide public concerns over illegal slaughter. Trust in the mainstream meat market is comparatively low, though it must be said that some companies are starting to modernise and use the latest technology, particularly those in the poultry industry. Although certification is not really an issue in Turkey at the present time, many companies are aware that certification will soon become necessary; some companies are already starting to acquire certification in order to export to external markets.

The first export only halal certificate of authentication in Turkey was issued in 2009

by GIMDES, and over the last year GIMDES has issued a further 28 export only licenses for Turkish companies.²⁴¹ While import companies may attempt to cut corners to access the Turkish market, the increasing attention given to these issues must also be seen as part of the emergence of a global halal market, where demand for products qualified as halal is increasing and where there are many market opportunities; certification bodies offering export licenses to Turkish companies come from countries as diverse as America, Austria and Malaysia.²⁴²

The political nature of these developments has been widely discussed.²⁴³ The AKP party's desire to develop an official halal standard from 2006 onwards has been questioned on the grounds that Turkey is a secular country and that the Government should not tell people what they can and cannot eat on religious grounds. As we discovered in our interviews, most Turkish companies follow Islamic practices and they consider what they produce and sell to be halal already. Consequently, as Cagaptay and Yegenoglu ask: 'If all food is already halal' why does the AKP wants to follow Malaysia's example and set up a state led halal certification scheme? The answer, as we have seen throughout this report, is that it helps to qualify products as halal for the global export market. At the moment it appears that Cagaptay and Yegenoglu's advice to provide certification for exports 'on request' is holding; for how much longer remains to be seen.

241. Ibid.

242. See ><http://www.gimdes.org><.

243. Cagaptay, S and Yegenoglu, D. (2006) Halal Turkey, *Bitterlemons International*, 9 March, <<http://www.cagaptay.com/723/halal-turkey>>.

CONCLUSIONS: COMPARATIVE SUMMARY OF FINDINGS

This report has put forward an exploratory overview of the structure of the meat markets and the characteristics of the distribution channels for halal and kosher meat in the UK, France, Germany, Norway and Turkey. Focusing on the issue of certification, it has examined relationships between religious authorities, market actors and consumers through interviews with selected key informants in certification bodies and significant retailers.

Certification has only become an issue in European halal and kosher markets over the past 10 to 15 years, though over the last decade calls for better certification have intensified on all sides of the debate. Certification is now often seen in a favourable light and labels are presented as a means of guaranteeing the transparency of the production system and assuring consumer trust. When presented as an asset to producers and industrial interests, certification is now promoted as a business opportunity and a way of gaining entry into expanding ‘world food’ markets. Demands for certification come from quite different sources and expectations vary greatly. In this context, the report has highlighted a proliferation of labels and organisations that prioritise, particularly for halal, commercial as well as religious concerns.

No statistics are kept on the number of animals slaughtered using religious methods in the countries studied. Nor is it possible to obtain a coherent set of figures with regards to the meat kosher/halal market. This made it particularly difficult to give an appropriate idea of the role of these products; because of the proliferating mix of cultural politics and market interests in this field, it has been difficult to obtain reliable information from the actors involved, thus making it difficult to characterise the landscape in any great detail. This situation is itself symptomatic of unequal degrees of transparency in the distribution channels, which makes it difficult to fully understand the role of products *qualified* as kosher and halal within mainstream markets.

TRANSPARENCY IN DIFFERENT DISTRIBUTION CHANNELS

KOSHER

The United Kingdom and French markets for kosher meat are characterised by relative clarity with regards to the rules of slaughtering and processing, with little variation across the distribution channels. In France in particular, control seems particularly high because

it is mostly centralised around one main certifier and there is no major religious conflict around what constitutes kosher, and thus how products are *qualified* as kosher. However, transparency concerning the actual procedures and how they take place could be improved greatly in both countries. Most of the information available to consumers is limited to a description of the rules and procedure for shechita and a list of authorised products. Information about what happens in the abattoir in the industrial part of the production and immediately after is not readily available.

Perceptibly smaller kosher markets are evident in Germany, Norway and Turkey. In Germany, there are only a handful of kosher outlets across the country and kosher can be regarded as a 'niche market'. As poor immigrants from the former Soviet Union, many German Jews show little interest in where their meat comes from and whether has a stamp or is certified; price is the significant factor. Some large supermarkets do sell kosher products, but it appears that Jewish consumers prefer to buy from the local butcher's shop where they trust that the rules and controls are strict. Controls are also very strict in Turkey and only a very small number of Turkish Jews eat kosher meat on a regular basis and the source of food is clear. In Norway, shechita is banned and the market is dependent on imports, which are controlled by the Jewish community in Oslo.

HALAL

Both in the United Kingdom and France there is no little clarity about the rules for halal slaughter; this is symptomatic of a lack of religious consensus on the matter. Control is neither homogeneous nor stable and a complex process of commercialisation and distribution has facilitated the rise of numerous certification bodies and labelling schemes. Transparency concerning the actual procedures involved is very low; information for consumers is not clear and it is not easy to understand what happens in the abattoir during the industrial aspects of production. Much like the UK, no central religious institution is in control of qualification in the huge French halal market. The market remains particularly obscure in terms of regulation, certification practices and halal definition, with auto certification dominating. The situation in Germany is similar to the UK and France, though the underlying debates are less evident. While the German market appears more open than these markets at the present time, this perception may change as the market expands and receives more interest. In Norway, a good relationship has been built between the Muslim community and the state regulated meat industry through ongoing dialogue; much like the non halal market transparency is high. In Turkey, where halal production is the norm, many people are concerned about illegal meat production and the transparency of the meat market is regularly questioned. As halal markets continue to expand in other countries and certification becomes more of an issue in Turkey, concerns over transparency will no doubt increase.

INFORMATION ABOUT RELIGIOUS SLAUGHTER

KOSHER

In France and the UK the production of kosher meat, particularly at the level of its supervision at the level of shechita (slaughtering), remains under the control of the Jewish religious community and certification is based on rabbinical affiliation; most certifying organisations provide on-line listings of certified products, retailers and restaurants. All kosher meat comes from non stunned animals, yet kosher labels do not provide precise information on the origin of products *qualified* as kosher. While some certification bodies claim to prioritise locally produced meat, it is not clear that this is always the case. The practice of transferring into the mainstream market meat obtained through shechita, but not of sufficient quality to be kosher (e.g. hindquarters), is starting to become an issue amongst the general public and there are calls for more information through labelling. However, some voices in the Jewish community object to the supply of information about kosher meat because of the possibilities of stigmatising shechita. A high percentage of the kosher meat sold in Germany is imported from other European countries and it is stamped and labelled as such; in general, however, it appears that many German Jews are not overly concerned about the provision of information. In Norway, all kosher meat is imported and Norwegian and the provision of information relates to imported products only. The kosher meat market in Turkey is so small that the provision of information is not really an issue.

HALAL

In the UK, independent certification is mainly in the hands of non-profit Islamic organisations; however there are also commercial certifiers and auto-certified businesses. In France, independent certification is still rare; there are certification services at the grand Mosques, but auto-certification is more common and there has been a proliferation of halal stamps and labels. The most discussed issue is the question of stunning, with new and emerging certification organisations claim adherence to stricter halal rules based on the practice of non stunning practices. An identifiable trend in the near future could be the establishment of a double certification channel for stunned and non stunned meat; because of the high tensions it is difficult to see how a centralised and standardised rule would be acceptable to producers and retailers. Resistance would not only come from religious organisations, it would also from commercial actors-concerned about the impact of such a move on their competitiveness; consumers might be the only actors really interested in better information. In Germany the situation is similar, though the market is young and less developed. Debates about certification and stunning are not as evident as they are in France and the UK, yet as meat *qualified* as halal has started to appear in mainstream supermarkets, questions are being in on-line consumer forums, much as they have in France. In Norway, the provision of information about the halal market is higher than it is elsewhere; this is due primarily to the good relationships that are being built between the Muslim community and the state regulated meat industry. Some Turkish retailers provide information to consumers, though questions have been raised about the level and avail-

ability of this information. At present, it appears that the pressures to provide information are greatest for products *qualified* as halal for export to external markets.

CONSUMER TRUST

KOSHER

In France, kosher generally remains a symbol of purity, hygiene and health. However, voices in the Jewish community continue to warn against fraud; although trust remains high, as the market has proliferated concerns have emerged. In the UK, trust in products qualified as kosher is high, as evidenced by the number of Muslim consumers who buy kosher products instead of halal. In Germany, the markets for kosher is small and local and grocery shops and butchers retain high levels of consumer trust, much as they do in Norway and Turkey.

HALAL

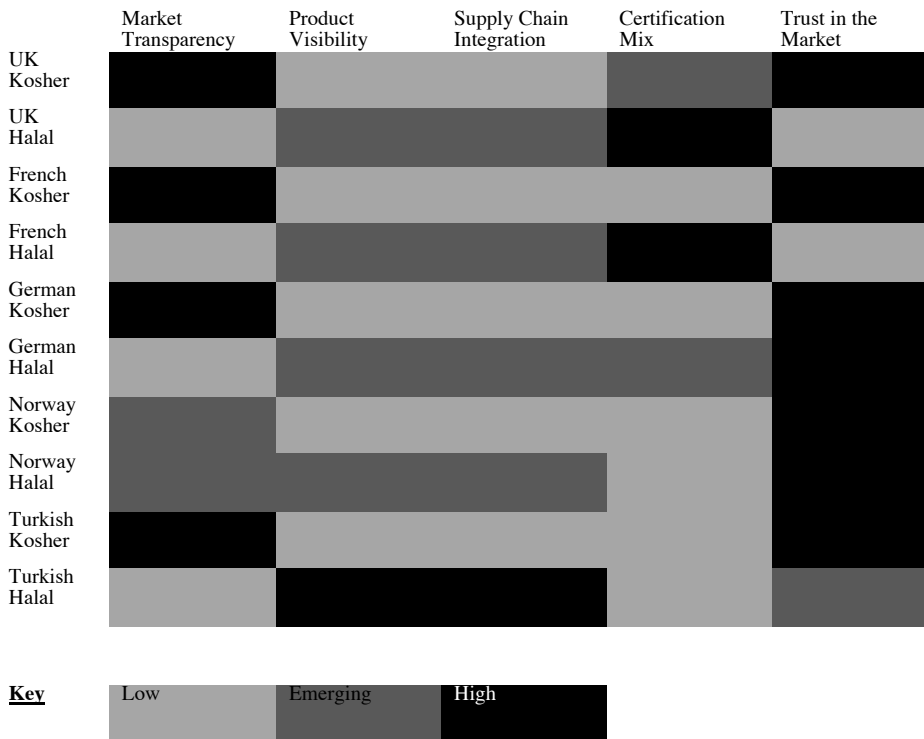
In the UK, the level of trust in products qualified as halal has been increasingly questioned and new certification bodies – with the aim of gaining consumer trust – have emerged. The market has thrown up numerous controversies amongst Muslim and non Muslim consumers alike; in the short term this will perhaps continue as the market expands and cultural and social practices proliferate. The image of halal has also been tarnished in France, where scandal and accusations of bad practice have also helped to undermine consumer confidence; trust is low. However, much like in the UK, this has not hindered the growth of the market. A possible reason for this is that identity and culture are the first reasons why younger generations consume halal meat rather than strict adherence to religious practice. In Germany, where a majority of scholars have to agree upon a stunning method before it can be certificated by EHZ, trust amongst Muslim consumers is still perhaps higher than it is in the UK and France, though things are starting to change as the market expands and products qualified as halal start to appear in supermarkets. In Norway we see a clear example of how to build consumer trust, with ongoing debate and dialogue between the Muslim community and the state regulated meat industry, facilitating levels of trust not seen in the markets in other countries. In Turkey, trust is quite low, though this is more about perceptions of illegal practice than of market developments. However, as the market for export has emerged, questions of trust about products *qualified* as halal are starting to emerge.

SUMMING UP

This report outlines a complex and emerging picture that is perhaps exemplified by developments in the UK, where the main difference between the kosher and halal markets

is the problem of trust and transparency, which is more intense the halal market. Because there is a common international system for the codification of kosher, kosher meat markets are generally more controlled than halal markets. Moreover, while many halal markets are experiencing growth because of a number of overlapping trends, it appears that some kosher markets are differentiating in order to grow. The underlying debates about slaughter and certification are symptomatic of larger concerns about what consumers put in their shopping baskets and we have highlighted similar trends, to lesser or greater degrees, in the United Kingdom, France, Germany, Norway and Turkey.

In the most advanced kosher market, France, we see that problems of trust and transparency are higher than they are in other kosher markets, with differentiation pushing the market forward rapidly. In the most advanced halal market, the UK, we see how the proliferation of cultural and social practices is pushing the market forward at an unprecedented rate, whilst creating controversies amongst Muslim and non Muslim consumers alike. Norway provides a clear example of how dialogue can emerge around market developments, in the case of both kosher and halal, but as the Turkish halal also demonstrates, wider global forces are pushing the boundaries of these markets on an ongoing basis. Certification is the means of entry for expanding export markets and in many countries market intelligence organisations are encouraging halal, and to a lesser extent kosher, development.



Figures 7.1. Overview of markets

A UK interviewee argued convincingly that the production discourses around stunning and non-stunning are themselves mirrored in wider global developments, particularly in the development of the Malaysian halal standard, where non-stunning is the preferred method of production but where stunning is also allowed. Observations made at the 5th World Halal Forum in Kuala Lumpur in June 2010 confirm this, with the desire to accommodate all aspects of production in many contexts now holding back the development of a global halal standard by the OIC (the Organisation of the Islamic Conference).²⁴⁴ As we have demonstrated throughout this report, the picture is complex and there is currently a lack of accurate market information on many aspects of halal and kosher production.

244.<<http://www.oic-oci.org>>.

APPENDIX

THE NORWEGIAN MARKET FOR HALAL AND SCHECHITA MEAT PRODUCTS

INTRODUCTION

In this sub-task we will address the role of halal and schechita products in the Norwegian meat market. The sub-task will put attention to the role of various distribution channels in Norway for halal and kosher meat products. The differences between distribution channels for halal and schechita products will be described. We will investigate the degree of transparency and trust in different distribution channels. We will also investigate what kind of information about religious slaughtering that reach consumers and non-consumers of these products.

We have strategically selected four key informants based on inputs from WP3.2 and WP4.2. To get an overview of the market we have selected the major market vendors of halal and kosher meat products in Norway, as well as a specialised halal butcher and we have been in contact with the authority regulating the Norwegian food market. In addition, we use material from other studies carried out at SIFO on the Norwegian retail market and the Norwegian food chain. We have carried out two days of fieldwork in two areas of Oslo in order to get an overview of the range and availability of halal meat products in the Norwegian food market. We selected two areas with a prominent number of Muslim immigrants; a suburban area, Furuset, and an area in the eastern part of central Oslo, Tøyen-Grønland, predominated with so called 'Immigrant Shops', specialised halal butchers, and fast food restaurants serving halal. The interview material is made semi-anonymous.

DEMOGRAPHICS – MUSLIM AND JEWISH POPULATION

Data from Statistics Norway indicates that there are 72000 Muslims living in Norway, of which most are living in the capital city Oslo. Pakistanis were prominent in the first wave of immigration and still represent the largest Muslim community in Norway. In recent years there has been a growth of immigrants of Somali origin. According to Vogt, about 500 ethnic Norwegians have converted to Islam. The first Mosque was opened in Oslo in 1974 by the Islamic Cultural Centre. The Muslim community has a manifold of organisations, partially reflecting the ethnic background and their specific faith (Vogt, 2000). The Islamic Council (Muslimsk råd) serves as an umbrella organisation and is one of the most

prominent voices of the Muslim community in Norway.

Today there are about 2,000 Jews in Norway. Most of the Norwegian Jews are living in Oslo. The Jewish Community (Det Mosaiske Trossamfund) was established in Norway in 1892 and is the largest and most crucial Jewish community in Norway.

The distribution channels for kosher meat and halal meat differ greatly, due to the size of ethnic community and due to their different slaughtering methods' positions in relation to Norwegian law. According to the Norwegian law all animals have to be stunned before slaughtering (Animal act § 9, 1974 – and previous). Some form of compromise related to the practice of religious slaughtering has been reached with large parts of the Muslim community in Norway. Such a solution is not found for the Jewish community. Kosher meat is therefore imported from other countries allowing religious slaughtering without pre-stunning. The fact that Jews have a common international system for codification of kosher, while Muslims haven't got international halal slaughtering codifications in the same way, structure their markets in different ways. Halal is more based on tradition than a common international codification. This means that Imams are freer to make independent decisions and validations regarding halal in the context they live, for instance in Norway.

First we will give a brief overview of the overall structure of the meat markets in Norway, before we look at the characteristics of the different distribution channels for religiously slaughtered meat.

STRUCTURE OF THE MEAT MARKET IN NORWAY

Norwegian grocery retailing is highly horizontally concentrated, with four groups accounting for 99.3% of the regular market as defined by AC Nielsen (AC Nielsen, 2004). Norwegian retailers' relatively lack of clout regarding fresh produce is reflected in the power of manufacturers, and foremost the farmers' cooperatives' strengths. Farmers' cooperatives in milk, meat and poultry/eggs effectively control these markets. The farmers' cooperatives are exempted from central parts of Norwegian competition law, e.g. regulations on price cooperation, a fact that follows from their by Government delegated role as market regulators (Almås, 2004). The consequence is that farmer cooperatives' branded goods hold monopolistic market shares in the milk, meat and poultry markets (Beckstrøm et al., 2004).

Annually meat for more than Nkr 22 billion is sold in the Norwegian market, including sales between meat businesses. The value of meat that is resold to the retailers is about Nkr 12–14 billion a year. The meat business is mainly based on Norwegian raw material. Only 2–3% of the meat in the Norwegian market is imported, and export is almost non-existent. In Table A1 the development of gross volumes of meat is illustrated.

The farmers' cooperatives are, as explained above, major suppliers under manufacturer's brands to grocery chains. For this report the farmers' cooperative, Nortura BA, covering beef, lamb, poultry and eggs, is of special interest, because Nortura BA is one of the largest actors in halal and the only actor with a brand for processed halal meat products. In Table A2 below the market shares of the Nortura farmers' Cooperative and private actors' shares in the meat market is illustrated.

Table A1. Gross volumes of meat.

Tonnes	1989	1994	1998	2000	2004	2005	2006	2007
Volume of slaughter	183 649	203 688	221 341	219 000	226 948	226 893	229 867	226 462
Processed products	112 378	125 858	145 782	159 454	169 797	174 175	177 044	
Cut products	35 140	57 828	58 464	44 267	50 284	49 174	50 293	

Source: KLF – Kjøtt- og fjørfebransjens landsforbund.

Note: In addition, 3,800 ton of carcass was sold in 2006.

Table A2. Shares in the meat market.

	2000		2004		2006	
	Private %	Cooperative (Nortura)%	Private %	Cooperative (Nortura) %	Private %	Cooperative %
Processing	57	43	57	43	55	45
Cutting	40	60	46	54		
Slaughtering	23	77	26	74		

Source: KLF – Kjøtt- og fjørfebransjens landsforbund.

There has for a long time been reluctance in the Norwegian meat industry to differentiate production lines. The reluctance to differentiate has been explained by additional expenditures, logistics and economic challenges. In a study carried out in the food industry and among producer organisations, we found both individual and structural reluctance to differentiate on animal welfare issues and organic production. Farmers' cooperatives have been detected as bottlenecks for processes of differentiating products (Dulsrud, Arne and Vramo, Lill: Deliverable 1.2.3, Welfare Quality). In our investigations of halal production lines, we find that the picture is somewhat different. Here we find that a small team within the Nortura farmers' cooperative has been a *driver* for the halal brand 'Al-fathi' and that the Nortura system has been having a prominent part in the process towards a certification scheme for halal products.

STATISTICS FOR HALAL AND KOSHER

Statistics for halal and kosher is not available from 'Statistics Norway' (SSB) or from 'Norwegian Agricultural Authority' (SLF). These two organisations gather statistics on animal *species* and not on the method of slaughtering. At SLF they explain: 'For us a cow is a cow and a pig is a pig. The method of slaughtering is not relevant'. At Animalia – Meat and Poultry Research Centre, Elisiv Tolo, a veterinary specialising on animal welfare issues related to animal transport and slaughtering, has roughly estimated that 21 000 individual animals are halal slaughtered in Norway each year (bull, cow, lamb, goat).

The statistics we have been able to obtain on halal is from the meat industry itself (see 4.1 and 5). The figures are roughly estimated and must be regarded as uncertain. The statistics we have obtained for kosher (see 3.3) are from the only kosher outlet in Norway and can be regarded as fairly reliable.

REGULATORY FIELD – DEFINING THE MEAT

Here we will give attention to the Norwegian regulatory set-up concerning slaughtering and import of religiously slaughtered meat and the emergence of certification organisations for halal and kosher. By bringing together representatives for regulatory bodies, knowledge on religious authorities, market actors and consumers, our aim is to understand how halal and kosher is defined in practice.

We will seek to understand how and who regulate this field on different levels. Who are certified to label halal or kosher, and why? How did this way of organising these products emerge? First we will give a short presentation of the ‘Customs’ and the ‘Food Safety Authority’, two administrations that are important in regulating the markets for halal meat products and kosher meat products in the Norwegian context.

CUSTOMS ADMINISTRATION

On their web page the ‘Customs Administration’ (Tollvesenet) presents its objectives like this:

The Customs Administration has responsibilities that are important to society. Our main objectives are, as always to:

1. Prevent unlawful imports and exports of goods
2. Ensure correct declarations and assessments and timely payment of customs and excise duties (<http://www.toll.no/upload/strategiplan2005-2008_eng.pdf>).

From our investigations the Customs Administration in Norway has no special positions in their tariff for halal and/ or kosher meat. This means that the Customs are not collecting figures for import of these types of meat. From the section for border control at the Customs, we were informed that they are not making any division between halal meat, kosher meat and ‘conventional’ meat. All the meat being seized is being registered as ‘meat’. (From correspondence with the Customs Administration, September 2008).

FOOD SAFETY AUTHORITY (MATTILSYNET)

The ‘Food Safety Authority’ (Mattilsynet) is the inspection body of all slaughtering in Norway. The Food Safety Authority is responsible for enforcing the Norwegian laws related to *animal protection*, *animal handling* and *hygiene*.

The sections at the Food Safety Authority dealing with slaughtering are:

1. ‘Section for animal food’ (‘Seksjon for animalsk mat’).
2. ‘Section for land animal and animal health personnel’ (‘Seksjon for landdyr og dyrehelsepersonell’).

These two sections are carrying out inspections related to hygienic demands and demands concerning animal protection and handling. The head of the section for animal food states that the general legislation in Norway is “good enough”. (From interview 5. September 2008). The sections are also producing documentary material as a foundation for regulations and practice. Veterinarians inhabit a large proportion of the positions in

these sections. The veterinary profession has been central in working out the definition and regulation set in 'The Animal Protection Act'. It has been argued that the veterinary profession is a central actor as the legitimate regulator of a relatively unpoliticized field (Elvebakken 1997).

The same set of rules applies to all types of slaughtering in Norway. There is no special set of rules for halal- or other religious methods of slaughtering. The attitude of Food Safety Authority towards religious slaughtering is reflected in this statement: 'What the abattoirs are producing is not our concern. What they are producing is related to their own good will. From what I understand, halal production disturbs the slaughtering houses by breaking up their routines.'

Below a representative from the Food Safety Authority give some insight into The Food Safety Authority's attitudes and practice of regulating and inspecting the production and labelling of halal. One representative tells us that what goes on *inside* the abattoirs is well attended to by the Food Safety Authority and their representative in the abattoirs. He says that the Food Safety Authority is concerned about what goes on *outside* the abattoirs: 'At the Food Safety Authority we are concerned about private slaughtering by certain groups of immigrants. We are concerned about private poultry slaughtering. We don't have any numbers or incidences, but we are concerned' (From conversation with representative for the section for animal food at the Food Safety Authority, 16. September 2008).

From our investigations with the controlling body of all slaughtering in Norway (Food Safety Authority), and the controlling body of meat import (Customs Administration), a picture is appearing: To Norwegian public authorities 'meat is meat' as long as the Norwegian law is abided. At the Customs there are no figures or statistics for imports or seizure of halal or kosher, which supports this picture. The market of meat from animals which have been religiously slaughtered is therefore somewhat invisible, and from conversations with different actors halal in particular is surrounded by 'myths' of private slaughtering. Our interviewees refer to a black market and illegal imports, but we have no figures to rely on. From our investigations the myths and the lack of reliable figures are creating distrust and insecurity in the market of halal. As will be demonstrated in the next section the market of kosher differs greatly from that of halal.

KOSHER IN THE NORWEGIAN MARKET

According to Jewish tradition people have to go through a specific training by a rabbi before they are allowed to slaughter animals. Butchers are called 'sjohatim' and the slaughtering method is called 'sjehitah'. Before slaughtering, the sjohet says a prayer and cuts the throat of the animal with an extremely sharp knife. In order to get a rapid and complete loss of blood, previous stunning is not permitted. As already stated, this way of slaughtering is not allowed in Norway. According to the Norwegian law all animals have to be stunned before slaughtering (Animal act § 9, 1974 – and previous). This explains why the market of kosher meat is dependant on imports. The kosher meat has to be declared by the Customs and conform to laws and regulations set by the Norwegian Authorities. The laws and regulations are enforced by the Food Safety Authority.

Based on interviews with two representatives from the Jewish Community in Oslo, we will present the market for kosher meat in Norway. The material is made semi-anonymous. Our focus will be on flows and strains, availability and price. Kea is working on a daily bases with the administration of 'the Kosher Outlet'. She is handling imports, and dealing with the Customs and the Food Safety Authority. Mark has been involved with the Jewish Community for several decades in an advisory position. He has also been a Chairman of the Board for the Kosher Outlet. We are also including comments from Anne Sender, the leader of the Jewish Community (Det Mosaiske Trossamfunn) in order to fill in the picture of the present situation.

We must again remind the reader that this is a mapping of the market, and is not intended as a complete assessment of the Norwegian market situation.

THE JEWISH COMMUNITY IN OSLO

The Jewish community in Oslo is the largest Jewish community in Norway. The community is located in central Oslo and consists of a synagogue, a community centre with a kindergarten, an old people's home, and kitchens for the preparation of kosher food for special occasions, kosher catering, and a shop selling only kosher food. The religious community consists of both liberal and orthodox Jews, but the synagogue is orthodox. Related to food, this means that inside the community's buildings only kosher is served. All food served for religious festivals, in the old people's home, to the children in the kindergarten and/ or for other occasions is prepared in the community's kitchens in order to secure kosher quality. This we can understand as an *institutional demand* for kosher, where the kosher food is part of sustaining the Jewish Orthodox Synagogue.

The community has 800 members whereas 150 members are keeping the orthodox tradition of kosher food. Related to food, this means that 150 consumers have a total need for kosher products including kosher meat, while the rest of the community has a more liberal approach. In food terms this means that the liberals eat both kosher meat and conventional meat. The demand for kosher increases within the community around religious and other festive occasions, which is reflected in longer opening hours of the Kosher Outlet, and a larger demand for certain products, where chicken is a crucial product.

DEFINING KOSHER

For the representative of the Jewish community kosher should be defined at different levels, as Mark explains:

'All kosher is labelled "kosher". For meat products the label indicates that the animal has been treated well through the whole value chain, that the animal has not been suffering in any way and that the animal is/ was healthy. The label also indicates that the slaughtering has been carried out in a clean and correct manner according to the Jewish tradition and that the animal has been blessed by a shoet under the supervision of a rabbi.'

At another level Mark says that kosher is "a service to the members of the Jewish community". This way of understanding kosher is a way of meeting a consumer demand in a context where kosher is hard to obtain. This understanding of kosher is reflected in a long

history of support to The Kosher Outlet (see below) through financial subsidies from the religious community, and through voluntary work on different levels.

THE KOSHER OUTLET

The only official kosher shop in Norway is 'The Kosher Outlet' which literally is located inside the buildings of the Jewish community. The outlet is open two days a week, one day and one evening, as well as in connection with religious festivals. Due to the location inside the guarded building of the Jewish community, the outlet is in practice exclusively for the members of the Jewish community. Before, the outlet had various locations outside the building and according to Mark did serve customers "from the street" and also Christian consumers. Due to large financial losses the outlet was moved to a small room inside the building in 2005–2006. The move has led to loss of customers and a smaller assortment of kosher products for sale. The meat products for sale are all frozen and are imported from one supplier in France. Chicken, which is the most important and a traditional product for Jews, is imported from France via Sweden. The products in the Kosher Outlets' deep freezer are labelled 'kosher' and the name of the rabbi who has certified it is stamped on the product.

IMPORT OF KOSHER

In this section we show that the import situation for Kosher to Norway has gone through a process of change. The leader of the Jewish community explains that in a three – four years period the import situation has turned from being *difficult* to a situation where the different parts involved have arrived at solutions. In Mark's opinion the problem with imports, beside what he understands as a strict Agricultural Policy, has been related to how the Food Safety Authority has historically reacted to minorities with different demands and needs. The leader of the Jewish community says that there has been a lack of sensitivity towards minority groups within organisations like The Food Safety Authority. In Mark's opinion: 'The Food Safety Authority's protection of 'health and food' has been practiced in rigid ways'. Mark explains that the problems for The Kosher Outlet used to be related to a lack of a predictable and permanent arrangement for kosher imports. The various problems in the past led to a time consuming and frustrating process of getting products through the customs, which Mark refers to as a historic struggle in relation to importing kosher to the Norwegian market.

'Today this is very different', the leader of the Jewish community says. She is pleased with the present situation, where she feels that the Jewish community has a good dialogue with the Food Safety Authority and the agricultural authorities in relation to imports of kosher meat. 'For the last three-four years the Jewish side and the authorities have both worked hard to find solutions – and today we no longer have these problems', she says.

Today the problems with imports are related to the fact that the demand for kosher is small, which gives no market-power towards suppliers of kosher and little power towards Norwegian authorities. When the Kosher Outlet buys meat by bulk duties get reduced. This works well for the pure meat, Kea says. But for the processed and specialised meat products the toll gets too high for such a small actor as the Kosher Outlet. Mark describes how the drawbacks of being a small actor lead to very expensive kosher products for the consumers and for the institution. The Jewish Community feels obliged to subsidize most

of the imported goods because the prices would be ridiculous without. ‘You have to be rich to be a Jew’, Mark says jokingly. The price level and the lack of choice for kosher food in the Norwegian market have some negative side effects, which Mark points out: ‘One side effect is a considerable trade leakage. When it is not possible to buy kosher through safe channels, people buy private quota of kosher meat from Sweden, England or Denmark. This involves a much higher health risk, because people might not store the meat in a proper way when they travel’, Mark says.

CONCLUSION

Because Jews’ traditional way of slaughtering (Schechita) is illegal in Norwegian context, all kosher meat is imported by the Kosher Outlet. The costs and obstacles related to kosher imports, which the representatives of the Jewish community refers to, makes kosher products costly for consumers of kosher. The Jewish community feels obliged to subsidise the products for their community and for the sustenance of their Orthodox synagogue. Being a small community gives little market power and also little power towards the Norwegian authorities. This has in the past been reflected in the Kosher Outlets lack of predictability and permanence related to imports and regulations. We find that the expressions above indicate that historically there has been a lack of confidence in the Food Safety Authority. This seems in the last three-four years to have turned to a constructive dialogue, where solutions are reached.

The problem the Jewish community did face in relation to Norwegian authorities in the past can also be regarded as a problem of handling difference within the Norwegian context. Marianne Gullestad has pointed out that the problem of handling difference is a typical feature in the Nordic countries. Scientific studies show that people in Norway are more interested in equality than people in other places, and that equality is understood as an extremely important value (in Lien et al 2001). In some areas of society this value has been explicitly formulated, for instance as political goals for more equality. In other areas of society this value exists as an underlying or unknown motive and/or value, that has an impact in real life. This doesn’t mean that Norwegians are less different than in other regions, but that they go further in finding strategies to hide difference and conform to a certain understanding of normality, all as ways of avoiding open conflict. Marianne Gullestad (2001) shows how this underlying cultural pattern has an outcome where people have to feel the same or feel similar (‘imagined sameness’) to understand themselves as equal or of the same kind (2001, pp. 35–36). There is no kosher restaurant in Norway and kosher products are hardly accessible for customers outside the Jewish Community. These factors make the kosher market invisible to the general public, which underplays ethnic difference and practice in the Norwegian context.

HALAL

Here we will focus on the halal market, and look at the distribution channels for this type of meat, pointing at areas in the value chain where trust and transparency are challenged, and investigate existing information and where consumers and non consumers of these

products receive information. First we will present the various definitions of halal that we found among the actors we have interviewed. The interviewed market actors mostly define halal as *consumer choice*.

Christian, who has been personally involved in the long term project of developing the halal brand; Alfathi, goes further in his definition or explanations behind/for Norturas halal products. Here is his definition: 'All the time (when it has been difficult to obtain raw material) we have said that we have to produce halal hot dogs because it is important for the children.* This is related to integration. You will not get that feeling of integration if you haven't got relevant choices.'

This definition or explanation of halal is related to *integration* and/or to *human rights*.

Christian also thinks respect is an underlying value behind producing halal, which is reflected in his next statement: 'For me there should be an underlying respect for other peoples needs. In this regard food is important.'

SUPPLIERS OF HALAL MEAT

For this sub-task we have done two days of field studies in the retail market. Halal slaughtered meat is typically found in 'immigrant shops' and in retailer chains located in areas with a considerable immigrant population. The market consists of branded and unbranded halal meat, and from our informants we get the impression that the Norwegian halal market also consists of a large amount of illegal halal meat and also 'conventional' meat sold as halal. All figures in this section are from the industry, and must be treated as uncertain.

In the Norwegian market there are three suppliers of halal meat to choose from; Nortura, a farmers' cooperative, Fatland AS and Furuseth AS, two private actors. Nortura is the largest actor in halal slaughtering and the only actor in halal processed meat at the moment. Furuseth AS is a family owned abattoir with only *one customer* of halal.

Furuseth AS

Halal slaughtering of individual animals at Furuseth AS in 2006:

- livestock: 228 (Bull: 227 individuals, Cow: 1);
- lamb: 1861.

Furuseth AS is the smallest of the abattoirs carrying out halal slaughtering in Norway. Furuseth AS is located in the eastern part of southern Norway. Their halal slaughtering is carried out on the company's premises every morning by a Muslim who owns an 'Immigrant Shop' (Pak Matsenter AS) at Grønland-Tøyen in Oslo. The Muslim is not employed by Furuseth AS. A representative for Furuseth AS says that the company is happy with having only one halal slaughterer, and that Furuseth AS is not interested in having more halal slaughtering on their premises.

Fatland AS

Halal slaughtering by individual animals at Fatland AS in 2007:

- livestock: 1,000 animals;
- lamb: 10000 animals.

Fatland AS used to produce halal at different plants in Norway, but today Fatland AS has only one slaughtering plant: 'Fatland AS Oslo', carrying out the halal production.

* Hot dogs are the predominant dish served at birthday parties and other events for children. Norwegian pork is a major ingredient in hot dogs.

A representative for Fatland AS explains that the reason for the restructuring is that the abattoirs got a practical strain when producing halal. 'The strain was related to Muslims wanting to come and have a look at the actual religious slaughtering', he says 'At the most 25 people wanted to take part in the celebration', he explains. 'To have so many externals coming inside the slaughtering house was difficult', he continues. Still this representative from Fatland AS is of the opinion that it is of importance to produce halal meat because there is a demand for halal in the market. (From a conversation 15 September 2008).

At Fatland's branch in Oslo lambs are slaughtered halal or conventional. The production lines are separated, but some of the halal slaughtered meat is sold as conventional meat in the retail market. This means that halal lambs are sold both as halal lamb and as conventional lamb, which adds to the difficulty of estimating the sales of halal to consumers. For consumers wanting to avoid halal, the fact that Fatlands lamb meat might be halal is not communicated. A representative from Fatland does not see this as a problem for consumers of non-halal. From his point of view "it is only a couple of words" separating the conventional meat from halal meat. From Fatlands perspective this practice might utilize the raw material better and simplify the logistics.

Nortura BA

Halal slaughtering at Nortura in ton 2007

- 200 ton raw material;
- 110 processed halal products (for the brand: 'Alfathi').

Nortura is the largest supplier of halal meat in the Norwegian market, with 200 tonnes halal raw material, and 110 ton processed halal products ('Alfathi'). Nortura is the major supplier under this manufacturer's brand to grocery chains. Beside selling carcasses or cuts of halal meat in the market, Nortura is a large sales cooperative with its own processed halal meat products and its own halal brand: 'Alfathi'.

NORTURAS HALAL BRAND 'ALFATHI'

Alfathi is the only processed and certified halal meat product range in Norway at the moment. By presenting the process behind the Alfathi brand, we will illustrate the dynamic between authorities (Food Safety Authority), the Islamic council, Nortura and the consumers.

Below an overview of the development of the 'Alfathi' products follows:

- 2002: 40–50 ton;
- 2004: 161 ton;
- 2005: 176 ton;
- 2006: 108 ton;
- 2007: 110 ton.

The increase from 2002 to 2004 can be explained by resources given for a project where a professional product developer did move Alfathi from 'homemade to professional'. The project was funded by SPIN (centre for product development in the food industry). Their

aim was to professionalize the brand Alfathi and develop five new products).

The sales of Alfathi products have been increasing steadily since their upstart, with a crack in the sales in 2006 due to an e-coli outbreak in one of Norturas non-halal products. The outbreak led to difficulties in obtaining enough raw materials (livestock and goat) for a period of time. The figures show that the decrease in the sales for 2006 has not picked up in 2007. Christian explains that it will take time to rebuild the figures after the e-coli outbreak.

‘ALFATHI’

Here we will describe the process behind and towards the halal brand Alfathi as we find it in the market today. The description is based on an interview with a key informant; Christian, the *project* leader of Alfathi who has been working with Alfathi products since 2001. The case treats the process towards the ‘Alfathi’ products as we find them in the market today. According to the project leader Alfathi started up as a project with a small amount of resources, but with two- three enthusiastic workers. In the beginning the project used cheap and ‘home made’ packaging.

The idea behind the Alfathi products came from a Somali man, Ibrahim, who literally, ‘knocked on the door at Gilde’ in 2001 (Gilde and Prior merged in 2006;* today the company name is Nortura). Ibrahim’s vision was: ‘to produce real and serious halal products which customers could trust’. Ibrahim said: ‘There are no real halal products in Norway, no serious actors, nobody whom one can trust’. Ibrahim was employed from 2001 to 2006 together with a salesperson.

Christian says Ibrahim knew where to find the customers. In the beginning they wanted to reach the ‘immigrant shops’. They travelled around to immigrant shops and also tried to sell in the halal products by telephone. Christian tells us that it was very difficult to sell the Alfathi products to the ‘Immigrant Shops’ because the profit on processed products is less than on carcass and cut meat.

The goal of the project has been to serve customers wanting Alfathi products through their local shops, Christian explains. A structural move towards this goal has been to let all large shops have Alfathi products on their listings. This means that the trajectories for the Alfathi products to the customers theoretically should be open. Still it is the shop manager who in the end decides if he wants to order and stock Alfathi products or not. The project has tried to empower customers who want to get Alfathi products by motivating them to ask for the products in their local shop.

In the early days of the project Ibrahim and The Islamic Council bought shares in ‘Alfathi’. In 2006 Nortura wanted to have total ownership of Alfathi. Ibrahim and The Islamic Council sold their shares the same year. Alfathi merged with Nortura. Today Alfathi is a wholly owned subsidiary of Nortura BA and an independent brand.

FROM TRUST TO CERTIFICATION

In order to be able to produce and create halal products, the collaborators on the Alfathi products had to find a slaughtering method which the different Muslim groups/ communities could agree upon and which the Food Safety Authority would validate.

* Gilde and Prior are the dominant slaughterers and processors of meat and poultry in the Norwegian market. They are both cooperatively owned by farmers.

‘No one thought that we would succeed when we started’, Christian says. ‘The Food Safety Authority was not interested in a dialogue during this process’, Christian continues. Instead, Christian tells us that The Food Safety Authority had an attitude “where we [the project] had to show them the method of slaughtering first, before they [The Food Safety Authority] wanted to comment, and tell if they would approve. Christian explains: ‘We hit the wall at the Food Safety Authority’.

In the beginning of the project period, Ibrahim did spend long evenings with different Imams in Norway in order to explain, create and convince them that Alfathi halal was trustworthy. At one stage in this process Ibrahim managed to get four or five Imams to travel to Nortura’s abattoir at Gol and validate the activity and the slaughtering of halal. A result of this trip was that the Imams signed a letter on behalf of *some* of the Islamic Councils representatives. The ongoing validations were carried out in an informal way: The Alfathi project transported different Imams to Gol if and/ or when they for some reason felt unsure about the correctness of the slaughtering process. At the Nortura abattoir at Gol the Imams were able to see the slaughtering and talk to the employed slaughterer who is a Muslim.

As this sequence illustrates, the Imams have been operating as certifiers for their own community. In this way trust been steadily built between parts of the Muslim community in Norway and Nortura BA. In comparison to this practice the small abattoir Furuset AS never had any Imam visiting on their premises. “No Imam has ever been here”, says the representative at Furuset AS. Furuset AS has got the shop owner of Pak Mat (see below) slaughtering on their premises every morning. He transports the meat to his own ‘Immigrant shop’, Pak Matsenter at Grønland-Tøyen in Oslo. In this case trust is built between the shop owner and his customers. This trust can be characterised as informal trust and/ or network based trust.

AVAILABILITY OF HALAL

Today the products in the Alfathi product series are: ‘Alfathi Halal Pizza’, ‘Alfathi Halal Hot dogs’, ‘Alfathi Halal Meat’, ‘Alfathi Halal pâté’, ‘Alfathi Halal spread’ and ‘Alfathi Halal Hamburger’.* All Alfathi products are frozen food in order to draw advantages from producing by bulk. All their recipes have to be based on these premises. From the view of a consumer this gives no other options for halal than frozen products and the assortment is still small.

From a field study at Furuset in Oslo we found that an outlet of the large supermarket chain Rema 1000 has four of the Alfathi products in stock.† The Alfathi products are labelled ‘Alfathi’ and are placed with their own product category in the freeze section. The outlet of Rema 1000 has an unbranded halal chicken in stock. This halal chicken is from Arne Magnussen, and the consumer can choose between Solvinge Chicken and Solvinge halal Chicken. Except for the Alfathi pizza, all halal products are more expensive than the conventional product of the same category.

* In Norway ‘Hamburger’ is the concept used for various burgers, without discriminating on ingredients.

† Furuset is a suburb in Oslo with a large immigrant population.

In the 'immigrant shop' next to Rema 1000 we found two halal products in the deep freezer. 'Boiled Kebab halal lamb meat' and 'Halal hot dogs from chicken meat'. The two products are delivered by 'Kalbakken Kjøtt og Fisk'.* The labelling is simple for both products. The country of origin (Norway) was printed on the halal chicken meat, but was lacking for the kebab meat. The products did not carry a certificate from the abattoir.

In our investigations in several immigrant shops we find that this is common. A very important exception is Pak Matsenter AS at Grønland-Tøyen. Pak Matsenter has a good reputation among consumers at Furuset. From interviews carried out with Pakistani and Somali consumers at Furuset, they say that they travel regularly to Pak Matsenter AS to purchase their halal meat (Roos and Rysst 2009). We may assume that consumers from other parts of Oslo and the eastern region of Norway do the same.

THE CONSUMERS – DEMAND – SMUGGLING

In 2004 a report was produced (by Spin) indicating a much larger demand for halal than what was produced (ten times what Nortura produces). The figures were based on estimating the needs of the Muslim population.

A general view among our interviewees is that there is a large black-market for halal in Norway. One implication of this might be that the figures for Halal products in Norway are uncertain because a large proportion is imported illegally. We find that all the actors we have interviewed are mentioning smuggling of halal as a problem, related to backers not being caught, to *health* and *hygienic problems*, and to *trust*.

Another aspect of the halal smuggling is related to *demand*. In Christian's opinion, Muslims in Norway are at times 'forced' to smuggle. He says that consumers have two options when they are not able to get halal. 'They either stop eating meat or they smuggle for their private consumption'. He thinks it is mostly private smuggling driven by private demand, while some larger actors are smuggling for large amounts of money. Christian doesn't believe that Muslims are travelling to Sweden for fun or with an idea of saving money. He doesn't think it is incidental that there are four shops which specialise in halal just on the other side of the Swedish border (at Svinesund). 'They haven't been established at the border for no reason', Christian says. From what Christian knows, there isn't any Swedish halal brand, but the Swedish market does import halal from Belgium, France and Germany.

Christian says that he knows that ethnic Norwegians are buying halal because the products are different and/or because they have some of the same values as Muslims regarding blood as being unclean. Some Muslims do not eat any halal in Norway, Christian tells us. Instead they have a vegetarian diet with or without fish, he says. This can be read as a silent protest against the halal market in Norway, to a lack of trust in the slaughtering process of halal in Norway, or be related to lack of information reaching the consumers wanting halal.

PAK MATSENTER AS

Pak Matsenter AS is the most specialised halal shop in Norway. It is located in an established community of immigrants in the inner city of Oslo. Pak Matsenter AS has a direct link to the halal slaughtering process through their shop owner who travels to Furuseth

* Kalbakken Kjøtt og Fisk is a company, no information on halal on their web-page.

AS every morning to carry out halal slaughtering. He brings parts of the meat to his specialised butcher and grocery shop, and part of the meat is taken to be processed at 'Smestad Gård'.* In Pak Matsenter they have a well stocked counter for fresh meat, a well stocked refrigerated counter for the meat processed at Smestad Gård and a refrigerated counter for halal chicken and turkey products delivered from Nortura Elverum. The shop owner says it is a problem that it is too little lamb available for halal slaughtering. The consumer demand for halal lamb is great, and Pak Matsenter AS has to import extra lamb from New Zealand to meet this demand.

Above the refrigerator counter for chicken and turkey products from Nortura Elverum, two A4 sheets of paper are hung on the wall. One of the sheets of paper have a confirmation from the abattoir at Nortura Elverum, dated 24.09.08. It confirms that all chicken meat slaughtered at Nortura Elverum which is delivered to Pak Matsenter AS is slaughtered following the current rules agreed upon with The Islamic Council Norway.

The information on the other paper is written in Urdu referring to 'the Jazba': The Voice of Overseas Pakistanis (<<http://www.theiazba.com/akhbar/news>>).

The fresh produce counter is stocking cut meat. All pieces of meat have small labels with information: '...from cattle' or '...from lamb'. In addition the pieces of meat carry information of country of origin. All meat is labelled 'from Norway'.

We will include another shop selling halal at Tøyen-Grønland. This shop which we will name 'The Immigrant Shop' was the first established halal shop in Oslo, and the interview with Aron, the head of the shop, can illustrate some of the tensions, areas with little transparency and fraud in the halal market. The information drawn from this interview shows how informal and personal trust plays a crucial part throughout the value-chain of halal.

'IMMIGRANT SHOP'

The shop was established as the first halal shop fourteen years ago (in 1994). Today there are numerous specialised halal shops in Norway where most are situated in Oslo. In the last three years the shop has had an independent section for cutting. The shop does its purchase of raw material from Fatland AS.

Aron tells me that of the shops' customers; about 65% are of Norwegian ethnic origin while the rest are what he terms 'foreign'. Aron and his seven employees are gathering statistics on the purchases of meat, as well as the background of the customers visiting the shop.

The customers are coming because there are not many meat shops of this kind in Oslo. They come to my shop because we have got quality. We give meat guarantees. If they don't like the meat they purchase, they get the money back.

Aron explains that they are very careful to have a *certificate* on the meat they sell in order to be able to show when and where the meat was slaughtered. The certificate has got a bar-code, date of slaughtering and a number for each animal. In addition they have a video recording from the abattoir as information material for customers. The video recording shows that the slaughtering is carried out by hand and is following procedures that Aron says most Muslims in Norway think 'qualifies as halal'. In Arons' experience only a few Muslims are not satisfied with the Norwegian way of producing and defining halal. Aron says some Muslims decide not to eat meat in Norway.

* We have not been able to find more information on this company on the web.

In a report on 'Eating Out', carried out in 2007, a consumer preferring halal meat tells us that he never eats meat at restaurants in Norway because he does not trust that the restaurants serve him halal, even though they guarantee it. He says it is the same if he goes to somebody's wedding in Norway. If he does not know the person very well he can not trust that they serve halal. When he goes on holidays in what he calls 'Muslim' countries he feels free to eat meat everywhere. He says he wishes that he could take his family out and eat meat in Norway as well. (Interview no. 5, 2007).

From Arons experience, the distrust in the Norwegian way of producing and defining halal is related to the customers' geographical origin and their religious background, meaning to which Imam or sect they belong. Aron is of the opinion that quite a few of the retailer chains are taking advantage of customers' ignorance, telling customers that the meat is halal, when it actually is not. Aron tells us that a large proportion of the meat in 'immigrant shops' is smuggled from Sweden. He tells us that smugglers have been coming to his shop offering meat eight or nine times.

The interview in the 'Immigrant shop' illustrates that the face to face contact has been and still is important for the process of building trust in a market where there has up until recently been little formal and standardised information to consumers. Aron uses a certificate and a video documenting the halal slaughtering method as a way of building trust, in addition to his own personal reputation.

In order to understand how market actors and consumers are trying to reduce uncertainty and build trust, it is necessary to look more closely at the actual practice and process towards what we see as an increasing standardisation of halal today. The Islamic Councils role in Norway is crucial for understanding the process of standardisation.

Box A1. 'The Islamic Council, Norway' (Muslimsk råd Norge – IRN).

The Islamic Council in Norway presents themselves on the web in this way:

'The Islamic Council is an umbrella organisation for Islamic religious communities and organisations in Norway. Today the Islamic Council represents 40 membership organisations with more than 60 000 Muslim members.'

'The Islamic Council consist of representatives from the membership mosques who are voted in every second year. The board consists of a chairman, vice-chairman, secretary, finance responsible and committee members. The Islamic Council has also an employed secretariat.'

The aim of The Islamic Council, Norway:

- Work towards a Norwegian society where Muslims can live in accordance with the Islamic teachings and contribute to build a Norwegian – Muslim identity.
- Promote solidarity among Muslims in Norway and attend to the rights and interests of the member organisations.
- Be a bridge-builder and dialogue partner who creates mutual understanding and respect between Muslims and non-Muslims in Norway, in relation to religion, culture and moral questions (<http://www.irm.no/>).

AGREEMENT ON CERTIFICATION

Today an agreement on certification is signed between Nortura and the Islamic Council Norway, where The Islamic Council Norway is responsible for the validation and certification of the slaughtering, the cutting and the processing plants. The agreement describes the number of revisions per year. The Islamic Council will both carry out notified and unnotified audits.

From a telephone conversation with a representative from Fatland AS, we learn that Fatland AS is also negotiating on an agreement with Islamic Council Norway about the validation and certification of their halal slaughtering. The leader for the slaughtering unit at Fatland AS says it is *consumer demand* that influences their production of halal, and that the amount is steadily increasing. As a consequence of this demand he says that Fatland AS wants to sign an agreement with Islamic Council Norway. As a future plan Fatland AS would like to sell halal to one of the largest retailers in Norway: Norgesgruppen. This would open up for a potentially wide distribution of halal certified products like cut meat to different grocery chains in Norway (but no processed meat products).

The Islamic Council Norway will get an active role in appointing an expert on such audits. It can be argued that The Islamic Council in this way will get to hold a monopolistic role in halal auditing and certifications.

NEW AGREEMENT

In these days a historic agreement is being signed between Islamic Council Norway and Nortura BA, where they are agreeing upon the production and slaughtering halal chicken. Halal chicken is a new product in the Norwegian market. There have been discussions and disagreement for a while regarding the slaughtering method for halal chicken. For a while the Islamic Council Norway even declared that halal chicken produced in Norway and in the border areas of Sweden could not be regarded halal. The *concern* from the Islamic Council and from parts of the Muslim community has been related to the heart activity of the animal during the slaughtering process. The question was if the heart activity was high enough to pump the blood at the moment of slaughtering.

Together with Nortura's abattoir at Elverum, the Islamic Council Norway has been running tests on heart activity after the chickens are anaesthetized with gas. In cooperation, the market actors and the Islamic Council have found a solution to the problem. The Nortura abattoir has agreed upon employing extra staff during the halal slaughtering in order to reduce the time between anaesthetization and the moment of slaughtering.

Christian at Nortura tells us that this new halal chicken product might be sold as a branded Alfathi product. The product is intended sold to industry customers, for instance to Pak Matsenter. On our field visit at Tøyen- Grønland in December 2008, Pak Matsenter had a whole freezer with halal chicken- and turkey products from Nortura Elverum

CONCLUSIONS

The Norwegian market for halal is still in an early phase of certification and more standardisation. We find that there are different practises related to communicating and ensur-

ing trust and standards towards the consumers. At Nortura Gol a Muslim is employed as a halal slaughterer. A historic agreement is being signed between The Islamic Council Norway and Nortura, where the two parties are agreeing upon producing and slaughtering halal chicken. These negotiations and agreements are fairly new.

This practice of halal slaughtering is accepted by The Islamic Council. At Fatland negotiations of an agreement with The Islamic Council regarding a future cooperation is taking place. At Furuseth AS we find another practice. Here a Muslim slaughterer has made a private initiative and is slaughtering the meat he sells to his shop (Pak Mat) at Grønland- Tøyen in Oslo. These different examples shows that the Norwegian market for halal includes both trust based on formal networks (face to face) and trust in informal relationships expressed through the use of standardised procedures and brands (Alfathi). These initiatives are largely demand driven in that demand is generally higher than supply. But consumers' purchases are contingent upon trustworthiness.

INFORMATION

'The Alfathi project' has, besides being an important driver for halal products, been an important channel for giving information on halal to consumers and meat producers in the Norwegian context.

In the early days of the Alfathi project, actors did promote the halal products in different shops and supermarkets, by barbequing at strategic places in Oslo, and by giving out information leaflets. These campaigns were carried out in cooperation with Animalia – The Meat and Poultry Research Centre.

In an information leaflet for Alfathi products, consumer choice and consumers possibilities are factors that are emphasized as values behind the production:

'Alfathi means new possibilities. Alfathi Halal AS wants to give Muslims in Norway new possibilities... – Muslims in Norway have to a large extent adopted Norwegian food habits like making packed lunch and barbequing, but until recently products to cover this demand has not been available' (author's translation, the leaflet can be downloaded from the Alfathis home page, <<http://www.alfathi.no/getfile.php/Alfathi/Spesielle%20elementer/HalalBrosjyre07MAR05.pdf>>, 27.04.09).

Another channel of information has been through the Alfathi project leaders receiving and answering mail from consumers. Christian tells us he has had a strategy of answering all e-mails whether they have been 'hate-mails', questions, or suggestions. 'I have always given the customers answers and explanations. Sometimes the customers have been given advice on how they can influence their local shop in order to stock halal.'

Christian tells us that he has been explaining and answering questions regarding cleanness and/or authenticity of the halal slaughtering process for years.

Still Christian gets feedback from some groups and individuals who don't think the slaughtering has been carried out properly, which means that they don't consider the meat as halal.

Christian tells us that he has been arguing with producers who have been saying: 'You are not permitted to slaughter my bull as halal'. In Christian's experience a lot of Norwegians are ignorant about what halal slaughtering actually means. Still he says that he gets

much positive response when he gives factual information regarding halal slaughtering. Even 'hate-mailers' often respond with: 'Oh, I did not know enough about what halal actually is'.

This suggests that there is a lack of information to both consumers and non-consumers of halal products in Norway. It also suggests that factual information is important in the process of counteracting prejudice and misunderstandings of what halal slaughtering actually means and how it is carried out.

Another source of information towards consumers is found on the web. On Nortura's home page they give an explanation of what halal means, how animals has to be slaughtered to be in accordance with Muslim tradition – permitted by Islam. They refer to the regulation of animal protection in the abattoirs according to the law of 20 December 1974 no. 73 of animal protection § 24c (<<http://www.alfathi.no/om-halal-slakting/category11121.html>>, 2 May 2009).

Neither Furuset AS nor Fatland AS have a web-page or communicate towards the public or consumers about their slaughtering practices of halal. Alfathi has an informative web page on the halal slaughtering process and the various products available.

CONCLUDING REMARKS

This report tells a story about a growing and unsatisfied demand for certain products in the Norwegian market. It also tells stories about building different types of trust, a basis for any market - a trust that the Norwegian institutions was not prepared for.

An interesting and important aspect with the development of a more standardised halal product in Norway is the collaboration between the meat industry (Nortura) and the Islamic Council. In the development of the only branded halal product in Norway and the new halal chicken product, it is clear that the meat industry with the large farmers' cooperative, Nortura, has been a driver in the process of finding solutions in order to create trustworthy halal products. It is worth noticing that the Norwegian Food Safety Authority has been conceiving its role as a passive and sometimes sceptical actor in this process.

The situation with only two suppliers of halal meat in the Norwegian market (Fatland AS and Nortura) gives a situation with little market competition and probably an element of good will and asymmetry from the supplying side.* This is partly reflected in the product range of Alfathi. The range can be seen as reflecting an attitude of normalising or mainstreaming the halal products, a degree of 'norwegianization' but also a strategy of integration by making products that are 'suitable' in a Norwegian context. This is done by making parallel products to already existing 'Norwegian products' in order for Muslims to participate in the Norwegian society. The range of halal products is still small; price is higher than for products of the same category and availability is still scarce especially outside Oslo.

Relevant information is distributed differently to consumers and non-consumers in the different distribution systems existing for halal or schechita products. Kosher products are hardly accessible for customers outside the Jewish Community. These factors make the kosher market invisible to the general public, which underplays ethnic difference

* Furuset AS is just having one customer and is not interested in expanding.

and practice in the Norwegian context. Kosher is part of an international standardisation process, with an international certification and a label found on all the pre-packed products. The whole process of labelling and packing Kosher is carried out outside Norway. The market for Kosher is small and the consumers within the Jewish community have a high awareness of the common standards and the labelling of Kosher. Kosher is not sold outside the Jewish community. The general public have little knowledge or information about the standards of kosher.

In the market for halal a process towards a larger degree of standardisation is happening in Norway right now. The religious authority: Islamic Council, Norway will be responsible for the validation of the halal products and the inspections on Norturas abat-toirs. It has not been possible to obtain information about the processes towards Islamic Councils standards and inspection procedures. We find that there are different practises related to communicating and ensuring trust and standards towards the consumers. This report shows that the Norwegian market for halal includes both trust based on formal networks (face to face) and trust in informal relationships expressed through the use of standardised procedures and brands (Alfathi).

The Islamic Council has in the process of standardisation and certification got a monopoly on certification of halal. In a more mixed Muslim population the conditions for consensus related to halal certification might be challenged. Will the Islamic Council be challenged by a more heterogenous Norwegian Muslim population, or will they be able to build trust among enough Muslims to continue as a trustworthy certifier?

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

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