CONSUMER INSIGHTS

June 2020

AHDB

DEMAND FOR HALAL MEAT

The UK halal food sector is one that is of growing importance to the national economy. Spend in the UK halal food and beverage industry in 2016 reached an estimated £4.64 billion, or 8% of the UK's total food and drink spend.

A major part of the halal food market is meat. Halal consumers eat more meat per capita than the general population, and although Muslims account for just under 5% of the UK population, they account for an estimated 20% of lamb consumption in England alone.

To better understand this important market and the opportunities within it for the UK supply chain, AHDB, in conjunction with Hybu Cig Cymru (Meat Promotion Wales) and Quality Meat Scotland, commissioned research in 2019. The research aimed to ascertain how halal consumers shop, cook and eat, while exploring the key needs of the halal meat consumer.

This report highlights key findings from the research and details the opportunities, challenges and considerations for the sector.

KEY OPPORTUNITIES FOR THE HALAL MEAT SECTOR

- Ranging: nine out of ten halal consumers would like to see at least one additional type of halal meat more readily available. There is scope to enhance ranges, with more choice across convenience foods, including marinades and sous-vide-type products particularly
- Presentation and display: there is demand for better presentation, in terms of visually appealing displays, clear signage and offering a variety of cuts
- Upskilling for halal butchers to provide an enhanced service to the halal consumer where there is demand, e.g. deboned red meat, butterflied lamb
- Supermarket counters are regarded as being more visually attractive, in terms of both layout and cleanliness. There may be scope for smaller independents to emulate this
- Greater levels of information about slaughter methods could be beneficial to offer the sector more flexibility in the future, with several segments of both halal and non-halal consumers indicating that stunned halal meat may be acceptable (once they understand the details)
- Consider when key events will happen throughout the year and the scope for maximising the opportunity with marketing, extended ranging and more premium products

RETAIL BEHAVIOUR AND PRIORITIES

Shopping habits

Halal consumers tend to spend more on meat than the UK population in general. Most halal consumers buy meat on a weekly basis, claiming they spend an average of £28.50. This compares with an average spend on meat in the UK of £12.60 per household per week (source: Kantar Worldpanel, 52 w/e 16 June 2019). This is both as a result of larger average household size and more meat consumption per capita.

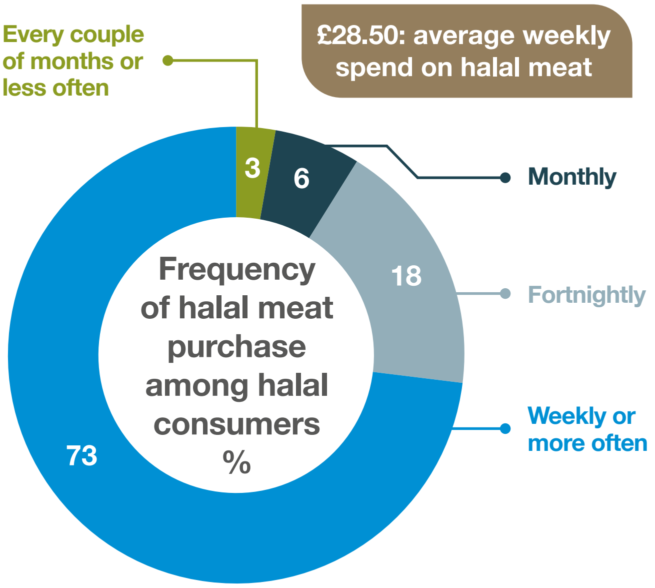

Figure 1. Frequency of Halal meat purchase amongst Halal consumers

Specialist meat shops or butchers are the key channel for more than half of halal consumers. These local independents, often operated by Muslims, are felt to be more trusted as to the requirements of halal meat; while a third of halal consumers appreciate the convenience and personal service of their local ethnic shop. Supermarkets are less widely used. Only 27% of halal consumers regularly shop at a supermarket for halal meat, compared with 81% of the general population, who use a supermarket weekly for buying meat. However, those who do use supermarkets (generally tending to be younger, more affluent consumers) appreciate the fresh counters, due to their clinical appearance, cleanliness and the visual appeal of the halal meat on offer. Regardless of where halal meat is purchased, over three-quarters of it is bought fresh from the counter.

Clear halal certification is vital for retailers

When deciding where to buy halal meat, the top priority for halal consumers is that products display halal certification. Having the certification is five times more important to halal consumers than the retailer having a good range of options, and ten times more important than acceptable prices. Halal certification is deemed by many halal consumers to be a mark of assurance that the product has been produced under strict guidance and supervision. There is a preference for retailers to label halal meat in both Arabic and English.

COOKING AND EATING

Cooking habits

Good food is at the heart of Muslim family mealtimes and social gatherings. More than three-quarters of halal consumers (81%) agree that mealtimes are important occasions for the family, compared with 62% of the general population. Half of halal consumers (49%) cook from scratch, with meals generally centred around more traditional cuisines.

Cooking habits for halal consumers change with age and, in some circumstances, which generation of the family migrated to the UK. More than half of 55–65-year-olds cook from scratch, compared with less than 40% of 18–24-year-olds. More than two-thirds of halal consumers enjoy experimenting with different recipes and food. However, second- and third-generation Muslims are more open to trying different cuisines than first generation. South Asian-, British- and Middle Eastern-influenced meals are prepared at least weekly, with those cooking British-influenced cuisine most likely to be third-generation Muslims.

Pester power influencing family food choices

Halal consumers in the family life stage claim to be highly influenced in their cooking choices by their (third-generation) children, with slightly older or teenage children having particular influence in what the family chooses to eat. This age group may reject more traditional food and look towards their peers and school friends for mealtime inspiration.

South Asian cuisines are the most popular to cook at home among halal consumers

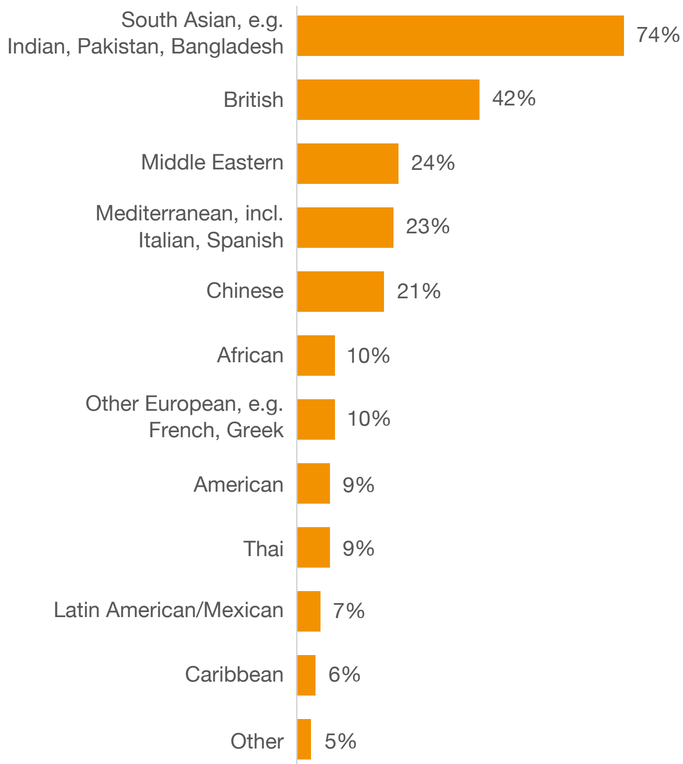

Figure 2. Percentage of halal consumers who enjoy cooking these cuisines at home

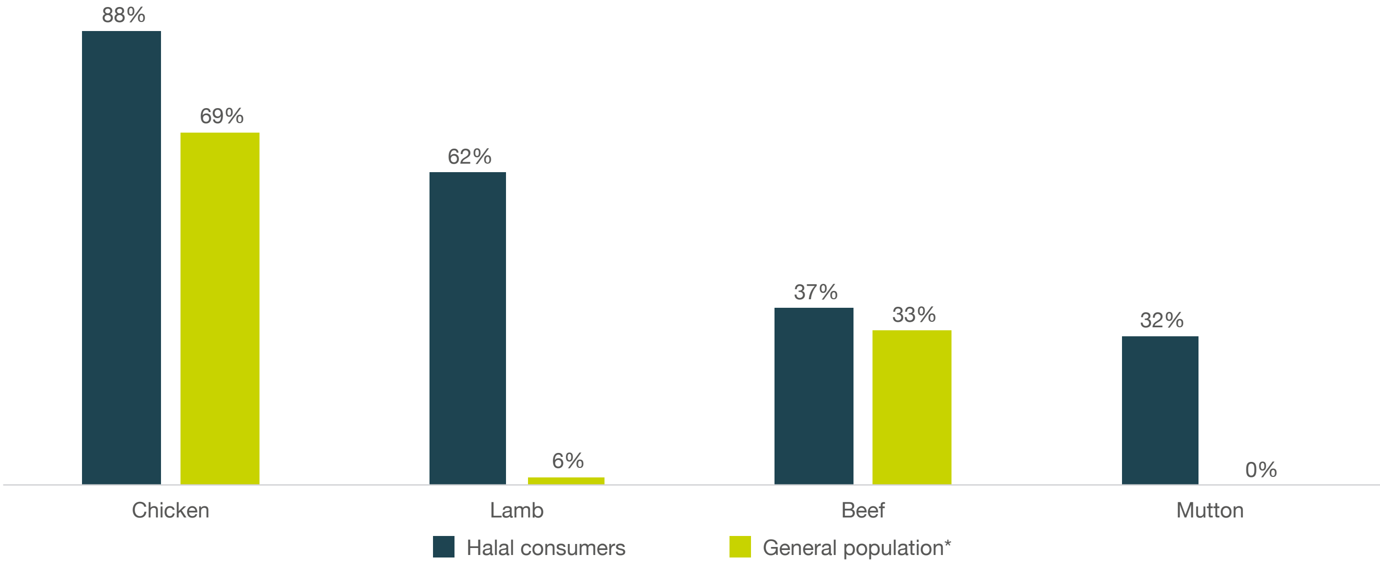

Figure 3. Percentage of consumers that eat each protein weekly

*YouGov nationally representative sample, includes Muslims

Meat consumption: the importance of sheep meat

Meat is viewed as an essential part of a main meal for halal consumers and is often the main feature of the meal. Chicken is the most commonly consumed protein, followed by lamb, beef and mutton.

More than 60% of halal consumers eat lamb at least weekly, compared with just 6% of the general UK population.

Lamb and mutton consumption is significantly higher among halal consumers than the wider population. Per capita lamb consumption in the UK has been in gradual decline for a number of years, driven by comparatively high prices, relative to other proteins such as chicken, and a shift to more convenient, quicker meal options. More than 60% of halal consumers, however, eat lamb at least weekly, compared with just 6% of the general UK population.

Weekly mutton consumption among halal consumers, although less than lamb, is also considerably higher than the national average. Beef is less commonly consumed than lamb, but over a third of halal consumers are eating it at least weekly.

Chicken is valued for its versatility and convenience, with halal consumers eating a wide range of cuts. For both mutton and lamb, chops are the most popular, with mince, shoulder joints and leg joints equally enjoyed. For beef, mince and diced/boneless cuts are selected most often, but this may reflect what is available at halal meat retailers.

> “It would be an insult to have someone over for dinner and not have meat in the meal; it would be seen as disrespectful”
>
> Male respondent, Manchester

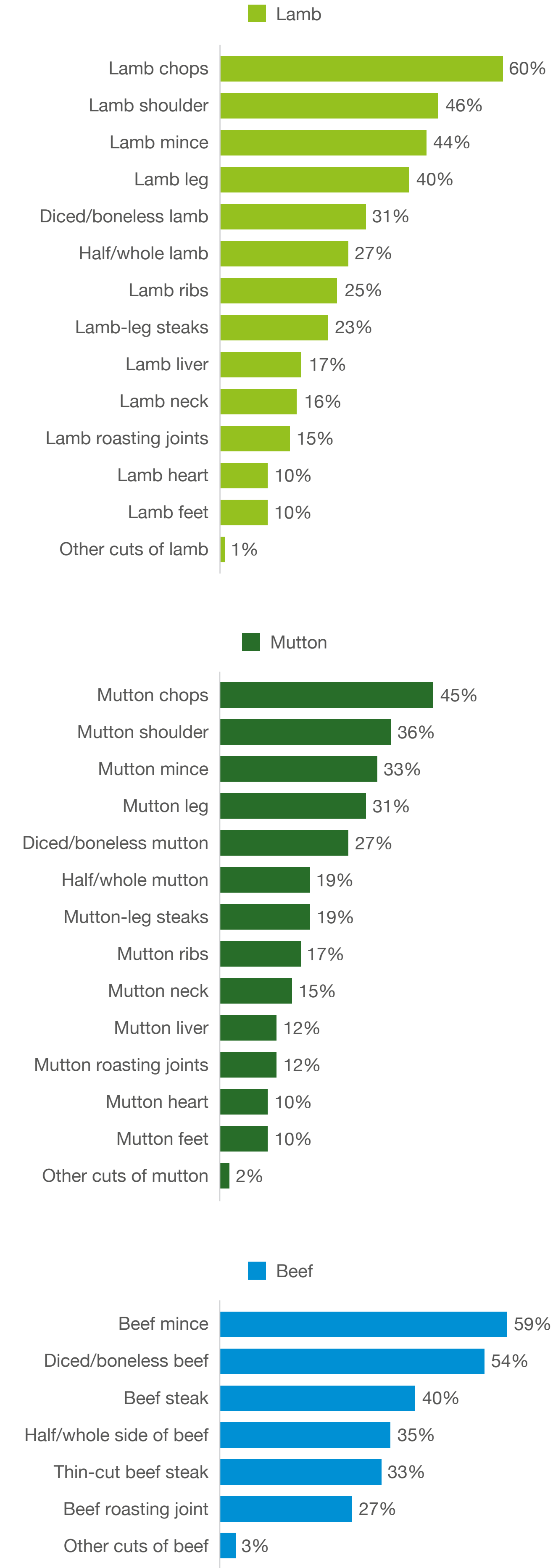

Figure 4. Percentage of Halal consumers regularly buying and cooking with different cuts of lamb, beef and mutton

Lamb: All respondents eating lamb once a month or more
Beef: All respondents eating beef once a month or more
Mutton: All respondents eating mutton at least once a week

While halal consumers enjoy red meat, some claim they are trying to cut down, in line with broader British attitudes and government health advice. However, the extent to which this is happening is not clear-cut: 44% of halal consumers are still buying the same amount of meat as they were three years ago, with a further 10% buying more. We know from other studies that claimed and actual purchasing behaviour are not always the same.

Eating out

The importance of, and love for, good food is again apparent in halal consumer attitudes to eating out. Halal consumers claim to eat out of home more often than the national average, with very few struggling to find halal options. In addition, around half of halal consumers get a takeaway or buy food-to-go weekly, compared with 23% and 40% of the national population, respectively. Eating in restaurants tends to be on a fortnightly or monthly basis among halal consumers. However, 27% do this on a weekly basis, compared with 13% of the nationally representative population. When eating out of home, halal consumers tend to eat similar food to what they cook at home, favouring South Asian, British and Middle Eastern cuisine.

> “The kids like to get a takeaway once a week, pizza or chicken… And we’ll eat out once a week or so, too”

Female respondent, Manchester

THE IMPORTANCE OF EVENTS

Awal Fuseini,
Halal Sector Manager

Aside from the usual consumption of halal meat, peak consumption has been reported around three key Islamic festivals: Ramadan, Eid-al-Fitr and Eid-al-Adha. These festivals usually include family and community events and celebratory meals, in which meat typically features heavily. The significance and timing of these festivals needs to be recognised in order to understand where demand peaks and to target marketing activities. It is worth noting that these festivals typically come 10–11 days earlier each year, due to the length of the Islamic lunar calendar.

Ramadan (fasting)

During Ramadan, Muslims abstain from food and drink for 29–30 days (depending on the sighting of the moon), breaking the daily fasts with evening meals that typically feature meat. Some Muslim households begin bulk shopping of Ramadan meat a few days prior to the start of the period; others prefer to spread shopping across the month.

Eid-al-Fitr (festival of breaking the fast)

Eid-al-Fitr is celebrated a day after the completion of Ramadan. The day begins with special prayers, followed by social gatherings to celebrate the successful completion of the fast. Meat forms an important component of the celebratory meals during these gatherings. Shopping for Eid-al-Fitr meat usually takes place a day or two before the event or after prayers on the day itself.

Eid-al-Adha (festival of thanksgiving or sacrifice)

During Eid-al-Adha, also called Qurbani, Muslims pay for a suitable animal (sheep are generally preferred) to be slaughtered or sacrificed. The meat is equally donated among the performer of the sacrifice, relatives, friends and the poor or destitute in society. The day is traditionally spent celebrating with loved ones.

THE DEFINITION OF HALAL: UNDERSTANDING AND ATTITUDES

Unsurprisingly, and in concordance with religious requirements, the vast majority (86%) of halal consumers 'always choose' halal when buying meat, with very few admitting to knowingly buying non-halal. Only one in ten halal consumers eat non-halal occasionally if a halal option is unavailable. Lack of availability is the main reason cited by halal consumers for choosing non-halal meat in the past, particularly for some first-generation Muslims moving to the UK and not knowing where to shop for halal meat initially.

The halal consumers we spoke to said that choosing halal is a way of life for Muslims and a core part of their faith. For some, it was an almost subconscious decision that stems from their family traditions and upbringing, while around a quarter believed that halal meat is treated more ethically in terms of welfare and is better quality than non-halal meat.

Stunned vs non-stunned

Preference for meat slaughtered using the stunned or non-stunned method is not clear-cut. Half of halal consumers are unsure whether they currently buy stunned or non-stunned halal meat; for them it is enough that meat is labelled 'halal'. While 15% of halal consumers say they buy stunned halal meat, only a third (35%) claim to know they buy non-stunned halal meat.

The fact that the meat is certified as 'halal' is nearly three times more important to consumers than the slaughter method.

Consumers in the UK tend to shy away from the specifics about slaughter, preferring to rely on assurance schemes to feel confident that animals have been humanely treated. The halal consumers we spoke to were no exception. From the research, it is apparent that there is some lack of understanding among both Muslim and non-Muslim consumers surrounding the specifics of stunned and non-stunned halal meat.

There appears to be a lack of clarity from those halal consumers who reject stunned halal meat as to what the stunning process involves. Some halal consumers are unaware that some methods of stunning (e.g. electrical head-only stunning) are recoverable; with some assuming that all stun methods result in the death of the animal.

Despite differing opinions among halal consumers regarding stunned and non-stunned halal meat, the fact that the meat is certified as 'halal' is nearly three times more important to consumers than the slaughter method.

KEY OPPORTUNITIES FOR THE HALAL MEAT SECTOR

If consumption of red meat reduces among the general population, the UK halal meat sector may become an increasingly important market to explore, particularly for sheep meat. Halal consumers are a highly engaged demographic when it comes to the meat they buy, consuming a diverse range of cuts and proteins. However, consumers of halal meat want more options, extended ranges and improved presentation in store, with the reassurance that the meat is certified, clearly labelled and of high quality.

We have therefore identified some key opportunities for the halal meat sector, in the following themes:

Ranging

- Nine out of ten halal consumers would like to see at least one additional type of halal meat more readily available. There is scope to enhance ranges, with more choice across convenience foods, including marinades and sous-vide-type products particularly
- Upskilling for halal butchers to provide an enhanced service to the halal consumer where there is demand, e.g. deboned red meat, butterflied lamb

Presentation and labelling

- There is demand for better presentation, in terms of visually appealing displays, clear signage and offering a variety of cuts
- Supermarket counters are regarded by halal consumers as being more visually attractive, in terms of both layout and cleanliness. There may be scope for smaller independents to emulate this
- Greater levels of information about slaughter methods could be beneficial to offer the sector more flexibility in the future, with several segments of consumers indicating that stunned halal meat may be acceptable (once they understand the details)

Importance of events

- Consider when key events are happening throughout the year and how this affects domestic supply and demand. Is there scope to maximise these opportunities with targeted marketing, wider ranges and more premium products?

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AHDB's Consumer Insight team actively tracks, monitors and evaluates consumer behaviour, reporting on the latest consumer trends and picking out what they mean for the industry and agriculture.

Read more on consumer trends on our website **ahdb.org.uk/retail-and-consumer-insight**
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Ask the analyst

If you'd like any more information on the areas covered or have suggestions for future content, then please email us at **strategic.insight@ahdb.org.uk**

AHDB is a statutory levy board, funded by farmers, growers and others in the supply chain. Our purpose is to inspire our farmers, growers and industry to succeed in a rapidly changing world. We equip the industry with easy to use, practical know-how which they can apply straight away to make better decisions and improve their performance. Established in 2008 and classified as a Non-Departmental Public Body, it supports the following industries: meat and livestock (cattle, sheep and pigs) in England; horticulture, milk and potatoes in Great Britain; and cereals and oilseeds in the UK. AHDB's remit covers 72 per cent of total UK agricultural output. Further information on AHDB can be found at **www.ahdb.org.uk**

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