



THE VALUE OF THE **HALAL** SECTOR TO THE UK ECONOMY **FROM FARM TO FORK**

www.halalhmc.org

UNIVERSITY OF HUDDERSFIELD

John Lever, Shabbir Dastgir, Awal Fuseini

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INTRODUCTION

Overview of the halal market's importance to UK farming and the UK economy

This short report emphasises the continuing importance of the halal market to UK farming and to the UK economy during a period of ongoing economic crisis. The underpinning research estimates the value of the halal meat and poultry sector at slaughter at approximately £1.7 billion out of an overall UK total¹ of £11 billion² – which equates to about 15% of the overall value. Assuming the market for halal remains constant at 15% over the next five years, this figure is projected to rise to almost £2 billion by 2028 for an average forecasted sector revenue of £13.5 billion.

Independent butchers and specialist meat shops operated by Muslims have long been the preferred outlet for halal consumers (Ahmed, 2008). However, the introduction of fresh meat counters mainly certified by the Halal Monitoring Committee (HMC) in some supermarkets in areas of the UK with a high Muslim population has started to change this dynamic. Economically significant is the fact that Muslims do not only purchase fresh meat when they visit a supermarket. As an interviewee from a major supermarket chain pointed out: *'What you tend to find from the data is that the Muslim consumer spends about three, four times more in the supermarket than other people, so therefore to attract them with the meat offer is key.'* Attracting halal consumers is thus hugely important for the financial viability of supermarkets, with all the added benefits this brings for the UK economy.

HMC Supermarket Fresh Meat Counter



¹ Excluding pork, rabbit, buffalo and horse meat.

² <https://www.statista.com/outlook/cmo/food/meat/fresh-meat/united-kingdom?currency=GBP#revenue>

HALAL MEAT AND POULTRY SECTOR

Analysis of the halal meat and poultry sector, focusing on chicken, sheep, and cattle

In 2022 chicken was the most popular halal meat protein, followed by sheep, mutton, beef and cattle. As we can see from our analysis of FSA (2011-2022) data in Box 1, sheep and goat account for the greatest percentage of halal slaughter across both the stun and non-stun sectors. In the rest of this report, we look at the halal sheep, chicken and beef sectors in more detail.

Box 1

HALAL STUN SLAUGHTER AS A % OF ALL ANIMALS SLAUGHTERED 2011-2022

HALAL NON-STUN SLAUGHTER AS A % OF ALL ANIMALS SLAUGHTERED 2011-2022

Animal	Year				Animal	Year			
	2022	2018	2013	2011		2022	2018	2013	2011
Cattle	4	3	2	3	Cattle	0	1	1	1
Calves	4	4			Calves	1	3		
Sheep	50	46	26	41	Sheep	22	25	15	10
Goats	31	30			Goats	25	8		
Horses	0	0			Horses	0	0		
Meat Chicken	11	13	18	26	Meat Chicken	2	9	3	4
Spent Hens	0	6			Spent Hens	4	1		
Turkeys	0	0			Turkeys		0		
Other Poultry	0	2			Other Poultry		0		



THE HALAL SUPPLY CHAIN



Detailed examination of the halal sheep, chicken and beef sectors, including financial value and market dynamics

SHEEP: The National Sheep Association (NSA) estimates that there are approximately 30 million ovine animals across the UK. In 2020, they estimated the financial value of the sector at around £1.3 billion overall, with another £290 million being created annually for the UK economy from 150,000 associated jobs.³ Our analysis of Food Standards Agency data (FSA, 2022) suggests that as a percentage of all sheep and lambs slaughtered in the UK in 2022, 50% went into the stunned halal market and 22% into the non-stunned market. Using data from Statista⁴ we estimated the financial value of halal sheep and lamb at slaughter at approximately £810 million out of an overall market value of £1.1 billion – which equates to about 74% of overall market value. These figures confirm that the halal sheep sector has never been more important to UK farming and agriculture, and for the UK economy. This was confirmed by an interviewee from the NFU, who suggested that without the halal sector “the UK sheep industry would contract by a third, possibly more.”

In one region in the UK Midlands, we were informed that 45% of all lambs are sold by deadweight and that the remaining 55% are sold at regional livestock markets. Almost all meat from deadweight sales go directly to mainstream retailers via the major abattoirs and meat processors. Such is the dominance of the halal market in the UK that all such meat is processed as stunned halal, as none of the mainstream retailers sell meat from animals slaughtered without stunning (on their labels). Of the remaining 55% auctioned at livestock markets in the region, we were informed that that the majority are destined for the non-stunned halal market. It should be noted that these figures will vary around the country in line with the size of the local Muslim population.

³ <https://www.nationalsheep.org.uk/for-the-public/>

⁴ <https://www.statista.com/outlook/cmo/food/meat/fresh-meat/united-kingdom?currency=GBP>



LAMB: While lamb consumption has been declining for years among the general population, it is eaten at least weekly by more than 62% of halal consumers ([AHDB, 2020](#)). The significance of this figure was confirmed by numerous interviewees, one of whom stated that ‘for driving consumption or maintaining consumption of sheep meat in the UK’, Muslim consumption is ‘massively important.’ As well as recognising the value of lamb for domestic consumption, several interviewees stressed the value of

international lamb export markets in the post Brexit period, as an abattoir owner stated: “One of the models... for lamb, is selling whole carcasses to Europe. That’s probably where the majority of our trade is... 70% would be whole carcass.” This market has been growing since Brexit and in 2022 carcasses accounted for 81% of all exported sheep meat ([AHDB, 2023](#)).

Halal markets in the Middle East have also become important during this period. The Gulf Cooperation Council (GCC) countries have an increasing appetite for British meat, and all beef, lamb and poultry meat destined to the GCC countries must be certified halal. Data from HMRC ([see AHDB 2022](#)) indicate that the value of fresh sheep meat exported to Kuwait alone between January and August 2022 was nearly £4.5 million, which was generated by exporting 516 tonnes of meat. To put this in perspective, during the reporting period, a total of 927 tonnes of sheep meat was exported to non-EU countries, and export to Kuwait thus represented over half of the UK’s export of fresh sheep meat outside the EU. These data also indicate an almost 700% increase in the volume of sheep meat exported to the UAE between 2018 and 2019. While stunned halal meat has become increasingly lucrative in these export markets, the non-stunned sector remains a key aspect of the UK halal sector overall.





Sheep waiting to be auctioned at a livestock market in the UK Midlands

MUTTON: While mutton is rarely consumed among the general population, it is highly valued by some Muslim communities in the UK. Visits to livestock markets brought the value of mutton into direct focus. Cull ewes (female sheep past their production age) are often bought by sheep abattoirs for whole carcass export to Europe, or for boning halls, where carcasses are broken down for sale nationally or internationally. Informal conversations with farmers revealed that Muslim buyers also buy large quantities of cull ewes specifically for the restaurant

and butchery trade in Birmingham and other areas of the UK with a high Muslim population. An interviewee confirmed this situation, stating that: ‘Because Bangladeshis also own a lot of Indian restaurants, it is mutton that’s predominantly used in the Indian restaurants as opposed to lamb.’ This emphasises the continuing importance of liveweight sales and non-stun slaughter for the UK sheep supply chain overall.

Auctioneers and representatives of livestock associations stressed just how significant the mutton trade is, not only from an economic point of view, but for the sustainability and viability of UK farming. This was clarified by an auctioneer who stated that this is ‘something for which we should be eternally grateful, sheep farmers and auctioneers alike, because if the Muslim population were not consumers of mutton... there would be very little value associated with it.’ Importantly, it has also been argued that the halal mutton trade is re-localising sheep slaughter in ways that will benefit regional economies and help the UK to feed itself.⁵

⁵ <https://vittles.substack.com/p/lamb-dressed-as-mutton>



HALAL CHICKEN: Chicken production is closely linked to the major producers, and it plays a key role in creating economic value by helping the meat industry to achieve carcass balance. For example, while the foodservice sector takes a lot of breast meat, the fast-food sector takes a lot of chicken wings and legs. Halal plays a big role here and eighty-eight (88%) percent of halal consumers eat chicken weekly ([AHDB, 2020](#)). Our analysis of Food Standards Agency data ([FSA, 2022](#)) suggests that 11% of all broilers

(meat producing chickens) go into the stunned halal market and that 2% go into the non-stunned market. The latter represents a drop of 7% from 9% in 2018 and both figures are likely to have been impacted by Brexit and the Covid-19 health pandemic. However, in the same period the volume of non-stun chicken in supermarkets overtook the volume of stunned chicken in supermarkets, perhaps reflecting the economic importance of HMC endorsed fresh meat counters during this period. The number of stunned spent hens (laying hens at the end of their productive life) slaughtered for halal meat also dropped from 6% to zero (0%), although the number of spent hens slaughtered using non-stun methods rose from 1% of the overall total in 2018 to 4% in 2022.

These figures clearly highlight the continuing importance of the non-stun halal market to the UK economy. According to our estimates, the average forecasted revenue for halal poultry (mainly chicken) at slaughter for the UK economy in 2022 was £700 million out of an overall market value of £5.3 billion. The sector is forecast to generate average revenues of £6.55 billion by 2028. Assuming a 13.10% share for halal, this would equate to £858 million.





HALAL BEEF: Much like the chicken sector, the beef market is dominated domestically by the big retailers, who have historically forced the industry to have a direct relationship with the big processors. There has therefore been a movement away from live selling and we were informed by an abattoir owner that as much as 80% of halal beef currently goes to supermarkets from the big abattoirs and processors. According to our estimates, the overall slaughter value of halal beef as measured by average forecast revenue

for the UK economy was £180 million in 2022 relative to an overall value of £4.7 billion. Assuming a constant 3.86% sector share of £5.23 billion by 2028, this is projected to rise to nearly £202 million – or nearly 4% of the total sector value. As a percentage of all cattle and calves slaughtered in 2022, our analysis of Food Standards Agency data ([FSA, 2022](#)) suggests that 4% of cattle and 4% of calves go into the stunned halal market; the figures for non-stun are 0 and 1% respectively. These figures have dropped significantly in recent years because of new slaughter regulations, which have raised questions around permissibility.

Halal consumers eat more lamb and chicken than beef, but over a third still eat beef at least weekly ([AHDB, 2020](#)). Because of the difficulties of producing halal beef in the UK, imports of halal beef have risen since Brexit, notably from countries where the costs of production are likely to be lower ([ADHB, 2020a](#)). If these issues could be addressed and a label for halal beef was available, a number of interviewees argued that the sector could grow significantly.

OPPORTUNITIES

Exploration of potential opportunities and challenges in the halal sector, including religious festivals and fraud concerns

One of the biggest opportunities in the halal sector is around religious festivals. The [AHDB \(2021\)](#) have indicated that Eid al-Adha (The Festival of Sacrifice), is now one of the busiest weeks for sheep sales and slaughter across the UK. Several interviewees estimated that more than 70,000 animals were processed for what is known as the Qurbani market in the UK 2022. However, compared to Ramadan, the event is little known outside the Muslim community, and this lack of knowledge is often seen as a barrier to market development. Qurbani processing in the UK is underpinned by the Qurbani protocol, which was agreed by key stakeholders 2021, including the UK's major certification bodies for both stunned and non-stunned halal meat and poultry to ensure Qurbani compliance.⁶

As the halal meat market has grown, instances of fraud that bypass religious dietary requirements and present serious public health concerns have also increased ([Fuseini, 2023](#)). In the UK, instances of what can be classified as livestock rustling and/or organised crime have been documented, which often revolves around the production of illegal sheep carcasses called 'smokies' ([McElwee, Smith, and Lever, 2017](#)). Fraud is also a concern in the Qurbani market and the [AHDB \(2021\)](#) has identified instances of fraud through misrepresentation, where supply practices do not meet religious criteria or legal requirements. The timing of slaughter is more important in the Qurbani market than it is in the regular halal market. Also, as an interviewee noted: *'because lambs have to be a certain age for qurbani and because of seasonality, there's not very many of those lambs available'* at the time of the festival. This enhances the opportunities for various types Qurbani fraud (see Table 1).

⁶ <https://hfic.org.uk/qurbani-1443-2022-is-upon-us/>

The slaughter period generally occurs over three days (although a minority of Muslims perform it over four days) and slaughter outside the time invalidates the sacrifice. Qurbani slaughter must commence after Eid prayers on the 10th day of the final month of the year according to the Islamic calendar (Dhul Hijjah) and end at sunset three (or four) days later. Although meat from animals slaughtered outside these times can still be consumed as regular halal, it cannot be classified as sacrificial Qurbani meat (Fuseini, 2023).

Table 1

Type of Qurbani Fraud	Contravention
Slaughter of animals before Eid prayers on the 10th of Dhul Hijjah*	Religious rules
Slaughter of underage animals	Religious rules
Slaughter of animals after the 13th of Dhul Hijjah	Religious rules
Slaughter of animals outside licensed premises	UK welfare legislation
Processing of Qurbani carcasses into smokies	UK welfare and food safety regulations
Sale of by-products (e.g. skins/hides) of the Qurbani animal	Religious rules

*Dhul Hijjah is the tenth month of the Islamic lunar calendar during which Qurbani is performed



HALAL CERTIFICATION

Halal certification is an effective tool against Qurbani fraud. Abattoirs can increase consumer confidence in their Qurbani products by using the services of Halal certification bodies. To the best of our knowledge, the HMC is the only Halal certification body in the UK involved in monitoring and supervision of Qurbani slaughter. Implementing collaborative arrangements (between the police, local authorities, trading standards, halal certification bodies, and environment health officers) can also help to prevent illegal slaughter and Qurbani fraud (Fuseini, 2023).

Meat fraud is arguably the biggest challenge facing the Halal sector. The incidence of halal meat fraud in the UK and across the EU has been reviewed (see Fuseini et al., 2017). Table 2 describes the three main forms of fraud that can occur in the Halal sector. Additionally, Halal consumers need to be aware of mislabelling, illegal slaughter, and contamination. It remains to be seen how the opportunities the Qurbani market presents for UK farming are taken up and what procedures are put in places to safeguard halal consumers and the meat industry more broadly.

Table 2

Type of fraud	Description	Example
Misrepresentation	Selling a product as something that it is not	Selling mutton and describing it as lamb or selling meat from stunned animals as non-stunned and vice versa
Substitution	Replacing all or part of a product with another substance of a similar kind without altering its overall characteristics	Using mutton in lamb kebabs and describing it as lamb
Adulteration	Rendering food poorer in quality by adding extraneous substances	Beef sausages made with little or no beef



SUSTAINABILITY

Discussion on the impact of affluent younger Muslims on the halal sector and sustainability issues

Affluent younger Muslims are also pushing the halal sector in new directions by eating out more frequently than their parents and demanding a more diverse range of halal food products. Alongside the high Muslim birth rate, this is directly linked to the growing demand for traceable products with ethical and environmental qualities. As an interviewee noted: *‘Things have changed, it’s not all about price anymore. Particularly for younger Muslims their tastes are changing... around sustainability, animal welfare, antibiotics.’* As these demands increase, the UK meat industry is well placed to address them. The NFU recently ran a seminar on livestock production and climate change, which highlighted the fact that the UK has a very efficient and sustainable beef and lamb production system with a greenhouse gas footprint 2.5 times less than the global average ([Fuseini and Lever, 2021](#)). In the years ahead, these developments and the opportunities they present will be increasingly important for the halal sector, for environmental sustainability concerns and for the future of farming, rural communities, and the UK economy more generally.



DATA AND METHOD

Data sources and methodology

The aim of the research outlined in this report was to estimate the value of the UK halal sector from farm to fork for the UK economy. To do this we used qualitative and quantitative (statistical) data collection methods. Our qualitative work consisted of formal interviews with key actors throughout the halal supply chain; we also visited livestock markets in the Midlands and North of England where we undertook observations and conducted informal interviews.

In the quantitative work, we initially used the UK Food Standards Agency's (FSA) Slaughter Sector Survey for England and Wales (2022) to estimate the volume of stunned and non-stunned animals species as a percentage of all animals slaughtered in the UK. Secondly, we cross tabulated these results with publicly available data on fresh meat trends in the United Kingdom from the Statista statistics portal⁷ to estimate the financial value of stunned and non-stunned halal for each species. It is pertinent to mention a significant limitation of the FSA (2022, 4) data which underpins our estimates, in that the survey used *"is based on a single week which was selected with the intention of it being representative of the entire year, avoiding any religious festivals."* Also, while the FSA (2022) categorises and reports animal slaughter data using individual categories for cattle, calves, sheep, goats, meat chicken and spent hens, Statista report overall figures for beef and veal, mutton and goat, and poultry.

⁷ Defined by Statista as meat which has not been cooked, heated or processed.

⁸ See [here](#).



Table 3 below shows the number of animals slaughtered (FSA, p.12, 2022). For example, 95.4% of cattle were slaughtered using conventional, non-religious methods, 3.7% using halal stun and 0.1% using halal non-stun; another 0.8% were Shechita-slaughtered (not reported here). The percentages equate to 1,235 and 33 cattle slaughtered using halal stun and halal non-stun respectively, or 1,268 cattle slaughtered using the halal method overall.

Table 3: Percentage of Total Animals Slaughtered for Given Species. (FSA, 2022).

Species	Total animals slaughtered	Standard (1)	Halal stun (2)	Halal non-stun (3)
Cattle	33,377	95.4%	3.7%	0.1%
Calves	2,225	95.2%	4.1%	0.7%
Sheep	219,016	27.5%	49.9%	22.4%
Goats	372	44.4%	30.9%	24.7%
Horses	16	100.0%	-	-
Pigs	194,612	100.0%	-	-
Meat chicken	18,353,961	83.3%	11.3%	2.0%
Spent hens	394,500	96.3%	-	3.7%

Table 4 indicates that 1,326 cattle and calves were halal-stunned, 49 cattle and calves were halal non-stunned, and 1,375 cattle and calves were halal-slaughtered overall. The percentage of cattle and calves slaughtered using halal stun and halal non-stun methods as a proportion of the total figure are 3.72% using halal stun, 0.14% using halal non-stun and 3.86% of all cattle and calves slaughtered as halal. Estimates for sheep and goats and meat chicken and hens are derived in the same way. Overall, 3.86% of all cattle and calves slaughtered, 72.7% of sheep and goats, and 13.10% of meat chicken and spent hens, were slaughtered as halal.

Table 4: Percentage of Total Animals Slaughtered for a) Cattle and Calves, b) Sheep and Goats and c) Meat Chicken and Spent Hens. (Adapted from FSA, 2022).

Species	Slaughter	Halal (%)			Halal (no.)		
		Stun	Non-stun	Total	Stun	Non-stun	Total
Cattle	33,377.00	3.70	0.10	3.80	1,234.95	0.1%	1,268.33
Calves	2,225.00	4.10	0.70	4.80	91.23	0.7%	106.80
	35,602.00				1,326.17	22.4%	1,375.13
					3.72	24.7%	3.86
Sheep	219,016.00	49.90	22.40	72.30	109,288.98	49,059.58	158,348.57
Goats	372.00	30.90	24.70	55.60	114.95	91.88	206.83
	219,388.00				109,403.93	49,151.47	158,555.40
					49.87	22.40	72.27
Chicken	18,353,961.00	11.30	2.00	13.30	2,073,997.59	367,079.22	2,441,076.81
Hens	394,500.00	-	3.70	3.70	-	14,596.50	14,596.50
	18,748,461.00				2,073,997.59	381,675.72	2,445,673.31
					11.06	2.04	13.10



Table 5 below gives Statista data on revenue, volume and price of fresh meat in the UK. Column 1 shows the forecasted fresh meat revenue from beef and veal slaughter in 2022 - £4.66 billion. On the broad assumption that 3.86% of this figure is accounted for by halal slaughter, the market for cattle and calves was worth £180 million. Assuming 72.7% of mutton and goat were halal slaughtered, the market for sheep and goats was worth £810 million and assuming 13.10% of poultry were halal slaughtered, the market was worth £700 million. Taken together, halal meat slaughter in 2022 generated revenues of £1.69 billion in sector generating £11.11 billion overall – approximately 15% of the market. In column 2, the average market value of halal slaughter was nearly £25 for each person in the UK. This will of course be higher if averaged for Muslim consumers. In column 3, annual meat and chicken consumption was almost 95 million kilograms and just over 53 million kilograms for sheep and goat meat. Nearly 18 million kilograms of halal-slaughtered cattle and calves were consumed. In column 4, the terms of average volume of halal meat consumed per person is almost 2.5kg. Finally, column 5 shows estimated prices for a kilogram of meat in 2022.

Table 5: Fresh Meat Slaughter in the UK by Revenue, Volume and Price. Statista (2022).

Species	Revenue (£GBP Billion)		Volume (Kg Million)		Price (£GBP per Kg)
	1	2	3	4	5
Beef and Veal	4.66	68.07	463.70	6.80	10.05
Cattle and Calves	0.18	2.63	17.90	0.27	
Mutton and Goat	1.12	16.29	73.54	1.10	15.18
Sheep and Goats	0.81	11.84	53.46	0.80	
Poultry	5.33	77.76	723.90	10.60	7.36
Meat Chicken and Spent Hens	0.70	10.19	94.83	1.39	
Totals	11.11	162.12	1261.14	18.50	
	1.69	24.59	165.88	2.46	



MORE ABOUT US



Phone

0333 447 886



Email

info@halalhmc.org



Website

www.halalhmc.org



Office Address

**Leicester Business Centre
111 Ross Walk, Leicester, LE5 5HH**