



An Overview
of the
Global Halal Market

imarat
consultants

South East Asia

Driving the Halal Market Forward

- Malaysia
- Thailand
- Singapore
- Brunei
- Philippines
- Indonesia
- China

Regional competition has stimulated the local & global market



All view Halal as a means to stimulate the economy through exports, tourism, value-add, trade, research

• Thailand

- Halal Science Centre
- Halal Science Symposium
- Govt initiatives
- Southern Thailand
- IMT-GT programmes

• Philippines

- BIMP initiative
- New Certification Authority
- Mindanao developments

• Indonesia

- MUI Halal authority
- Largest Muslim population
- Raw material source
- Huge consumer market

• Singapore

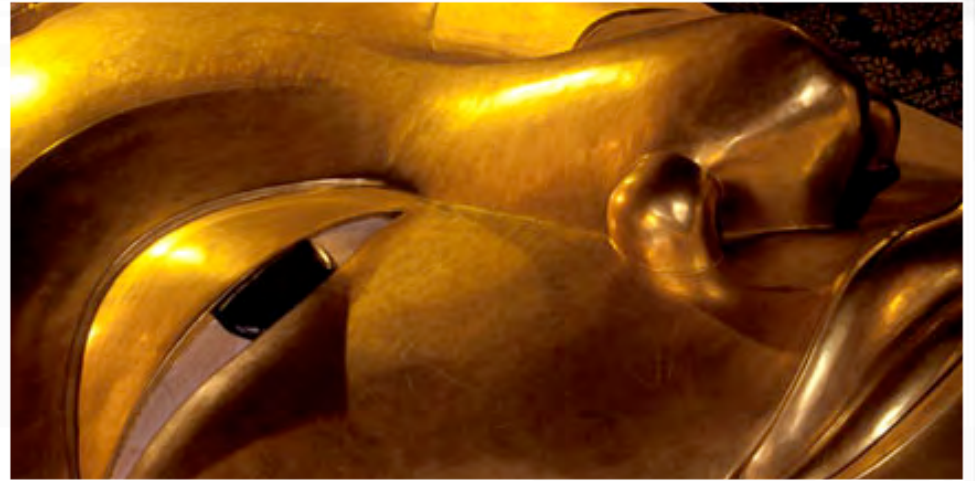
- Certification expertise
- MUIS authority
- Value-add, trade

• China

- Emerging market
- Huge Muslim population
- Raw material supplier

• Malaysia

- Standards & Certification
- MIHAS expo
- World Halal Forum
- HDC programmes
- Media focus (HJ, HJTV)
- Centres of Halal Excellence



Cultural diversity has lead to strict Halal standards

The multi-cultural complexion of Southeast Asia has stimulated the development of the world's most advanced Halal Standards and certification agencies.

Halal - a global market force

- ▶ Meat & Poultry
 - ▶ Food Manufacturing
 - ▶ Food Retailing
 - ▶ Restaurant Chains
 - ▶ Food Service Industry
 - ▶ Logistics & Shipping
 - ▶ Islamic Banking & Finance
 - ▶ Standards, Auditing, Certification
 - ▶ Science & new technologies
 - ▶ Personal care products
- ▶ 2 billion 'de facto' consumers
 - ▶ USD 500 billion annually
 - ▶ Expanding market parameters

Estimated Global Halal Market Value

Region Value	2005 Muslim Pop	Per capita food expenditure p/a USD	Halal Food Market Millions USD
Africa	461.77m	250	115,443
West Asia	195m	570	111,150
South Central Asia	584.8m	300	175,440
South East Asia	266.37m	350	93,230
China	39.1m	175	5,865
Europe (inc Russia)	51.19m	1,250	63,988
N. America	8.26m	1,750	14,455
S. America	1.64m	500	820
Oceania	.35m	1,500	525
Total	1,565m		US\$ 580,915

Source: www.islamicpopulation.com, Euromonitor

Average 5-year growth rates in avg. per capita food expenditure

- ▶ Malaysia 16%
- ▶ Saudi Arabia 18%
- ▶ Thailand 19%
- ▶ China 22%
- ▶ Indonesia 34%
- ▶ USA 17%
- ▶ Netherlands 41%
- ▶ France 43%
- ▶ South Africa 96%

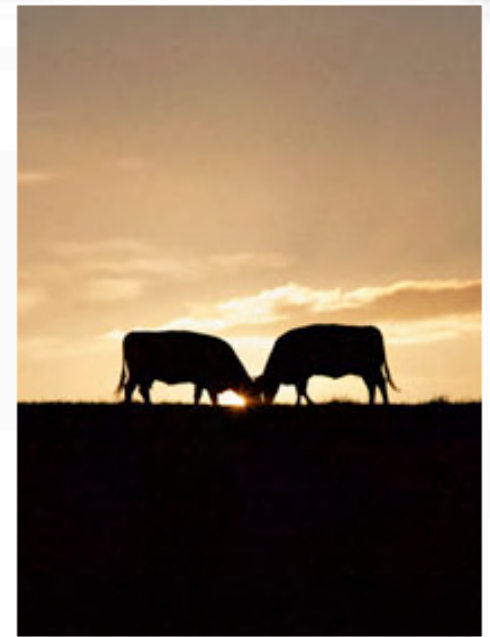
source Euromonitor





Halal's market neighbours

- Healthy
- Organic
- Environmentally friendly
- Animal welfare
- Ethnic
- Fair Trade





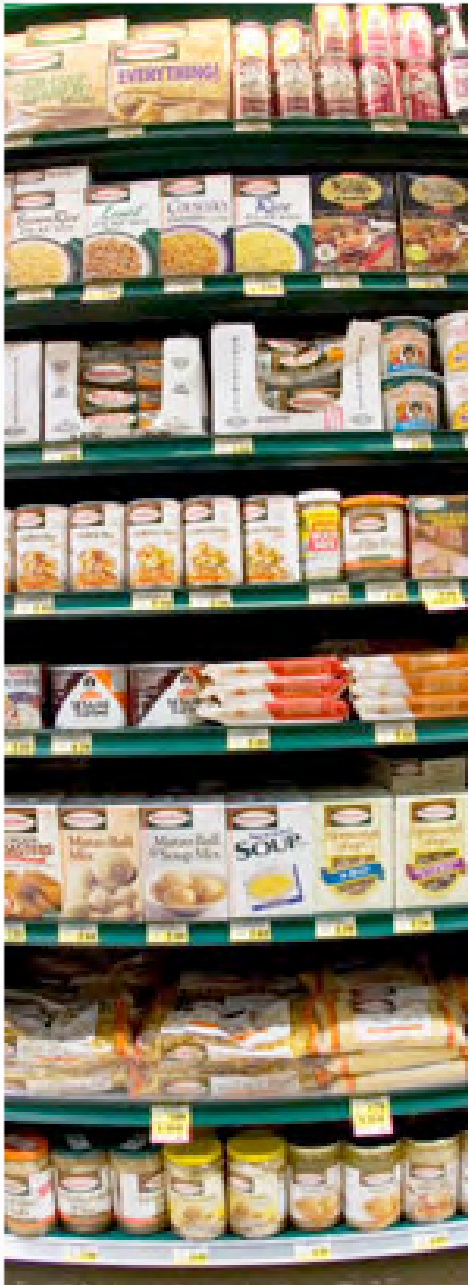
US Kosher market

- 5-6 million Jews in USA
- >US\$100 billion market
- 86,000 product range

Consumer profile

- 15% Jews (5% strict kosher)
- 55% Health conscious
- 38% Vegetarian
- 24% Dairy-free
- 16% Muslim

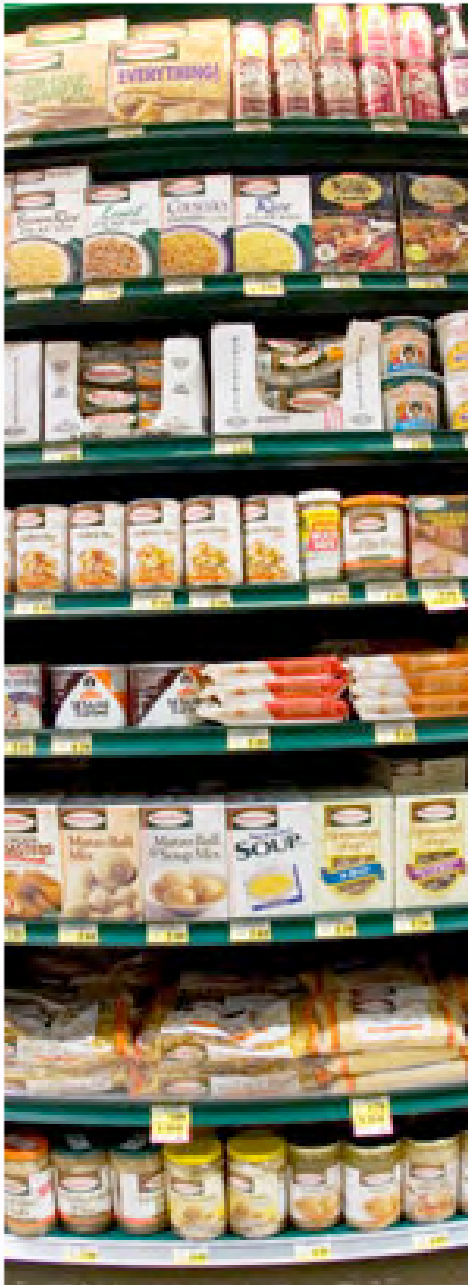
source Mintel



For every
1 Halal product
on the US
supermarket
shelves...

...there are **86**
kosher products





***US Muslims are
spending
\$16 billion a year
on Kosher products***

***because the
Halal products
are not available***

***Wouldn't they prefer
to buy
Halal products?***





Wider Range

Better Quality

Better Packaging

Consistent Supply

Professional Audit

Halal Certification

HACCP, GMP, GHP



The UK Halal Market

Growing at 15% - Nat Avg 1%

Avg household 4.5 - Nat Avg 2.3

Over 50% London boroughs ethnic majority in 2011

51% of all UK education authorities now require Halal meat

Muslim population (4%) accounts for 12% total meat sales

100% Asian Muslims use supermarkets for main grocery shopping

0.5% of Halal meat sales through supermarkets

Halal products are not available

Halal is not just about meat

The Halal market is waiting for

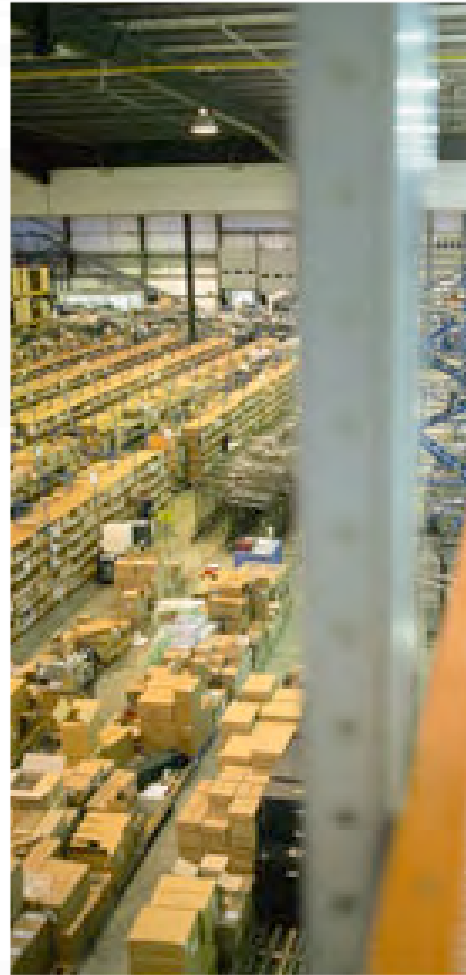
- Complete product ranges
- Cultural diversity
- Pre-cooked meals
- Toiletries & Personal care items
- Pharmaceuticals
- Health Supplements





The Halal Market is expanding

fine dining to fast food...in the air, and in the prison...in schools, hospitals and military rations



New Halal industry sectors

protecting the integrity of the entire Halal value chain is becoming increasingly important

Upmarket

- natural
- organic
- ethnic
- environment
- animal welfare

High level quality assurance mark

Influential opinion forming

Global Standard

- HACCP
- GMP
- GHP
- professional

HALAL

Lifestyle Choice

- new 'green'
- ethical
- popular culture
- fashion, music, film

Track & Trace
Secure supply chain

Mainstream

- supermarket
- global presence
- full product range
- diverse application

Worldwide availability & acceptance