Canadian Halal Meat Market Study

An Alternative Market for Alberta's Meat Industry

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Executive Summary

Alberta Agriculture, Food & Rural Development (AAFRD) and Farming For The Future Farm Demo Project (FFF) funded the Canadian Halal Meat Market: An Alternative Market for Alberta's Meat Industry. The objective of the project is to qualify and quantify the market opportunities for Alberta meat producers and processors to supply halal meat within Canada.

The information contained in this report was obtained from both primary and secondary research. The primary research entailed the development and implementation of a written consumer survey targeting Muslim households in Toronto, Ottawa, Vancouver, Calgary and Edmonton. Secondary research entailed data gathering from trade magazines, business and government sources.

The Canadian domestic halal meat market value is estimated to be $214 million with an average annual household expenditure of $1623. Muslims are ardent consumers of meat and meat products, with feast days and celebrations that often include several different meat dishes. On average, Muslim households spend $31 per week on halal meat products. This is almost double the Canadian household meat expenditure of $17 per week. (Statistics Canada, 2003). This difference in weekly household expenditures may partially be explained by the difference in average household size. The survey respondents' average household size was 4.4 people per household where as the Canadian Food Expenditure study's average household size is 2.5 people per household (CMHC, 2004 Canadian Housing Observer).

In response to the growing demographics of the Muslim population in Canada, the demand for halal meat is predicted to demonstrate consistent growth rate. According to 2001 Canadian census, there are approximately 600,000 Muslims in Canada and an estimated 8 to 11 million in the United States with a purchasing power of $12 billion (US). (AJR Consulting Inc., 2004) The Canadian Muslim population is expected to double by the end of this decade (Statistics Canada) and by the year 2025, 30% of the world's population is expected to be Muslim. (CIA World Fact Book, 2000)

The average Canadian Muslim household consumes 5.6 meat servings per day. Halal beef and chicken are the most widely consumed followed closely by lamb and goat. Out of all consumed meat cuts, ground beef ranks first at 16% followed by chicken legs (15%) then bone-in beef and whole chicken (14%). Boneless beef stands in fifth place (12%), followed closely by chicken breast (11%), then beef steak and chicken drums at 10%.

Consumers purchasing decisions are primarily influenced by their confidence that the meat is halal. Price was the third ranked attribute to influence purchasing decisions. The majority of Canadian Muslims (74%) would pay a premium of at least $0.50 per pound over "regular" meat. Thirteen percent seem to be willing to pay at least a premium of $1.50 per pound for quality halal meat.

The Canadian halal meat industry is fragmented. Approximately 15% of Canada's federally inspected cattle slaughter and 35% of calf slaughter is processed in Halal certified establishments. Alberta's largest halal food processor, AL-NOOR Canada Inc., manufactures

halal meat and cheese. Prior to the USA export restraints associated with BSE, AL-NOOR Canada Inc., exported 95% of its total production to the USA. Beef based product was approximately 40% of it product line. (AJR Consultants Inc., 2004).

Although some halal meat products can be found in large grocery retail outlets throughout Canada, the primary halal meat retail channel is small, privately owned halal meat shops located in larger urban centers. Each individual shop is responsible for acquiring its supply of halal meat through local processors and/or abattoirs. It was reported, that there was concern with inconsistent quality.

While this study suggests that there is potential for Alberta meat processors to supply the Muslim ethnic market, understanding Islam's halal requirements and international business protocols is necessary for the processor to successfully enter this market.

Even though there are two distinct sectors within Islam, (Sunni and Shi`i), Muslim meat consumption is based on the Quan'an, hadiths (traditions), various legal schools and cultural distinctions. Successful market entry will depend on:

- Adherence to the religious laws of Islam. It is essential to implement the principles of halal slaughter. As the legitimacy of the label "halal" is fundamental, it is recommended to work with a Muslim certifying body.
- Packaging, shipping and storage should be addressed. Halal products must be processed in conditions that are free from contamination from haram (illegal) products such as blood, blood-related products, pork or non-halal products.
- Marketing strategies aimed at the halal market will have to be transparent and encourage trust and loyalty in their relationships and business practices.

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Introduction

The "Canadian Halal Meat Market: An Alternative Market for Alberta's Meat Industry" is the second part of a Farming For the Future On Farm Demo Program (FFF) "Muslim Consumer Driven Meat Value Chain". The study is a national Muslim consumer research study, which qualifies and quantifies the Canadian halal meat market. The study defines the opportunities and challenges of supplying halal meat to Muslim consumers in Canada. This report addresses:

- What is the market potential for halal meat products?
- What are the demographic, economic and lifestyle characteristics of the consumer?
- What are the purchasing patterns of the consumer (where and when they purchase, quantity of meat purchased)?
- What product attributes do they want - size, frozen, fresh, whole, cut-up, packaging, quality, additional processing, etc?
- Are they willing to pay more for a halal meat? How much more would they be willing to pay?
- Is there an opportunity for a new processor to serve the halal market?

Background

It is estimated that there will be over one billion adherents to the Islamic religion all around the world early in this millennium. In France, Muslims have become the second largest religion and in the United States they are reported to be over 8 million Muslims.

According to 2001 Canadian census, there are approximately 600,000 Muslims in Canada and an estimated 8 to 11 million in the United States with a purchasing power of $12 billion (US). (AJR Consulting Inc., 2004) The Canadian Muslim population is expected to double by the end of this decade (Statistics Canada) and by the year 2025, 30% of the world's population is expected to be Muslim. (CIA World Fact Book, 2000)

Islam

The religion brought to Arabia by the Prophet Muhammad during his lifetime (570-632 C.E.) is called Islam, the religion of peace. It established certain minimum legal requirements for believers and laid down rules for daily life so that people could live in a religious way.

All Muslims look to the Qur'an, the Holy Book of Islam, as the basis for their faith. The hadith or traditions of the Prophet Muhammad are the basis for the development of Islamic law which led to various legal schools e.g. Hanafi, Maliki, Shafi`i, and Hanabali.

While every Muslim accepts the basic ways of being Muslim, like the Christian division between the Catholics and Protestants, Islam has two distinctions in faith. They are the Sunni and Shi`i sectors of Islam. (Waugh, 2002)

Sunnis constitute the largest number in the world (about 80%), but some areas have a predominance of Shi`i believers, as for example, in Iran.

Sunnis

Sunnis come from many different countries, such as Egypt, Jordan, Pakistan, India, Malaysia, Philippines, Palestine, etc. and make up about 75% of the Muslim population in Canada.

Their religious buildings are called mosques or masjids. Mosque councils run all activities in these buildings and the president of the mosque council normally speaks on behalf of the community on matters of business.

The basic requirements of proper eating for the Sunni depend upon the guidance in the Qur'an, the hadith and the four schools of law, Hanafi, Maliki, Shafi`i, and Hanabali. While Sunnis practice their Islam together, cultural distinctions play an important role in the food they eat. Once food has been designated as legally acceptable (halal), taste and ethnic preferences determine how it will be used.

Sunnis accept cultural and language differences with openness, but they are less tolerant of minority groups within Islam speaking for them. For example, they are resistant to allowing small groups like the Ahmadiyya, an Indian sub-continent group with claims for an inspired leader beyond the Prophet Muhammad, to speak for Sunnism, even though the latter group claims to be Sunni. Businesses who hope to trade with Sunnis should be aware of these internal attitudes. Ahmadis, however, adhere to the same rules in food as their other brethren. (Waugh, 2002)

Shi`is

Shi`is are associated with four principal areas in the world (Iran, Iraq, the Yemen and South East Asia). Shi`is believe that a spiritual individual designated directly by God should head the Muslim community. This person is given the title of imam, but the role assigned to him is much different than that found in Sunnism. The Shi`i imam is regarded as having full, complete control and has the final say on how the community should live out its Islamic life.

The Shi`is look to an inspired leader from the Prophet's line as the true head of the community. There are some differences among the Shi`i as to which imam is the correct one. All divisions within the Shi`a tradition are found in Canada, therefore, one will find Twelvers, Fivers, and Seveners (indicating differences on the number of imams held to be in the lineage).

The largest group among Shi`is are the Twelvers, designated because their imam's line had twelve visible imams. They are centred in Iran, but they are also found in Iraq, Pakistan and India. The Twelver population in Canada comprises of about 15% of all Muslims. The tiniest representation (less than 2% of the Muslim population in Canada) is the Fivers; these are Yemenis who have a different interpretation of who the imam is.

The most powerful group of Shi`is in Canada is the Isma`ilis (known as 'Seveners'). They make up about 9% of the Muslim population in Canada. Their interpretation of 'imam' focuses upon a certain line (seven from the Prophet) from which the Aga Khan is said to descend. He runs the international organization from Paris. Isma`ilis have been extraordinarily financially successful in Canada. They are internationally well organized from the top down, in contrast with the other Muslim groups who invest much of their structure in the local community. Isma`ilis only operate on the authority of the Aga Khan and the rules issued by his office and they do not accept Sunni interpretations on food. Most adhere to Muslim rules on pork, but they are less concerned about other matters.

It is important to know that all Shi`is are reluctant to allow other groups, especially Sunnis, to speak for them. Even though Twelvers have very few differences with Sunnis over the application of food rules, they, nevertheless, have their own authorities and they cite them when discussing these issues. Generally speaking, though, they buy the same Islamically validated food as the Sunnis. (Waugh, 2002)

Other Islamic Groups

The Druze are adherents of a religion from Palestine, Lebanon and Syria in the Middle East who have a particular interpretation deriving from Islamic tradition. With an internal family-orientation, faith is determined by a group of elders within the community. They usually are closely allied with Sunnis from the same areas of the Middle East, sharing the same language and culture. They usually adhere to Muslim rules of food.

Sufis cut across both Sunni and Shi`i lines. Stressing mystical themes, inner fulfillment and loyalty to an inspired leader, they have attracted some converts among Canadians. Many Sufi groups adhere to Muslim dietary rules.

The Baha`is arose out of Shi'i tradition in Iran and eventually separated from them completely. Some of the local people who were raised in Iran still practice Muslim dietary rules; the North American converts seldom do. These rules are regarded as culturally determined (rather than religiously-determined) by the Baha`is. (Waugh, 2002)

Islamic Food Requirements

In Islam, there are two terms that denote Islamic prohibitions or restrictions on food: haram and halal. The word 'halal' means lawful and permitted by or conforming to Islamic Law (Divine Rules); ritually clean, healthy and proper. In the context of this study, halal meat means meat that is permissible to eat based on Islamic Shari'ah.

Opposite to halal is haram, which means unlawful or forbidden. Muslims are prohibited from consuming pork and alcohol because they are regarded as najis (unclean) and therefore are considered haram. For Muslim consumers, beef and poultry products must be deemed as halal and must originate from certified slaughterhouses that follow Islamic slaughter practices.

Conditions of Halal

An animal or poultry has to be slaughtered in a ritual way known as Zabiha. Zabiha requires:

- Animals to be alive and healthy at the time of slaughter. Therefore the animal should not be suffering with any ailments or any lacerations and shooting, electrical shock, or hitting the animal on the head with a hammer is not permitted. To incur as little pain as possible, and because carrion is forbidden the jugular vein, carotid artery and windpipe have to be severed by a razor sharp knife in a single swipe. The knife should be four times the size of the animals' neck and razor sharp. If possible the slaughterer and the animal should face Quibla or Mecca.
- The hand of a Muslim male who knows the skill of slaying and blessing must slaughter animals or poultry.
- All the flowing blood must be completely drained out of the carcass, as blood is forbidden.
- Since pork is forbidden, halal slaughtering must not be done in the vicinity of pork slaughtering and processing.
- Prior to slaughter, the animal must be fed and given water. Also, one animal must not see the other being slaughtered.
- Stunning an animal prior to slaughter is a controversial issue. There is concern that stunning may kill the animal prior to slaughter, therefore rendering it haram or unsuitable for Muslims consumption.

Research Methodology

The information contained in this report was obtained from both primary and secondary research. The primary research entailed the development and implementation and analysis of a written consumer survey targeting Muslim households in Toronto, Ottawa, Vancouver, Calgary and Edmonton. Although Montreal is home to the second largest Muslim population, the project team did not survey the community. The team was concerned with accurately translating the survey into French.

Secondary research entailed data gathered from trade magazines, business and government sources.

Primary Research

Sample Design

The target survey respondents were adult Canadian Muslims responsible for the household food expenditures.

The development of an accurate sample was challenging. Although there are a variety of directories available through the mosques, Islamic organizations and Muslim community organizations, there was a concern that a survey population selected from any specific directory may lead to survey bias. Therefore, Muslims household geographic density data and postal codes of census track data with a Muslim population of 30% or greater were purchased from Statistics Canada. Using the first three digits of the postal code and the languages most commonly spoken by Muslims, Canada Post developed a database. The project team then picked up the database through Canada Post's Online Business Center and randomly selected 14,000 homes from the delivery routes provided. The number of surveys distributed to each of the metropolitan areas was established based on its percentage of the national Muslim population:

- Calgary – 7%
- Edmonton – 5%
- Vancouver – 3%
- Toronto – 65%
- Ottawa – 10%

Questionnaire Design

Little secondary data is available on the Muslim consumer, therefore, the project team designed a survey questionnaire to:

- Identify the demand and estimate the value of the Canadian halal meat market;
- Determine the cut, price, quality, and average consumption for beef, lamb, chicken and goat currently;
- Develop an understanding of the attributes affecting the Muslim consumers purchasing decisions;
- Identify opportunities value-added meat products and food service products.

A copy of the survey is included in Appendix A.

Data Collection and Statistical Reliability

On March 15, 2004 the survey questionnaire was sent to the sample population as unaddressed ad mail. To reduce sample error, the goal was to receive 600 completed questionnaires. However, due to the difficultly in reaching the Canadian Muslim population and the cost associated with sending a second survey notice, the project team chose to not send a survey reminder. As of May 30, 2004 the project team received 200 questionnaires of which six were incomplete and therefore discarded.

The confidence levels, which are important indicators of the reliability of observed results, are being provided at a 95% confidence level and 7.03 confidence interval. However, in the analysis of findings, no specific reference is made to statistical significance, as such reference can be misleading.

Study Results

Market Value

The Canadian domestic halal meat market value is estimated to be $214 million with an average annual household expenditure of $1623. Muslims are ardent consumers of meat and meat products, with feast days and celebrations that often include several different meat dishes. On average, Muslim households spend $31 per week on halal meat products. This is almost double the Canadian household meat expenditure of $17 per week. (Statistics Canada, 2003). This difference in weekly household expenditures may partially be explained by the difference in average household size. The survey respondents' average household size was 4.4 people per household where as the Canadian Food Expenditure study's average household size is 2.6 people per household (CMHC, 2004 Canadian Housing Observer).

Figure 1: Canadian Halal Meat Market Value

Canadian Halal Meat Market Value			
	Lower	Average	Upper
Total Market Value	$177,162,986	$213,791,301	$249,107,858
Market Value/Household	$1,345	$1,623	$1,891
Household Weekly Expenditure	$26	$31	$36
Canadian Average (2001 - Statistics Canada Income Statistics Division, Catalogue no.62-554-XIE)		$17.34	

Industry

The Canadian halal meat industry is fragmented. Approximately 15% of Canada's federally inspected cattle slaughter and 35% of calf slaughter is processed in Halal certified establishments. Alberta's largest halal food processor, AL-NOOR Canada Inc., manufactures halal meat and cheese. Prior to the USA export restraints associated with BSE, AL-NOOR Canada Inc., exported 95% of its total production to the USA. Beef based product was approximately 40% of it product line. (AJR Consultants Inc., 2004).

Although some halal meat products can be found in large grocery retail outlets throughout Canada, the primary halal meat retail channel is small privately owned halal meat shops located in larger urban centers. Each individual shop is responsible for acquiring its supply of halal meat through local processors and/or abattoirs. Currently, 85% of respondents trust the halal meat they currently buy from their local halal meat store is 100% halal. However, it was reported, that there was concern with inconsistent quality.

When survey participants were asked if they would purchase halal meat from large grocery retail outlets stores such IGA, Safeway, Superstore etc, 74% reported that they would be willing to purchase halal meat from them if the packaging displays a halal tag or logo. The majority of respondents (69%) stated they trust the display of a halal logo on packaged meat means that the meat is 100% halal. Only 15% stated they would not buy halal meat from supermarkets.

Even though 34% of respondents said they would purchase halal meat from the Internet if the halal meat was cheaper than in retail outlets, 39% would not buy it from the Internet regardless of the price.

Figure 2: Current Halal Distribution Channels

Halal Meat Distribution Channels	
	%
Halal Meat Shops	85.1
Grocery Stores	24.7
Farmer/Auction Mart	9.3
Kosher Stores	2.6
Other	10.3

Consumer Demographics

It is assumed that males are the person responsible for meat expenditures as the survey respondents were primarily male. Other demographic characteristics identified in the survey responses were:

- Immigrated to Canada within the last ten years
- Annual income below $50,000
- Well educated with 74% having at least a post-secondary degree or diploma and 45% with a graduate degree/post-doctorate;
- Average household size – 4.4 people per household
- Monthly halal meat expenditures ranged $50 to $199 per month
- Attend mosques at least once a week.

Product Definition

Purchasing Considerations

Consumption of halal meat is an integral part of the Canadian Muslims' religion and culture. Therefore, the main factor influencing Canadian Muslim's meat purchasing decisions is having confidence and trust that the product is halal. This is supported by:

- 88% stated it is very important to consume halal meat (Figure 3)
- 72% would only consume halal meat (Figure 4)
- 71% (137/194) ranked halal as the number one purchasing consideration. (Figure 5)

Only 3 % of respondents stated halal meat consumption is not at all important and they do not consume halal meat.

Figure 3: Importance of Consuming Halal Meat

Importance of Halal Meat		
	Frequency	%
Very important	170	87.6
Somewhat important	12	6.2
Not really important	5	2.6
Not at all important	6	3.1
Undecided	1	0.5
Total	194	100

Figure 4: Frequency of Halal Meat Consumption

Halal Meat Consumption		
	Frequency	%
Consume halal meat 100%	140	72.2
Consume halal meat 75 to 99%	25	12.9
Consume halal meat 50 to 74%	13	6.7
Consume halal meat 25 to 49%	5	2.6
Consume halal meat 1 to 24%	5	2.6
Do not consume halal meat	6	3.1
Total	194	100

Figure 5: Factors Influencing the Consumption of Halal Meat

Factors Influencing Purchasing Decisions				
	Frequencies			
Rank	Halal	Quality	Pricing	Processor
1	137	16	6	22
2	19	55	9	38
3	7	47	42	21
4	5	7	59	46

The majority of the survey respondents reported that they prefer to purchase halal meat fresh (75%), once a week (42%), with most purchases being made Friday through Sunday. Thirty percent of the respondents report purchasing meat once or twice a month and 25% purchase frozen halal meat products.

Figure 6: Purchasing Frequencies

Purchasing Frequency		
	Frequency	%
Daily	3	1.5
2 or 3 times a week	35	18
Once a week	81	41.8
Twice a month	34	17.5
Once a month	24	12.4
Other	8	4.1
Valid Responses	185	95.4
Missing Responses	9	4.6
Total	194	100

Household Consumption

The average Canadian Muslim household consumes 5.6 meat servings per day. (Figure 7) There are as many Muslims consuming greater than four servings per day as there are Muslims consuming less than four servings per day. For the purpose of this study, a serving was defined as 140 grams of meat (a small chicken breast, one hamburger patty).

Figure 7: Average Halal Meat Servings Per Day

Halal Meat Servings Per Day	
Mean	5.6
Median	4

Product Consumption

Meat Variety and Cuts

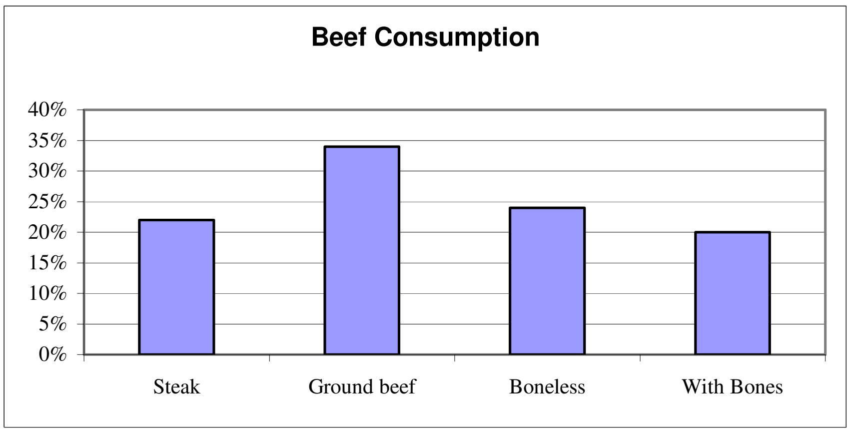
Although the survey respondents ranked beef and chicken equally (28%) as their preferred halal meat, Muslims who reported consuming halal meat one to five times a week, selected beef over chicken. Lamb and goat followed simultaneously. Muslims who reported consuming halal meat more than six times a week, ranked the meats varieties in the following order: chicken, beef, lamb and goat.

Muslims who reported consuming halal meat one to five times a week, selected ground beef as their most consumed form of halal meat, followed by whole chicken. This tendency is reversed when halal meat is consumed more than six times a week.

The cuts of beef consumed ranked:

- Ground beef (34%)
- Cubed boneless beef (24%)
- Steaks (22%)
- Cubed beef with bone in (20%).

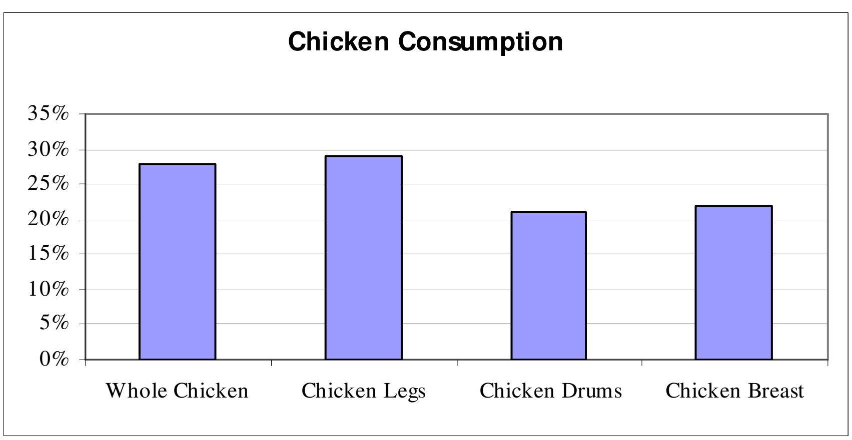
Figure 8: Beef Product Consumption



The Muslim consumer reported purchasing the following chicken products:

- Legs (29%)
- Whole (28%)
- Breasts (22%)
- Drums (21%).

Figure 9: Chicken Product Consumption



Halal Meat Product Attributes

Only 37% of the survey respondents completely agree that the halal meat they currently buy is of excellent quality. Whereas, 51% stated that they either somewhat agree or somewhat disagree that the halal meat they currently buy is of excellent quality. Therefore, the survey implies that Muslim consumers are unhappy with the quality of halal meat available at retail.

Figure 10: Excellence of Halal Meat Quality

Excellence of Halal Meat Quality		
	Frequency	%
Completely agree	72	37.1
Somewhat agree	98	50.5
Somewhat disagree	9	4.6
Completely disagree	2	1
Valid Responses	181	93.3
Missing Responses	13	6.7
Total	194	100

Most respondents like their meat to be somewhat pink, with some fat content to lean, and very tender.

Figure 11: Preferred Halal Meat Product Properties

Preferred Halal Meat Product Properties			
	Color	Fat Content	Tenderness
	%	%	%
1-light pink, lean, tender.	19.6	42.3	40.2
2	14.4	19.6	12.4
3	25.3	12.9	19.1
4	17	6.7	9.3
5	6.2	2.1	2.1
6-dark read, fat, tough.	5.2	1	2.1
Valid Responses	87.6	84.5	85.1
Missing Responses	12.4	15.5	14.9
Total		100	100

Most respondents (57%) would not buy halal meat coming from an animal that was treated with antibiotics and/or growth hormones, however a substantial number (26%) of respondents would still consider buying meat that was treated with antibiotics and/or growth hormones.

Figure 12: Antibiotics and Growth Hormones

	Antibiotics	Growth Hormones	Accumulative
	Frequency	Frequency	%
Completely disagree	63	101	42%
Somewhat disagree	35	22	15%
Somewhat agree	34	22	14%
Completely agree	33	15	12%
Valid Responses	165	160	84%
Missing Responses	29	34	16%
Total	194	194	388

Price

The majority of the survey participants believe they are currently paying a premium for halal meat. It was reported that:

- 50% believe they are paying a premium of $0.10 to $2.00 per pound
- 9% believe they are paying over $2.00 per pound
- 10% believe they are paying no premium.

Figure 13: Current Premium Perception

Current Premium Perception		
Premium per lbs	Frequency	%
10c to 49c	13	6.7
50c to 99c	40	20.6
$1 to $1.49	33	17
$1.5 to $2	12	6.2
Over $2	26	13.4
Do not pay more	17	8.8
Cheaper that non-halal	3	1.5
Undecided	35	18
Total Responses	179	92.3
Missing Responses	15	7.7
Total		194

Forty-one percent reported a willingness to pay a premium of $0.50/lb, 19% stated they are willing to pay a premium of $1/lb and 13% stated they are willing to pay a premium of at least $1.5 per lb. Although the majority of the survey participants are also willing to pay a premium for halal meat, 31% stated they should not pay any premium over regular non-halal meat.

Restaurant Expenditures

The majority of survey respondents eat at least 1 to 5 meals per month at restaurants. The majority of these meals are consumed at dinner (69%) and lunch (51%). Only a small number of the population (16%) eats breakfast at restaurants. When selecting a restaurant the availability of Halal meat was stated as being a very important consideration in their decision to dine out for 75% of the survey respondents. Only two percent stated that it is not really important. The survey also revealed, that 74% of survey participants would eat out more often if more restaurants had halal meat available. Only 8% stated that the increased availability of halal meat on restaurant menus would not increase their decision to eat outside the home.

Processed Meat

Although half of the participants reported purchasing ready-made meals, the majority would like to see an increased availability of processed meats. Figure 15 outlines the products they are requesting.

Figure 14: Processed Meats

Processed Meats	
	%
Winners	14.9
Sausage	22.7
Salami	22.7
Luncheon meat	27.8
Nuggets	30.4
Patties	28.4
All above	39.2
None above	7.2

Geographic Implications

Twenty-seven percent of Edmonton survey participants spend over $300 per month on halal meat products as compared to Calgary 0%, Ottawa 8%, Toronto 4.5% and Vancouver 7.1%. Fifty-seven percent of Calgary Muslim participants spend from $50 to $99 compared to Ottawa 25%, Toronto 30%, and Edmonton 33% and Vancouver 36%. Statistical testing revealed that these variations between cities are statistically significant and that they are not just due to chance. Further analysis confirmed that income level and the household size could indeed explain 65% of these spending fluctuations between cities.

Figure 15: Monthly Halal Meat Expenditures

Monthly Halal Meat Expenditures								
	$0	$1 - $49	$50 - $99	$100 - $149	$150 - $199	$200 - $249	$250 - $300	Over $300
Ottawa	0.0%	16.7%	25.0%	16.7%	16.7%	8.3%	8.3%	8.3%
Toronto	0.0%	11.3%	30.1%	26.3%	14.3%	6.8%	6.8%	4.5%
Edmonton	0.0%	6.7%	33.3%	6.7%	6.7%	0.0%	20.0%	26.7%
Calgary	7.1%	7.1%	57.1%	7.1%	14.3%	7.1%	0.0%	0.0%
Vancouver	0.0%	0.0%	35.7%	7.1%	28.6%	0.0%	21.4%	7.1%
Total	0.5%	10.1%	32.4%	21.3%	14.9%	5.9%	8.5%	6.4%

Other Survey Findings

Also further analysis revealed the following interesting facts:

- People who spend more on halal meat tend to eat out more at restaurants that are offering halal choices. As well they tend to buy more halal ready-made meals.
- People who go more often to mosques tend to have the highest halal meat consumption.
- Households in which the household head falls within the older age group tends to be less likely to eat out at restaurants, but tend be more likely to purchase ready-made meals with an increase in beef and goat consumption as opposed to chicken and lamb.
- Households with higher income tend to be most likely to consume only halal meat and less likely to purchase frozen meat.
- People with the higher average household size tend to be the less likely to eat out at restaurants.
- The perception of good quality halal meat increased with the level of trust toward the halal meat supplier.
- Households in which the household head lived longer in Canada tend to consume more ground beef and less chicken legs.

Study Summary/Recommendations

Although market efforts to supply certified Halal products throughout Canada has been sporadic, this study suggests that there is potential for Alberta meat processors to supply the Muslim ethnic market. Alberta meat processors are well positioned to meet the requirements of Muslim communities and to becoming one of the leading suppliers of halal food products throughout the Canada. However, in order to capitalize on this opportunity an exceptional understanding of international Islamic religious and business protocols is essential.

Even though there are two distinct sectors within Islam, (Sunni and Shi`i), Muslim meat consumption is based on the Quan'an, hadiths (traditions), various legal schools and cultural distinctions. Successful market entry will depend on:

- Adherence to the religious laws of Islam. It is essential to implement the principles of halal slaughter. As the legitimacy of the label “halal” is fundamental, it is recommended to work with a Muslim certifying body.
- Packaging, shipping and storage should be addressed. Halal products must be processed in conditions that are free from contamination from haram (illegal) products such as blood, blood-related products, pork or non-halal products.
- Marketing strategies aimed at the halal market will have to be transparent and encourage trust and loyalty in their relationships and business practices.
- Establishing a supply chain relationship between Alberta meat processors and the Canadian Muslim community could be beneficial to all parties.

References

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Statistics Canada. (February 21, 2003). "Household Spending on Food" **The Daily**, retrieved from http://www.statcan.ca/Daily/English/030221/d030221a.htm

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Appendix 1: Survey

Canadian Halal Meat Market

This survey is designed to identify the Canadian Muslim consumer needs, the availability of halal meat products and qualify the Canadian halal meat market. Your input is valuable to us. Please have the primary purchaser of meat in your household complete the following survey.

All information provided will remain confidential and no individual responses will be reported. Only group results will be analyzed and communicated. Also, no future contact will be made without your consent. Please refer to question 40 and 41 of the survey.

1. I consider myself to be a Muslim.

- ☐ **Yes**
- ☐ **No**

If your answer is no, please stop here and we thank you for your time. It is not necessary to return this survey.

2. How important is it to you, that the meat you consume is processed following the halal/zabihah processing methods? *(Please choose only one)*

- ☐ Very important
- ☐ Somewhat important
- ☐ Not really important
- ☐ Not at all important
- ☐ Don't Know/Undecided

3. Please choose one of the statements that best fits your meat consumption habits at home?

- ☐ We consume halal meat **100%** of the time.
- ☐ We consume halal meat **75 - 99%** of the time.
- ☐ We consume halal meat **50 - 74%** of the time.
- ☐ We consume halal meat **25 - 49%** of the time.
- ☐ We consume halal meat **1 - 24%** of the time.
- ☐ We do not consume halal meat.

If you do not consume halal meat please proceed to question number 28, otherwise please continue on to question 4.

4. On average how many servings per day of Halal meat does your household including yourself consume? One meat serving is equivalent to one small piece such as small chicken breast, one hamburger patty or one 140 grams steak.

___________Number of servings per day per family

5. On average, how much money do you spend monthly on halal meat purchases?

- ☐ $0
- ☐ $1– 49
- ☐ $50 – 99
- ☐ $100 – 149
- ☐ $150 – 199
- ☐ $200 – 249
- ☐ $250 – 300
- ☐ Over $300 per month

6. Please put a checkmark in the box that best describes how many times per week your family consumes the following halal meat groups. Your answer should be based on your family's average weekly halal meat consumption. *(choose one per line)*

Number of Times/Week	*0*	*1-5*	*6-10*	*11-15*	*Over 16*
Beef					
Chicken					
Lamb					
Goat					

7. Please put a checkmark in the box that best describes how many times per week your family consumes the following halal meat cuts. Your answer should be based on your family's average weekly halal meat consumption.
(choose one per line)

Number of Times/Week	*0*	*1-5*	*6-10*	*11-15*	*Over 16*
Beef Steak					
Ground Beef					
Boneless Beef (cubed)					
Beef Cubes with bones					
Whole Chicken					
Chicken Legs					
Chicken Drums					
Chicken Breasts					
Other *(Please Specify)*					

8. In my opinion, the halal meat I currently buy is of excellent quality. *(Please choose only one)*

- ☐ Completely agree
- ☐ Somewhat agree
- ☐ Somewhat disagree
- ☐ Completely disagree

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9. From 1 to 4, please place in order of importance the following criteria for purchasing halal meat. *(1 being the most important and 4 being the least important)*

- ☐ Halal considerations
- ☐ Quality considerations
- ☐ Price considerations
- ☐ Muslim processor/owner

10. For each of the following quality traits please circle the number that mostly closely describes your personal preference. *(Please circle one number for each quality trait)*

Color	Light Pink	1	2	3	4	5	6	Dark Red
Fat Content	Lean	1	2	3	4	5	6	Fat
Tenderness	Tender	1	2	3	4	5	6	Tough

11. Where do you purchase your halal meat products?*(Please choose all that apply)*

- ☐ Halal Meat shops
- ☐ Grocery stores (Safeway, Sobey's, Superstore, Loblaws, IGA etc.)
- ☐ Purchase from a farmer or auction mart & slaughter at a processing facility
- ☐ Kosher stores
- ☐ Other: *(Please specify)*_____________________

12. What days of the week do you prefer to purchase your halal meat? *(Please choose all that apply)*

- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday

13. How often do you purchase your halal meat products?
(Please choose only one)

- ☐ Daily
- ☐ 2 or 3 times a week
- ☐ Once a week
- ☐ Twice a month
- ☐ Once a month
- ☐ Other: *(Please specify)*_____________________

14. On a monthly average, what percentage of your halal meat would be purchased fresh? ______%

15. On a scale of 1 to 4 (*1 being completely disagree and 4 being completely agree),* **please rate the following statements.** (animal is defined as beef or chicken)

Please circle one number on each	**Completely Disagree**		**Completely Agree**	
I will buy meat coming from an animal that was treated with antibiotics	1	2	3	4
I will buy meat coming from an animal that received growth hormones.	1	2	3	4

16. On average, how many meals per month do you eat at restaurants (not just halal restaurants)?

Meal	**Number of times per month**
Breakfast	
Lunch	
Dinner	

17. Please choose the statement that best fits the importance of the availability of halal meat in your choice of restaurant. *(Please choose only one)*

- ☐ Very important
- ☐ Somewhat important
- ☐ Not really important
- ☐ Not at all important
- ☐ Don't know/Undecided

18. If you had more restaurant choices that offered halal meat, would you eat out more often in these restaurants?

- ☐ Yes
- ☐ No
- ☐ Don't know/Undecided

19. Do you currently purchase ready-made meals from your grocery store/halal store?
(Ready-made meal is defined as food ready to be served for consumption that only needs minimal time for heating or cooking.)

- ☐ Yes
- ☐ No

20. What processed halal meats would you like to see available for purchase? *(Choose all that apply)*

- ☐ Wieners, Smokies
- ☐ Sausages
- ☐ Salami, pepperoni, etc.
- ☐ Luncheon Meats (sliced sandwich meat)
- ☐ Nuggets
- ☐ Meat patties
- ☐ All of the above
- ☐ None of the above
- ☐ Other: ***(Please specify)***_____________________

21. In your opinion, is the price you currently pay for Halal meat fair?
- ☐ Yes
- ☐ No
- ☐ Don't know/Undecided

22. What premium do you think you are currently paying for halal meat? *(Premium is defined as the price difference between halal meat and non-halal meat) Please only choose one.*
- ☐ \$0.10 to \$0.49/lb (\$0.22 - \$1.07/kg)
- ☐ \$0.50 to \$0.99/lb (\$1.10 - \$2.17/kg)
- ☐ \$1.00 to \$1.49/lb (\$2.20 - \$ 3.28/kg)
- ☐ \$1.50 to \$2.00/lb (\$3.30 - \$4.40/kg)
- ☐ Over \$2.00/lbs (Over \$4.40/kg)
- ☐ I don't think I pay more
- ☐ It is cheaper than non-halal meat
- ☐ I don't know/Undecided

23. How much of a premium are you willing to pay for halal meat products as compared to what you are currently paying for non halal meat?
- ☐ \$0.50/lb (\$1.10/kg)
- ☐ \$1.00/lb (\$2.20/kg)
- ☐ \$1.50/lb (\$3.30/kg)
- ☐ \$2.00/lb (\$4.40/kg)
- ☐ Other: *(Please specify)* ________________________

24. What would influence your decision to purchase meat products from a supermarket such as IGA, Safeway, Sobey's, IGA, Loblaws etc? (*Please choose only one)*
- ☐ It must have a Halal tag or Halal logo.
- ☐ It does need to have Halal tag or logo. I would purchase it as long as it is not forbidden by Islam, ie pork etc.
- ☐ It does not need to have a Halal tag or logo. I would buy any type of meat including pork products.
- ☐ I do not purchase halal meat products in supermarkets.

25. I completely trust that the meat I purchase from my halal butcher is 100% halal?
- ☐ Yes
- ☐ No

26. I completely trust that the display of a Halal logo on packaged meat means that the meat is 100% Halal?
- ☐ Yes
- ☐ No
- ☐ Don't know/Undecided

27. Would you be willing to buy Halal meat online if such a service is made available in Canada?
- ☐ Yes, but only if it is cheaper
- ☐ Yes, even if it costs a bit more
- ☐ Yes, but only if it costs the same as I am paying now
- ☐ No. Why Not?___________________________

28. Which of the following statements, if they were found on a packaged halal meat product, would influence your decision to buy the product? *(choose only one)*
- ☐ Halal
- ☐ Slaughtered by hand by a Muslim
- ☐ Slaughtered according to Islamic Rites
- ☐ Certified by any organization
- ☐ Certified by a specific organization
- ☐ Zabihah
- ☐ None. If it is sold in a Halal meat store, I assume that it has been prepared properly
- ☐ None. I do my own background research on the company and its practices

The following demographic questions will help us classify the gathered data.

29. What is your gender?
- ☐ Male
- ☐ Female

30. What is your marital status?
- ☐ Single or equivalent
- ☐ Married or equivalent

31. Which of the following age groups do you belong to?
- ☐ 18 – 24 years
- ☐ 25 – 34 years
- ☐ 35 – 44 years
- ☐ 45 – 54 years
- ☐ 55 and over

32. Were you born in Canada?
- ☐ Yes
- ☐ No

If yes, please go to question 34 and if no, please continue to next question.

33. Which of the following geographic areas are you originally from? (*Please choose only one)*
- ☐ Africa
- ☐ Asia
- ☐ Australia
- ☐ Europe
- ☐ Middle East
- ☐ Americas

34. How long have you lived in Canada?
- ☐ Less than 5 years
- ☐ 5-10 years
- ☐ 11 – 15 years
- ☐ 16 – 20 years
- ☐ Over 20 years

35. Which city do you currently reside in? *(choose only one)*
- ☐ Ottawa
- ☐ Toronto
- ☐ Edmonton
- ☐ Calgary
- ☐ Vancouver

36 Including yourself, how many people reside in your household? ________________

37. Which of the following represents the highest level of education you have completed?
- ☐ Prior to high school
- ☐ High school diploma
- ☐ Some post secondary
- ☐ Post-secondary degree/diploma
- ☐ Graduate degree/post-doctorate

38. Which of the following categories best describe your total household income before taxes?
- ☐ Under $20,000
- ☐ $20,000 – 29,999
- ☐ $30,000 – 39,999
- ☐ $40,000 – 49,999
- ☐ $50,000 - 59,999
- ☐ $60,000 69,000
- ☐ $70,000 – 79,999
- ☐ $80,000 – 89,999
- ☐ $90,000 – 99,999
- ☐ $100,000 and over

39. To which wing of Islam do you belong to?
- ☐ Sunni
- ☐ Sheiat
- ☐ Suffi
- ☐ Other (*Please specify*)________________________

40. How often do you go to the mosque for prayer?*(Please choose only one)*
- ☐ Daily
- ☐ 2 or 3 times a week
- ☐ Once a week
- ☐ Twice a month
- ☐ Once a month
- ☐ Holiday/Eid
- ☐ Other

The following 2 questions are optional:

41. I am interested in receiving a copy of the results summary.
- ☐ Yes
- ☐ No

42. I would be willing to participate in future halal meat surveys if required.
- ☐ Yes
- ☐ No

If you answered yes, to either question 40 or 41 please provide your name and address below.

Name: ____________________________
Address: ____________________________
____
____
Phone: ____________________________
E-mail ____________________________

Thank you for your time!!

The personal information collected on this form will be used only for the purposes as indicated in questions 40 and 41 of this survey and is collected under the authority of the Freedom of Information and Protection of Privacy (FOIP) Act and is subject to the FOIP Act. If you have any questions about the collection, contact **Hicham Aitelmaalem, Financial Strategist, Alberta Agriculture, Food and Rural Development, 4709-44 Ave, Stony Plain, AB (780) 968-3550, e-mail: hicham.aitelmaalem@gov.ab.ca**