

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ

In the Name of Allah, Most Gracious, Most Merciful



The Muslim Consumer as the Key Player in Halal

ASIDCOM investigations 2010-2012

Report prepared by:

- Nora Stitou, Professional Master in Sociology and Demography, Member of ASIDCOM
- Hanen Rezgui, Engineering Technology, President of ASIDCOM

English translation by ASIDCOM (*association of French Muslims consumers*) with editorial assistance from Prof. Joe M. Regenstein, Professor of Food Science in the Department of Food Science and head of the Cornell Kosher and Halal Food Initiative

ASIDCOM report: The muslim consumer as the key player in halal – march 2012

ASIDCOM - Maison des associations, 6 rue Berthe de Boissieux, 38000 GRENOBLE - FRANCE

E-mail : contact@asidcom.org - Web site : <http://www.asidcom.org>

Contents

Survey 1: What type of a Muslim consumer are you?.....	6
1 - Methodology.....	6
2 - The sociological profile of respondents	6
3 - Analysis of Survey responses : the butcher, a pledge of confidence	7
4 - The Muslim consumers demands good hygiene and quality for halal products	9
5- Conclusion of the survey 1	9
Survey No. 2: What do you know about the halal status of foods?	10
1 - Methodology.....	10
2 - The sociological profile of the surveyed consumers	11
3 - Analysis of responses to the second survey : The Muslim consumer.....	12
<i>a- The choice to eat halal is due to religious beliefs</i>	<i>12</i>
<i>b- Muslim Consumer Protection.....</i>	<i>12</i>
4 - Religious Slaughter and Animal Welfare.....	13
<i>a- Consumers know little about the killing methods.....</i>	<i>13</i>
<i>b- A religious slaughter without stunning.....</i>	<i>14</i>
5 - Halal and animal welfare standards	14
<i>a- Support for a national halal standard:.....</i>	<i>14</i>
<i>b- Halal standard without any type of stunning.....</i>	<i>14</i>
6- The mindset of Muslim consumers.....	14
7- Conclusion of the survey 2	15
Survey 3: You and halal.....	16
1 - Methodology.....	16
2 - The sociological profile of the surveyed persons	17
3 - Analysis of responses to the third Survey : Deception on merchandise and consumer behavior.....	18
4 - Responsibles of the deception	19
5 - The paradox of the halal product quality.....	20
6 – Conclusion of the survey 3	21
General conclusion	22
Appendix 1 : survey 1 : What type of a Muslim consumer are you?	23
Appendix 2: Survey 2 : What do you know about the halal status of foods?	24
Appendix 3:survey 3 : <i>Le Halal et Vous</i>	29

Introduction

"To imitate the Jewish Consistory and pocket some royalties, the Paris Mosque had created, in the 70s, signed halal certificates that were not seriously monitored - that were quickly forged with impunity by the butchers themselves as the Mosque of Paris was not controlling anything,"¹ and this situation continues to this day. Youssef Daniel Leclercq tells us² he was "Alerted (By Professor Muhammad Hamidullah) in the late 70s to the fact that so-called halal butchers were not actually such and that some foods could contain pork derivatives or animals that have not been religiously slaughtered." He then founded the first association for the defense of Muslim consumers in France, in 1979 in Calais. He led it for twenty years, first in Calais then in Bobigny in Seine Saint Denis (close to Paris).

The state intervened in halal issues for the first time in 1980 by publishing the Decree: "Qualifications for the religious slaughter man." The text states that *"Religious slaughter may be performed by slaughterers authorized by an approved religious organizations on the recommendation of the Minister of Interior, by the Minister of Agriculture."* and *"If any religious organization has not been approved, the prefect of the department where a slaughterhouse is situated may be used for religious slaughter if granted an individual authorization on the basis of a reasoned request of the interested parties."*

This can be seen as the first institutional measure in France to try to address the practice of Muslim religious slaughter. We remark that the text emerges as an analogy, possibly wrongly, between the practice of religious slaughter among Muslims and among Jews. Even if Muslims and Jews agree that they practice religious slaughter in the same way, given their right to freedom of worship, we must recognize that each has specificities that must be taken into consideration. The Jewish religion, for example, restricts the practice of religious slaughter to a small group of specifically trained individuals *"Highly qualified, whose mastery of the laws of "shehita" and "treifot" is attested to by a certificate (Kabbala) issued by a competent rabbinic authority in front of whom he made three shehitot"*³. However, Islam recommends that every Muslim, who has the means, learn the practice of religious slaughter and should carry it out by himself/herself, including on the occasion of various religious celebrations such as the feast of Eid Al-Adha.

¹ Daniel Leclercq-Yusuf : founder of *Integrity*, secretary and president of the *National Federation of Muslims of France* (1985-1990), and executive director of the Paris office of the *Muslim World League* (1998-1999). He is currently an Honorary board member of the *Muslim World League*

² Interview with Daniel Leclercq-Yusuf: to have a reliable label that is legally protected: <http://www.asidcom.org/Interview-avec-Daniel-Youssef.html>

³ *Encyclopedic Dictionary of Judaism*, Ed. Deer / Robert Laffont, Bouquins collection, Paris 1996, p. 200-202

By drawing analogies from other religions, the Decree fails to understand and meet the needs of the Muslim community in France by failing to address the need for each Muslim to be able to slaughter his/her own animals.

Similarly, other interventions of the State have led to too much power being put in the hands of the three great mosques (Paris, Lyon and Evry), which have not been diligent in protecting the needs and rights of Muslims. Rather than making the needs of Muslim consumers known to the government, they have rather for their own self-benefit helped to create a state of disorder in the halal food sector. Indeed, the efforts made by the association known as "Integrity" and its creation of the "Tayyibah" (a gathering of about 70 Muslim associations) have permit the French Muslim community's establishment of a definition of halal that has been validated by Professor Muhammad Hamidullah⁴ in Paris in 1982.

Definition of Professor Muhammad Hamidullah: Paris August 15, 1982

Meats are considered Muslim (Halal) from religious slaughter performed exclusively, without stunning, by a Muslim, as follows:

- *Turn the throat of the animal towards the direction of the Kaaba (in Mecca, south-east France)*
- *Invoking the name of God by the slaughterer before bleeding, on each animal, using the formula: "Bismillah, Allahu Akbar "(i.e., The name of God, God is the greatest)*
- *Cut the larynx, using a sharp instrument, the jugular veins, carotid arteries and the trachea, but no the spine*

None of the three mosques have taken the opportunity granted to them by the French government to defend this definition, although the definition was established, at the initiative of an organization of Muslim consumers, by a broadly representative number of Muslim associations.

Today the Muslim consumer remains the forgotten stakeholders with respect to halal. However, in 2006 Hadj Abdel Aziz Di Spigno founded a second association for the defense of Muslim consumers in France. Thus, the creation of ASIDCOM is a continuation of the fight of Muslim consumers to establish respect for their rights, make known their true needs and require its recognition by various institutions and stakeholders within the economic and political spheres within France.

The association ASIDCOM will try in this report to analyze consumers' responses to a set of surveys which they undertook. This analysis aims to:

- Determine the consumers' opinions on various topics related to halal,

⁴ http://en.wikipedia.org/wiki/Muhammad_Hamidullah; http://www.albalagh.net/general/dr_hamidullah.shtml;

- Determine the mindset of the consumer and the degree of his mastery/knowledge of subjects related to halal,
- Collect some useful information about the response of Muslims to possible reforms or improvements in providing halal foods for the French Muslim consumer.

Survey 1: What type of a Muslim consumer are you?

1 - Methodology

On the occasion of having a stand at the annual meeting of the Muslim community in France at Le Bourget in 2010, we chose to ask some visitors to fill out a written survey. The people requested to answer were learning about our association for the first time. Indeed, we sought to understand the general mindset of Muslim consumers beyond what is found on the Internet, which seems to be the main source for halal information, awareness campaigns and halal consumer information. Thus the survey was expected to interview consumers with different awareness levels about halal foods and matters relating to their consumption.

Each respondent was asked individually to sit in our stand and answer the survey questions. The surveyors were careful to not discuss the subject of halal with the respondent until the person was finished answering. Often, people began a discussion after taking the survey and express a wish to know more about the subject. Thus, although the surveyors tried not to talk with consumers until each had finished the survey, the respondents often posed questions on the subject, even if they are not finished suggesting a strong interest in understanding some of the issues more fully.

2 - The sociological profile of respondents

The questionnaire was conducted with a sample of 188 people. Of these people, 75% of them live in the department of Ile de France (around Paris) and the remaining 25% were divided between several departments just beyond Paris. By gender: 56% of the respondents were women and 43% men. The age distribution is illustrated in the following diagram:

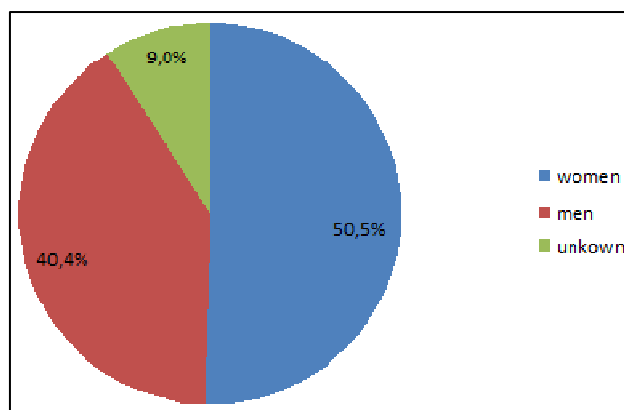


Figure 1: Survey 1: Distribution by gender [unknown: did not answer the question]

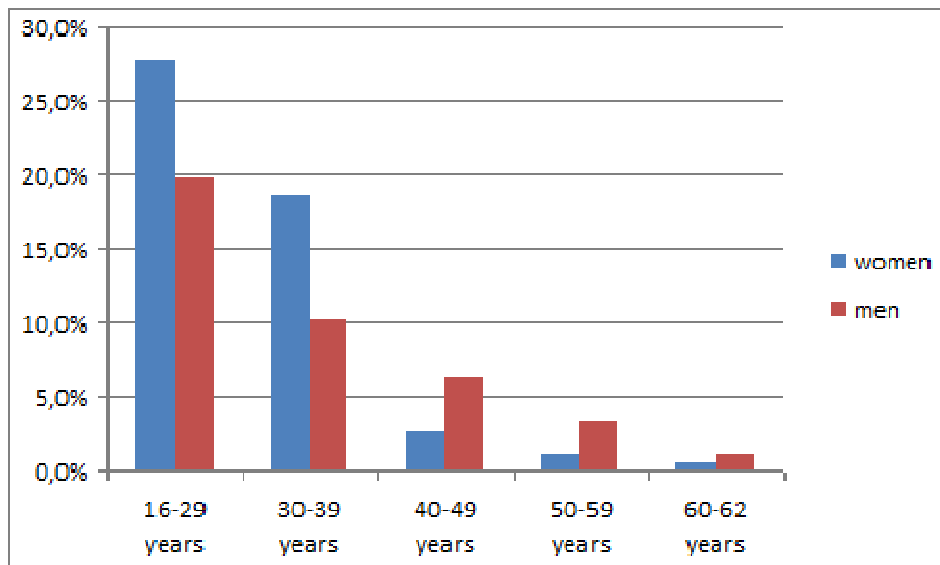


Figure 2: Survey 1: Age distribution

By age: 47% of respondents were between 16 and 29 years of age and 28% were aged 30 to 39 years. The population attending the annual Muslim meeting tends to be relatively young. This can be further explained by the fact that this is the profile of Muslims who are most attracted to this type of meeting organized for Muslims.

3 - Analysis of Survey responses : the butcher, a pledge of confidence

Although a large majority of Muslims use nearby larger shopping centers in their urban areas, half of those surveyed do not buy their meat there. This fact suggests a possible lack of confidence of Muslims in the certification of "halal" as declared by a less personal retailer and/or the importance of the loyalty of Muslim consumers to their neighborhood butcher, and his pledge for certification of halal meat. Interestingly, 92% of Muslim respondents buy their meat or deli meat from traditional "halal" butchers. Indeed, almost three quarters (70%) say they do not go elsewhere because they trust the butcher.

Among Muslim consumers who buy their meat or halal meat in supermarkets, 43% say they do so only if there is an organization that certifies it. It can be hypothesized that these Muslims are part of the customer who are well informed of the problems with halal products in supermarkets. On the other hand, 30% of those interviewed buy halal meat in the presence of a single halal logo. It can also be noted that 8% of them buy kosher products. Knowing that kosher products are more expensive than halal

ones, it is understandable that Muslims may accept paying more for their foods if they can be certain to have an authentic certification.

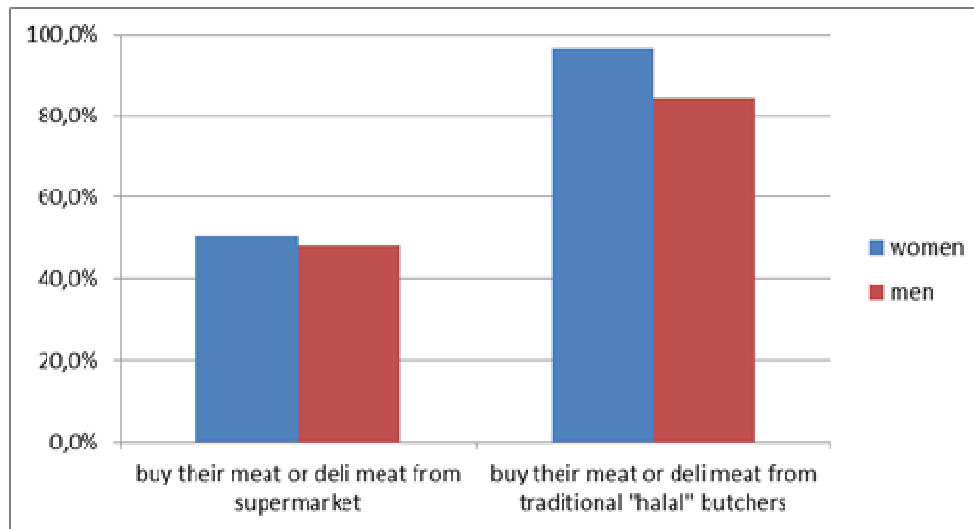


Figure 3: Muslim consumers favor a traditional halal butcher

Similarly, among Muslim consumers who buy their meat in a traditional “halal” butcher, 69% gave the argument that it is the “halal certification of the butcher by an organization” which is the motivation to do so. However, it is important to note that only about 5% of traditional butchers are halal certified by an organization⁵. This shows the Muslim consumers’ confusion about the principle involved in the certification of halal meat. Generally, a Muslim consumer could consider whether a traditional butcher is actually certified by the presence of a single document claiming that product is halal. Such a piece of paper attesting to halal certification is usually posted in the butcher shop in such a manner as to be visible to customers. It would be interesting to know what the law provides for when this is an intentional deception of the consumer. Unfortunately, it is suspected that the butcher will still be able to justify his actions by denying his intentions to mislead the consumer through this type of signage.

⁵ only the French control body AVS certifies butchers (so that the butcher has to sell only AVS controlled products). AVS only controls about 5% of the French halal market (in their own press release (Nov., 20011). However an INTERBEV representative of the French meat industry says AVS controls only 3% of the French halal market.
http://www.dailymotion.com/video/xg5nip_al-har-rencontre-avs-partie-1_news#rel-page-1

4 - The Muslim consumers demands good hygiene and quality for halal products

Among the Muslims who buy their meat at a butcher shop, only 19% say they do so because "everyone goes there." So we have a minority of "followers" and a majority of Muslim consumers who seem to be making reasoned choices about halal products. Indeed, 85% of all Muslim consumers surveyed said that they are "among people who question before buying a product." Unlike the 11% who say they "buy what everyone buys." In this case one can question their criteria for selection of halal products?

5- Conclusion of the survey 1

There have always been, since the 1970s, Muslim consumers in France, seeking a reliable assurance certifying that the meat is halal. This concern may be the natural result of the rigor of the person's choice of halal products, given that unlike in Muslim countries, where the governments assure the integrity of products, the French government believes that it is not able to guarantee the legality of products sold to its Muslim citizens. This search for the legality and quality of halal meats can also be the result of a Muslim consumer's awareness of the disordered state of the halal market in France.

But, until the later part of the last century, most Muslim consumers relied on a simple moral guarantee provided in the person of the butcher or a paper guarantee (halal logo, certifier's name known or unknown, document of certification possibly of no value). This explains the contradiction between what was heard from consumers surveyed in terms of the care they take in seeking halal products, although one has to raise the question that if so many Muslims claim to ask questions, how come the situation hasn't improved and many inappropriate products are labeled as halal. Indeed, consumers have little access to the information they would need to verify the accuracy of the information provided and thus, determine whether the product meets their halal standard.

Survey No. 2: What do you know about the halal status of foods?

1 - Methodology

Most of the people interviewed as part of the first survey indicated a willingness to learn more about issues related to halal products marketed in France. After several discussions between ASIDCOM volunteers at the scene and visitors to the meeting, it was decided to do additional consumer survey work. A second survey was published on the ASIDCOM website. The survey is concerned with several issues:

- The Muslim consumer
- Animal welfare
- Halal standards and animal welfare

Each of the items above is first addressed in a way that might educate the Muslim consumer on some of the definitions that would be used in some of the questions. Thus, the terms are explained and some background information or information about current events were included. Similarly, a gradual approach of providing information and asking questions was taken to allow the interviewee to master new information. The last part of the questionnaire attempted to obtain information that would allow the surveyors to understand the mindset of the consumers' responses to the information learned and provide a statement of his/her position regarding different issues related to halal in France.

The survey was posted at the beginning of November, 2010 and was closed at the end of February, 2012. ASIDCOM was encouraged to keep the questionnaire open for the longest time possible for several reasons:

- The context prevailing around halal in France has not changed significantly in that time period as to be concerned that this would influence the responses of the Internet users
- We observed a stable trend for the results throughout the period the questionnaire was on-line
- The extra time permitted the largest number of spontaneous responses beyond the already loyal readers. The advantage of this type of response is indeed to know the opinion of people with little or no information on the subject of halal in France prior to visiting the website.

2 - The sociological profile of the surveyed consumers

The advantage of the online collection of responses is to broaden the scope of participants. Thus, we received responses from 45 departments covering cities where there are large concentrations of Muslims such as Paris, Lille, Marseille, Grenoble, and Lyon and also from areas of the country with smaller Muslim populations. Some answers were also received from Belgium and even England although the survey was in French.

Age distribution of interviewed persons

The percentage of men who responded to questionnaire was higher than for women, unlike the previous questionnaire. Thus, 59% were male and 41% were women. With respect to age: 36% of people are between 16 and 29 years and 42% are between 30 and 39 years. The men who answered the questionnaire were older than the women. The following graph illustrates in more detail the age distribution of respondents.

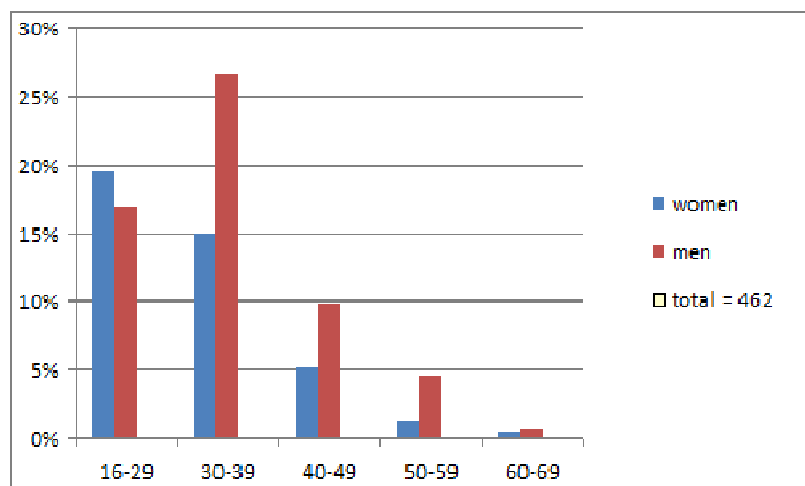


Figure 4: Survey 2: Age distribution

About a third (30%) of the respondents have a family with 1 or 2 children, 27% have a family with 3 or 4 children. This represents the extra purchasing power of relatively large families.

About 70% of the respondents had a job at the time of their response. Thus, people from several professions have participated. Professions covered include: journalism, sociology, medicine, engineering, consulting, marketing and trade, education, finance, service delivery, and the food industry. Jobs go from that of an ordinary worker to that of executive or business persons. The participation of some butchers and halal product controllers should be specifically noted.

The remaining 30% were housewives, unemployed people or persons who did not specify their occupation.

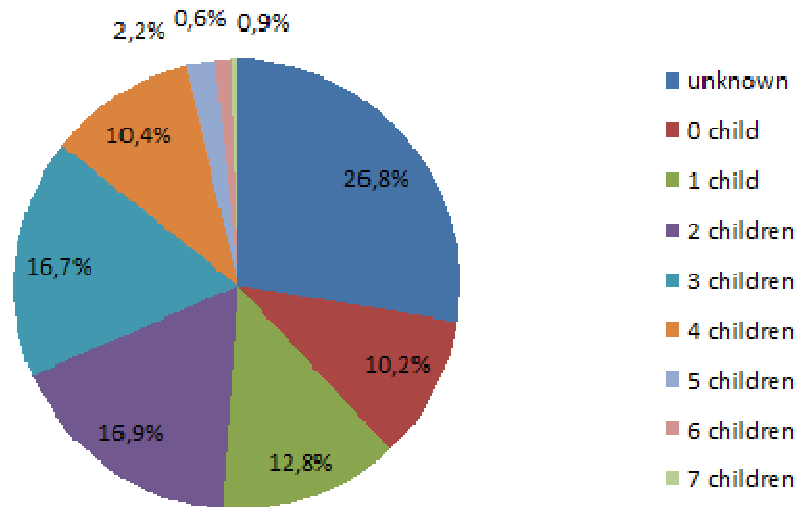


Figure 5: Survey 2: Number of children per respondent

3 - Analysis of responses to the second survey : The Muslim consumer

a- The choice to eat halal is due to religious beliefs

Only two people responding by saying they were not Muslim. About 4% say they were non-practicing Muslims. *However, 95% say they were practicing Muslims and 98% say they choose to eat halal "for their religious beliefs."* Moreover, 17% stated they eat halal because of "ethical and moral convictions." The choice of halal is, indeed, an attempt by Muslims to integrate social and economic values that are in harmony with the environment and respect the rights of other creatures.

b- Muslim Consumer Protection

About 50% of Muslim consumers believe that religious bodies such as the CFCM (including the Paris Mosque and the Mosque of Lyon) should defend and guarantee their rights. This may simply reflect the fact that the CFCM (French Council of the Muslim Faith) is seen as the body that is supposed to represent the Muslims of France. Moreover, one should remember the clear position of Mr. Muhammad Moussaoui, the president of the CFCM since 2008, who opposes the use of any type of stunning as part of religious slaughter. This gave consumers confidence that the required halal meat was prepared without stunning.

Among consumers, there were also those who trust one religious institution mentioned above, for example, the Mosque of Lyon as being more serious in the control of halal meat in recent years, by including the use of more inspectors.

One can also note that there is no certification body that is unanimously accepted and trusted by Muslim consumers. Indeed, when more certifiers were presented to the respondents in the question (mainly AVS, AFCAI, Halal Services, Mosque of Ivry, Mosque of Paris, Mosque of Lyon, MCI, Halal Correct, etc....) the proportion of Muslim consumers trusting them increases, shifting from the 50% mentioned above for just the Paris Mosque and the Mosque of Lyon to 72% for the group of cited certifiers. About 90% of consumers believe that Muslims want or hope for an association of consumer that can defend their rights. This may be justified by the awareness of consumers of their economic potential. The independence of a consumer association, defined by the Consumer Code, would increase the trust of consumers. Contrary to the common perception, the current religious institutions doing certification are subject to conflicts of interest both politically and religiously as certification bodies depend on compensation from the industry they are supposed to be controlling.

However, consumers are more confident, up to 87%, with respect to different Muslim institutions and control bodies when there is also an association specifically involved in defending the rights and needs of the Muslim consumer.

4 - Religious Slaughter and Animal Welfare

a- Consumers know little about the killing methods

About 78% of Muslims consumers believe they are misinformed about the slaughter techniques and treatment of the animals they eat. Note, also, that people are more informed about the use of electricity for the slaughter of animals. Indeed, this concerns 48% of the Muslim consumers, compared to only 37% for the case of the captive bolt and 15% for the case of gassing of the animals.

About 12% of Muslim consumers were confident in the fact that stunning methods (electrical stunning or captive bolt) are not used as part of religious slaughter in France and Europe. About 31% say they have no knowledge of the use of these methods. And 27% say they have learned this from someone and only 28% say they are "well informed about the use of these methods."

b- A religious slaughter without stunning

For almost all (98%) Muslim consumers, the use of electrical stunning (electronarcosis) was certainly considered to painful for the animal. About 94% of Muslim consumers will not knowingly consume the meat of an animal that was electrocuted (stunning post-mortem, after bleeding). In addition, 18% of them say they follow a legal opinion that discourages this practice and 75% say they follow a legal opinion that condemns it.

5 - Halal and animal welfare standards

a- Support for a national halal standard

About 77% of Muslims consumers say they are supportive of the establishment of a European halal standard. However, 79% say they are favorable to starting the process by creating a nationally Halal standard. This shows the interest of Muslim consumers in the development of best practices for the halal market, and the desire for national institutions that can provide answers to their needs.

b- Halal standard without any type of stunning

Muslim consumers are unanimous: 100% support requiring that a halal standard must ensure good animal welfare while respecting the religious requirements in terms of religious slaughter and processing of animals. Similarly, 97% of the respondents say that the standard must ensure that the halal meat comes from animals slaughtered without any stunning. They also require compliance monitoring for halal products by an independent Muslim organizations that will defend their requirements with respect to the halal standard.

6- The mindset of Muslim consumers

About 23% of the Muslim consumers say they do not understand the ins and outs of this market. Also, 11% believe that the guilt for selling products that are not halal falls upon the industry including the butchers. We know⁶ that most Muslim butchers do not inquire about the slaughter technology practiced by the slaughterhouses from which they receive their meat. One might wonder why these people have so little concern for the legality of the products they themselves consume and why they are willing to defer the issue of verification of the legality of their products to the butcher. Is it for lack of an alternative for obtaining proper halal products?

⁶ Eblex report, 2010. http://www.asidcom.org/IMG/pdf/L19-_Mohammed_Shujauddin_Shafi.pdf

Nevertheless, 64% of Muslim consumers say that they have mastered the subject and they knowingly consume products they find acceptable. Yet only 28% say they "know well" that stunning was used as part of the religious slaughter and at the same time 97% refuse to eat meat from an animal stunned before or after bleeding. These results are inconsistent and again highlight the existence of confusion among consumers, including the concept of certification of halal products (see Survey 1), which is the major way consumers have to obtain a halal guarantee for products they purchase and consume.

The next question is further confirmation that the consumer considers the Muslim butcher as "a gage of confidence." Indeed, 69% of respondents consider that the marking of the word "halal" on products is nothing more than a meaningless marketing term. In the first questionnaire, 70% of consumers said they trust the Muslim butcher, so that the latter is the major form of assurance used by the consumer, although there is little ability to verify the veracity of the Muslim butcher.

Muslim consumers believe in their market potential. Indeed, 20% of them think that the Muslim consumer "is born" (he is recognized as a specific consumer) and 60% find it "being born" (his consumers specificities are being recognized by the market). However, the least optimistic (19%) think it is only an illusion.

7- Conclusion of the survey 2

In short, Muslim consumers are poorly informed about the methods of slaughtering of animals. In most cases, they think the halal meat they eat comes from a religious slaughter without stunning. Others are just discovering that this is often not the practice for much of the meat they consumer. This can be one explanation for the slowdown in sales growth of halal products beyond the traditional halal butchers. This shows the potential impact from advocacy and consumer information being provided to Muslim consumers by different Muslim groups including Muslim consumer associations.

There is unanimity among consumers to the requirement that the religious slaughter for a product to be halal must be done without stunning. This is also then required for any possible halal standard whether national or European. But Muslim consumers, with their strong convictions with respect to their choice of halal, remain perplexed by the glaring lack of information and alternatives, especially meat from slaughter without stunning being available to meet their needs. It appears that consumer choice is far from being accepted by manufacturers and distributors of halal products.

Faced with this complex situation of the reality of this market in France, it was decided to supplement this report with a final questionnaire, entitled "Halal and You."

Survey 3: You and halal

1 - Methodology

The third survey should help to understand consumer behavior when facing fraud in the halal market. It also aims to shed light on possible developments of a more active consumer response in the next few years.

This is part of an approach that aims to be constructive. ASIDCOM wants to enable manufacturers and various managers and market participants to direct their efforts towards the harmonization of the halal market, including better accountability and verification of halal products.

The questionnaire was offered to visitors to the sixth annual meeting of Muslims in the north of France (Lille), 25 February, 2012. This was ASIDCOM's first stand in northern France. Almost all of the people who responded to the questionnaire did not know about the association before attending the meeting. They were asked to answer the questionnaire individually. Then they could visit the exhibit on "Muslim consumption and halal issues".



Figure 6 : Photos ASIDCOM-Exhibition annual meeting of Muslims in the north of France 2012

2 - The sociological profile of the surveyed persons

There were 223 people who responded to the questionnaire "Halal and You." About 64% were women and 36% were men. They came mainly from northern France, but the participation of 12 people from Belgium was noted.

About 51% of the respondents were between 16 and 29 years of age. Indeed, a large presence of students at this meeting was noted (24% of respondents to the questionnaire were students). In addition, 26% were between 30 and 39 and 14% were between 40 and 49% (see Figure 5).

Only two people were more than 60 years old. What is special about some of the people at that age, whether they responded to the questionnaire or not, is their clear knowledge of the presence of fraud in the halal market. And when they were asked what they think about this problem, they put the blame on the butcher. Yet they went further by stating that they buy from these butchers and consider that the guilt of halal fraud returns to the butcher not to them.

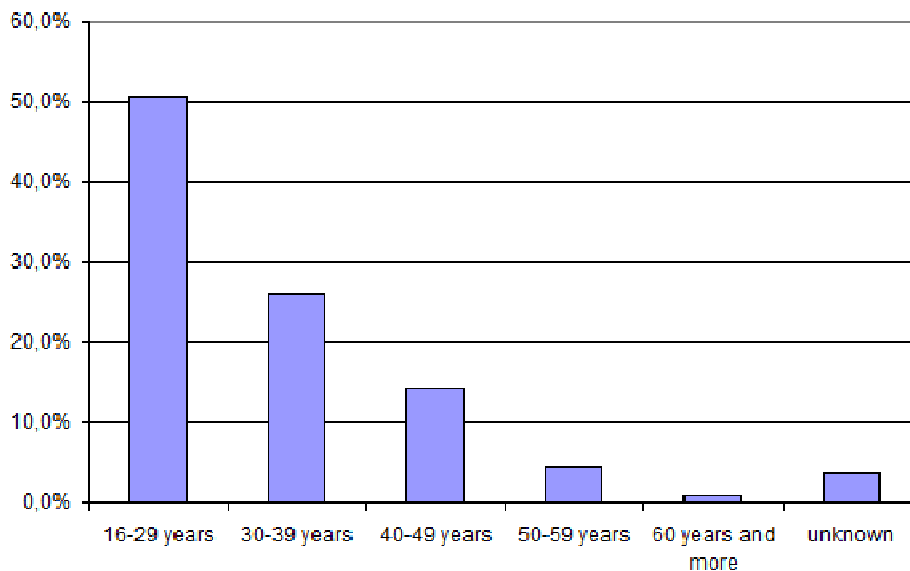


Figure 7: Survey 3: Distribution by age

About 51% of the respondents are married, 44% were single and 4% were divorced. This explains why only 42% of those surveyed reported having children. The following illustration shows the distribution of number of children per person.

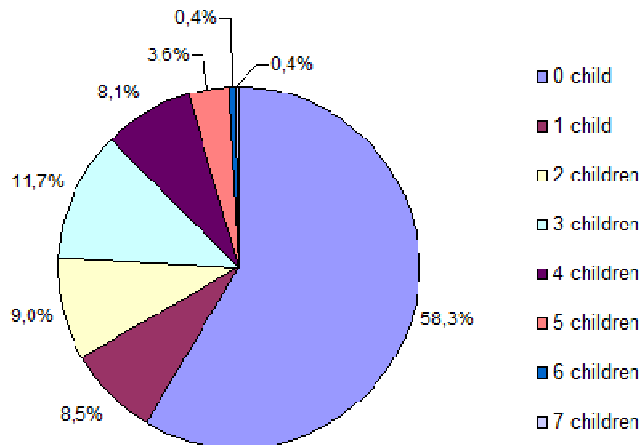


Figure 8 : Questionnaire 3: Number of children per person

3 - Analysis of responses to the third Survey : Deception on merchandise and consumer behavior

About 89% of the respondents said that they are aware of the fraud in the halal market. However, their estimate of the extent of this fraud is very variable. (See the table below):

Fraud Rate (in %)	0	10	20	30	40	50	60	70	80	90
% Response	11	1	9	13	11	10	13	13	9	10

Table 1: Estimate of the rate of "falsely labeled Halal products" on the market, according to Muslim consumers

The question that should be asked here is: "what is the consumer's definition of fraud with respect to halal products?". Some examples, not exhaustive, of what consumers may perceive of as "fraud" with respect to halal food products within France include:

- A product from the conventional food producing companies that is sold as halal to Muslim consumers. Generally this type of product shows only the word "halal" without any mention or symbol of a halal certification body. These products can be found in supermarkets, but also in local Muslim run stores.
- A product is certified "halal" by a halal certification body that is simply collecting a fee and not actually checking the product.

- A meat product is sold that was slaughtered with prior stunning without the knowledge of the consumer.
- A meat product is sold that was electrocuted post-mortem without the knowledge of the consumer.
- A product is actually contaminated with ingredients that are considered unlawful (e.g., pork, alcohol, etc.).

Only 10% of respondents say they have never had any doubt about the legality of the halal products they buy. However, 17% say they buy them even when they have doubts about the conformity to halal of the product because they have no choice. Another 17% say they also buy them even if they have doubts because they consider that the guilt of the fraud returns to the industry and butchers. The remaining 56% say that when they have doubt, they abstain from purchasing the products.

Despite the different behaviors among Muslim consumers when faced with a lack of reliable information with respect to the halal status of products, 87% said they were willing to pay more for a real halal product. It would be interesting to know more about how those consumers abstaining in case of doubt deal with finding the food they want and need, especially with respect to meat products.

4 - Responsibles of the deception

It is difficult to designate who should be held responsible for the misrepresentation of halal products in the marketplace. The question was asked of consumers to learn their opinion on this thorny point. About 40% of consumers surveyed consider that the greatest responsibility for the deception in the marketplace falls with the halal certifiers. About 16% said that it is rather the responsibility of the state and 11% said it is the butchers themselves. Furthermore, 15% believed that the responsibility fell with all three groups without any specific ranking of order. It was surprising to note that over a quarter of the Muslims surveyed felt that the state should have such a major responsibility for deception with respect to halal products.

It is normal that consumers consider these three stakeholders as responsible for deception. Indeed, it goes without saying that in a democracy citizens have the right to expect the government to provide effective measures to protect them from all types of deception. Similarly, as seen in the first survey, dating from 2010, the Muslim consumers see the butcher as their major source for confidence in their purchases and that in 69% of cases they believe that the butchers they use are certified "halal".

Other stakeholders that were designated as either first, second or third with respect to responsibility for the integrity of halal products were: 18% for the CFCM, 16% for the consumers themselves and 14% for the mosques. It should be noted that many of those interviewed were unaware of the existence of CFCM! Also, the questionnaire did not provide the "industry" as a possible choice. Indeed, even if they have a share of responsibility, there still remains a legal vacuum whose continuation is favored by the government and the Muslim religious institutions.

Similarly, the survey did not propose the UOIF (Union of Islamique Organization in France) as a potential organization to be held responsible for some of the fraud with halal products. Indeed this organization, despite its growth and its popularity among many faithful Muslims remains on the sidelines in this area and is not part of the power centers within France. This of course does not exempt it from its responsibility for not doing more to address the issue of false halal products in the marketplace.

But it is important to note that the certification body affiliated with the UOIF has been known as "HALAL SERVICE" since 2007. However, both CFCM and UOIF deserve credit for having, despite some internal dissension, a clear position against the use of any type of stunning as part of Muslim religious slaughter. CFCM took this position in 2008 and UOIF took this position even earlier.

But unfortunately, the certification of halal products is still perceived by these organizations mainly as a source of income. It is ironic that the CFCM will be represented at some official working meetings with the halal certification body affiliated with the Mosque of Lyon. This Mosque's organization permits the use of életronarcosis on poultry and simultaneously claims to represent the position of the CFCM in such meetings. Also, the Evry Mosque and the Mosque of Paris tolerate stunning for all types of animals, even while they are member of CFCM.

5 - The paradox of the halal product quality

Two questions need to be posed to consumers:

- Are you willing to eat mechanically separated meat? (Produced using a machine that separates meat from the bones of animals from which the traditional cuts of meat have already been removed)

- Are you willing to eat deli meat made from mechanically separated meat and animal fat?

About 90% said no. Yet MSM (mechanically separated meat) is largely consumed by Muslims. The only explanation for these contradictions is yet again the misleading information available to consumers. The result is also so surprising for the case of "couscous sheep" (a French word used by breeders to mean the oldest "industrial" sheep) and industrially produced chickens. About 93% of respondents refuse to eat meat of "couscous sheep" and 88% said no to industrial chickens. However, it is not certain if consumers have been able to link these issues to the reality of what they eat daily.

6 – Conclusion of the survey 3

Muslim consumers have shown an evolution in their commitment and understanding about halal, although some confusion persists. More than half of consumers have already begun a spontaneous action of boycotting "false halal". Of course, these actions have had little impact so far, to the extent that the information about halal standard is not easily accessible and alternatives are almost non-existent.

Consumers attribute primary responsibility for the deception that occurs with some halal products to certification agencies, the state and to Muslim butchers. They also regard themselves as among those responsible. This is a sign of commitment to contribute to the reform of the halal market and reducing the cases of fraud to a minimum.

Beyond the legality of the products, the consumers have shown indirectly that they are unaware of the quality of products that are available to them in the halal market. However, the awareness of the poor quality of halal products is increasing and this may in the future limit the marketability of low quality products.

General conclusion

The Muslim population in France is currently estimated at 7.5%⁷ of the total population. Less than 5% of French production of meat comes from a religious slaughter without stunning. Of this limited production, a share goes to the Jewish community.

Even if all of this production is for the domestic market, and it all meets the religious requirements to be halal or kosher, it is easy to see that the numbers do not add up in terms of meeting the quantity of meat needed by the Muslim and Jewish communities. Indeed, Muslim consumers have unanimously expressed their commitment to consume a halal product that meets their religious conviction with respect to the method of slaughtering animals, i.e., a traditional slaughter with no pre- or post-slaughter interventions yet fully compliant with the modern understanding of animal welfare.

Also, with respect to poultry meat sold as halal only 5% is obtained from a slaughter without stunning⁸. This is essentially the production of small local slaughterhouses directly serving the local religious community.

Thus, Muslim consumers are often unaware of how their meat was slaughtered and whether it meets their religious convictions.

We are witnessing in the last few years the mobilization of consumers by different consumer groups to educate and inform them on issues in the halal marketplace. This has led to changes, especially in consumer behavior and in the consumer's attitudes and concerns. The Muslim consumer is more informed and more rigorous in his/her selection of food. But the reconciliation process between the nature of the demand and the available supply is very complex in the French context. There are, indeed, policies of the government and of the major stakeholders⁹ in the marketplace that work against the development of religious slaughter practices that actually meet the needs and demands of the consumer^{10 11 12 13}.

⁷ <http://www.lefigaro.fr/actualite-france/2011/02/07/01016-20110207ARTFIG00664-la-population-musulmane-en-forte-progression.php>

⁸ <http://www.asidcom.org/Croisade-contre-l-abattage-rituel.html>

⁹OABA (an organization working to assist slaughterhouse animals) is the only animal welfare organization authorized to visit French slaughterhouses since 1961. The association argues against the use of religious slaughter and considers it as a source of suffering for animals.

¹⁰ <http://www.asidcom.org/Croisade-contre-l-abattage-rituel.html>

¹¹ <http://www.asidcom.org/Election-2012-Nicolas-Sarkozy-et.html>

¹² <http://www.asidcom.org/ASIDCOM-interpellates-the.html>

Appendix 1 : survey 1 : What type of a Muslim consumer are you?

Femme / Homme Age : Département ou pays :

1. Achetez-vous la viande/ charcuterie en grande surface ? oui / non

Si oui, comment choisissez-vous vos produits ?

- Il suffit qu'il y ait un simple logo Halal oui / non
- Je n'achète que si il y a un organisme qui certifie en plus oui / non si oui lesquels :
.....

- J'achète aussi des produits casher oui / non

2. Achetez-vous la viande/charcuterie en boucherie « halal » traditionnelle ? oui / non

Si oui, vous achetez car :

- Car vous faites confiance au boucher oui / non
- Parce que tout le monde s'y rend oui / non
- La viande est certifiée par un organisme de certification halal oui / non

3. D'une façon général en tant que consommateur musulman je suis plutôt du genre

- A m'interroger avant d'acheter un produit oui / non (si oui sur quels critères qualité marque etc....) :
.....
.....

- A acheter ce que tout le monde achète oui / non

4. Que savez-vous des additifs alimentaires contenus dans les produits de consommations courantes ?

- J'en connais certains qui contiennent du Porc oui / non (si oui lesquels) :
.....

- Il y en a tellement que je ne me pose pas la question et j'achète les produits que j'aime oui / non

Ces questions vous ont interpellées ! Venez vite rejoindre le Stand de l'association de consommateurs ASIDCOM pour échanger sur votre rôle en tant que consommateur musulman sur la question du halal mais aussi du Hajj et de la finance islamique –

www.asidcom.org – Stand AS21

ASIDCOM : Association de Sensibilisation d'Information et de Défense de Consommateurs Musulmans -
association loi 1901

¹³ <http://www.asidcom.org/Un-seul-objectif-Interdiction-de-l.html>

Appendix 2: Survey 2 : What do you know about the halal status of foods?

In France, More than 20,000 persons have signed the petition "halalendanger" (Halal is in danger) in only 15 days.
<http://www.halalendanger.com/>

They are rejecting the idea that the religious concept of halal ought to be permanently altered by the industrial production and distribution community. They are also requesting that the CFCM (the French Muslim Council) act in a spirit of consultation, as soon as possible to develop a halal certification standard.

Those signing the petition also showed their solidarity with the Muslim organizations responsible for halal supervision (such as AVS, the Mosque of Lyon, the Mosque of Evry ...) who seek to avoid the worst possible outcome that can happen to them and the Muslim community: their disappearance from halal supervision. These organizations have seen that Muslim consumers are willing to defend them against an attempt by the industrial and distribution community to substitute the religious halal supervision bodies with non-religious private audits.

Will the Muslim consumer, as always, be the forgotten stakeholders in the HALAL market?

ASIDCOM, an Association organized under Law 1901 (i.e., a non-profit organization) has no financial interest in the outcome of any specific halal supervision. It is a 100% volunteer organization serving the consumers.

The official representatives of the Muslim community are responsible for allowing the halal supervision agencies to operate in a state of anarchy and to not work with government departments to crack down on commodity fraud that should be subject to enforcement through the consumer code. It is time that this attitude be changed.

Your opinion matters to us, thank you for taking the time to respond to the questionnaire. The results will be published shortly on the website of ASIDCOM. <http://www.asidcom.org>

A survey of what the Muslim consumer knows about and thinks about issues relating to Halal?

(To make the survey most useful, we kindly ask you to try to answer every question. This will help make the survey credible.)

Age:

Gender:

- Female
- Male

Social status:

- Single

- Married
- Divorced

If you have children, how many do you have:

Job [Title or brief description please]:

Are you:

- A practicing Muslim
- A non-practicing Muslim
- Not a Muslim

A - The Muslim consumer

1 - Why do you eat Halal meat (several choice are possible, select all that apply):

You are Muslim and you always eat halal:

- Because of my religious convictions
- Because of my ethical and moral convictions
- Because it is better to be seen eating halal in my social and family environment

You are not Muslim but you eat Halal meat:

- Because I find that the meat quality is better
- For convenience reasons
- Because the meat is cheaper

2 - Consumer protection.

In France, Halal control bodies (or supervision agencies) may or may not be affiliated with a religious institution. They also operate with serious economic constraints, so that the consumer requirements in terms of halal can often take second place. Who do you feel can defend and secure your rights as a Muslim consumer?

Religious institutions such as the CFCM (the Mosque of Lyon, or the Paris Mosque ...) who are involved with halal issues and markets:

- yes
- no

The Associations of Muslim Consumers (such as ASIDCOM in France) (<http://www.asidcom.org>):

- yes
- no

Any of the halal control bodies such as AVS, AFCAI, Halal Services, Mosque of Ivry, Paris Mosque, Lyon Mosque, MCI, Halal Correct, etc....):

- yes
- no

All of these organizations are necessary:

- yes
- no

B - Religious slaughter and animal welfare

1 - Do you think that you have mastered the issue of industrial halal slaughter techniques and the issues involved and know how the animals that you consume have been treated?:

- yes
- no

2 – Do you feel that you understand the major issues involved with the following methods of stunning.

Electrification or electrical stunning of the animal:

- yes
- no

Captive bolt:

- yes
- no

Gassing of the animal:

- yes
- no

3 - Do you know that that both of the first two methods are widely used for halal slaughter in France and in Europe. For example, at least 80% of halal poultry are stunned using an electric water bath before the cut?:

- No, I did not think that this has been happening
- In my opinion, it is impossible to use such techniques for halal slaughter
- I knew that I didn't know how hHalal slaughter was performed
- I knew because someone told me about this previously
- I know because I try to be well informed on issues of halal slaughter

4- Electronarcosis or electrical stunning of animals: this method consist of immersing the head of poultry into an electrified water bath.

In your opinion, this is?:

- Assuredly painful
- Provides relief for the animal

5 - Post-cut stunning using electrocution : When the animal is religiously slaughtered, it dies due to hemorrhage that follows the neck cut, but if the animal receives a stun (electrocution), immediately after its neck is cut, it may die from the effect of the stun and there is no practical way to determine the real cause of its death.

Would you agree to consume meat of a post-cut stunned animal?:

- yes
- no

6 - If there were several Islamic opinion on the issue, I would probably follow:

- A religious opinion favorable to this practice
- A religious opinion that advises to avoid this practice
- A religious opinion condemning this practice

7 - What are the kinds of slaughter that you allow for you own consumption?:

- A religious slaughter as defined by the Sunnah, i.e., without any stunning (the Sunnah is the way the Prophet Mohammed (pbuh) slaughtered animals.)
- A slaughter with pre-cut stun (electrical, captive bolt or gassing of the animal)
- A slaughter with an electric post-cut stun

C - Halal standards and animal protection

Following the expansion of the halal market, the European Union wanted to create a single European Halal Standard.

1- Would you support the creation of such a standard:

- yes
- no

2- Would you support the creation of a national standard:

- yes
- no

3- According to you, must a halal standard ensure:

Halal meat is obtained after a slaughter without any stunning:

- yes
- no

Animal welfare requirements that respects the religious requirements with respect to religious slaughter but imposes additional conditions on the treatment of animals:

- yes
- no

That the control of the compliance to the halal standards be the responsibility of an independent Muslim body:

- yes
- no

General questions

1 - Regarding the requirements for halal:

- I have tried to master the subject and feel comfortable that I know enough to make an informed decision.
- I do not understand many of the issues and am feeling overwhelmed by the issues and this questionnaire
- I prefer to leave the responsibility for halal to others and eat what is designated as halal without asking further questions

2 - The sacred dimension of halal:

- Is fundamental for me and I always try to respect it
- Is nothing more than a meaningless marketing tool
- Is no longer relevant in our secular societies

3 - The Muslim consumer:

- Currently exists
- Is slowly coming into existence
- Is an illusion

Appendix 3: survey 3 : Le Halal et Vous

Le consommateur musulman est capable de réformer le marché halal, il n'en tient donc qu'à vous de faire connaître vos exigences et les défendre.

➤ Votre Profil

Une Femme Un Homme Age : Département ou pays :

Statut matrimonial Célibataire Marié(e) Divorcé(e)

Nombre d'enfants 0 1 2 3 4 5 6 7 et plus

Votre profession (précisez le secteur d'activité svp)

.....

1- Savez-vous qu'il y a de la fraude sur le marché Halal ?

OUI

NON

2- A combien estimez-vous le pourcentage de la « fausse viande Halal » sur le marché français ? (entourez votre choix)

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

3- D'après vous qui sont les responsables de cette tromperie sur la marchandise Halal ? (Maximum 3 choix, numérotez par ordre d'importance, 1 pour le plus responsable etc...)

L'Etat le CFCM Les mosquées les certificateurs Les bouchers les consommateurs musulmans

4- Quand vous avez des doutes sur le caractère « Halal » :

Vous achetez car vous n'avez pas d'autres choix Vous achetez, malgré tout, car la culpabilité du non Halal

revient aux industriels et aux bouchers

Vous vous abstenez Non j'ai jamais eu de doute sur le caractère « Halal »

5- Accepteriez-vous de manger ?

- de la viande séparée mécaniquement (avec une machine à partir d'une carcasse déjà dépourvue de sa chair) Oui Non

- des brebis couscous (*la viande des vieilles bêtes issues de l'industrie de lait ou de la reproduction industrielle*) Oui Non

- les bêtes présentant des anomalies (une malnutrition ou des affections parasitaires les empêchant d'allaiter ou de fournir du lait à leurs propriétaires) Oui Non

- un poulet industriel (poussin de 40 jours maximum) Oui Non

- de la charcuterie à base de viande séparée mécaniquement et de graisse animale Oui Non

6- Etes-vous prêt à payer plus cher vos produits Halal ? (pour compenser les frais supplémentaires de contrôle, ralentissement de la production, investissement en matériel...que nécessite une production conforme à vos exigences et convictions religieuses) Oui Non

▪ Si oui, Combien par rapport au prix d'habitude?

10% 20% 30% 40% 50% 80%