# Religion and companies: the keys for doing business in the Islam

# Religión y empresas: claves para hacer negocios en el Islam

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**Abstract**: The aim of this research has been to analyze empirically the internal demand and its future evolution, as well as whether and how the Spanish retailers are currently satisfying the needs of Muslim residents in Spain. There are numerous articles about the great market potential Halal as the result of growth of the Muslim population and the expected future growth of the population. These studies in Spain are based on the great potential of Spanish manufacturers to increase their sales through exports, finance and tourism. Once reviewed the existing bibliography, we have not found any research that covers our topic. It will bring managerial implications in the areas of innovation, production, distribution and marketing that will guide and orientate the decisions that manufactures, distributors, commercial managers or other operators can make in the retail market.
This research has also identified an interesting opportunity in adapting retailer's assortment to a segment of the population that is increasingly concerned by Halal products in each act of consumption. The main retailers Mercadona, Carrefour, Dia and Auchan, should include products with the Halal Guarantee to identify products that satisfy the requirements of the Halal Guarantee Islamic Law.
This paper has been organized as follows: First, we explain the retail market in Spain. Second, we extrapolate population and consumption to 2050. Later we explain the methodology and results.

And, after summarizing the conclusions, we discuss the limitations. Lastly, we present future lines of research.

**Keywords:** Halal, Modern Distribution, Meat Consumption, forecast, Muslim population

**Resumen**: El objetivo de esta investigación ha sido analizar empíricamente la demanda interna y su evolución futura, tanto como si, y de qué forma, los minoristas españoles satisfacen actualmente las necesidades de los residentes musulmanes en España. Hay numerosos artículos sobre el gran potencial del mercado Halal como resultado del crecimiento de la población musulmana y el crecimiento futuro esperado de la población. Estos estudios en España se basan en el gran potencial de los fabricantes españoles para aumentar sus ventas a través de las exportaciones, las finanzas y el turismo. Una vez revisada la bibliografía existente, no hemos encontrado ninguna investigación que cubra nuestro idea. Sus conclusiones traerán implicaciones administrativas en las áreas de innovación, producción, distribución y comercialización que guiarán y orientarán las decisiones que los fabricantes, distribuidores, gerentes comerciales u otros operadores puedan tomar en el mercado minorista.
Esta investigación también ha identificado una oportunidad interesante para adaptar el surtido de minoristas a un segmento de la población que está cada vez más preocupada por los productos Halal en cada acto de consumo. Los principales minoristas Mercadona, Carrefour, Dia y Auchan deben incluir productos con la Garantía Halal para identificar productos que cumplan con los requisitos de la Ley Islámica de Garantía Halal.
Este documento se ha organizado de la siguiente manera: En primer lugar, explicamos el mercado minorista en España. En segundo lugar, extrapolamos la población y el consumo a 2050. Más adelante explicamos la metodología y los resultados. Y, luego de resumir las conclusiones, discutimos las limitaciones. Por último, presentamos futuras líneas de investigación.

**Palabras clave:** Halal, Distribución Moderna, Consumo de Carne, predicciones, población musulmana.

## 1.INTRODUCTION

The Muslims population is increasing in Europe, weighing 4,6% in 2016 over total Europe´s population to 11,2 % in 2050 (Pew 2018). There is a quite homogenous consensus on the academic marketing literature that this segment of consumer could be a potential new segment to explore in terms of consumption for a variety of sectors, such as cosmetic, drinks, food, tourism or financial.
Approaching these segments requires for the companies and immersion of its culture, and more specifically to Halal, Haram and Masbouq concepts regarding consumption.

Halal Term (Instituto Halal, 2019), includes everything that is allowed, and therefore, is beneficial and healthy for the human being, promoting an improvement in the quality of life and the reduction of health risks. It could be translated as authorized, recommendable, healthy, ethical or non-abusive. Muslims today understand the term Halal, as a way of life, a global and integral concept that influences and affects everyday issues, such as food, hygiene, health, economy, fashion, commerce or tourism.

All food are Halal, except those identified as Haram by Sharia, such as pork, improperly slaughtered animals, ethanol and other toxins, carnivorous animals, blood, contaminated and dangerous foods, etc. The Halal industry not only includes the food sector, it also includes Tourism, Banking and Finance, Drugs, Fashion and Cosmetics.

Haram term refers to everything that is prohibited, not allowed, is harmful or abusive. They are considered Haram, according to Islamic regulations:

The meat of the animal found dead, the blood, pork and wild boar, as well as its derivatives. The animals sacrificed without the invocation of the name of God. Carnivorous animals and scavengers, as well as birds with claws. Alcohol, alcoholic beverages, harmful or poisonous substances and toxic plants or beverages.

Ingredients from animals or Haram products, such as pork gelatin. Additives, preservatives, dyes, flavors, etc., produced from Haram ingredients. The interest, the usury and the abusive speculation. The bets in the game. Pornography

Masbouqis is a concept that refers to everything for which its origin cannot be clearly determined or there are differences in its assessment in the different Quranic traditions, in which case each Muslim decides his personal position before them.

The Halal Institute prefers not to issue certifications for dubious foods, such as animals from hunting, given that it is quite complicated to apply our control model to offer maximum guarantees to consumers.

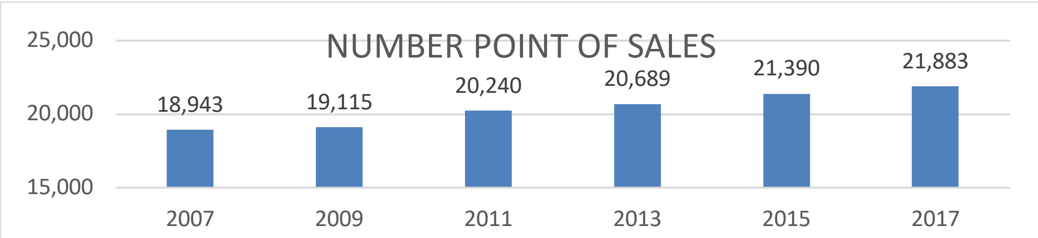
Focusing in Spain, The Halal economy is seen as a potential new segment to grow for a big number of Spanish manufactures, and nowadays more than 300 companies (Halalconsulting 2019) in Spain achieved Halal certificate to commercialize products. Those companies currently are focusing on exports.

Our research, despite this, focused on a different approach. We estimated in a first step, how big could be the opportunity in the domestic market with 2050 horizon. Secondly, we checked real situation of the offer in modern distribution and determining the current gaps between offer and demand.

Traditional distribution is not covered in the research. Understanding that today could be probably one of the relevant distribution channels for Halal food

## 2. THE RETAIL IN SPAIN

In 2017, there were 21,553 supermarkets in Spain, with a sales area of 11.4 million square meters (Alimarket 2018). The number of supermarkets has grown by 13.7% since 2007. The average density in Spain is 248 m2 per thousand inhabitants.




Source: Alimarket, 2018

| | | |
|---|---|---|
| HIPERMARKETS (more than 2,500 m2) | 477 | 2,2% |
| LARGE SUPERMARKET (1,000 - 2,499 m2) | 3.816 | 17,4% |
| SUPERMARKETS (400 - 999 m2) | 6.047 | 27,6% |
| SMALL SUPERMARKETS (less than 399 m2) | 11.543 | 52,7% |
| TOTAL | 21.883 | 100,0% |

Source: Alimarket, 2018

It is a concentrated market where the 6 main chains absorb almost 50% of the market. Mercadona has reinforced its position as leader of the Spanish distribution in 2018 according to the report 'Balance of Distribution and Large Consumption 2018' of Kantar Worldpanel. Mercadona closes the year with 24.9% market share. This means, 1 out of every 4 euros is spent in Mercadona. Carrefour captures 8.4% of the business in 2018 although it loses 0.3 points with respect to 2017.

| MARKET SHARE IN VALUE | | |
|---|---|---|
| | 2007 | 2018 |
| MERCADONA | 24,10% | 24,90% |
| CARREFOUR | 8,70% | 8,40% |
| DIA | 8,20% | 7,50% |
| EROSKI | 5,50% | 3,30% |
| LIDL | 4,30% | 4,80% |
| AUCHAN | 3,40% | 3,50% |
| RESTO | 45,80% | 47,60% |
| TOTAL | 100,00% | 100,00% |

Source: Kantar, 2019

The supermarket format continues its trend of increasing market share in food (representing 60%), mainly coming from traditional stores, which still take one out of every five euros spent on food in Spain, a phenomenon that does not occur in other countries.

| CHANNEL MARKET SHARE IN VOLUME (MEATS) | |
|---|---|
| | 2018 |
| HYPERMAKETS | 10,5% |
| SUPERMARKETS | 66,3% |
| TRADITIONAL STORES | 22,4% |
| ECOMMERCE | 0,8% |
| TOTAL | 100,0% |

Source: MAPA, 2019

Profitability is obviously fundamental. Managers of the sector complain about the fierce competition, causing "price wars". The prices of Spanish retailers are 6 points lower than the average of EU retailers (Inforetail, 25019)

A key factor for the evolution of the sector is demography. Not only the stagnation ("if there are no more mouths there will be no more sales") but also the aging that changes the habits of the buyers and will bring consequences in the shelves of the retailers

Another determining factor is the size of households. Half of them in Spain are composed of one or two people. Smaller and more senior households will decrease the storage capacity and increase the convenience purchase.

The abundance of nearby stores ("there is a supermarket within ten minutes walking from your home as a maximum") is the determining factor for the online sale of food only represents 1.6% compared to 10% in countries like the United Kingdom. For the business side also has risks: economic (logistics is very expensive); social (in the interests of profitability, the distribution would not reach remote areas); and the environmental one (the super is the most sustainable format because the purchase is made by walking).

Fresh, and its complicated logistics, is another barrier on Internet commerce. The Spanish client, who spends a third of his budget on fresh products (Nielsen, 2018), likes to touch, see, smell them and that cannot be done through a screen.

The convenience also means a healthier assortment, adapted to groups such as vegans or celiacs; more ecological and sustainable (closer suppliers, with less plastic and cleaner transport); with more presence of takeaway (on the go) and prepared or gourmet dishes.

## 3. METHODOLOGY:

The methodology followed to analyse the current situation of the modern distribution in relation to the range of food and beverage products of Halal certified products has been carried out in three different phases.

In the first stage, a quantitative research was carried out through a store check in the main distribution chains in Spain.

In a second stage a qualitative research was carried out for a better understanding of the results of the store check and to define previous assumptions for determining demand.

In last stage, we analysed the current demand for Halal-certified food products and forecast their evolution in the coming years

### 3.1: Quantitative research: In store check

For the development of quantitative research a non-probabilistic sample has been selected. The sample was selected through our subjective judgment instead of making the selection at random. The reason has been our experience in the sector. The selected technique has been the sampling for convenience due to the high concentration of the sector and the centralized management of the points of sale.

The selected sample was Mercadona, Carrefour, Dia, Lidl and Auchan. Those retailers absorb a total value market share of 49% in Spain. The selected sample was 4 different locations of each of these retailers in Madrid. To notice, Madrid represents 15% of total muslin population in Spain. These retailers are characterized by having a centralized assortment for the different stores, which allows us to extrapolate the results in the city of Madrid through visits to twenty stores.

All food and beverage categories were analysed in the store check. These points of sale organized their sale rooms in the following eighteen sections:

Section: Beers, Liqueurs, Whiskeys and Gins.
Section: international wine, white and rosé wines, sparkling wines and wines of denomination of origin.
Section: mineral waters, soft drinks and isotonic drinks.
Section: sausages and olives.
Section: soups and pures, cooked dishes, meat preserves, pasta and rice and vegetables.
Section: canned vegetables, canned fish and asparagus.
Section: oils, condiments and sauces.
Section: Spanish dietetics and foods.
Section: flours, confectionery, chocolates and jams.
Section: coffee, cereals, sugar and infusions.
Section: cookies, sliced bread, industrial patisserie and toast.
Section: dairy products.
Section: charcuterie.
Section: fish and shellfish
Section: butchery.
Section: greengrocer
Section: cheeses.

From the five visited retailers, with the implementation of their stores nationwide, only Auchan chain had some references with a Halal certificate. The products offered were five different chicken presentations. What was also found is that all these references had a premium price between 12% and 32% vs. to the equivalent reference.

| | RSP (€/KG) | | VARIATION | |
|---|---|---|---|---|
| REFERENCES | HALAL | EQUIVALENT | DIFFERENCE (€) | DIFFERENCE (%) |
| Chicken breast | 7,99 | 6,05 | 1,94 | 32,10% |
| Chicken drumsticks | 5,19 | 4,59 | 0,6 | 13,10% |
| Chicken legs | 5,35 | 4,29 | 1,06 | 24,70% |
| Chicken wings | 5,55 | 4,95 | 0,6 | 12,10% |
| Clean chicken | 3,29 | 2,59 | 0,7 | 27,00% |

Source: Source: Own elaboration, 2019

The offer of Halal products was well identified on Alcampo's shelf.


Source: Source: Own elaboration, 2019

### 3-2 Qualitative research

The qualitative research has been carried out through an in-depth interview. The type of interview was semi-structured in order to be able to alter the questions and time of the interview and also be able to guarantee the relevant topics of the investigation.
For a better understanding of the results obtained in the store check and to establish the starting hypotheses to estimate the potential demand of the food and beverage products, we had an interview with the owner of a

company dedicated solely to the manufacture of food products allowed for the Islamic population and with Halal certificate.

## 3.3 Quantitative research: time series

### 3.3.1 Muslims population evolution in Spain from 2018 to 2050.

The goal is to quantify the potential halal meat market. Based on the previous academic literature, in store checking, and qualitative research we assumed that the greatest potential demand in the food and beverage sector is the meat category.

First step was to study the growth path for the Muslim population in Spain. We need to take into account that current data protection law in Europe, does not allow to ask for religion in the census. Under that premise, all the figures we used, are based on different time series analysis methodologies.

We only found two potential sources for information. Pew research center (PEW). This research gives estimations towards 2050 of the increasing weight of the muslins population in different European countries. Their estimations are not only based on immigrants but other ratios as fertility rates.

Another potential source is coming from the Observatorio Andalusi (UCIDE). That research provides figures for the weight on Muslins in Spain for 2018, and it is based on different nationalities and, the predominant religions on those countries.

Results and figures from those two sources are different. The source selected is PEW, because it allows us to extrapolate the same methodology for any other European country, and it provides estimations for next decades about the evolution of the segment.

Another important source, in terms of "absolute" numbers is the Instituto Nacional de Estadística, (INE). This official organization provides estimations of the evolution of the total Spanish population for 2050.

| | Estimated size of Muslin population (% over total Population 2018) | Total Muslins 2018 | Estimated size of Muslin population (% over total Population 2050) | Total Muslins 2050 |
|---|---|---|---|---|
| Pew Estimation | 2,50% | 1.213.142 | 6,80% | 3.375.725 |
| UCIDE estimation | 4,30% | 1.993.000 | Na | Na |

Source: Own elaboration based on information of PWE and UCIDE, 2019

Additionally we calculate an annual average growth between 2018 and 2050 in order to apply the increasing weight of muslins population into the Spanish population forecast on a yearly bases.

| | 2050 | 2045 | 2040 | 2035 | 2030 | 2025 | 2018 |
|---|---|---|---|---|---|---|---|
| Total Population Spain | 49.643.013,97 | 49.660.986,30 | 49.465.504,61 | 49.160.223,38 | 48.731.578,23 | 48.039.828,22 | 46.659.301,59 |
| Total Muslimn population | 3.375.724,95 | 3.051.046,85 | 2.714.419,57 | 2.375.053,29 | 2.034.543,39 | 1.690.401,46 | 1.213.141,84 |
| Weight (%) | 6,80% | 6,14% | 5,49% | 4,83% | 4,18% | 3,52% | 2,60% |

Source: Source: Own elaboration based on information of PWE and INE, 2019

Previous forecast shows more than 2 million new population of muslins increase in Spain for the coming years.

### 3.3.2 <u>Estimation of meat consumption of the Muslims population in Spain.</u>

For the estimation of the potential demand in the modern distribution we use the panel elaborated by the Ministerio de Agricultura, Pesca y Alimentación (2019) that allows us to have a complete information about the consumption of food and drinks of the residents in Spain during the year 2018. It is necessary to keep in mind that tourism consumption or food service consumption is not considered. The sample of this research is 8,000 households.

Total spend on Meat the Spanish Households was 9% of total food in 2018.

Our approach contains a linear hypothesis. We assumed that the behavior of muslin population in Spain regarding both, per capita consumption in kg and per capita spending will be the same as it is for the rest of Spaniards.

To extrapolate those figures of consumption, we use as initial figures for 2018. Over that initial numbers, we applied an increase/decrease rate. Such as an increase rate is coming from Euromonitor forecast source.

To take into account that Euromonitor estimations of growth includes all kind of meat, non Halal, such as pork, too.

In order to make a more accurate estimation applied for Modern distribution, we deduct 22.4% of the total estimation of consumption. This figure represents the value market share of traditional stores in the total distribution market in Spain (MAPA, 2018).

Same methodology and source was applied for prices increases too.

The obtained figures refers to the total potential consumption for Spain.

| | 2050 | 2045 | 2040 | 2035 | 2030 | 2025 | 2018 |
|---|---|---|---|---|---|---|---|
| Consumption per capita, Meat (exc. Pork). Kg | 27,8 | 28,9 | 30,1 | 31,3 | 32,6 | 33,9 | 35,9 |
| Spend per capita, Meat (exc. Pork). € | 522 € | 482 € | 445 € | 411 € | 380 € | 351 € | 314 € |
| Total Kg | 72.748.246 | 68.445.671 | 63.389.267 | 57.736.938 | 51.485.980 | 44.530.085 | 33.805.981 |
| Turnover | 1.366.631.749 € | 1.140.945.208 € | 937.614.575 € | 757.795.797 € | 599.621.574 € | 460.184.103 € | 295.527.146 € |

Source: Own elaboration, 2019

## Geographical distribution:

Muslins population is not distributed homogenously across Spain. Since the Muslims population is not homogenously distributed in Spain, there is a clear potential for modern distribution and manufactures in starting a halal meat offer in main regions.

| Regions with 100K or more muslin | | % |
|---|---|---|
| Cataluña | 533.600 | 27% |
| Andalucía | 324.680 | 16% |

| | | |
|---|---|---|
| Madrid | 290.991 | 15% |
| Valenciana | 211.056 | 11% |
| Murcia | 105.326 | 5% |

Source:UCIDE 2018

| | 2050 | 2045 | 2040 | 2035 | 2030 | 2025 | 2018 |
|---|---|---|---|---|---|---|---|
| Cataluña: Muslin population | 547.259 | 545.102 | 542.954 | 540.813 | 538.682 | 536.559 | 533.600 |
| Total Kg | 11.793.659 | 12.228.551 | 12.679.480 | 13.147.037 | 13.631.835 | 14.134.510 | 14.869.549 |
| Turnover | 221.552.960 € | 203.842.068 € | 187.546.981 € | 172.554.519 € | 158.760.550 € | 146.069.269 € | 129.987.508 € |
| Andalucía: Muslin population | 332.991 | 331.679 | 330.371 | 329.069 | 327.772 | 326.480 | 324.680 |
| Total Kg | 9.040.402 | 9.373.768 | 9.719.427 | 10.077.831 | 10.449.452 | 10.834.777 | 11.398.218 |
| Turnover | 134.808.499 € | 124.031.939 € | 114.116.855 € | 104.994.380 € | 96.601.153 € | 88.878.880 € | 79.093.599 € |
| Madrid: Muslin population | 298.440 | 297.264 | 296.092 | 294.925 | 293.762 | 292.604 | 290.991 |
| Total Kg | 6.431.501 | 6.668.663 | 6.914.570 | 7.169.546 | 7.433.923 | 7.708.050 | 10.449.603 |
| Turnover | 120.820.685 € | 111.162.307 € | 102.276.018 € | 94.100.097 € | 86.577.757 € | 79.656.752 € | 91.348.966 € |
| Valenciana: Muslin population | 216.459 | 215.605 | 214.756 | 213.909 | 213.066 | 212.226 | 211.056 |
| Total Kg | 4.664.772 | 4.836.786 | 5.015.143 | 5.200.077 | 5.391.830 | 5.590.654 | 5.881.386 |
| Turnover | 87.631.337 € | 80.626.109 € | 74.180.876 € | 68.250.874 € | 62.794.915 € | 57.775.104 € | 51.414.250 € |
| Murcia: Muslin population | 108.022 | 107.596 | 107.172 | 106.750 | 106.329 | 105.910 | 105.326 |
| Total Kg | 2.327.922 | 2.413.764 | 2.502.772 | 2.595.062 | 2.690.755 | 2.789.976 | 3.782.299 |
| Turnover | 43.731.797 € | 40.235.888 € | 37.019.440 € | 34.060.115 € | 31.337.357 € | 28.832.256 € | 33.064.326 € |

Source: own elaboration based on data form UCIDE, PEW and INE, 2018

## 4. CONCLUSIONS

The main conclusions of the qualitative research were the following ones:

The modern distribution does not currently have as a priority the listing of Halal certified products. This statement is consistent with the store check made at the points of sale, where the offer of Halal products is almost non-existent.

The usual channel of purchase by Islamic consumers is the traditional channel that is run by the Muslim population. The explanation is that the Muslim population in Spain is first generation and they only trust this channel because the modern distribution doesn´t have Muslim vendors. For the first-generation Muslim population, the greatest guarantee is that a Halal product is sold by a Muslim, since the responsibility for non-compliance remains in the seller. This barrier disappears in countries like France and Germany where the Muslim population is third or fourth generation. Muslims born in Spain are more open to consumption in modern distribution. Spain is entering in this second generation of Muslims. France, for example, is already in the fourth generation of Muslims, so consumption in the modern channel is widespread.

There is no study of the potential demand either by suppliers or the modern distribution to estimate the potential demand of this market. A study of these characteristics could provoke a change of attitude on the part of the modern distribution to reference these products.

The potential demand in the modern distribution will be focused only for the next few years on the consumption of meats.

The barrier of distrust on the part of the Muslim population to buy these products in the modern distribution could be overcome through specific marketing campaigns.

The price of the products offered in Spain depends on brand equity and the quality of the products.

The cost of certification is approximately 2,600 euros per year. Therefore, it is not an entry barrier for manufacturers to obtain Halal certification.

The main conclusions of the quantitative research are the following ones:

In the modern distribution there is no appropriate offer either in breadth (number of categories) or in depth (number of references) by category for the Muslim population.

Among the five visited chains, all of them with nationwide implementation, only the Auchan chain has some references with a Halal certificate. Those references offered were five different chicken presentations.

It was also found is that all these references had a premium price between 12% and 32% vs. to the equivalent reference. Although this difference in price can be motivated by reasons of brand value and product quality as it was indicated in the in-depth interview maintained in the qualitative part of this research.

The halal meat segment could be a potential grow area both distributors and manufactures. Our estimation, even considering a gradual decrease of the meat consumption per capita, shows that total Muslims meat consumption will be multiplied by two during the next years.

The estimation also shows a promising increase of 4 times in the market segment, scope 2050. Such an increase is mainly due to the fact on an increasing population for the future.

Since the Muslims population is not homogenously distributed in Spain, there is a clear potential for modern distribution and manufactures in starting a halal meat offer in located areas: Cataluña, Andalucia and Madrid as the main ones. These regions potentially absorb 58% of the total consumption of the Muslim population.

## 5. LIMITATIONS

The limitations of this research are based on the quantitative part since the store check was made only in Madrid and through a numerical distribution of twenty points of sale. Given the centralization of the ranges at a regional level, the extrapolation of results at the national level may incur some inaccuracies.

The estimation of the demand has been calculated only taking into account the meats category, as it was recommended in the qualitative research. In this sense, the potential demand in modern distribution could be even greater.

In the calculation of the demand estimated, the starting hypothesis was that the amount consumed by Muslims is the same as Spanish per capita consumption.

We have assumed that the entire Muslim population demands Halal products.

We did not introduce a potential increase in the muslin income per capita, that could even increase our estimations.

## 6.- FUTURE LINES OF RESEARCH

Consequently, developing a new range of Halal meat products is an excellent opportunity for modern distribution. It would be convenient to analyze how the value market share of traditional stores would evolve with the incorporation of modern distribution in this market segment. Role of the brand as a guarantee of quality of Halal products is also a relevant concept to develop.

Finally, it would be necessary to study the potential demand in two different lines: i) other product categories ii) new consumers, no Muslims, who could buy Halal products by association of the concept with healthy food

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