



الغرفة الإسلامية للتجارة والتنمية
Islamic Chamber of Commerce and Development
Chambre Islamique de Commerce et de Développement

UNLOCKING THE UK HALAL ECONOMY

A Strategic Outlook for Ethical
Growth and Global Positioning

AN INNOVATIVE
ROADMAP

to empower leaders and stakeholders
with the knowledge and strategy to shape
A SUSTAINABLE HALAL FUTURE



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List of Abbreviations

Abbreviation	Full Term	Abbreviation	Full Term
AHDB	Agriculture and Horticulture Development Board	API	Active Pharmaceutical Ingredients
ASEAN	The Association of Southeast Asian Nations	BLME	Bank of London and The Middle East
BVA	British Veterinary Association	CAGR	Compound Annual Growth Rate
DBT	Department for Business and Trade	DEFRA	Department for Environment, Food & Rural Affairs
FCA	Financial Conduct Authority	FDI	Foreign Direct Investment
FSA	Food Standards Agency	GCC	Gulf Cooperation Council
GIEI	Global Islamic Economy Indicator	HFA	Halal Food Authority
HMC	Halal Monitoring Committee	ICCD	Islamic Chamber of Commerce and development
OIC	Organisation of Islamic Cooperation	OTC	Over-The-Counter
R&D	Research and Development	SGIE	State of the Global Islamic Economy Report
SMEs	Small and Medium-sized Enterprises	UK	United Kingdom
USD	United States Dollar		



Glossary of Terms

Term	Definition
Eid	A significant Islamic festival. The report implicitly refers to Eid al-Fitr, which marks the end of Ramadan, and is a major driver of consumer spending on food, gifts, and celebratory activities.
Fintech	A term combining "financial" and "technology", referring to the use of new technology and innovation to improve and automate the delivery and use of financial services. In the report, this specifically relates to Shari'ah-compliant digital banking, investment platforms, and finance solutions.
Fiqh	Islamic jurisprudence. It refers to the human understanding and interpretation of the divine Islamic law (Shari'ah). Differences in Fiqh among scholars can lead to variations in standards, for example, in Halal certification.
Halal	An Arabic term meaning "permissible" or "lawful" according to Islamic law. In the context of the modern economy, it extends beyond food to include products and services that are ethically produced, sourced, and financed.
Halalpreneurs	A term blending "Halal" and "entrepreneurs". The term refers to a new generation of business owners who create and market products and services that are compliant with Halal principles, often leveraging digital platforms and e-commerce to reach their target audience.
Haram	An Arabic term meaning "forbidden" or "unlawful" according to Islamic law. It is the direct opposite of Halal and refers to any product, service, or action that is not permissible for Muslims, such as the consumption of pork or alcohol.
Iftar	The evening meal with which Muslims end their daily fast during the month of Ramadan. It is often a communal meal, driving significant activity in the food and hospitality sectors.
Mipster	A term created by merging "Muslim" and "hipster", referring to a young, trend-conscious, and often Western-educated Muslim who navigates a modern, cosmopolitan identity while adhering to their faith. This demographic is a key driver of trends in sectors like modest fashion and cosmetics.
Qibla	The direction that Muslims should face when praying, which is towards the Kaaba in Makkah. Providing the Qibla direction is a key feature of Muslim-friendly hotels and facilities.
Ramadan	The ninth month of the Islamic lunar calendar, observed by Muslims worldwide as a month of fasting, prayer, reflection, and community. It is associated with a significant increase in consumer spending, often referred to as the "Ramadan Economy".
Shari'ah	The religious law forming part of the Islamic tradition, derived from the Qur'an and the teachings of the Prophet Muhammad (PBUH). It provides the guiding principles for all aspects of Muslim life, including finance, diet, and ethics.
Sukuk	Commonly referred to as "Islamic bonds", Sukuk are Shari'ah-compliant financial certificates. Unlike conventional bonds, which represent a debt obligation, Sukuk represent an ownership interest in an underlying asset, with returns linked to the performance of that asset.
Takaful	An Islamic insurance concept based on the principles of mutual assistance and shared responsibility. Participants contribute to a pooled fund to mutually guarantee each other against loss or damage. It is presented as an ethical alternative to conventional insurance.
Tayyib	An Arabic term meaning "good", "wholesome", "pure", or "ethical". In the context of the Halal economy, it represents a standard beyond mere permissibility, requiring that products also be sustainably and ethically produced. The convergence of Halal and Tayyib is a key driver of the market's appeal to a wider audience.



Foreword by the Secretary General



The global Halal economy stands today as a dynamic, multi-trillion-dollar force, anchored in the principles of Halal and Tayyib (wholesomeness, purity, and ethical integrity) that increasingly appeals not only to Muslim consumers but also to a growing number of non-Muslims worldwide.

The United Kingdom holds immense potential to lead the Western Halal market, supported by its vibrant Muslim community, advanced industrial base, and globally respected standards.

Yet, realizing this leadership demands moving beyond organic growth toward coherence, standardization, and a unified strategic vision.

Yousef Hasan Khalawi
Secretary General

In this context of expanding global opportunity and rising demand, we are pleased to present this strategic report, [“Unlocking the UK Halal Economy.”](#) It serves as a roadmap to identify existing gaps and chart a clear strategy, built on four key pillars: Governance, Enterprise, Trade, and People, to align efforts and unlock the UK’s full potential.

This report offers both a call for strategic clarity and a framework for progress. It maps the Halal ecosystem, identifies structural challenges, and outlines practical pathways for progress. Ultimately, it seeks to transform the UK’s Halal economy from a promising market segment into a cornerstone of national economic strength and global influence.

We believe this publication will serve as an essential reference for policymakers, investors, entrepreneurs, and researchers alike, providing data-driven insights and strategic guidance to elevate the UK Halal economy from untapped potential to a position of global leadership.

Executive Summary

The United Kingdom is slowly becoming a pivotal player in the global Halal economy. It is strengthening its role as a key player in the global Halal economy through leveraging its young and diverse Muslim community, the rapid growth of ethically conscious consumers, and its long-standing reputation for quality, innovation, and regulatory excellence. However, this progress is limited by the lack of a unified national strategy, resulting in a fragmented landscape which prevents the UK from fully achieving its potential as the top Western hub for Halal trade and thought leadership.

The UK Halal economy is a significant, multifaceted contributor to national prosperity, encompassing six interlinked sectors: Halal food and beverages, Islamic finance, modest fashion, Halal-friendly tourism, and the emerging pillars of pharmaceuticals and cosmetics. Together, these sectors form a dynamic market valued in tens of billions of pounds, with significant potential for continuous growth. [The UK holds the 14th position in the State of the Global Islamic Economy Report's Global Islamic Economy Indicator \(GIEI\)](#), an remarkable achievement for a country without a Muslim majority, highlighting its strengths in high-value lifestyle areas.

Key insights from this report include:

- **A Paradoxical Position:** The UK exhibits a strategic paradox. It is a world leader in high-value sectors such as Islamic finance, modest fashion design, and Halal media, yet it lacks a cohesive national strategy for its foundational Halal food sector, which remains hindered by fragmented certification and inconsistent government engagement.
- **Deep-Rooted Authenticity:** The UK's Halal industry is characterized by its grassroots origins, dating back to 1950s. This heritage comes from community-led initiatives and tells a strong story of trust and honesty. This is an important asset on the global stage, but it is not used to its full potential.
- **Demographic Dividend:** The market is driven by a young, tech-savvy, and wealthy British Muslim demographic that sets trends worldwide. Their demand for ethical, sustainable, and innovative products and services shows where the global Halal economy is headed.
- **Sectoral Strengths & Weaknesses:** While Islamic Finance thrives under a supportive regulatory framework, and Modest Fashion benefits from the UK's creative industries, the Halal food sector faces a "certification trilemma" that fragments the market. The growing sectors of pharmaceuticals and cosmetics hold great potential but are limited by complex supply chains and regulatory challenges.

Despite its promising growth, the UK Halal economy faces persistent challenges. These include inconsistent certification standards, supply chain vulnerabilities, data gaps, and a lack of public understanding. To tackle these issues, coordinated action from the industry, government, and civil society is necessary. This report puts forward a strategic framework built on four key pillars to unlock the full potential of the UK's Halal economy:

- 1) Establish Cohesive Governance:** The creation of a government-supported UK Halal Economy Council to unify standards, manage a national accreditation scheme, and coordinate strategy across departments.
- 2) Foster Enterprise and Innovation:** Launching targeted financial and regulatory support for Halal SMEs and fund R&D in high-growth areas like Halal tech, sustainable materials, and pharmaceutical alternatives.
- 3) Drive Global Trade and Investment:** Implementing a proactive export strategy which lobbies for the Halal market in trade talks and promotes the UK as a top destination for FDI in high-value Halal sectors.
- 4) Develop People and Shape Perceptions:** Investing in a skilled, future-ready Halal workforce and launching a national campaign to change the public narrative from one of conflict to one of significant economic and cultural opportunity.

By prioritizing these areas, the United Kingdom can move beyond organic growth, resolve its internal policy contradictions, and strategically position itself as a global leader in ethical, inclusive, and sustainable economic growth. This approach will maximize both its economic returns and its role in the evolving global Halal ecosystem.

01

Introduction: Global Phenomenon and a Strategic Inquiry



52.198

242.980

132.478

8365

175

575

4768

876

1.1. Defining the Halal Economy: Beyond Compliance to a Value-Based Ecosystem

The Halal economy encompasses a wide array of sectors that provide goods and services permissible under Islamic law (Shari'ah).



Globally, this concept has evolved beyond a narrow focus on religious observance to represent an integrated system of ethical production and consumption. It caters not only to the world's 2 billion Muslims but also to a broader, cross-cultural demographic interested in the quality, transparency, and ethical principles associated with Halal-certified products and services.

This modern conception of the Halal economy represents a powerful convergence of two core Islamic principles: Halal (permissible) and Tayyib (wholesome, pure, and ethical). This alignment means that for a product to be truly part of this global ecosystem, it must not only be free from forbidden ingredients but also be produced in a manner that is safe, clean, sustainable, and socially responsible.

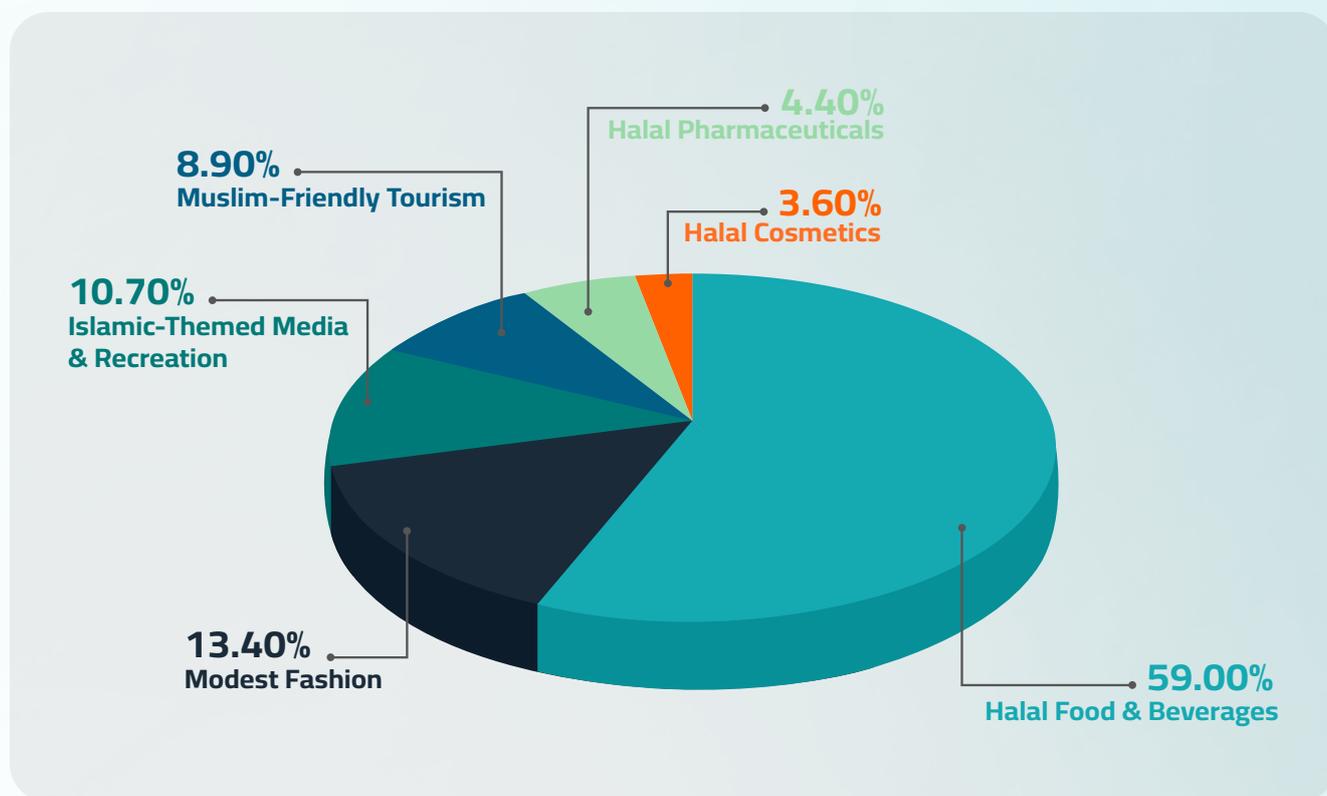
This dual focus is a primary driver of the sector's universal appeal, as it resonates strongly with the global consumer trend towards ethical and clean-label products, thereby expanding the market far beyond its traditional religious boundaries.

1.2. The Global Halal Economy Landscape

To fully appreciate the scale of this phenomenon, it is essential to understand the global context. In 2023, the world's Muslim population spent approximately \$2.43 trillion across the core Halal economy sectors. This spending is projected to reach \$3.36 trillion by 2028, growing at a compound annual growth rate (CAGR) of 5.3%.

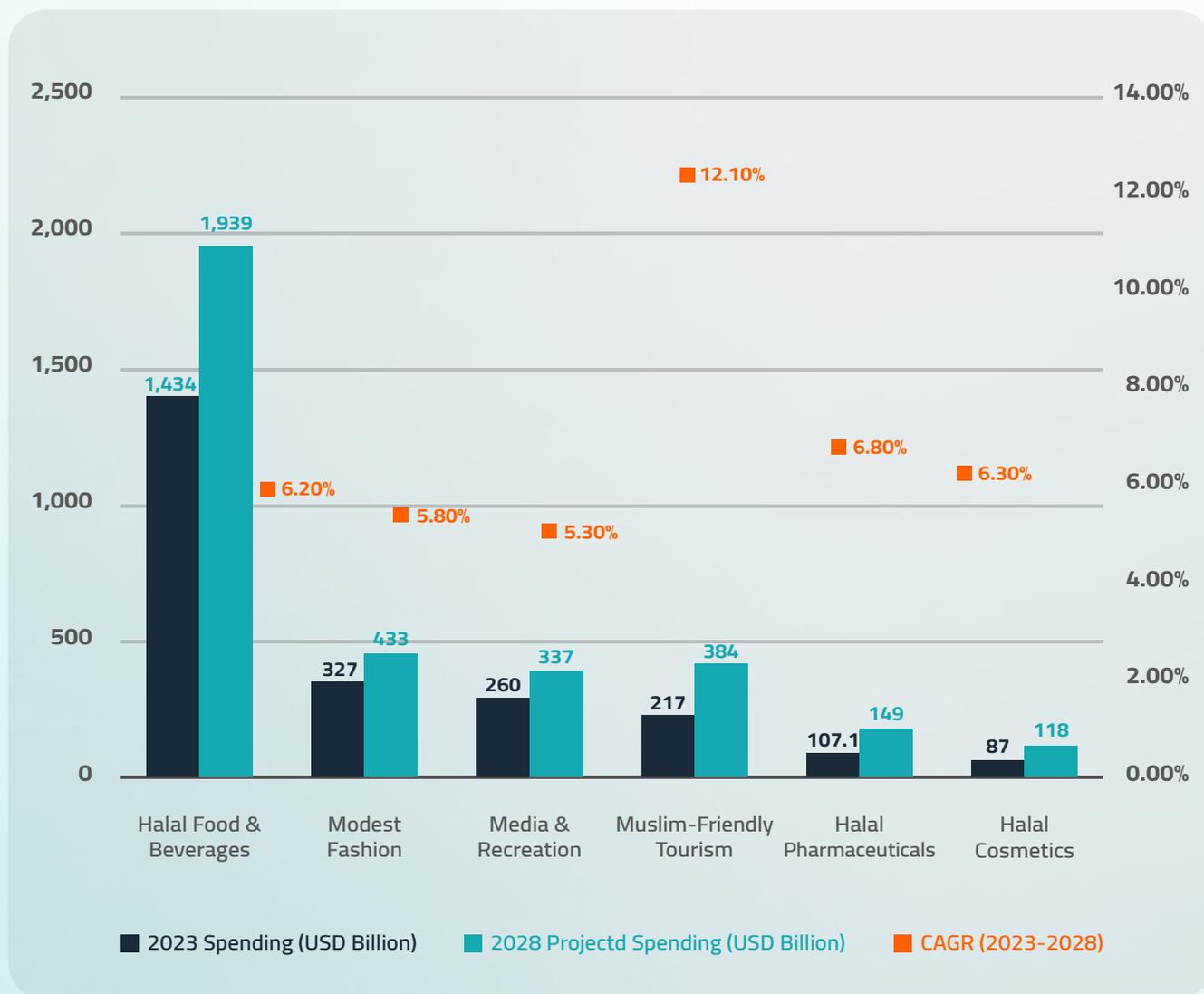
The data clearly illustrates the absolute dominance of the Halal food and beverage sector, which accounts for nearly three-fifths of all Muslim consumer spending. This underscores its foundational role in meeting daily, essential needs in accordance with Shari'ah. The subsequent ranking reveals a clear hierarchy of consumer priorities, with sectors related to lifestyle and identity (Modest Fashion, Media) following, succeeded by high-growth, value-driven sectors (Tourism, Pharmaceuticals, and Cosmetics). This distribution reflects a market that is grounded in necessity but is rapidly expanding into discretionary and aspirational consumption.

Distribution of Muslim Spending Across Halal Sectors (2023)



Source: DinarStandard, State of the Global Islamic Economy (SGIE) Report 2024/25.

Muslim Consumer Spending on Halal Sectors and Growth Forecasts (2023–2028)



Source: DinarStandard, State of the Global Islamic Economy (SGIE) Report 2024/25.

The projections confirm positive growth across all Halal sectors, signalling the sustained dynamism and increasing appeal of the Halal economy as a whole.

Notably, Muslim-friendly tourism is forecast to be the fastest-growing sector, with a remarkable 12.1% CAGR, reflecting a strong post-pandemic recovery and rising demand for travel experiences that align with cultural and religious values. The robust growth rates in pharmaceuticals (6.8%) and cosmetics (6.3%) also indicate a growing consumer awareness of health, wellness, and ethical product formulations.

This analysis confirms the immense economic importance of the Halal industry, with the food sector remaining dominant while exceptional growth opportunities emerge in other lifestyle-oriented sectors.

1.3. Report Scope, Objectives, and Methodological Considerations

In the context of a dynamic and expanding global market, this report will narrow its focus to provide a comprehensive analysis of one of its most influential Western hubs: the Halal economy in the United Kingdom.

The objectives of this report are to:



Detail the current landscape, historical development, and growth trajectory of the UK's key Halal sectors.



Analyse the economic contribution and consumer dynamics within each of these core sectors.



Map the ecosystem of key stakeholders, including consumers, businesses, governmental bodies, and certification authorities.



Examine the pivotal developments, legislative changes, and prevailing trends that have shaped the market between 2020 and 2025.



Synthesise the systemic, cross-sectoral challenges, from policy incoherence to fragmented standards, that inhibit the economy's growth, providing a holistic analysis of the contemporary landscape



Propose a forward-looking national strategic framework, articulating a clear vision for 2035 and outlining four actionable pillars for policy to secure the UK's position as a global leader in the Halal economy.

It is essential to acknowledge a significant methodological challenge in assessing the UK Halal economy: the fragmented and often inconsistent nature of the available data. Unlike more conventional sectors, there is no single official repository that provides comprehensive statistics on the Halal market. As a result, valuations and projections frequently differ between market research firms due to differences in scope, definitions, and methodologies. This issue is further exacerbated by the limited number of economic specialists focusing on this field, which can impact the depth and consistency of data collection and analysis.



However, these limitations should not deter action. On the contrary, they highlight the urgency of taking the initiative to undertake this study as both a timely responsibility and a call to relevant stakeholders to devote greater attention to the Halal economy. There is a pressing need to prioritise the systematic collection and professional analysis of reliable data, ensuring that the Halal industry receives the same analytical rigour and policy focus that is typically afforded to conventional economic sectors.

In this spirit, this report draws upon a wide range of reputable industry, governmental, and academic sources, with explicit citations to ensure transparency. Where discrepancies are identified, they are noted to present a comprehensive and balanced view of the market's scale, dynamics, and projected trajectory.

02



The UK Halal Economy: A Portrait of a Dynamic Market

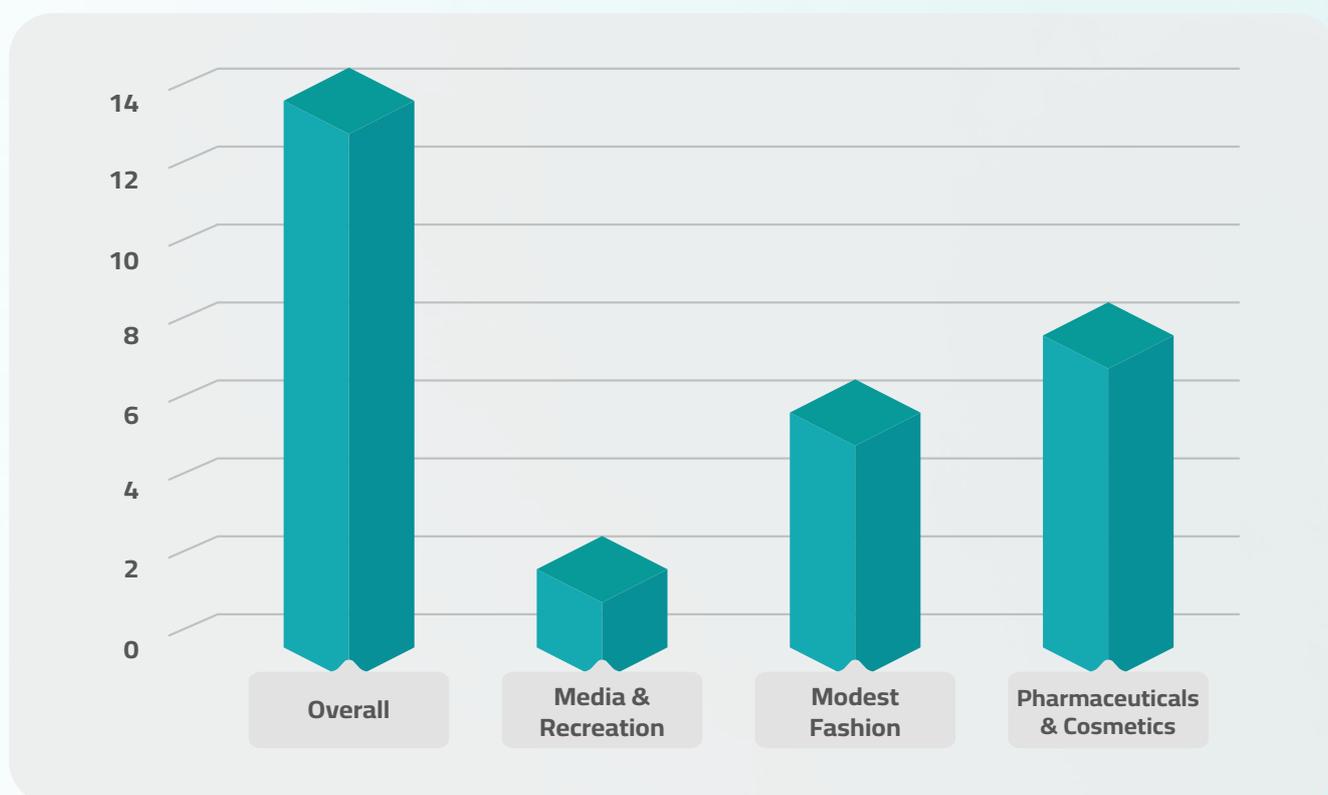




2.1. The UK's Standing in the Global Halal Economy

Within the vast global market established in the preceding chapter, the United Kingdom holds a uniquely influential position. According to the State of the Global Islamic Economy Report (SGIE) 2024/25, the UK ranks 14th overall in the Global Islamic Economy Indicator (GIEI), making it one of only two non-Organisation of Islamic Cooperation (OIC) countries in the top 15.

UK Position in the Global Halal Economy (Ranked 14th Overall | Top 15 in Key Sectors)



Source: DinarStandard, (SGIE) Report 2024/25.

This high ranking, disproportionate to its Muslim population size, signals a significant “soft power” advantage. The UK’s competitive edge lies not in mass commodity production, where nations like Brazil dominate Halal food exports, but in its sophisticated ecosystem for creating high-value brands, services, and creative content.

This is evidenced by its exceptional performance in lifestyle-focused GIEI sectors, where it ranks 6th in Modest Fashion, 8th in Pharmaceuticals & Cosmetics, and shares the top spot globally for Media & Recreation. This consistent high ranking indicates a mature consumer base and a developed industry infrastructure, underpinned by robust regulatory and innovation frameworks, positioning the UK as a potential global hub for Halal thought leadership, design, and services.

2.2. Market Scale, Economic Contribution, and Growth Trajectory

The Halal economy represents a substantial and rapidly expanding component of the UK's domestic economic landscape. While precise consolidated figures for the entire UK Halal economy remain elusive, individual sector valuations point to a multi-billion-pound industry with considerable future growth potential.

For instance, according to IMARC Group 2025



The UK Halal food market

Size reached **USD 89.52 billion** in **2024** and is expected to reach **USD 193.47 billion** by **2033**.

Research from the Halal Monitoring Committee UK and the University of Huddersfield revealed that



The Halal meat and poultry sector alone

Was valued at approximately **£1.7 billion** at the point of slaughter **in recent years**.

According to CORQ



The UK Modest fashion market

is forecast to be worth **£12.5 billion** in **2025**.

According to Spherical Insights



The UK Islamic finance market

a cornerstone of the Halal economy, held assets valued at **USD 7.25 billion** in **2023**, and is projected to grow steadily.

Furthermore, The Equi (2025) estimated that



The seasonal "Ramadan Economy"

injects a significant annual boost to be **worth between £800 million and £1.3 billion**, encompassing heightened spending on food, gifts, travel, and charitable giving.

This growth is propelled by powerful demographic tailwinds and increasing global demand for trusted, high-quality products that the UK is well-positioned to supply.

2.3. The Demographic Engine: The British Muslim Consumer

The foundational driver of the UK Halal economy is its dynamic and influential Muslim population.

The Muslim community in the United Kingdom is a significant and growing demographic.

The 2021 Census recorded 3.9 million Muslims in England and Wales, constituting 6.5% of the population, with demographic projections suggesting this figure could rise to 13 million by 2050. This community is notably youthful, with one in ten Gen Z consumers in the UK identifying as a practising Muslim and possesses significant economic clout.



British Muslim consumer behaviour is characterised by higher-than-average expenditure in key areas; for example, according to the AHDB, the average Halal shopper reports a weekly meat spend of £49.20, more than double the UK average of £19.46.

This youthfulness and economic activity make the British Muslim demographic a leading indicator for future trends in the global Halal market.

As digitally native, culturally fluent, and ethically conscious consumers, they are often early adopters and trendsetters, shaping demand for everything from sustainable modest fashion to innovative Islamic fintech products.

Consequently, understanding and engaging with this demographic is not merely a marketing exercise but a strategic imperative for predicting the future trajectory of the entire global Halal economy.



12.9	164,900	500
0.91	124,900	1,490
+63	37,800	2,07,320
81	22,500	3,900
2.30		100,000



03

Historical Foundations: The Authentic Roots of a Modern Industry





Pioneering the Market: Post-War Migration and the Birth of Halal Enterprise (1950s–1970s)

The UK Halal industry possesses a uniquely authentic and grassroots heritage, born not from top-down government strategy but from the entrepreneurial spirit of post-war migrant communities. This history, which began in the 1950s, provides a powerful narrative of community-driven enterprise that serves as a cornerstone of the market's modern identity.

Among the earliest pioneers was Haji Riaz Fazl Daad, who arrived in London in the 1950s. Recognising the needs of the nascent Muslim community, he started a grocery shop and began supplying Halal meat by travelling to slaughterhouses outside the city, hiring the facilities, and performing the slaughter himself before returning to supply the local area. This micro-level entrepreneurship was mirrored across the country as immigration from South Asia and other regions grew. In cities like Manchester, former factory workers opened cafés and grocery stores to provide familiar food for their colleagues, laying the groundwork for a community-centric food scene.



The 1960s and 1970s saw the establishment of the first dedicated Halal butcher shops, such as those founded by Mr Sethi in Canning Town in the 1960s and Haji Baba in Hounslow in 1972.



In this foundational era, trust was not institutional but personal. The reputation of the local butcher, as a known member of the community, was the primary guarantee of Halal integrity. This origin story, rooted in necessity and community, contrasts sharply with the state-led development of Halal industries in many Muslim-majority nations and stands as an under-leveraged strategic asset. It endows the UK market with a claim to “authentic heritage”, a narrative that resonates powerfully with contemporary consumers who value provenance and community stories.



3.2. From Niche Butchers to Mainstream Aisles:

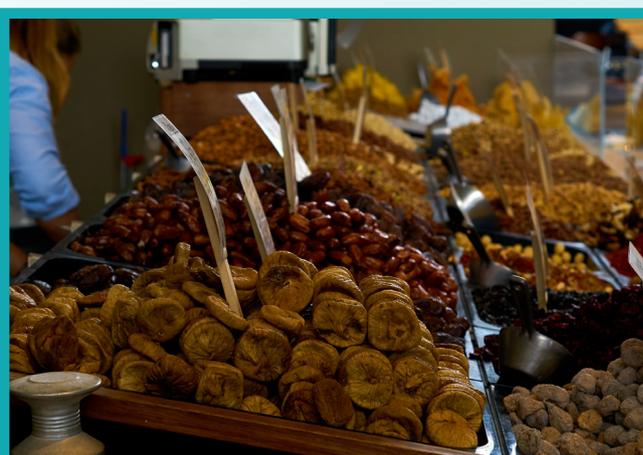
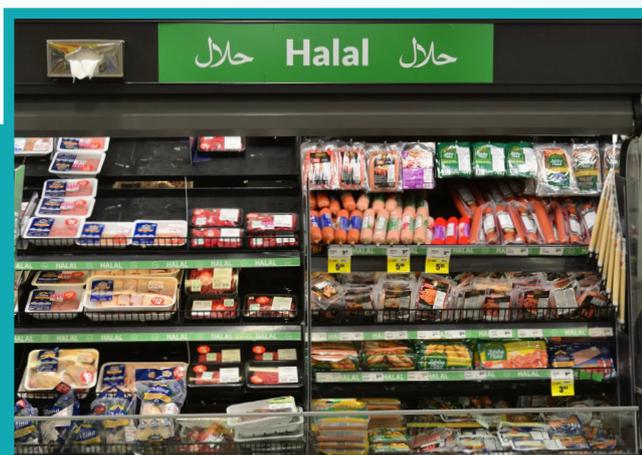
The Commercialisation Journey (1980s–2010s)

The transition from a network of community shops to a recognised commercial industry accelerated in the 1980s and 1990s. This period was marked by product innovation and the emergence of brands that would become household names. A notable example is Iftikhar Ahmad's Kebabish restaurant, which introduced the "chicken doner" to Green Street in 1983, transforming the fast-food landscape. The late 1980s also saw the founding of major food producers like Noon Products in 1989, which specialised in high-quality ready meals for supermarkets and played a key role in popularising ethnic cuisine in the UK.

The commercial journey of Halal foods in the United Kingdom spans more than two decades. A critical turning point in the commercialisation journey occurred in 2007, when Halal products first began appearing on the shelves of a major UK retailer, initially placed within the "world foods" category.

This marked the beginning of broader market recognition.

The profile of Halal food was further elevated in 2008 with the launch of the first dedicated Ramadan and Eid promotional event at a UK retailer. This 12-week campaign showcased Halal offerings in high-traffic stores and prompted other retailers to adopt similar strategies. Subsequent product innovations, such as the introduction of Haribo Halal Sweets and Halal Ramadan countdown calendars, also played a role in expanding the market's reach and appeal.



Today, the Halal food landscape in the UK is remarkably transformed. Major supermarket chains, including Tesco, Sainsbury's, Morrisons, and Asda, now offer an extensive array of Halal-certified products throughout the year. The dining-out sector has also witnessed a boom, with a plethora of restaurants offering diverse Halal cuisines, and fast-food giants like KFC and Nando's are increasingly investing in Halal-certified outlets.

3.3. The Digital Age: E-commerce, Social Media, and the New Generation of Halalpreneurs



The most recent phase of the UK Halal economy's evolution has been defined by the transformative impact of digital technology. The rise of social media platforms, in particular, has acted as a powerful catalyst for growth and trendsetting, empowering a new generation of consumers and entrepreneurs. This is especially evident in the modest fashion sector, where a grassroots movement of young, digitally-savvy British Muslim women has leveraged platforms like Instagram and TikTok to pioneer styles and shape global conversations.



Simultaneously, the proliferation of e-commerce has fundamentally altered the market's accessibility. The rise of online shopping platforms has further enhanced accessibility, offering a wide gamut of Halal products, particularly during key religious festivals.

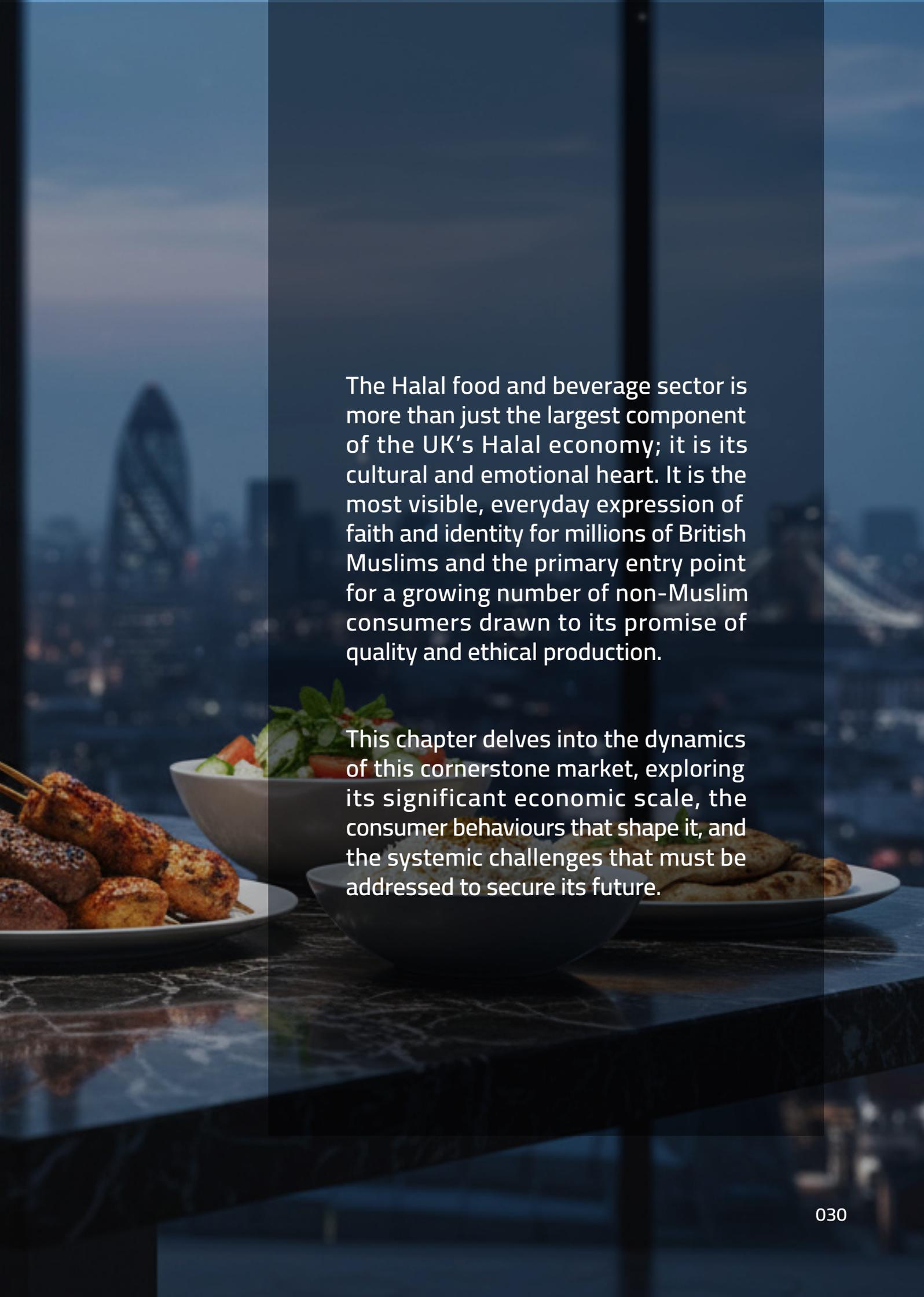


Online retailers and specialised platforms have democratised choice, allowing consumers in all parts of the UK, including those outside of major urban centres, to access a wide array of Halal products and services. This digital infrastructure has not only broadened the consumer base but has also lowered the barrier to entry for a new wave of "Halalpreneurs," enabling them to build brands and reach customers with unprecedented speed and efficiency.

04

Halal Food & Beverages: The Cornerstone of the UK Halal Market





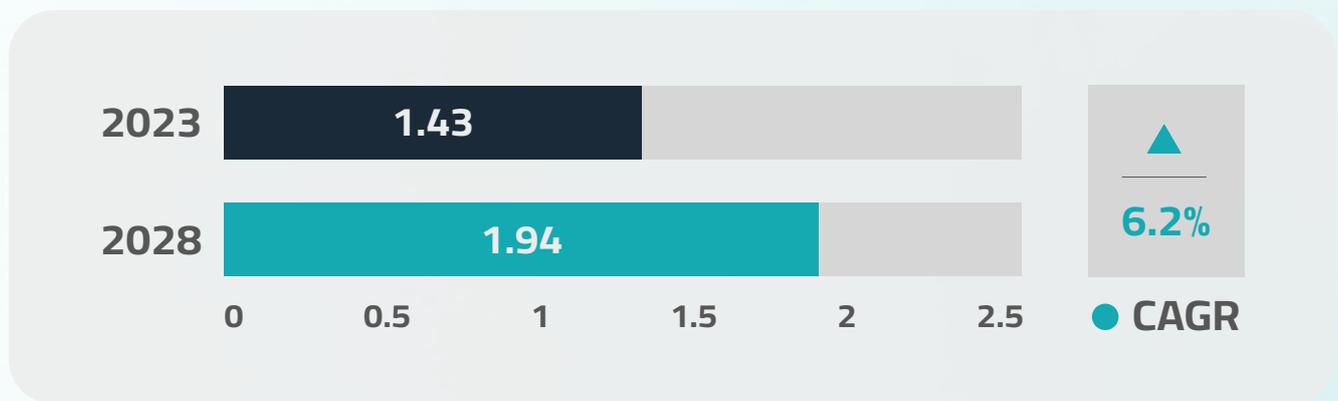
The Halal food and beverage sector is more than just the largest component of the UK's Halal economy; it is its cultural and emotional heart. It is the most visible, everyday expression of faith and identity for millions of British Muslims and the primary entry point for a growing number of non-Muslim consumers drawn to its promise of quality and ethical production.

This chapter delves into the dynamics of this cornerstone market, exploring its significant economic scale, the consumer behaviours that shape it, and the systemic challenges that must be addressed to secure its future.

4.1. A Market of Scale and Significance

Mirroring global trends, the food and beverage sector forms the bedrock of the UK Halal market. Globally, Muslim consumer spending on Halal food reached US\$1.43 trillion in 2023 and is projected to climb to US\$1.94 trillion by 2028, at a compound annual growth rate (CAGR) of 6.2%, demonstrating the immense and sustained demand for faith-compliant food products.

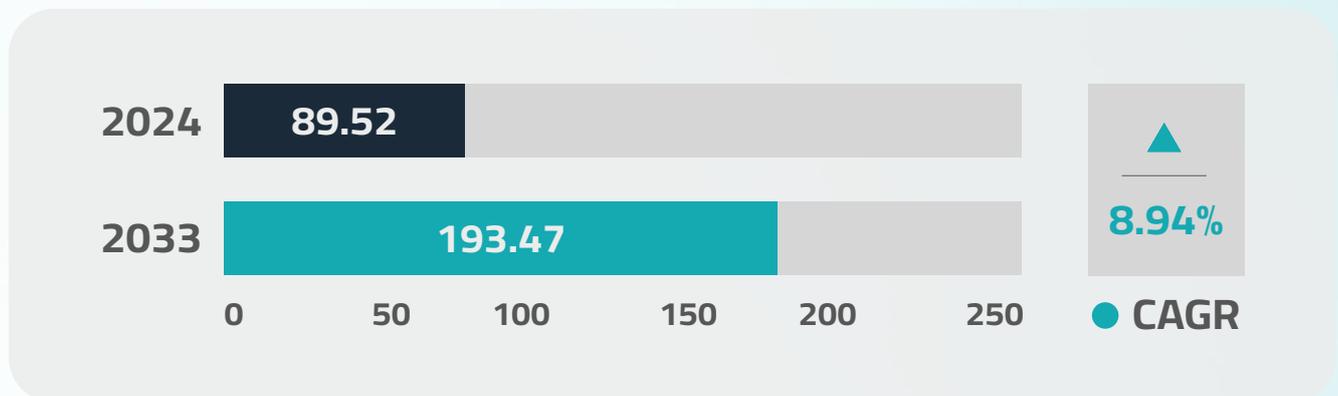
Global Muslim Spending On Halal Food (USD Trillion)



Source: DinarStandard, (SGIE) Report 2024/25.

Within this global landscape, the UK market is a formidable economic force. Valued at an impressive USD 89.52 billion in 2024, the UK Halal food market is forecast to more than double, reaching USD 193.47 billion by 2033, expanding at a robust compound annual growth rate (CAGR) of 8.94%.

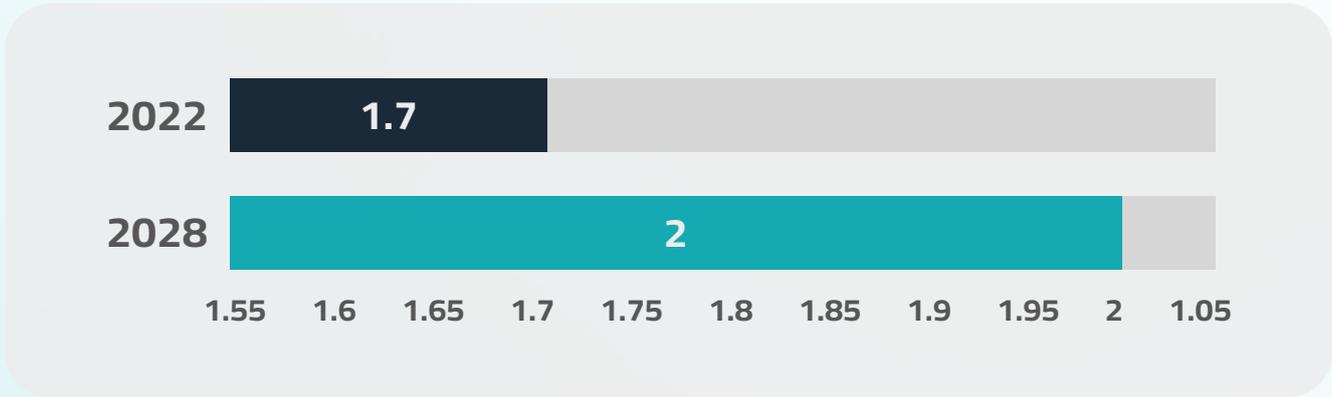
UK Halal Food Market Size (USD Billion)



Source: IMARC Group (2025).

This powerful growth trajectory is not merely an abstract figure; it translates into a tangible and vital domestic industry. The Halal meat and poultry sector alone was valued at approximately £1.7 billion at the point of slaughter, representing a substantial 15% of the UK's total £11 billion meat industry. Projections suggest this could reach £2 billion by 2028, underscoring its strategic importance to British agriculture and food processing.

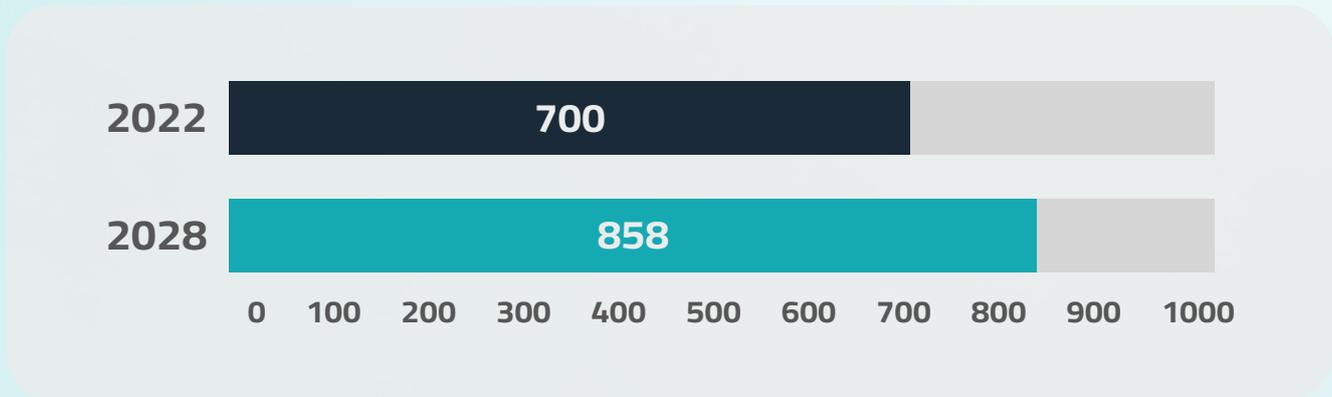
Market Size of Meat and Poultry (at Slaughter) in the UK (£ Billion)



Source: Halal Monitoring Committee & University of Huddersfield (2024).

The economic weight is particularly pronounced in specific segments. The Halal sheep sector, for instance, is not a niche but a dominant market force, accounting for an estimated £810 million, a staggering 74% of the entire UK sheep market's value at slaughter. The poultry sector is similarly significant, with a value of £700 million, projected to rise to £858 million by 2028.

Size of the Halal Poultry Sector in the UK (£ Million)



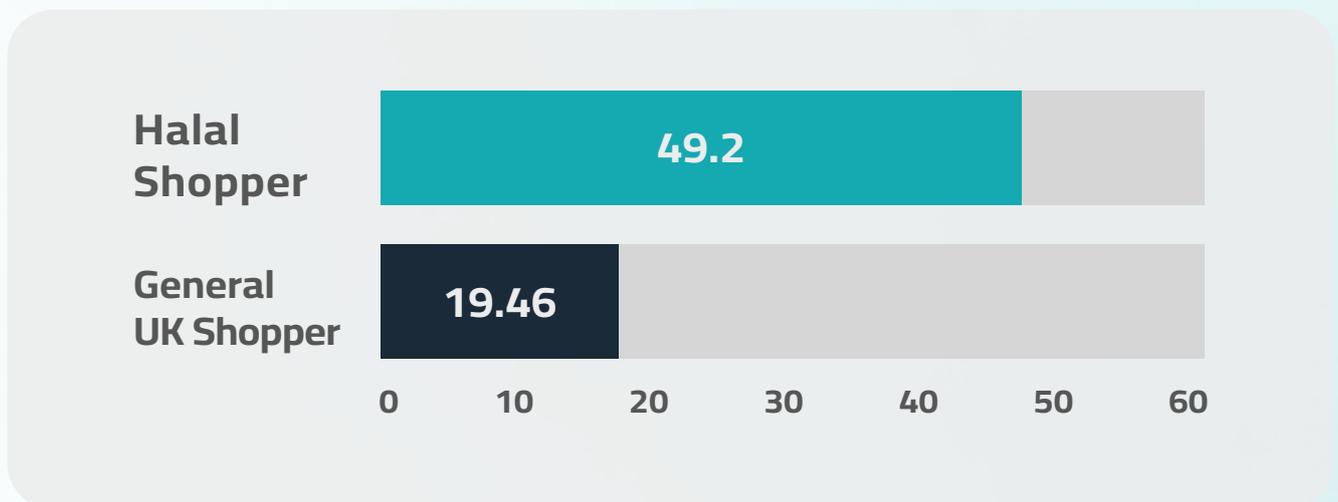
Source: Halal Monitoring Committee & University of Huddersfield (2024).

These figures paint a clear picture: the Halal food sector is not a peripheral market but a mainstream economic engine, integral to the UK's food industry and poised for significant future expansion.

4.2. The Halal Consumer: A Story of Trust, Taste, and Togetherness

To understand the Halal food market is to understand the consumer who drives it. Their decisions are shaped by a complex interplay of faith, culture, and a deep-seated demand for trust. Research from the Agriculture and Horticulture Development Board (AHDB) reveals that British Muslims consume more meat per capita than the general population, with an average weekly meat spend of £49.20, more than double the national average of £19.46. This is not just about sustenance; it is about cultural traditions and the central role of food in family and community life.

Average Weekly Meat Spend in the UK (£)

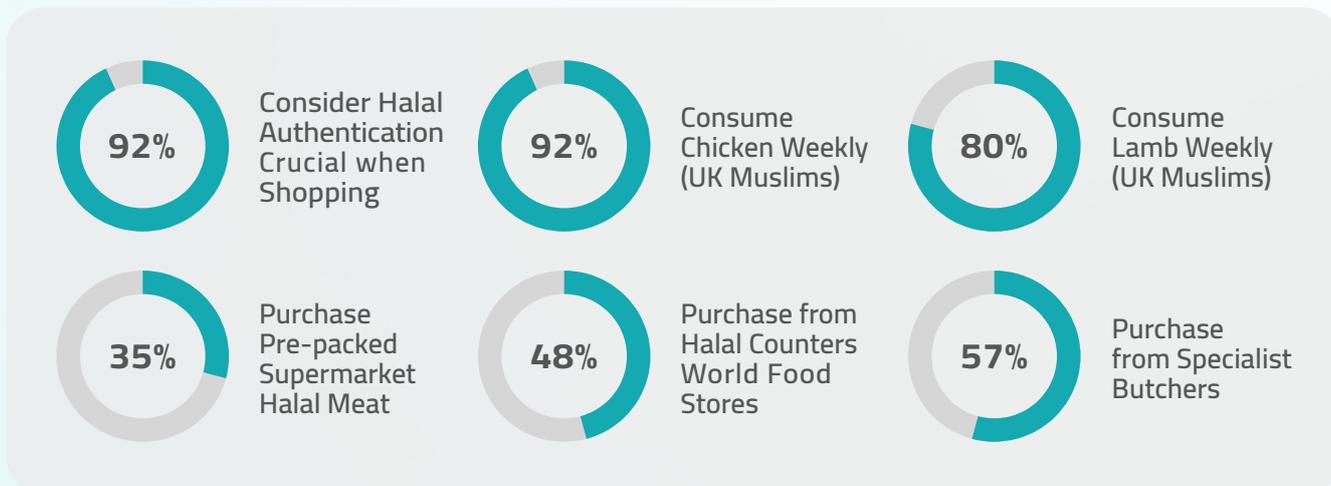


Source: Agriculture and Horticulture Development Board (2024)

When it comes to purchasing locations for Halal meat, AHDB research shows a clear preference for outlets that instil trust. Specialist Halal butchers are favoured by 57% of Muslim consumers, while 48% shop at Halal counters in world food stores. Pre-packed Halal meat from supermarkets is purchased by a smaller proportion, at 35%. This underscores a deep-seated concern for authenticity and a desire for community connection.

Lamb and poultry are the primary meat proteins consumed. A remarkable 80% of UK Muslims consume lamb at least once a week, and 92% consume chicken weekly, compared to only 6% of the general UK population for lamb. Despite this tradition, there are evolving tastes, particularly among younger Muslim consumers who show an increasing appetite for beef and Western-style dishes. The importance of Halal certification is paramount, with 92% of Halal consumers considering authentication a crucial criterion when shopping, according to AHDB research.

UK Halal Consumer Meat Purchasing Habits



Source: Agriculture and Horticulture Development Board (2024); Food and Beverage Business (2025).

The cultural vibrancy of the sector is most visible in its celebrations. The seasonal “**Ramadan Economy**” injects up to £1.3 billion into the UK annually through heightened spending on food for Iftar gatherings and Eid celebrations. Beyond the home, this sense of community comes alive at large-scale public events.



The Halal Food Festival, holding major events in cities like Manchester and Glasgow, and more localised pop-ups like the Eid on Tour series, are more than just markets. They are cultural touchstones that bring together street food vendors, artisans, and thousands of people in mainstream public spaces, celebrating Halal food as a joyful and integral part of modern British life.

4.3. The Business Landscape: From Heritage Brands to Culinary Innovators

The UK Halal food market is served by a dynamic ecosystem of businesses that have evolved alongside their customers. At one end are the established “heritage brands” that have built their reputation on trust and consistency over decades. In a 2025 survey, **Tariq Halal** and **Shazans** were jointly recognised as the most trusted brands in the Halal meat category, a testament to their deep roots in the community. They are supported by major producers like **Janan Meat Limited**, a key provider of British lamb and mutton, and specialists like **For Aisha**, which has carved out a niche in Halal baby food.



At the other end of the spectrum is a new wave of culinary innovators catering to the sophisticated tastes of a younger, trend-conscious generation. A standout example is **Legends Burgers**, a London-based brand that is redefining Halal fast food. By pioneering fusion flavours, offering gourmet plant-based options, and focusing on high-quality presentation for social media, they demonstrate a deep understanding of the modern consumer who seeks an experience that is both Halal and aspirational.



This trend towards diversification, from ready meals by long-standing manufacturers like **Spice Time** to the growing availability of plant-based alternatives, shows a market that is continuously innovating to meet evolving demands for convenience, ethics, and health.



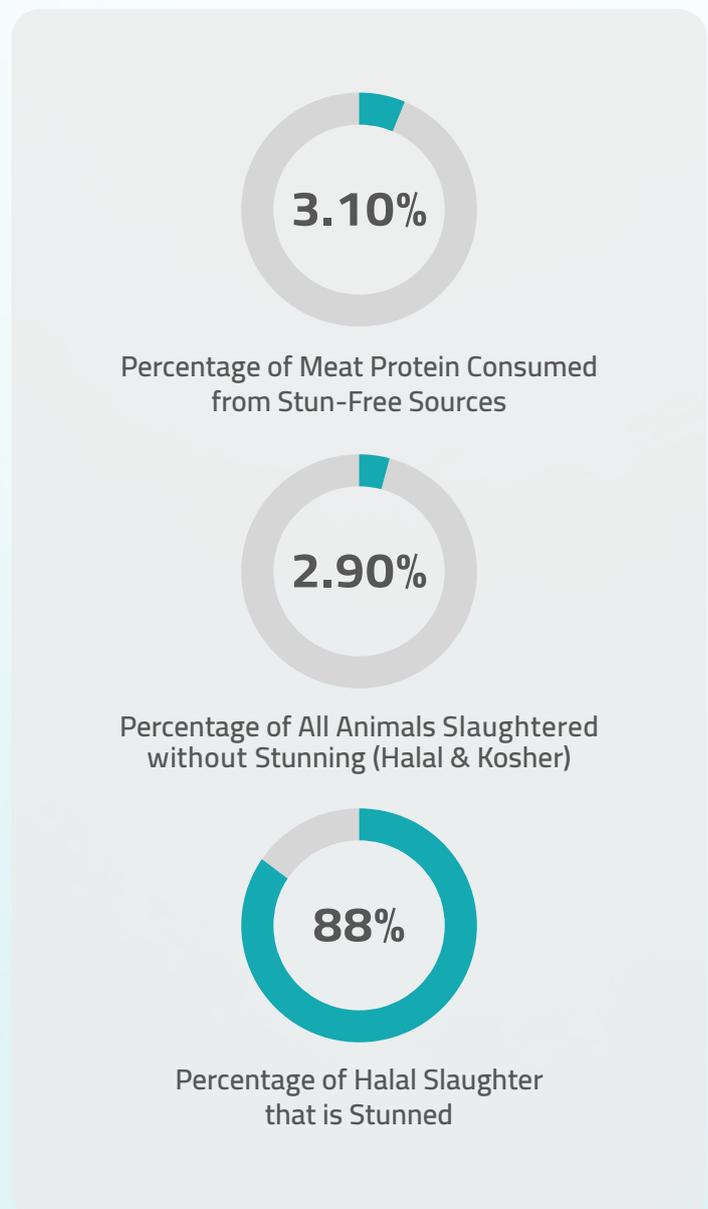
4.4. The Meat Supply Chain: The Epicentre of Scrutiny and Misconception

Central to the Halal food sector is its meat supply chain, a subject of considerable public debate and regulatory attention. A critical fact, often lost in the public discourse, is that the vast majority of Halal meat in the UK is produced using pre-slaughter stunning.

According to the Food Standards Agency's (FSA) 2024 survey, **a total of 4,107,688 animals were slaughtered under Halal methods**, and of these, **88% were stunned beforehand**. Meat from non-stunned animals, combining both Halal and Kosher rites, accounts for an estimated **3.1% of all meat protein consumed in the UK**.

This statistic is crucial because it directly counters the widespread misconception that Halal practice is monolithic and incompatible with mainstream animal welfare standards. However, the supply chain itself is not without significant challenges. Businesses consistently report difficulties in sourcing reliable, consistently certified suppliers. This is exacerbated by the lack of a single, overarching governing body for Halal in the UK, a reality that creates operational hurdles for businesses and fuels the consumer confusion and mistrust that are hallmarks of the sector.

UK Slaughter Statistics



Source: Food Standards Agency (2024); Halal Food Information Centre (2024).

4.5. Recent Developments (2020–2025): A Market in Motion

The period between 2020 and 2025 has been one of significant evolution, with the market responding to both global trends and domestic pressures. Globally, increased investment in food processing technology and a surge in plant-based Halal products reflect a market aligning with wider consumer shifts towards ethical and health-conscious eating.

In the UK, these trends are clearly visible. The move by retailers like Hancocks to introduce extensive aisles dedicated to vegan and Halal confectionery signals a growing mainstream recognition of this consumer segment.

On the regulatory front, the government's 2024 implementation of mandatory labelling for meat from non-stunned animals represents a significant intervention aimed at enhancing consumer transparency, though it also highlights the politically sensitive nature of the sector.



Corporate activity, such as the acquisition of UK-based Pure Ingredients by a Dutch company, **GoodLife Foods B.V.**, in August 2024, points to the market's attractiveness to international investors, while a steady stream of industry and government reports continues to provide the data needed to shape future strategy.

4.6. Strategic Pathways: Overcoming Fragmentation to Build a Trusted Future



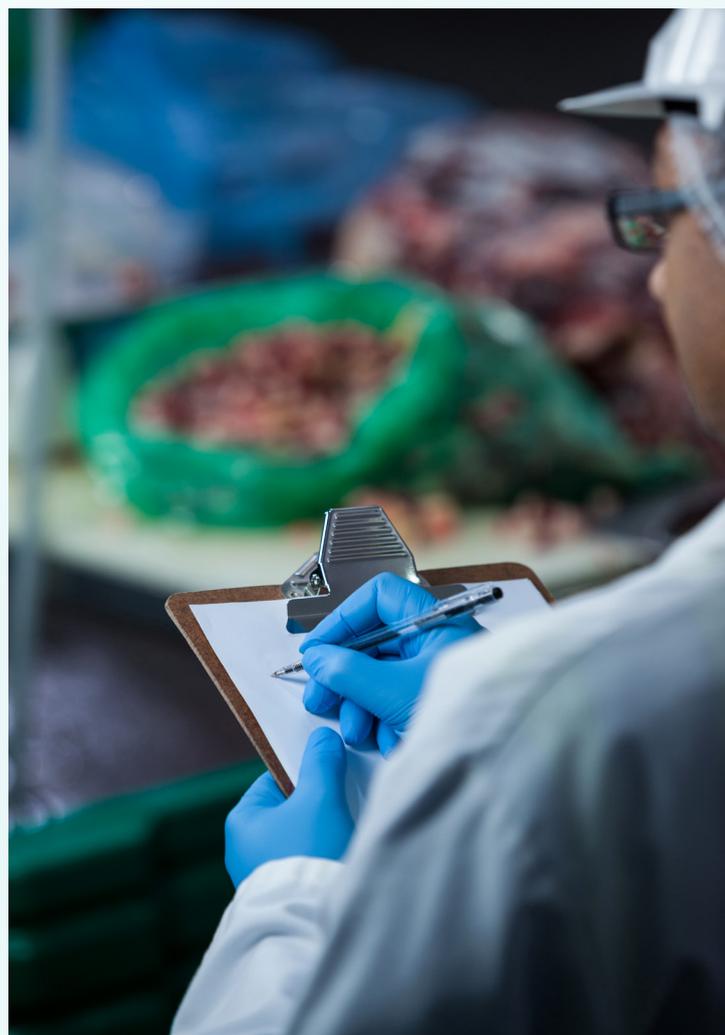
4.6.1. Persistent Challenges: Standards, Supply Chains, and Consumer Trust

1. Certification Fragmentation: The absence of a single, unified national standard remains the sector's primary structural weakness. The ongoing theological and procedural debates among certifiers, particularly regarding pre-slaughter stunning, create profound confusion for consumers and significant operational complexity for businesses navigating a diverse market.



2. Supply Chain Integrity: The risk of food fraud and mislabelling, underscored by past scandals, remains a deep-seated concern. Businesses report persistent difficulties in sourcing reliable, consistently certified suppliers, a vulnerability that directly undermines the trust consumers place in the "Halal" promise.

3. Supermarket Mistrust: A tangible trust deficit exists between many Muslim consumers and large supermarkets. The preference for specialist butchers is a clear signal of this, rooted in concerns over the authenticity and integrity of complex, often opaque, retail supply chains.



4.6.2. Emerging Opportunities: Innovation, Mainstream Appeal, and Global Reach

1. Growing Mainstream & Ethical Appeal: There is a significant and expanding interest from non-Muslim consumers who associate Halal products with higher animal welfare standards, superior quality, and greater traceability. This crossover appeal is a powerful engine for future growth.

2. Product Innovation and Diversification:

Consumer demand is rapidly moving beyond basic meat cuts towards value-added, convenient, and sophisticated options. This creates a fertile market for Halal-certified ready meals, gourmet products, snacks, and plant-based alternatives that cater to modern lifestyles.

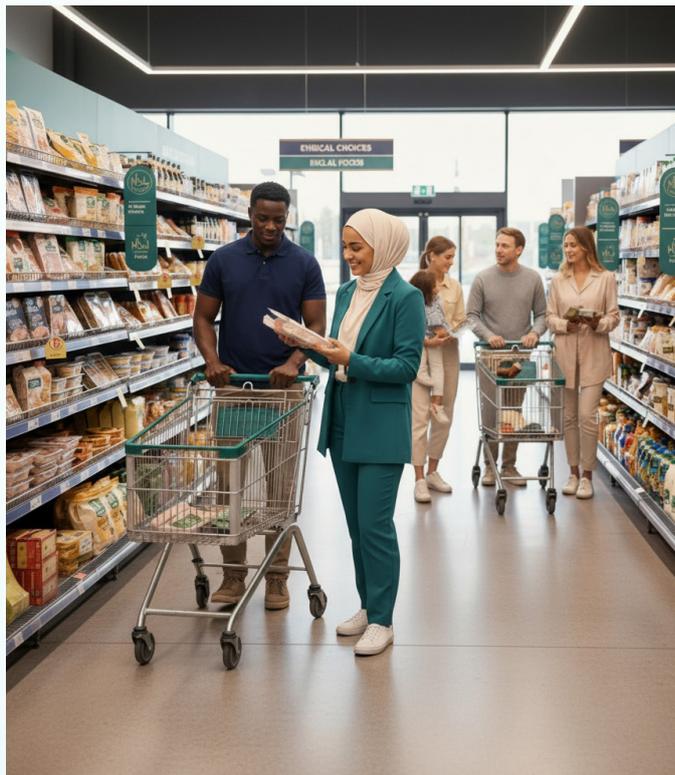
3. Export Potential: The UK's global reputation for high food safety and quality standards provides a strong platform for exporting premium Halal products, particularly beef and lamb, to high-demand international markets, especially within the OIC nations.

4.6.3. Strategic Recommendations: Building Confidence and Driving Growth

1. Government: Spearhead the establishment of a government-backed national Halal food standard and assurance scheme. A single, trusted "UK Halal" mark would harmonise certification, build consumer confidence, and act as a powerful facilitator for both domestic trade and exports.

2. Industry: Industry bodies must champion the adoption of technology to solve the trust deficit. Widespread implementation of blockchain and RFID tagging can create an immutable, transparent record from farm to fork, directly addressing consumer concerns about fraud and integrity.

3. Businesses: Supermarkets and large retailers must bridge the trust gap by embracing a policy of "radical transparency." This should include clear, unambiguous in-store signage detailing the specific certifier and slaughter method for each product and potentially hosting in-store representatives from certification bodies to engage directly with customers.



05

Islamic Finance: The UK as a Premier Western Hub

A hand is shown stacking several coins. The background is dark with a blue and purple color palette. Overlaid on the image are various financial data visualizations, including a bar chart at the bottom, a line graph on the left, and a circular gauge with the number '80'. The text is white and positioned in the upper right quadrant.

If the Halal food sector tells a story of grassroots enterprise, the UK's Islamic finance industry tells a story of strategic foresight. It stands as a powerful testament to what can be achieved when proactive government policy, regulatory sophistication, and market innovation converge.

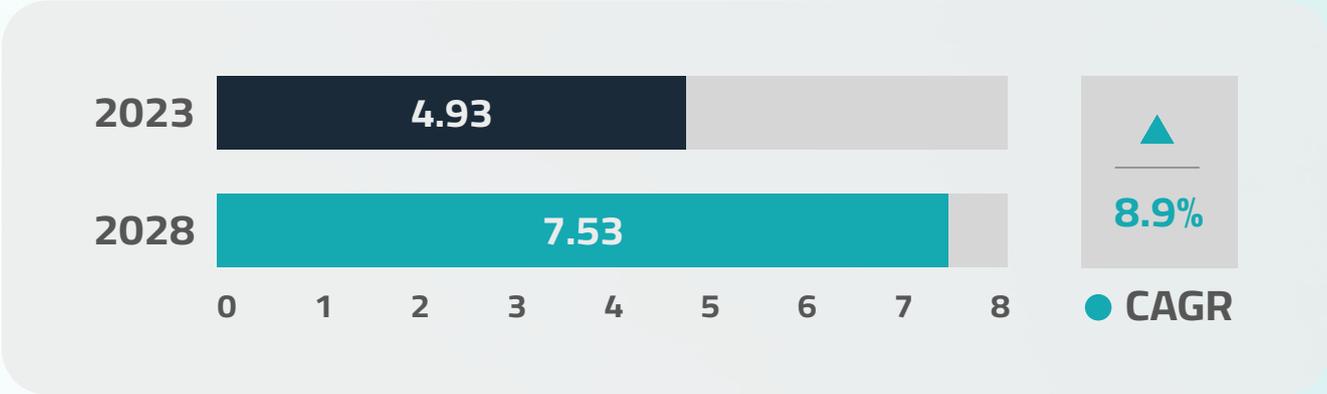
This chapter examines the UK's journey to becoming the undisputed Western leader in Islamic finance, analysing the deliberate policy decisions that built this success, the dynamic market that has emerged, and the strategic imperatives required to maintain its competitive edge in a rapidly evolving global landscape.

5.1. A Deliberate Ascent to Global Leadership



The United Kingdom’s position as the premier Western hub for Islamic finance was not an accident; it was the result of a concerted, decades-long effort to create a welcoming and robust regulatory environment. In a global market where Islamic finance assets were valued at US\$4.93 trillion in 2023 and are projected to reach US\$7.53 trillion by 2028, growing at a robust CAGR of 8.9%, the UK has carved out a uniquely influential niche.

Global Islamic Finance Asset Size (USD Trillion)

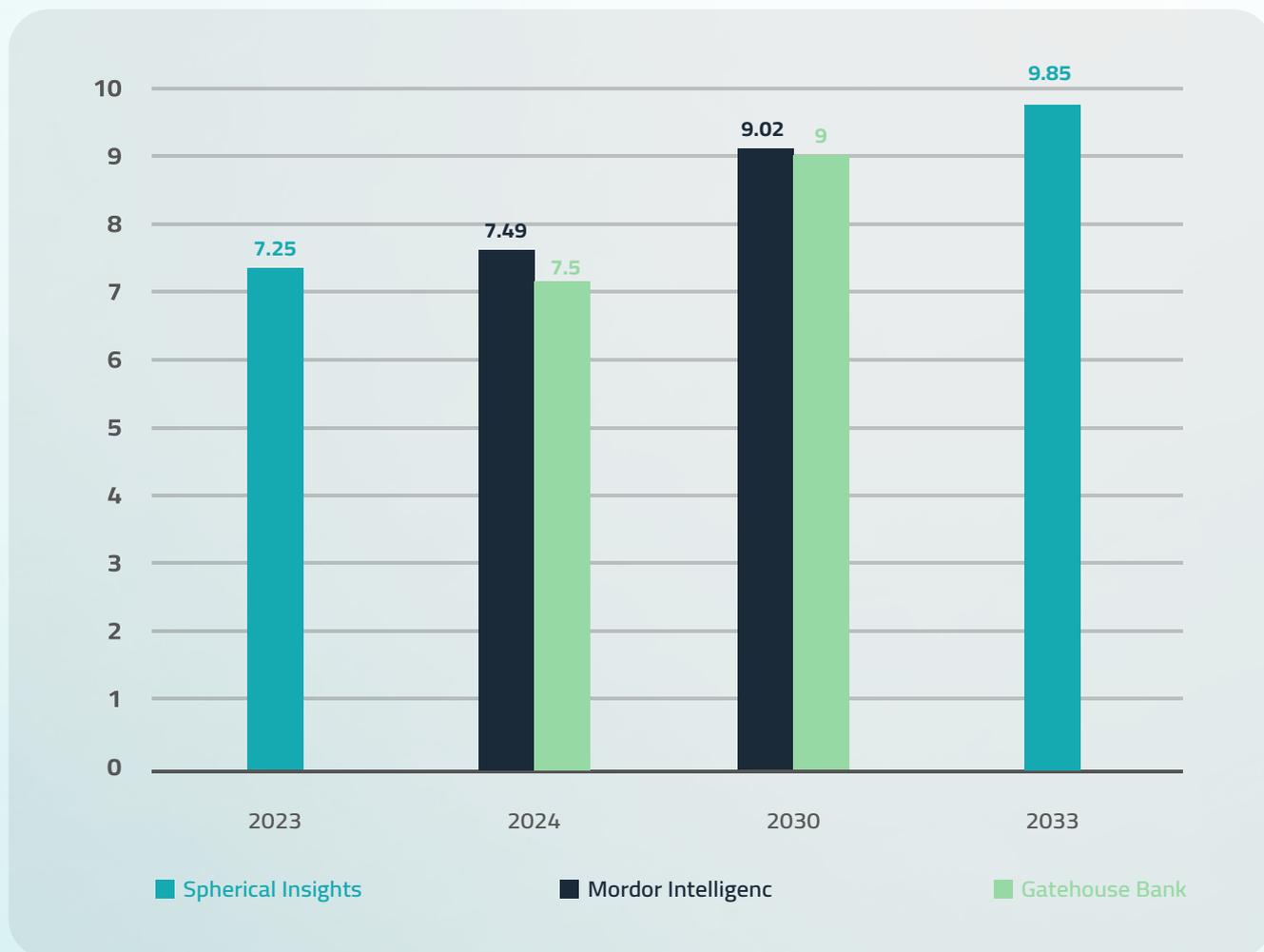


Source: DinarStandard, SGIE Report 2024/25.

Within this global landscape, the UK market shows consistent growth. According to Spherical Insights, the UK Islamic Finance market was valued at USD 7.25 billion in 2023 and is projected to reach USD 9.85 billion by 2033, growing at a CAGR of 3.11% from 2023 to 2033. Mordor Intelligence offers a comparable forecast, estimating the market at USD 7.49 billion in 2024 and projecting it to reach USD 9.02 billion by 2030. Gatehouse Bank also reports that the sector was valued at approximately USD 7.5 billion in 2024, with expectations of growing to around USD 9 billion by 2030.

Additionally, there has been a significant increase in UK Islamic banking assets, which, according to Fitch Ratings (2024), grew by 26% in 2023, reaching \$8.2 billion. Projections indicate that these assets could potentially rise to \$15 billion in the medium term.

UK Islamic Finance Market Size and Forecasts (USD Billion)



Source: Spherical Insights (2024); Mordor Intelligence (2025); Gatehouse Bank (2025).

The UK commands an estimated **85% of all European Islamic banking assets (excluding Turkey)**, and the London Stock Exchange is a dominant global venue for US dollar-denominated Sukuk (Islamic bonds), holding around **35% of the global share with approximately \$80 billion** outstanding as of mid-2024.

Currently, Britain is home to **over 20 financial institutions** that provide Islamic finance products, including five fully Shari'ah-compliant banks. This diversity of providers, which ranges from specialist Shari'ah-compliant banks to conventional institutions offering Islamic windows, showcases the sector's resilience and capacity for growth. Britain leads all other Western nations in this domain.

This leadership was built on a foundation of key regulatory milestones. Successive governments, working with the Financial Conduct Authority (FCA) and the Bank of England, have been instrumental in creating a level playing field. They introduced legislative changes to eliminate issues like the double imposition of tax on Shari'ah-compliant property financing and established clear rules for Islamic finance contracts. Crucially, the UK government signalled its official endorsement through two sovereign Sukuk issuances, first in 2014 and again in 2021, while the Bank of England has created vital liquidity facilities for Islamic banks. This deliberate and sustained policy support has been the bedrock of the sector's success.

5.2. The Anatomy of a Dynamic Market:

From Global Sukuk to Local Fintech

The result of this supportive environment is a vibrant and diverse market ecosystem. The sector is anchored by established, fully Sharī'ah-compliant institutions like **Gatehouse Bank**, **Al Rayan Bank**, and **the Bank of London and The Middle East (BLME)**, which provide a range of services from property finance to savings and wealth management.

Alongside these are the critical components of a mature financial centre, including a developing market for Takaful (Islamic insurance) and a thriving ecosystem for Islamic funds, exemplified by the success of the **Nest Sharī'ah fund**, which had attracted over £180 million by 2024.



However, the sector's dynamism is most powerfully illustrated by its burgeoning financial technology (fintech) scene. The UK is a recognised leader in the Global Islamic Fintech Index, and a new generation of innovators is reshaping how financial services are delivered. A standout example is **StrideUp**, an Islamic digital platform for home finance that was named among the top 20 fastest-growing start-ups in the UK for 2025. It is joined by other promising ventures like **Wahed Invest**, an online Halal investment platform, and Ayan Capital, which recently secured £25 million in financing. This fusion of established banking integrity with disruptive technological innovation is the defining characteristic of the UK's modern Islamic finance market.



5.3. The Forces Shaping the Future: Technology, Ethics, and a New Generation

The period between 2020 and 2025 has been marked by trends that are not only driving growth but are fundamentally reshaping the sector’s future. Fintech remains a dominant force, with cross-border collaborations and the introduction of new digital banking solutions showcasing the industry’s relentless pace of innovation.



Crucially, two powerful currents are converging. The first is the growing alignment between Islamic finance and the global sustainable and green finance movement. Products like Gatehouse Bank’s Shari’ah-compliant green home finance offerings are at the vanguard of this trend, tapping into a powerful demand for investments that deliver both financial returns and positive environmental impact.

The second, and perhaps most significant, is a generational shift in awareness and values. The 2025 Gatehouse Bank Islamic and Ethical Finance Consumer Report highlights widespread awareness of Islamic finance across the UK population, but with a striking generational gap. More than eight in ten (83%) of those aged 18–24 are familiar with Islamic finance, compared to only just over a quarter (26%) of those aged 55 and above. Awareness also extends beyond the Muslim community: nine in ten (90%) of Muslims reported awareness, while three in ten (30%) of non-Muslims indicated the same. Importantly, three in ten (30%) of non-Muslims also expressed a willingness to switch to an Islamic finance provider if comparable services were offered. These findings underscore both the inclusivity of Islamic finance and its significant untapped market potential in the UK.

As this values-driven generation gains economic power, the inherent ethical principles of Islamic finance, such as avoiding investment in harmful industries, will become an increasingly powerful market differentiator, positioning the sector for mainstream growth far beyond its traditional base.

Awareness of Islamic Finance in the UK



Source: Gatehouse Bank (2025).

5.4. Strategic Pathways: Consolidating the UK's Global Advantage





5.4.1. Key Challenges: Awareness, Scalability, and Regulatory Complexity

1.Low Public Awareness: Despite its success, the sector suffers from a significant awareness gap among older and non-Muslim demographics. This perception of Islamic finance as a niche or exclusively religious product is the single greatest barrier to its mainstream adoption.

2.Scalability and Competition: Islamic financial institutions, operating as a specialised segment, face challenges in achieving the scale necessary to compete directly with the vast product ranges and marketing budgets of conventional high-street banks.

3.Regulatory Complexity: While the UK's regulatory environment is world-leading, the inherent complexity of ensuring dual compliance, with both Shari'ah principles and UK financial regulations, can still act as a barrier to entry for new firms and slow down product innovation.

5.4.2. Opportunities for Growth: Youth, Fintech, and Green Finance

1.Youth Engagement and Ethical Appeal: The high awareness and openness among young people represent the sector's single greatest opportunity. By positioning itself as the natural home for values-driven finance, the industry can capture a generation for whom ethical considerations are paramount.



2.Fintech Leadership: The UK's established strength in both conventional and Islamic fintech provides a unique opportunity to pioneer and export next-generation financial technology, from blockchain-based Sukuk platforms to AI-driven ethical investment tools.

3.Green Finance Convergence: The powerful alignment between the principles of Islamic finance and the rapidly growing sustainable finance movement allows UK firms to lead the world in developing innovative green Sukuk and other ethical investment products that appeal to a global investor base.

5.4.3. Strategic Recommendations: Government, Industry, and Business Actions

1.Government: Establish a dedicated, government-led Islamic Finance Taskforce to develop a cohesive national strategy, actively promote the UK as a global hub for Islamic and ethical finance, and address remaining regulatory friction points, such as expanding the Bank of England's liquidity facilities for Islamic banks.

2.Industry: Launch a coordinated, sector-wide marketing and education campaign that decisively reframes Islamic finance as "ethical finance for all". This campaign should target younger, values-driven consumers (both Muslim and non-Muslim) by highlighting its core principles of fairness, transparency, and social responsibility.

3.Businesses: UK fintech firms must be supported to actively pursue global collaborations and partnerships. This will cement the UK's position not just as a financial centre, but as the world's leading hub for the innovation that will define the future of Islamic finance.

06

Halal Pharmaceuticals & Nutraceuticals: An Emerging Pillar of Health and Wellness





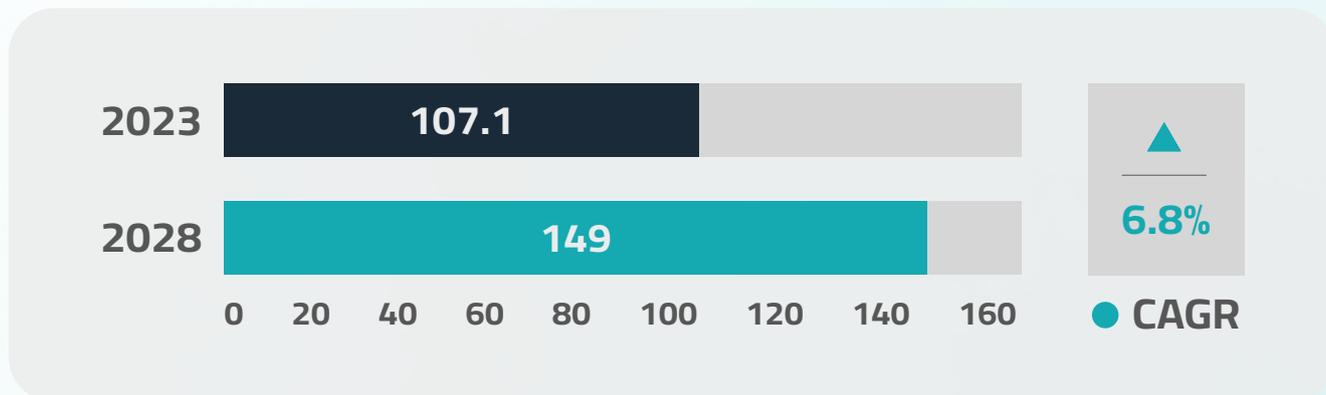
Beyond the daily choices of food and finance lies a more intimate and critical domain: personal health.

For an increasing number of consumers, the principles of Halal are not just a matter of dietary preference, but a fundamental requirement for their well-being. The Halal pharmaceuticals and nutraceuticals sector represents this deeply personal intersection of faith, ethics, and modern science. It is an emerging pillar of the UK Halal economy, driven by a non-negotiable demand for products that are not only effective but also pure in their composition and provenance. This chapter explores this high-potential sector, analysing its growth drivers, its unique challenges, and the strategic steps needed to unlock its full potential.

6.1. The Dynamics of a Needs-Driven Market

The demand for Halal-compliant health products is a significant and rapidly growing global phenomenon. In 2023, Muslim spending on pharmaceuticals worldwide reached US\$107.1 billion, with forecasts predicting a rise to US\$149 billion by 2028, at a CAGR of 6.8%.

Global Muslim Spending on Halal Pharmaceuticals (USD Billion)



Source: DinarStandard, SGIE Report 2024/25.

This robust growth is mirrored in the UK and Europe, where the market is expanding at a remarkable pace. The UK’s Halal nutraceuticals market is anticipated to grow at a CAGR of 7.63% between 2025 and 2032, while the broader European Halal pharmaceuticals market is projected for even faster growth at 9.47% over the same period.

Table (1): UK & European Halal Pharmaceuticals/Nutraceuticals Market Growth

Market Segment	Forecast Period	CAGR (%)	Key Growth Drivers
UK Halal Nutraceuticals	2025-2032	7.63%	Rising Muslim population, health/wellness focus, ethical/clean-label demand.
Europe Halal Pharmaceuticals	2025-2032	9.47%	Growing Muslim population, rising awareness, ethical/clean-label preference.

Source: Inkwood Research (2024).

This expansion is fuelled by a confluence of powerful drivers. The UK’s growing Muslim population provides a foundational consumer base with specific, unmet needs. This is amplified by a post-pandemic heightened focus on health and preventative wellness across all demographics, alongside the powerful mainstream trend towards ethical, clean-label products. For many consumers, a Halal certification on a vitamin or supplement is a trusted assurance of purity, free from alcohol, animal-derived ingredients, and other undesirable additives.

6.2. The Patient and Consumer Perspective



At its core, this is a market defined by the needs of the individual. There is a clear and pressing demand for everyday health products, from vitamins and dietary supplements to over-the-counter (OTC) medicines, that are free from common non-Halal ingredients like pork-derived gelatine and alcohol. The UK, in fact, dominates the European market for Halal OTC medicines, signalling a particularly aware and engaged consumer base.

This demand is becoming increasingly sophisticated. Younger consumers are actively seeking out specific brands that align with their values, while a broader trend towards plant-based nutraceuticals is gaining momentum. The recent period has seen a market maturation, moving beyond general wellness products towards targeted, evidence-based Halal health solutions for prevalent concerns like diabetes and cardiovascular health.

This evolution is also driving innovation in product delivery, with a distinct shift towards plant-based capsules and more convenient forms like gummies and effervescent tablets, catering to a consumer who demands both ethical assurance and modern convenience.



6.3. The UK Landscape: From Mainstream Brands to Niche Specialists

The UK market is served by a mix of established healthcare companies and pioneering specialists. Mainstream engagement is demonstrated by **Vitabiotics**, a leading British company that offers well-known, Halal-certified products such as **Pregnacare** and **Ferroglobin**. Similarly, major retailers like **Holland & Barrett** play a crucial role in distribution, making Halal-certified wellness products accessible to a wider audience.



Alongside these are key specialists like **Rosemont Pharmaceuticals**, which focuses on developing formulations for patients with specific dietary needs, and the recent entry of global players like **Nestlé Health Science**, which has launched Halal-certified options in its probiotics range. This blend of mainstream adoption and specialist innovation indicates a market that is both maturing and integrating into the broader UK healthcare landscape.



6.4. Strategic Pathways: Building a Trusted Health Ecosystem



6.4.1. Key Challenges: Certification, Supply Chains, and Professional Awareness

1.The Trust Deficit: A Complex Supply Chain: The intricate nature of pharmaceutical ingredients makes certification both technically demanding and expensive. This is compounded by a scarcity of certified-Halal raw materials, excipients (like gelatine), and active pharmaceutical ingredients (APIs). This supply chain vulnerability creates a critical bottleneck for manufacturers and makes it difficult to provide the absolute assurance that consumers and patients require.

2.The Knowledge Gap: A Disconnect in Care: A significant barrier exists within the healthcare system itself. Many pharmacists and doctors lack awareness of Halal requirements or the availability of compliant alternatives. This knowledge gap risks undermining patient trust and adherence, particularly when common medicines contain porcine-derived gelatine or alcohol, forcing patients to choose between their health needs and their faith principles.

3.Fragmented Standards: As with other sectors, the absence of a single, unified Halal certification framework for pharmaceuticals creates additional barriers to entry for SMEs and can lead to confusion for both healthcare professionals and consumers.



6.4.2. Emerging Opportunities: Nutraceutical Growth, Ingredient Innovation, and Export Potential

1.The Untapped Nutraceuticals Market: The burgeoning consumer demand for Halal-certified vitamins, minerals, and dietary supplements represents a major growth opportunity, driven by the powerful global trend towards preventative health and wellness.

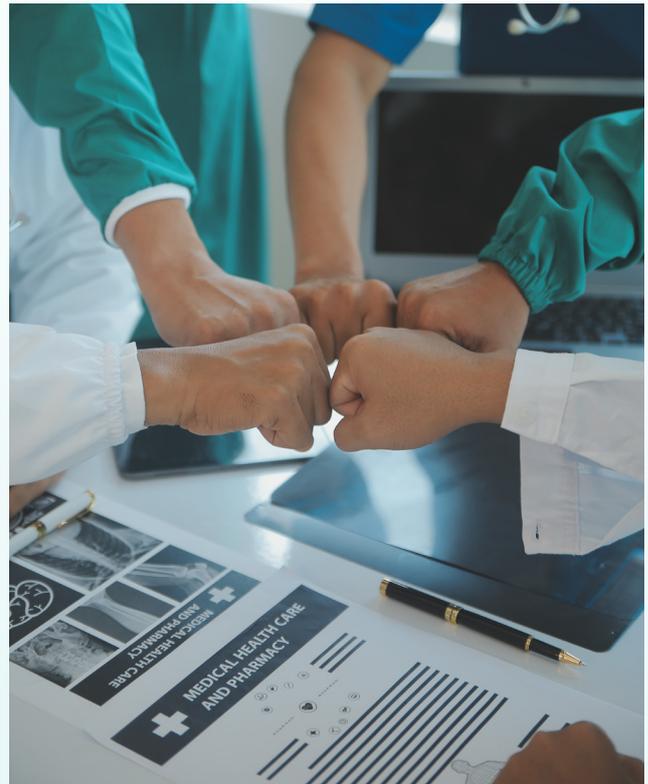
2.The Innovation Imperative: The scarcity of compliant ingredients creates a strong incentive for UK-based research and development into alternatives, such as plant-based capsules (e.g., HPMC) and fish gelatine. Leadership in this area could create a significant competitive advantage.



3.A Global Reputation for Quality: The UK's world-renowned reputation for high-quality, rigorously regulated pharmaceuticals provides a powerful platform to expand exports of Halal medicines and nutraceuticals to high-demand OIC and other international markets.

6.4.3. Strategic Recommendations: Standards, Transparency, and Systemic Support

1.Government & Regulators: Government agencies like Innovate UK should create dedicated funding streams to sponsor R&D into Halal-compliant ingredient alternatives, helping to build a secure domestic supply chain. The NHS and professional bodies like the General Pharmaceutical Council should collaborate to issue official guidance and develop training modules for healthcare professionals on advising patients about Halal medicines.



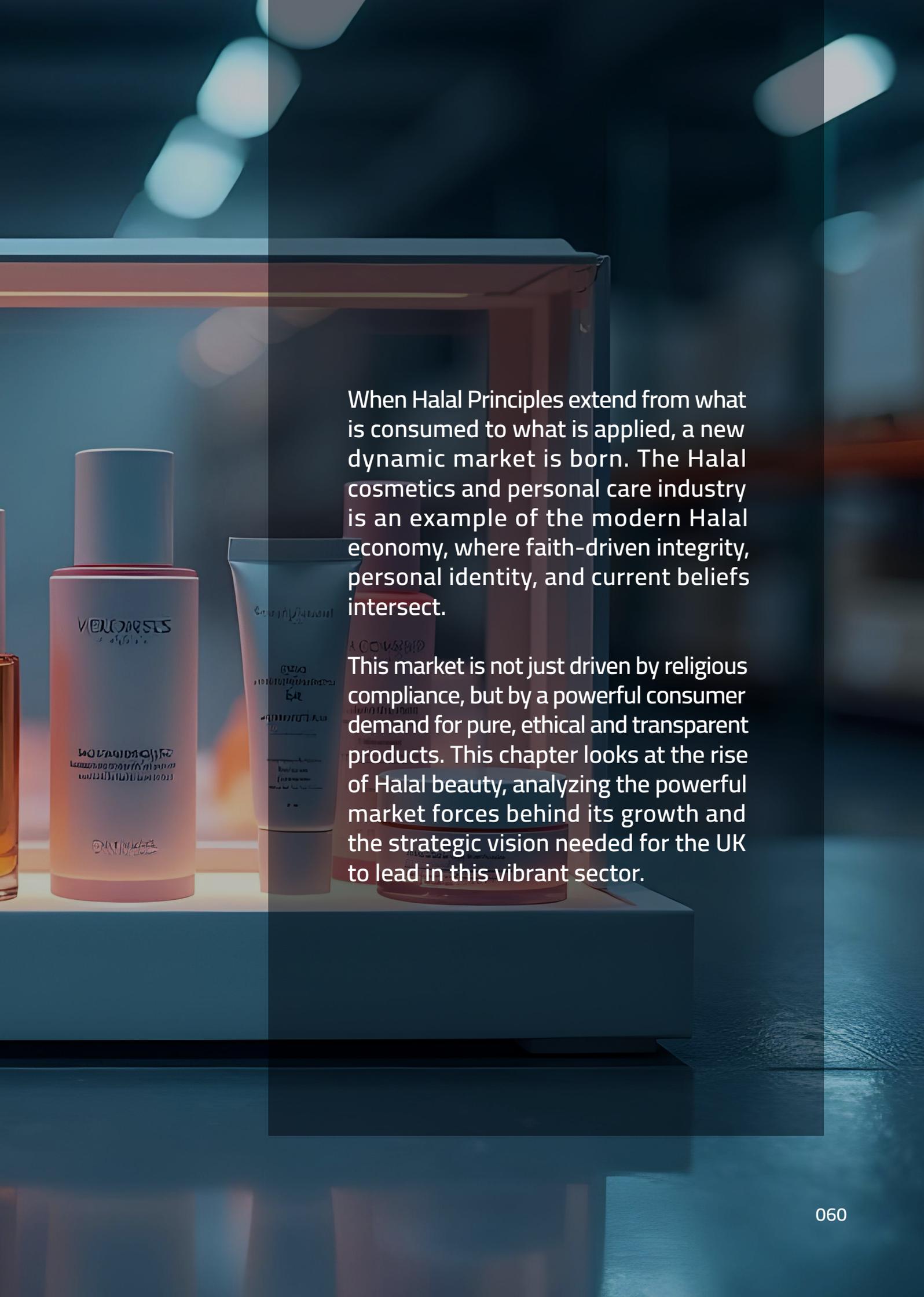
2.Industry: Pharmaceutical and nutraceutical associations should work to create streamlined and more affordable certification models tailored to the needs of SMEs, potentially through shared resources or a tiered system that lowers the barrier to entry.

3.Businesses: Pharmaceutical and nutraceutical firms must embrace radical transparency. This means improving labelling to clearly state the origin of all ingredients (e.g., "plant-derived cellulose capsule", "bovine-source gelatine") and proactively communicating Halal assurance to both healthcare providers and patients to empower informed decision-making.

07

Halal Cosmetics & Personal Care: The Convergence of Ethics and Beauty





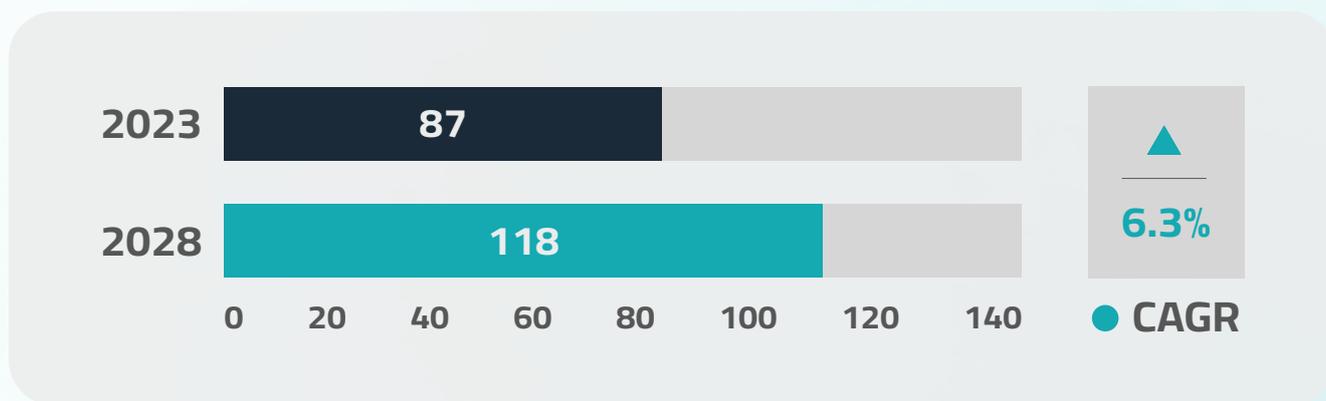
When Halal Principles extend from what is consumed to what is applied, a new dynamic market is born. The Halal cosmetics and personal care industry is an example of the modern Halal economy, where faith-driven integrity, personal identity, and current beliefs intersect.

This market is not just driven by religious compliance, but by a powerful consumer demand for pure, ethical and transparent products. This chapter looks at the rise of Halal beauty, analyzing the powerful market forces behind its growth and the strategic vision needed for the UK to lead in this vibrant sector.

7.1. A Market Fueled by Values

The Halal cosmetics sector is a significant global force, with Muslim spending reaching USD 87 billion in 2023 and is expected to reach USD 118 billion by 2028, with a CAGR of 6.3%. This impressive growth, however, tells only part of the story. The real energy behind this market comes from the values driving it. The expansion is supported by a “dual appeal” that acts as a powerful market multiplier.

Global Muslim Spending on Halal Cosmetics (USD Billion)



Source: DinarStandard, SGIE Report 2024/25.



At its core is the growing demand from a surging global Muslim population. However, the appeal of Halal cosmetics now extends far beyond this demographic. Many consumers now see Halal certification as a trusted sign of purity and safety. These products are becoming popular among non-Muslims who are attracted to their natural and eco-friendly ingredients.

Halal’s frequent association with cruelty-free and vegan formulations creates strong appeal with the broader ethical consumerism movement. This is where the principles of Halal (permissible) and Tayyib (wholesome and pure) find their strongest modern expression, aligning well with the current “clean beauty” trend.

This overlap creates a new kind of consumer: the values-driven individual. Whether it’s the young, trend-conscious “Mipster” (Muslim hipster) searching for brands that reflect their faith in a modern way, or the ethically minded non-Muslim consumer, they both demand one simple promise: beauty products that are as good for the conscience as they are for the skin.

7.2. The UK's Pioneering Brands

Brands which understand this powerful convergence are being founded throughout the UK. These cosmetic brands no longer focus on mass production, but on innovative, ethical enterprises. A prominent example is **PHB Ethical Beauty**, a Birmingham-based family-run brand that has built its identity on this dual appeal. It is known for its 100% natural, vegan, and Halal-certified products, manifesting the perfect synergy between ethical and faith-based principles.



This innovation is reflected in new UK brands such as **Pure Halal Beauty**, which specializes in strictly Halal products, and **Aana Cosmetics**, known for its Halal-certified lash growth mascara. Established brands with a strong presence in the UK, like **Sampure Minerals**, reportedly the first Halal-certified makeup line in Europe, and **Saaf Skincare**, also contribute to this landscape. These brands are not just catering to a niche; they are leading a global movement, highlighting the economic strength of a values-driven approach to beauty.



7.3. A Maturing Market: From Niche to Strategic Investment



Between 2020 and 2025, the Halal cosmetics market has transformed significantly, growing from a niche segment into a hub for strategic investment. The surge of interest from mainstream investment firms shows that Halal beauty is now seen as a profitable and scalable global industry.



As the market matures, consumer expectations are becoming more sophisticated. There is a growing demand for more inclusive, sustainable and more eco-friendly packaged products. Consumers desire innovative formulations which adhere to Halal standards while appealing to contemporary beauty trends.

Brands that successfully address these demands are leading the way in a sector that is quickly adapting to the future of the cosmetics industry. Despite this rapid growth, fragmented certification remains an ongoing challenge throughout this sector.



The absence of global standards and the presence of multiple certification bodies create complexity, which can be a significant cost barrier for the small and medium enterprises that are driving innovation

7.4. Strategic Pathways: From Niche Appeal to Mainstream Leadership





2. Supply Chain Limitations: The limited availability of certified-Halal raw materials, such as specific emulsifiers and preservatives, can restrict product development and increase production costs, hindering the ability of brands to scale.

3. Consumer Awareness Gap: Despite the rapid growth, mainstream consumers remain unaware of the inherent ethical nature of Halal cosmetics, only viewing them as a religious product. This perception gap limits the market's ability to reach its full potential.



7.4.2. Opportunities for Growth: Ethical Beauty Convergence, Market Expansion, and Brand Differentiation

7.4.1. Persistent Challenges: Certification Costs, Supply Constraints, and Consumer Awareness

1. Certification Complexity and Costs: The complex formulations of cosmetics make certification a difficult and expensive process. The existence of multiple certification bodies with different standards adds more barriers to entry, especially for small and medium-sized firms that are essential to the sector.

1. Convergence with Ethical Beauty Trends: The Halal cosmetics sector's natural alignment with the sustainable beauty movement is the sector's top growth driver. This allows brands to appeal simultaneously to both Muslim and ethically minded non-Muslim consumers.

2. Market Expansion Beyond Core Demographics: The growing interest from ethically conscious mainstream consumers presents a clear path for market growth. By emphasizing shared values like purity and transparency, brands can reach a much wider audience beyond their niche demographic.



7.4.3. Strategic Recommendations: Unified Standards, Consumer Education, and Transparent Branding

3.Brand Differentiation Through Transparency: In a crowded ethical beauty market, Halal certification can help brands stand out. Those that clearly showcase their dual attributes (e.g., “Certified Halal & Vegan”) can build trust and appeal to a diverse range of consumers.



1.Government & Regulators: Encouraging the creation of unified certification standards for cosmetics leads to lower costs and simplifies compliance for UK businesses, thereby enhancing their competitiveness internationally.

2.Industry: Coordinated consumer education campaigns promote Halal cosmetics as a key part of the broader ethical and sustainable beauty movement, highlighting the shared values of purity, safety, and transparency.

3.Businesses: Businesses should leverage the clean beauty crossover by promoting their dual certifications and use transparent labeling to communicate the product’s ethical and Halal credentials, positioning Halal cosmetics as a premium choice for quality and integrity.

08

Modest Fashion: A Fusion of Style, Faith, and Identity



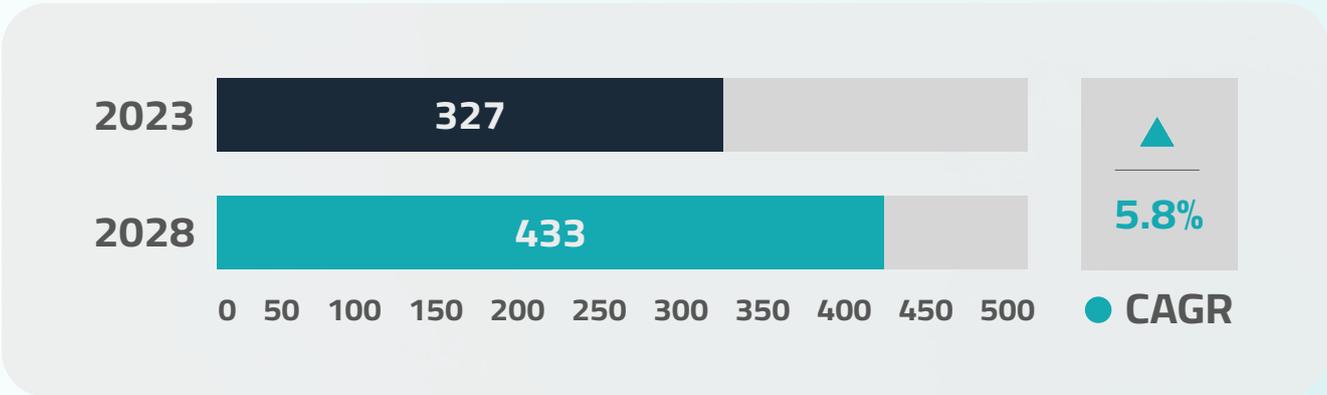
In the dynamic landscape of the UK Halal economy, modest fashion represents the most visible and vibrant expression of contemporary identity. It is a sector that has evolved far beyond a simple category of clothing to become a powerful global movement, fusing faith-based values with modern style, driven by a generation of digitally-native, trend-conscious consumers.

The UK, with its unique blend of creative energy and cultural diversity, has not just participated in this movement; it has been instrumental in shaping it. This chapter explores the rise of modest fashion as a major economic and cultural force, analysing the consumer dynamics that fuel it and the strategic opportunities that lie ahead.

8.1. A Multi-Billion Pound Statement of Style

The modest fashion sector is a commercial powerhouse, both globally and within the UK. Worldwide, Muslim consumer spending on modest fashion reached a staggering US\$327 billion in 2023 and is projected to grow to US\$433 billion by 2028, at a CAGR of 5.8%.

Global Muslim Spending on Modest Fashion (USD Billion)



Source: DinarStandard, SGIE Report 2024/25.

The UK is a significant and influential market within this global picture. According to a forecast cited by CORQ (2025), the UK modest fashion market is projected to be worth a substantial £12.5 billion in 2025.

This valuation positions modest fashion not as a niche, but as a major retail segment integral to the UK’s creative economy. The market’s energy is palpable at major consumer events, such as the [London Muslim Shopping Festival](#), the world’s largest pre-Ramadan shopping event, which attracts over 20,000 attendees and 250 global exhibitors. These gatherings are more than just commercial opportunities; they are vibrant celebrations of culture, style, and community, showcasing the sector’s immense dynamism and consumer engagement.



8.2. The UK Scene: A Global Trendsetter



The UK's influence in the modest fashion world far outweighs its market size. The modern iteration of this movement was significantly shaped not by corporate boardrooms, but by a grassroots revolution led by young, digitally-savvy British Muslim women. Leveraging platforms like Instagram and TikTok, they pioneered styles, shaped global conversations, and built a community that redefined what it means to be both modest and fashionable. This has positioned the UK as a key trend-setting hub, where styles often originate before gaining global traction.

The trends themselves tell a story of convergence with mainstream fashion. For 2025, key looks include relaxed silhouettes, tailored layering, and neutral palettes, signalling a move away from niche aesthetics towards a more integrated and universal style. Critically, this is a market with a conscience. Sustainable and ethical fashion choices are no longer a bonus but an expectation, with a strong emphasis on ethically sourced fabrics and "slow fashion" principles that align with the broader values of the modern consumer.

8.3. A Vibrant Ecosystem of Brands and Designers

The UK modest fashion market is served by a rich ecosystem of pioneering domestic brands and international platforms. At the forefront are premium brands like **Aab Collection**, which was one of the first to enter mainstream department stores and was named Fashion Business of the Year 2024. It is joined by a host of other successful UK-based brands, including **Inayah**, known for its sophisticated outfits, and online retailers like **Modora**, which offers a wide range of contemporary modest wear.



The sector's entrepreneurial spirit is embodied by brands like **Key Modesty**, which successfully transitioned from an Instagram start-up to a physical retail presence, demonstrating the power of online community building.



The market also includes ethical brands like **Muzungu Sisters**, which, while not exclusively modest, appeal to the values-driven consumer with their sustainable approach.

The growing commercial viability of the sector is further evidenced by the entry of major mainstream retailers like **ASOS** and **Next**, which now offer curated modest fashion edits, and fast-fashion giants like **Pretty Little Thing**, which launched its first modest collection in 2020.



8.4. The Unmet Needs of a Powerful Consumer



Despite the market's vibrancy, a significant disconnect exists between what the modest fashion consumer wants and what the mainstream market provides. While demand is persistent and growing, shoppers often face a choice between expensive designer brands and lower-quality fast fashion, with a clear gap for affordable, high-quality options.

This disconnect is most evident in the practical challenges consumers face. Standard UK sizing and designs, with sheer fabrics, side slits, or cropped lengths, often fail to meet modesty requirements, forcing consumers to layer garments or size up, which compromises both comfort and style. This leads to a revealing consumer behaviour known as the "Winter Scramble". Research shows that a staggering three out of four British Muslim women strategically stock up on wardrobe staples from mainstream autumn/winter collections simply because they offer better coverage. This behaviour is a powerful signal of a massive, unfulfilled, year-round demand for fashionable, modest-friendly clothing that most retailers are failing to recognise and service.

8.5. Strategic Pathways: From Misunderstanding to Mainstream Integration





8.5.1. Key Challenges: Mainstream Misunderstanding, Affordability, and Sizing Gaps

1. Mainstream Misunderstanding: Many high street retailers fail to grasp the nuances of the modest fashion consumer. Their engagement is often superficial, limited to tokenistic “Ramadan edits” rather than integrating modesty-friendly principles into their year-round core offerings, thus missing the vast majority of the commercial opportunity.

2. The Affordability Gap: Consumers are often caught between high-end designer brands that are financially inaccessible and lower-quality fast fashion that lacks durability and style. There is a clear and underserved market for brands that can deliver on style, quality, and affordability.

The Practicality Gap: Standard UK sizing and seasonal design trends frequently ignore the practical needs of modest dressers. This fundamental failure in inclusive design forces consumers into inconvenient compromises and signals that they are not a priority for mainstream brands.

8.5.2. Emerging Opportunities: Gen Z Demand, Year-Round Market Potential, and Global Influence

1. The Gen Z Mandate: The demand from young British Muslim women is exceptionally high, with an incredible nine in ten actively searching for modest wear. This demographic is highly engaged, vocal on social media, and ready to reward brands that genuinely cater to their needs with both loyalty and spending power.

2. The Year-Round Market Insight: The “Winter Scramble” is not a niche behaviour; it is a clear market signal. It reveals a massive, unfulfilled, year-round demand for fashionable, modest-friendly clothing that retailers can tap into by simply being more strategic with their existing stock and design principles.

3. The Global Trendsetting Hub: The UK’s position as a global fashion and creative capital means that modest fashion trends developed here have significant international influence. This provides a unique opportunity for UK-based designers and brands to lead the global market in innovation and style.

8.5.3. Strategic Recommendations: Policy Support, Inclusive Design, and Authentic Engagement



1. Government: The Department for Business and Trade (DBT) and the British Fashion Council should actively support modest fashion SMEs by including them in international trade missions, providing targeted export grants, and ensuring they are showcased at major events like London Fashion Week.

2. Industry: Mainstream fashion retailers must shift from seasonal, tokenistic edits to integrating “modesty-friendly” principles—such as longer hemlines, higher necklines, and opaque fabrics—into their core, year-round collections. This inclusive design approach will cater to a wider range of consumers without alienating any demographic.

3. Businesses: Brands must move beyond assumptions and engage in authentic collaboration with Muslim designers, stylists, and influencers to ensure their products and marketing are genuinely resonant. They should leverage the “Winter Scramble” insight by repurposing and marketing suitable stock year-round, explicitly labelling it as “modest-friendly” to capture this clear and waiting demand.

09

Halal-Friendly Tourism: Tapping into the Faith-Conscious Traveller

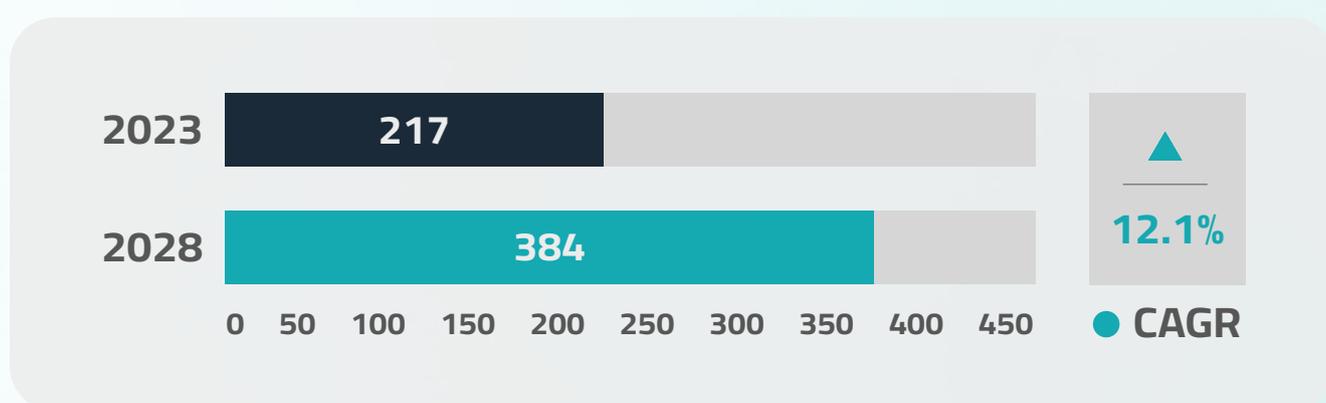
A woman wearing a dark hijab and a black backpack is seen from behind, looking towards the Shard skyscraper in London at night. The building is illuminated with warm lights. Overlaid on the scene are various financial charts, including a line graph with a yellow line and a bar chart with teal bars. The overall color palette is dark with teal and yellow accents.

Travel is one of the most personal and aspirational of human experiences. For the faith-conscious individual, it is an experience that must align with their core values, transforming a simple holiday into a journey that is both enriching and spiritually comfortable. Halal-friendly tourism is the global response to this deeply felt need, and it has become one of the fastest-growing and most lucrative segments of the international travel industry. This chapter explores the UK's significant potential within this dynamic market, analysing its unique assets, the pioneers shaping its offer, and the strategic vision required to transform the country into a premier destination for the world's Muslim travellers.

9.1. A Global Journey with Local Potential

The economic scale of Halal-friendly tourism is immense. Global Muslim spending on travel reached US\$217 billion in 2023 and is on a steep upward trajectory, projected to surge to US\$384 billion by 2028, at a remarkable CAGR of 12.1%.

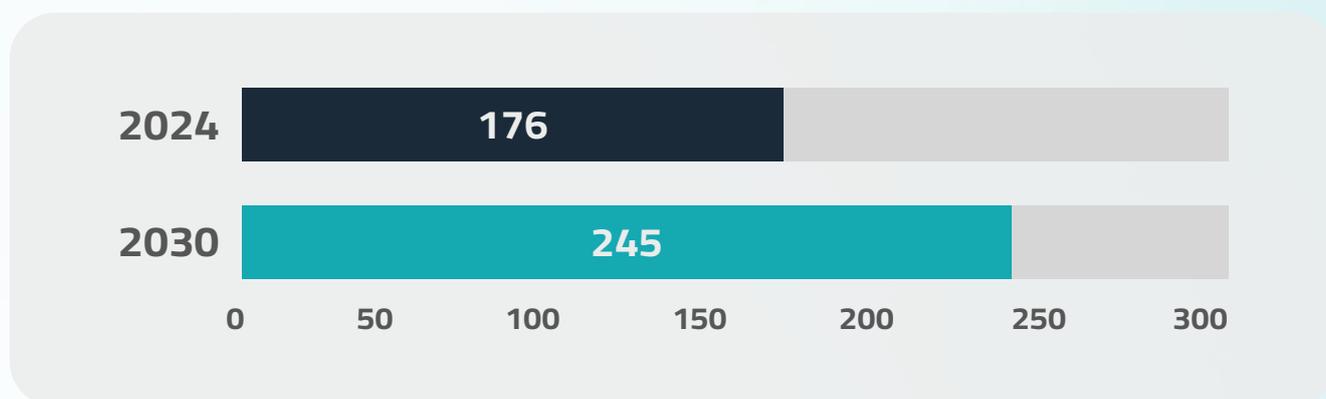
Global Muslim Spending On Travel (USD Billion)



Source: DinarStandard, SGIE Report 2024/25.

The 2025 Mastercard-CrescentRating Global Muslim Travel Index projects that international Muslim arrivals will rise from 176 million in 2024 to 245 million by 2030. This significant increase is expected to be accompanied by traveller expenditure reaching USD 235 billion in the same year, emphasising the sector's expanding economic influence.

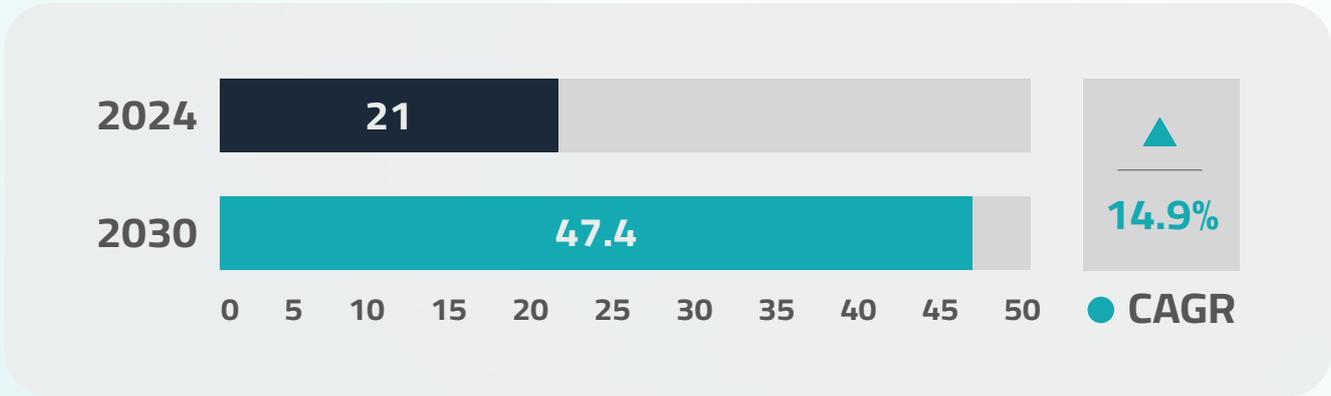
International Muslim Arrivals (Million)



Source: Mastercard-CrescentRating (2025).

The UK is already a significant player in this space. The domestic religious tourism market, which encompasses Halal travel, generated an estimated USD 21.0 billion in revenue in 2024 and is forecast to more than double to USD 47.4 billion by 2030, growing at a CAGR of 14.9% from 2025 to 2030. In 2024, the UK accounted for 7.3% of the global religious tourism market.

UK Religious Tourism Market (USD Billion)



Source: Grand View Research (2025).



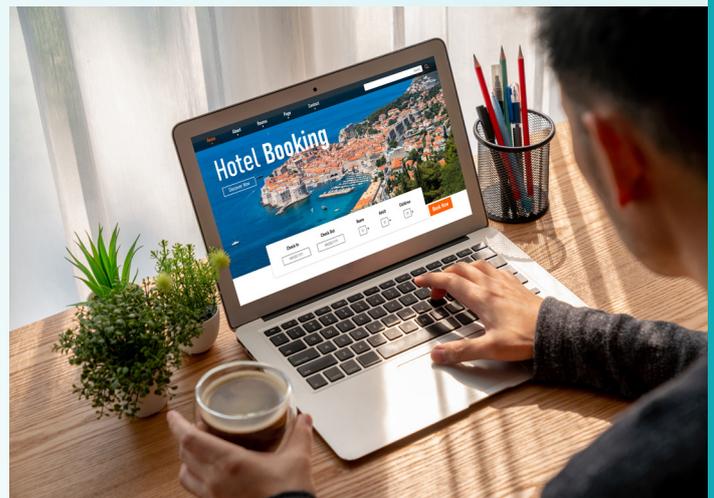
Crucially, Islam is identified as the fastest-growing segment within this market. This growth is not only driven by international visitors but also by a robust and resilient domestic market. A notable trend is the rise of the “staycation”, with a growing number of British Muslim families exploring the UK’s own rich landscapes, from the Lake District to the Cotswolds, creating a powerful internal engine for growth.

9.2. The UK's Offer: Heritage, Hospitality, and Hubs

The United Kingdom's appeal to the Muslim traveller is built on a strong foundation. Its major cities are multicultural hubs offering a wide variety of Halal food options and accessible prayer facilities, from the iconic [London Central Mosque](#) to community mosques across the country. This is layered upon a world-class tourism offering of historic landmarks, museums, and stunning countryside.

This inherent potential is being actively shaped by a vibrant ecosystem of key players. Most significantly, the UK serves as the global headquarters for [HalalBooking.com](#), the world's leading online platform for Halal-conscious travellers, serving over 2 million customers worldwide. This positions the UK not just as a destination, but as a central hub for the technology and innovation driving the global sector.

On the ground, this is complemented by the pioneering work of specialist operators like [Halal Tourism Britain](#), founded by AbdulMaalik Tailor. This organisation is at the forefront of developing curated experiences, offering meticulously researched guided tours that focus on Britain's rich and often untold Muslim heritage. By providing consultation to major destinations and training for the industry, such players are building the infrastructure of expertise needed for the market to mature. These efforts are supported by the national tourism agency, [VisitBritain](#), which provides market insights to help UK businesses cater to the cultural nuances of Muslim travellers, particularly from high-value markets like the Gulf Cooperation Council (GCC) countries.



9.3. Strategic Pathways: From Untapped Potential to a Premier Destination





9.3.1. Key Challenges: Awareness Gaps, Fragmented Offerings, and Limited Promotion

1.A Patchwork of Provision: While individual hotels or restaurants may offer Halal-friendly services, these are often ad-hoc and inconsistent. Outside of major multicultural cities, there is a lack of integrated, destination-wide strategies that can provide a seamless and reliable experience for the traveller from arrival to departure.

2.The Last Mile Problem: A Lack of Awareness and Infrastructure: There is often a limited understanding among the broader hospitality industry of the specific needs of Muslim travellers, such as the provision of certified Halal food, accessible prayer facilities with privacy, and family-friendly entertainment options.

3.A Story Left Untold: Despite the clear economic potential, there is insufficient targeted marketing from national and local tourism boards to actively attract and welcome this valuable demographic. Many travellers are left to rely on word-of-mouth or specialist platforms, leaving a significant promotional gap in the market.

9.3.2. Emerging Opportunities: Muslim Heritage, Domestic Staycations, and Tech Leadership

1.Britain's Hidden Narrative: A Unique Tourism Product: Britain has a deep and fascinating Muslim history stretching back centuries. This rich heritage—from early trade links with the Islamic world to the establishment of the country's first mosques—is a unique and largely unmarketed tourism asset that can be developed into compelling cultural tours and experiences.

2.The Resilient Domestic Market: The increasing preference among British Muslim families for domestic holidays presents a significant and stable market for UK destinations. This provides a reliable foundation for growth, particularly for regions that can offer family-friendly activities alongside Halal-friendly amenities.



9.3.3. Strategic Recommendations: National Frameworks, Industry Standards, and Global Partnerships

3.The UK as a Global Hub for Halal Travel Tech: The global success of a UK-headquartered platform like HalalBooking.com demonstrates the country's potential to be a world leader not just as a destination, but as a hub for Halal travel technology, innovation, and services that can shape the global industry.



1.Government & Tourism Boards: Curate and promote a national "Muslim Heritage Trail" that connects key historical sites across the UK, turning a hidden asset into a marketable tourism product. In partnership with industry, create a voluntary national "Muslim-Friendly" accreditation scheme for hotels, restaurants, and attractions to standardise offerings and build traveller trust.

2.Industry: Hospitality providers must invest in the core facilities that matter most. This includes obtaining formal Halal certification for their kitchens, designating proper prayer rooms with qibla direction, and implementing basic cultural sensitivity training for staff to create a genuinely welcoming environment.

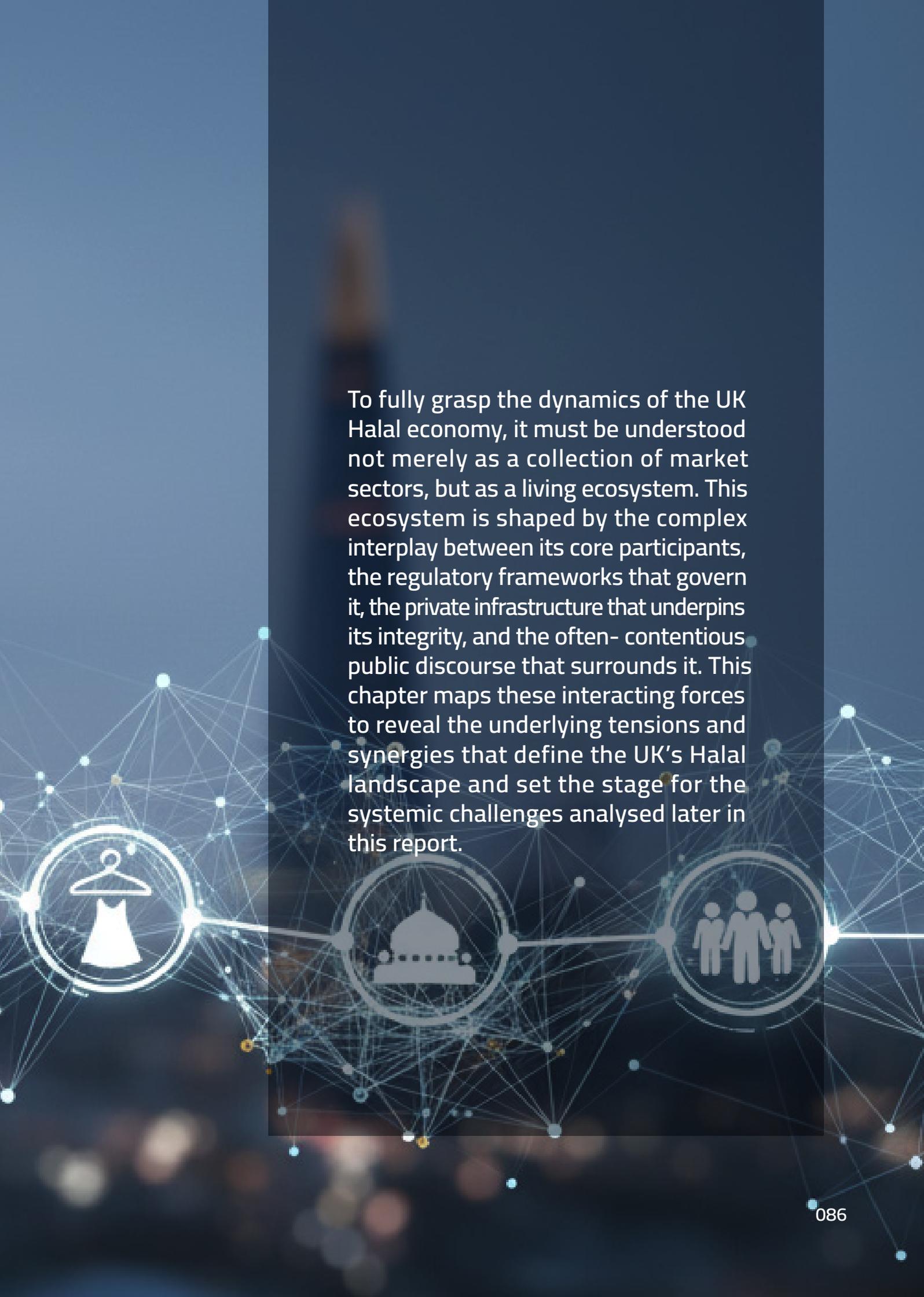
3.Businesses: Tour operators and travel agents should forge strategic partnerships to accelerate growth.

This means collaborating with global platforms like HalalBooking.com to gain international reach and partnering with local heritage experts like Halal Tourism Britain to create authentic, high-value tour packages that go beyond generic sightseeing.



10

The UK Halal Ecosystem: A Web of Stakeholders, Standards, and Public Perception



To fully grasp the dynamics of the UK Halal economy, it must be understood not merely as a collection of market sectors, but as a living ecosystem. This ecosystem is shaped by the complex interplay between its core participants, the regulatory frameworks that govern it, the private infrastructure that underpins its integrity, and the often- contentious public discourse that surrounds it. This chapter maps these interacting forces to reveal the underlying tensions and synergies that define the UK's Halal landscape and set the stage for the systemic challenges analysed later in this report.

10.1. The Core Dynamic: Consumers and Enterprise



At the heart of the ecosystem lies the foundational relationship between consumers and the businesses that serve them.

The Consumer Core: The primary driver is the British Muslim consumer, a growing, youthful, and economically influential demographic. Their purchasing decisions are governed by a deep-seated demand for trust and authenticity. This is most evident in the food sector, where 57% of consumers favour specialist Halal butchers over supermarkets (35%), reflecting a belief in the superior integrity offered by independent, community-focused outlets. The importance of formal assurance is paramount, with 92% of Halal consumers stating that authentication is a crucial criterion when shopping. This demand for verifiable integrity is the central force to which the rest of the ecosystem must respond.

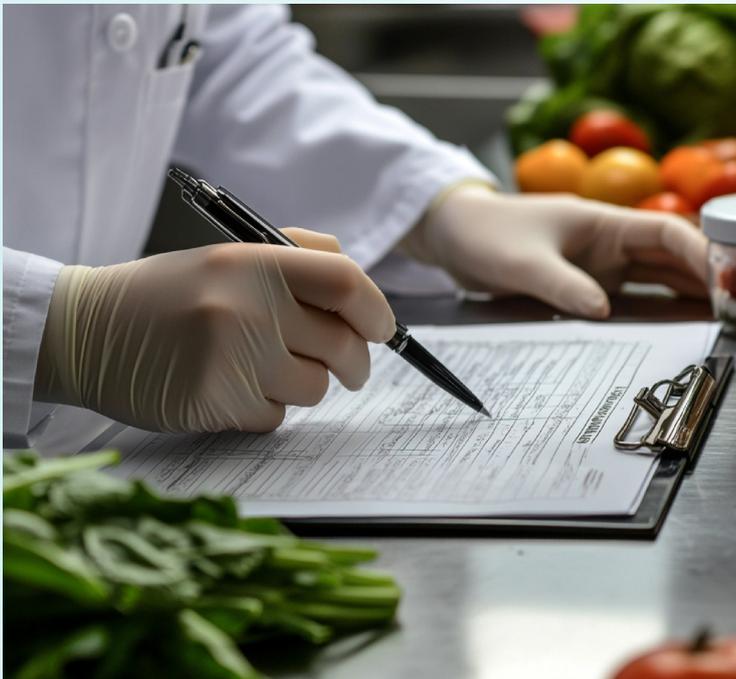
The Enterprise Engine: The business landscape is a diverse spectrum, from the family-run SMEs that form the industry's backbone to major multinational corporations. Key UK-based players have established strong brand recognition, including [Tariq Halal](#) and [Shazans](#) in food, [Aab Collection](#) in modest fashion, and [PHB Ethical Beauty](#) in cosmetics. The Islamic finance sector is populated by dedicated institutions like [Gatehouse Bank](#) and a vibrant fintech scene featuring innovators such as [StrideUp](#). This enterprise engine is constantly innovating to meet the evolving demands of the consumer core, navigating the complex regulatory and certification landscape to deliver trusted products and services.

10.2. The Governance Framework: A Tale of Two Policies



The UK government's engagement with the Halal economy is characterised by a notable fragmentation and, at times, a deep-seated contradiction. This creates a dual-track policy environment that simultaneously enables and constrains the market.

On one hand, the Treasury and the Financial Conduct Authority (FCA) have proactively cultivated a world-leading, supportive regulatory environment for Islamic finance. They have worked to create a level playing field, for instance, by addressing issues of double taxation on Shari'ah-compliant property financing, enabling London to become the premier Western hub for the sector.



On the other hand, the Department for Environment, Food & Rural Affairs (DEFRA) and the prevailing parliamentary discourse often frame the foundational Halal food sector through a narrow and contentious lens of animal welfare, treating it as a problem to be managed rather than a strategic economic asset to be championed. While the Food Standards Agency (FSA) plays a neutral regulatory role in ensuring that any food labelled "Halal" is not misleading, the overarching policy incoherence, promoting one high-value sector while treating another with suspicion, creates an unstable and uncertain environment for businesses and investors.

10.3. The Infrastructure of Trust: The Certification Trilemma

In the absence of a single, state-led standard, the critical role of guaranteeing Halal integrity falls to a diverse landscape of private certification bodies. Organisations like the [Halal Monitoring Committee \(HMC\)](#) and the [Halal Food Authority \(HFA\)](#) form the essential “trust infrastructure” for the consumer.



However, this infrastructure is fundamentally fragmented, primarily due to differing theological and procedural interpretations of pre-slaughter stunning. This has created what can be described as a “[certification trilemma](#)” for UK businesses, forcing them to navigate irreconcilable trade-offs between:

1. Strict Theological Authenticity: Embodied by bodies like HMC, which generally prohibits stunning. This standard commands high trust among a core segment of consumers but can limit supply chain options.

2. Global Market Access: Represented by bodies like HFA, which accepts reversible stunning. This pragmatic approach aligns with standards in key export markets like Malaysia and the UAE, facilitating international trade.

3. Mainstream Retail Scalability: The need for large, consistent supply chains to service major supermarkets often favours the flexibility and volume offered by stun-inclusive standards.



The lack of a national framework means no single certifier can optimally satisfy all three demands simultaneously. This perpetuates market fragmentation, creates complexity for businesses, and ultimately fuels consumer confusion, representing one of the most significant systemic weaknesses in the UK Halal ecosystem.

10.4. The Public Arena: The Contested Discourse on Religious Slaughter



The tensions within the ecosystem, particularly the government's paradoxical stance and the divisions in certification, spill over into the public domain, most visibly in the recurring and intense parliamentary debates on religious slaughter. This discourse serves as a powerful case study of how the Halal economy intersects with wider societal concerns about animal welfare, religious freedom, and cultural identity.

These debates are often triggered by public e-petitions calling for a ban on non-stun slaughter, framing it as "barbaric". This creates a charged environment where competing values and narratives collide.

Animal Welfare vs. Religious Freedom: Animal welfare groups like the RSPCA and the British Veterinary Association (BVA) argue that scientific evidence shows non-stun slaughter causes unnecessary suffering. Conversely, Muslim and Jewish community representatives, supported by several MPs, contend that their methods, when performed correctly, are designed to be humane and that a ban would infringe on religious freedoms protected in UK law since 1933. The UK Government has consistently walked a fine line, stating it would prefer all animals to be stunned but respecting the rights of religious communities.

The Charge of Islamophobia: A critical dimension of the debate, raised consistently by Muslim MPs, is the argument that the intense focus on Halal slaughter is disproportionate and often used as a proxy for anti-Muslim sentiment. MPs have cited correspondence referring to "Muslim meat" and described the debate's framing as a "dog whistle for xenophobia". The fact that 88% of Halal-slaughtered animals in the UK are already stunned is a crucial detail that is frequently overlooked in the heated public discourse, lending weight to the argument that the debate is not always driven solely by animal welfare concerns. This contested public narrative directly impacts consumer confidence and business stability, highlighting the urgent need for a more informed and balanced national conversation.

10.5. A Detailed Map of Key Stakeholders in the UK Halal Ecosystem



The following table provides a detailed, though not exhaustive, map of the key organisations and brands that constitute the UK Halal ecosystem. It offers concrete examples of the stakeholders discussed in this chapter, illustrating the diversity and dynamism of the market across its core sectors.

Table (2): The UK Halal Stakeholder Matrix

Core Sector	Stakeholder Category	Sub-Category / Type	Organisation / Brand Name	Primary Role & Significance in the UK Ecosystem	Official Website
Halal Food & Beverages	The Enterprise Engine	Major Producer / Brand	Tariq Halal	One of the most established and trusted Halal meat brands, with a strong retail presence and high consumer recognition.	https://tariqhalalmeats.com/
Halal Food & Beverages	The Enterprise Engine	Major Producer / Brand	Shazans	A leading producer of frozen and chilled Halal foods, widely available in major supermarkets. Recognised as one of the most trusted brands.	https://www.shazans.com/
Halal Food & Beverages	The Enterprise Engine	Innovative SME	Legends Burgers	A London-based brand redefining Halal fast food with gourmet options, illustrating the trend towards premiumisation and modern consumer tastes.	https://legendsburgers.co.uk/
Halal Food & Beverages	The Enterprise Engine	Niche Producer	For Aisha	A key innovator in the Halal baby food category, catering to a specialised and growing market segment.	https://www.foraisha.com/
Halal Food & Beverages	The Enterprise Engine	Niche Producer	Spice Time	A long-standing manufacturer of Halal ready meals and snacks with a significant history in the market.	https://spicetime.co.uk/
Halal Food & Beverages	The Trust Infrastructure	Certification Body	Halal Monitoring Committee (HMC)	A major and influential certification body, known for its stringent standards, particularly its non-acceptance of pre-slaughter stunning. A registered charity.	https://halalhmc.org/
Halal Food & Beverages	The Trust Infrastructure	Certification Body	Halal Food Authority (HFA)	One of the oldest certification bodies, which accepts certain methods of pre-slaughter stunning under strict conditions and holds international accreditations.	https://halalfoodauthority.com/
Halal Food & Beverages	The Governance Framework	Regulator / Agency	Food Standards Agency (FSA)	The primary government body for food safety and labelling. It enforces against misleading (Halal) claims and has implemented labelling rules for non-stunned meat.	https://www.food.gov.uk/
Islamic Finance	The Enterprise Engine	Established Bank	Gatehouse Bank	A key UK Shari'ah-compliant bank offering property finance and savings accounts. Actively contributes to industry discourse through reports.	https://gatehousebank.com/
Islamic Finance	The Enterprise Engine	Established Bank	Bank of London and The Middle East (BLME)	A London-based Shari'ah compliant bank providing real estate-focused wealth management, commercial property finance, and savings products.	https://www.blme.com/
Islamic Finance	The Enterprise Engine	Established Bank	QIB UK	A wholly-owned subsidiary of Qatar Islamic Bank, aimed at enhancing the parent bank's international investments.	https://www.qib-uk.com/
Islamic Finance	The Enterprise Engine	Established Bank	Habib Bank AG Zurich	Offers both conventional and Islamic (Sirat) banking services, including current accounts and commercial and residential property finance.	https://habibbank.com/gb/
Islamic Finance	The Enterprise Engine	Fintech Innovator	StrideUp	A leading Islamic digital home finance platform, ranked among the top 20 fastest-growing start-ups, indicating the dynamism of the fintech sector.	https://www.strideup.co/

Core Sector	Stakeholder Category	Sub-Category / Type	Organisation / Brand Name	Primary Role & Significance in the UK Ecosystem	Official Website
Islamic Finance	The Enterprise Engine	Fintech Innovator	Wahed Invest	An online Halal investment platform, making Shari'ah-compliant investing accessible to a broader audience of retail investors.	https://www.wahed.com/uk/
Islamic Finance	The Enterprise Engine	Fintech Innovator	Ayan Capital	A London-based fintech specialising in Shari'ah-compliant vehicle finance for SMEs and self-employed drivers.	https://www.ayan.co.uk/
Islamic Finance	The Governance Framework	Regulator / Agency	Financial Conduct Authority (FCA)	The UK's primary financial regulator, which has been instrumental in creating a supportive and level playing field for Islamic finance products.	https://www.fca.org.uk/
Islamic Finance	The Trust Infrastructure	Advocacy Group	Islamic Finance Council UK (UKIFC)	A specialist not-for-profit body that promotes the Islamic finance industry and advises the government, e.g., on alternative student finance.	https://ukifc.com/
Modest Fashion	The Enterprise Engine	Established Brand	Aab Collection	A leading and pioneering brand in contemporary modest wear with a strong retail and online presence. Awarded "Fashion Business of the Year".	https://aabcollection.com/
Modest Fashion	The Enterprise Engine	E-commerce Brand	Inayah	A prominent online retailer for modest wear and hijabs, representing the digital-native nature of the sector.	https://inayacollections.com/
Pharmaceuticals	The Enterprise Engine	Major Producer	Vitabiotics	A leading British vitamin company offering well-known Halal certified products like Pregnacare, demonstrating mainstream corporate engagement.	https://www.vitabiotics.com/
Pharmaceuticals	The Enterprise Engine	Niche Producer	Rosemont Pharmaceuticals	A UK-based company specialising in liquid medicines, developing formulations suitable for patients with specific dietary/religious needs.	https://www.rosemontpharma.com/
Cosmetics	The Enterprise Engine	Ethical Brand	PHB Ethical Beauty	A prominent family-run British brand known for its 100% natural, vegan, and Halal-certified products, embodying the Halal-ethical convergence.	https://phbethicalbeauty.co.uk/
Halal-Friendly Tourism	The Enterprise Engine	Market Leader Platform	HalalBooking.com	The world's leading Halal travel platform, headquartered in the UK, highlighting the nation's strength in high-value digital services.	https://halalbooking.com/
Halal-Friendly Tourism	The Enterprise Engine	Specialist Operator	Halal Tourism Britain	A pioneering tour operator and consultancy founded by AbdulMaalik Tailor, focused on developing and promoting Islamic heritage tours in Britain.	https://www.halaltourismbritain.com/
Cross-Sector	The Trust Infrastructure	Advocacy / Think Tank	Muslim Council of Britain (MCB)	The UK's largest Muslim umbrella body, advocating on a wide range of issues affecting the community, including the Halal economy.	https://mcb.org.uk/
Cross-Sector	The Trust Infrastructure	Advocacy / Think Tank	Equi	An emerging think tank platforming Muslim voices in public policy, producing key reports on the economic impact of Ramadan and other relevant topics.	https://equi.org.uk/



11

A Cross-Sector Synthesis: Systemic Challenges and Policy Dynamics

UK FISCAL ECONOMY

2020–2025



UK HALAL ECONOMY

The preceding sectoral analysis reveals that the UK Halal economy is not a monolithic entity but a complex ecosystem of distinct, yet interconnected, industries. Whilst each sector possesses its own unique dynamics, a cross-cutting synthesis exposes a set of recurring, systemic challenges and a fragmented policy landscape that collectively constrain the UK's full potential. This chapter synthesises these overarching themes, providing a crucial bridge between the detailed sectoral assessments and the forward-looking national strategy that follows.





11.1. The Shaping Forces of the Contemporary Landscape (2020–2025)

The period between 2020 and 2025 has been defined by a confluence of external forces that have simultaneously tested the resilience and accelerated the evolution of the UK Halal economy. The COVID-19 pandemic acted as a powerful disruptor and catalyst, fracturing physical supply chains whilst dramatically accelerating the adoption of e-commerce across all sectors, from online grocery to modest fashion. It also sharpened consumer focus on health and wellness, providing a significant tailwind for the Halal pharmaceuticals and nutraceuticals sectors.

Simultaneously, the UK's departure from the European Union (Brexit) has introduced new layers of regulatory complexity and trade friction, particularly for the import and export of food products. Yet, it has also created a strategic impetus for the UK to forge new trade agreements, with a potential UK-GCC Free Trade Agreement representing a significant opportunity for Halal exporters. On the domestic front, key policy and market events have reshaped the landscape. The UK Government's second sovereign Sukuk issuance in 2021 reaffirmed its commitment to Islamic finance, whilst the 2024 implementation of mandatory labelling for non-stun meat signalled a governmental push for greater consumer transparency in the food sector. This period has also been characterised by a surge in Islamic fintech innovation and strategic investments in Halal-centric businesses, indicating a growing recognition of the economy's commercial vitality.

11.2. Systemic Challenges: Common Threads in a Diverse Economy

Across the varied sectoral landscapes, four systemic challenges consistently emerge as the primary inhibitors of growth and cohesion.

1. The Governance Paradox: Proactive Finance, Reactive Food. A fundamental incoherence lies at the heart of the UK's governmental approach. On the one hand, the Treasury and the Financial Conduct Authority have proactively cultivated a world-leading regulatory environment for Islamic finance. On the other hand, departments like DEFRA and the prevailing parliamentary discourse often frame the Halal food sector through a narrow and contentious lens of animal welfare, rather than as a strategic economic asset. This paradoxical stance—championing one high-value sector whilst treating the foundational food sector with suspicion—creates an unstable and unpredictable environment for businesses and investors.

2. The Trust Deficit: A Crisis of Standards and Integrity. Trust is the ultimate currency of the Halal economy, yet it is consistently undermined by the lack of unified national standards. This is most acute in the food sector's "certification trilemma", but the challenge of fragmented, costly, and often confusing accreditation processes also constrains the emerging pharmaceuticals and cosmetics sectors. This lack of a single, trusted benchmark is compounded by supply chain vulnerabilities, where the risk of fraud and mislabelling remains a deep-seated concern for consumers, eroding confidence in mainstream retail offerings.

3. The SME Support Gap: Constraining the Engine of Growth. Small and medium-sized enterprises (SMEs) are the lifeblood of the Halal economy, driving innovation in everything from gourmet food to fintech and modest fashion. Yet, they consistently face disproportionate barriers. The high costs of certification are a significant hurdle, whilst access to appropriate, Shari'ah-compliant start-up and scale-up finance remains a persistent challenge, limiting the ability of promising ventures to achieve their full potential.

4. The Narrative Disconnect: Public Perception vs. Economic Reality. The public discourse surrounding the Halal economy is often disconnected from its economic and ethical reality. Whilst Islamic finance is increasingly understood through a positive frame of "ethical finance" and modest fashion is celebrated as a vibrant part of the creative industries, the Halal food sector remains mired in a negative and often misinformed debate focused almost exclusively on non-stun slaughter. This narrative disconnect not only fuels public misconceptions but also prevents a wider appreciation of the Halal economy's significant contribution to national prosperity and its alignment with broader consumer trends towards ethical and sustainable consumption.

11.3 The Policy Environment: Enablers, Gaps, and the Imperative for Cohesion

The current policy and support landscape reflects the same fragmentation seen in the challenges it seeks to address. There are clear pockets of excellence, most notably the robust regulatory framework for **Islamic finance** and the general support available to all UK businesses through entities like the **British Business Bank**. The Food Standards Agency plays a crucial role in ensuring that Halal claims are not misleading, providing a baseline of consumer protection.

However, these mechanisms are not part of a cohesive, overarching strategy. They are isolated enablers in a system with significant gaps. There is no central coordinating body to align the objectives of different government departments, nor is there a dedicated national strategy to champion the Halal economy as a whole. Proposed strategies from industry stakeholders—such as calls for a national Halal assurance scheme or the reinvestment of a “Halal premium” into cultural initiatives—highlight a clear demand for more integrated and ambitious thinking.

Ultimately, the analysis reveals an economy whose organic, community-driven growth has outpaced the strategic frameworks needed to support it. To overcome these systemic challenges and truly capitalise on the opportunities ahead, a more deliberate, integrated, and forward-looking national approach is no longer just desirable; it is a strategic imperative.





12

A Strategic Blueprint for the UK Halal Economy



12.1. The 2035 Vision: A Global Benchmark for Ethical and Economic Growth

Navigating the complexities of the global market and addressing the domestic challenges of the United Kingdom requires a clear and bold national vision for its Halal economy.

This report proposes the following guiding objective:

“ For the United Kingdom to be the undisputed Western hub for the global Halal economy, it must be seen as a world leader in Halal innovation, ethical finance, and high-quality, trusted Halal goods and services.

This vision is not just a dream; it is based on a strong demographic and economic imperative. The UK's Muslim population is projected to rise from nearly 4 million to as many as 13 million by 2050. This increase creates more than just a bigger consumer base; it forms a significant demographic advantage. The British Muslim community is young, tech-savvy, and economically influential, with one in ten Gen Z consumers in the UK identifying as a practicing Muslim. This demographic acts as a leading indicator for global trends, driving demand for products that combine innovation, sustainability, and ethical production.

The long-term economic benefit is significant. Based on current market values, the Halal food market is projected to reach USD 193.47 billion by 2033. It is entirely possible that the integrated Halal ecosystem will become an important part of the UK's GDP, contributing tens of billions of pounds each year in the coming decades.

This vision goes beyond just following religious rules. The modern Halal economy combines two key Islamic principles: Halal (permissible) and Tayyib (wholesome, pure, and ethical). Today's consumers expect products that are not only free from forbidden ingredients but also made in ways that are sustainable, socially responsible, and transparent. This trend aligns with the global shift towards ethical and clean-label goods which boosts the Halal economy's appeal, reaching far beyond its traditional religious base. The 2035 vision is not just to capture a niche market but to position the United Kingdom at the center of a global, value-driven economic movement. This will create a competitive edge that is both inclusive and impactful.

12.2. Key Drivers of Future Opportunity: Technology, Consumers, and Untapped Potential

Realizing the 2035 vision requires a clear assessment of the key trends and national assets the United Kingdom can strategically leverage. The future growth of the Halal economy will be driven by technological innovation, changes in consumer behavior, and the utilization of untapped potential.

Technology plays a crucial role. The UK's strength in financial technology gives it a significant edge, with Islamic fintech innovators like StrideUp and Ayan Capital making finance more accessible and efficient. This strength can be applied more widely. For example, blockchain technology provides a direct solution to the ongoing issues of supply chain integrity and the "supermarket mistrust" seen among consumers. It offers a transparent and unchangeable record from farm to fork. Digital transformation has already reshaped sectors like modest fashion through e-commerce and social media. This change will continue to speed up, creating a vibrant "digital Halal economy" that lowers barriers for a new generation of entrepreneurs.

At the same time, the Halal consumer landscape is evolving. Demand is quickly shifting from basic needs to premium and lifestyle-oriented products. This is shown by the rise of gourmet food brands like Legends Burgers, luxury modest fashion houses such as Aab Collection, and ethical cosmetics leaders like PHB Ethical Beauty. This trend gives rise to the "ethical Halal consumer," a growing and influential segment whose purchasing decisions reflect their holistic values. These consumers seek products that are not only compliant with religious teachings but are also sustainable, cruelty-free, and socially responsible. This strong alignment connects the Halal market with mainstream trends like veganism and clean beauty, greatly expanding its potential customer base to include ethically minded non-Muslims.

These dynamics highlight a key challenge that needs to be addressed: a strategic paradox at the heart of the UK's current approach. The country shows excellent performance in high-value, competitive sectors, ranking 6th in Modest Fashion and sharing the top spot in Media & Recreation. However, it lacks a clear strategy for its foundational everyday sector, Halal food, which suffers from fragmented certification, inconsistent government involvement, and widespread consumer mistrust. The government's strong support for Islamic finance is at odds with its cautious, welfare-focused view of Halal food production. Addressing this inconsistency is essential. The UK needs to apply the same clarity of vision, regulatory sophistication, and brand-building energy that have fueled its success in Islamic finance to the broader Halal economy. This way, its strengths in high-value services can help build trust, unity, and growth across all sectors.

12.3. A Coordinated National Strategy: Four Pillars for Action

To solve the paradox and unlock the full potential of the Halal economy, a passive and fragmented approach is no longer enough. An integrated national strategy is necessary, relying on four actionable pillars that bring together government, industry, and civil society for a common goal.

Pillar (1)

Establish Cohesive Governance and Standards

A coherent governance model is essential for creating a trusted and globally competitive Halal economy. The ongoing fragmentation of standards, especially in the food sector but also in pharmaceuticals and cosmetics, leads to consumer confusion, complicates operations for businesses, and hinders international trade. To tackle this issue, the government should spearhead the creation of a UK Halal Economy Council whose main role would be to guide the national strategy. This multi-stakeholder body should include representatives from key government departments (DBT, DEFRA, Treasury), industry associations, certification bodies, and consumer groups. The council would work to develop a voluntary yet government-supported National Accreditation Framework. This framework would not replace existing certifiers but would accredit them based on a unified set of standards for competence and transparency. This approach would help harmonize the landscape and create a single, trusted reference point for both domestic consumers and international trade partners.

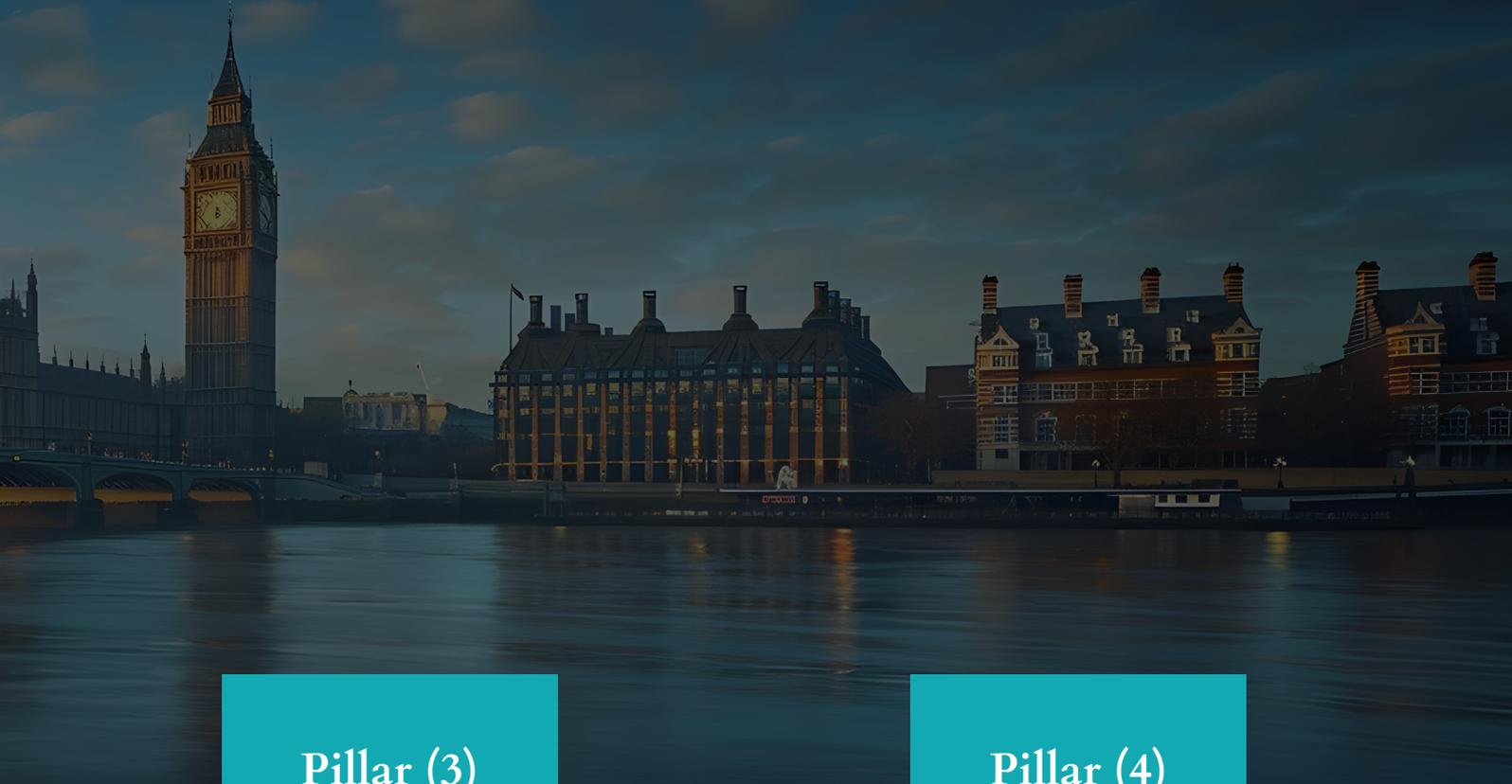
Pillar (2)

Foster Enterprise and Innovation

The growth of the Halal economy relies on its entrepreneurs. However, small and medium-sized enterprises (SMEs) face major challenges, such as the high costs of certification and limited access to suitable financing.

Targeted support is essential. The government should offer certification grants to ease the financial burden of compliance for SMEs and collaborate with the British Business Bank to enhance access to Sharīah-compliant start-up finance.

Additionally, to establish the UK as a leader in innovation, a specific funding stream should be created within Innovate UK. This fund would support research and development in key areas like Halal-tech, blockchain-based traceability solutions, sustainable materials for fashion and packaging, and the creation of Halal-compliant alternatives for pharmaceutical and cosmetic ingredients.



Pillar (3)

Drive Global Trade and Investment

The UK must adopt a proactive export strategy that clearly prioritizes the Halal economy. The nation's strong reputation for safety and quality gives it a solid base for exporting premium products and services to high-demand global markets.

Access to the Halal market and mutual recognition of standards should become priority goals in all future trade talks, especially with the Gulf Cooperation Council (GCC), ASEAN, and other Organisation of Islamic Cooperation (OIC) countries.

At the same time, the UK should be actively promoted as a top destination for Foreign Direct Investment (FDI) in high-value sectors where it has a clear advantage, such as Islamic fintech, pharmaceutical R&D, Halal-related media production, and sustainable fashion design.

Pillar (4)

Develop People and Shape Perceptions

A long-term strategy requires ongoing investment in human resources and a major change in the public narrative. The growth of the Halal economy is increasing the demand for a specialized workforce, but there are still skill gaps in areas like Shari'ah compliance, Halal auditing, and Islamic finance.

The government, along with educational institutions and industry groups, should help develop focused skills and training programs to prepare future talent. Importantly, a national public awareness campaign should be launched to inform the wider British public about the ethical, quality, and economic aspects of the Halal economy. This campaign would steer the public discourse away from narrow debates, like non-stun slaughter, and shift the focus to the significant economic opportunities and positive contributions to culture.

The following table summarizes this strategic framework, linking each pillar to the challenges it tackles, and the key actions re

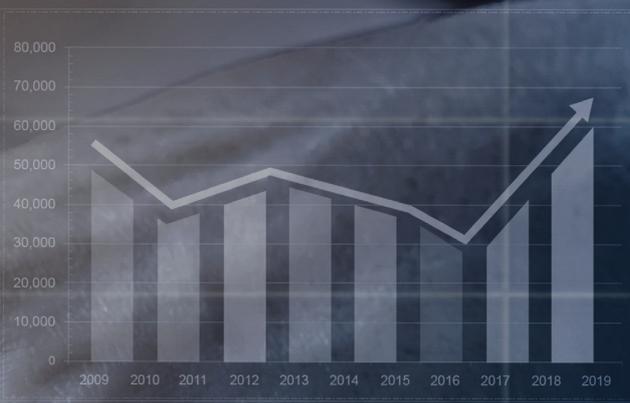
Table (3): The UK Halal Economy Strategic Framework at a Glance

Strategic Pillar	Systemic Challenge Addressed	Key Policy Recommendations	Lead Stakeholders
(1) Governance & Standards	<ul style="list-style-type: none"> - Policy incoherence. - Fragmented certification standards. - Consumer confusion. - Barriers to trade. 	<ul style="list-style-type: none"> - Establish a government-backed UK Halal Economy Council. - Develop a voluntary National Accreditation Framework for certifiers. 	<ul style="list-style-type: none"> - UK Government (DBT, DEFRA, Treasury). - Industry Bodies. - Certification Bodies.
(2) Enterprise & Innovation	<ul style="list-style-type: none"> - High barriers to entry for SMEs. - Innovation gap in key technologies and materials. - Limited access to compliant finance. 	<ul style="list-style-type: none"> - Launch certification grants for SMEs. - Improve access to Shari'ah-compliant finance. - Create a dedicated Innovate UK fund for Halal R&D. 	<ul style="list-style-type: none"> - Innovate UK. - Industry Associations.
(3) Trade & Investment	<ul style="list-style-type: none"> - Missed export opportunities. - Lack of strategic promotion in global markets. 	<ul style="list-style-type: none"> - Implement a proactive Halal Export Strategy. - Prioritise Halal market access in trade negotiations. - Promote the UK for FDI in high-value Halal sectors. 	<ul style="list-style-type: none"> - Department for Business and Trade (DBT). - British Fashion Council. - UKIFC.
(4) People & Perception	<ul style="list-style-type: none"> - Sector-specific skills gaps. - Negative public narrative focused on contentious issues. - Lack of a wider understanding of economic benefits. 	<ul style="list-style-type: none"> - Develop targeted skills and training programmes. - Launch a national public awareness campaign to reframe the Halal narrative. 	<ul style="list-style-type: none"> - Department for Education. - Industry Bodies. - Community Organisations.



13

Conclusion: Capitalising on the UK's Halal Advantage for Ethical and Economic Prosperity



Conclusion:

The United Kingdom stands at a strategic crossroad. With its progressive consumer base, world-class creative and financial ecosystems, and strong reputation for quality and innovation, the UK is well positioned to emerge as a leading force in the multi-trillion-dollar global Halal economy. The organic growth of the UK Halal market into a multi-billion-pound contributor to the national economy serves as strong evidence of these intrinsic advantages.

At the same time, the United Kingdom's Halal economy has evolved into a strategically important driver of national growth and global engagement. The UK Halal economy is significant, ranging from Halal food and beverages and Islamic finance to other fast-growing sectors such as pharmaceuticals, nutraceuticals, cosmetics, modest fashion, and Halal-friendly tourism. This reflects the maturity and the dynamic untapped potential of the market. When combined with the UK's demographic strengths, the rising influence of ethical consumers, its global reputation for quality, and a supportive regulatory framework, these factors offer a powerful platform for consolidating and extending the UK's leadership within the global Halal marketplace.

However, organic growth is no longer enough. The fragmentation of certification, incoherent policies, supply chain vulnerabilities, limited access to finance for SMEs, skills shortages, and lingering misconceptions in public discourse particularly regarding religious slaughter risk eroding consumer trust and limiting market growth. Without a deliberate, coordinated, and ambitious strategy, the UK risks losing its competitive advantage to more focused international rivals.

The path forward requires a fundamental change from being passive and reactive to being proactive and strategic. This means investing in aligned standards, using technology for transparency and traceability, improving innovation and research, and strengthening workforce skills. It also means integrating the sector into more high-value global trade networks. By putting together a clear framework focused on governance, businesses, trade, and education, the UK can tackle structural challenges. This will help create an ecosystem that serves its vibrant Muslim community and connects with a global audience of ethically minded consumers. Additionally, constructive cooperation among industry, policymakers, and community members will be crucial to build consensus, enhance public understanding, and emphasize the positive impact of the Halal economy on society.

If pursued in a clear and cooperative way, this approach could change the United Kingdom into the global leader for an ethical, inclusive, and sustainable Halal economy. By doing so, the UK will not only generate significant long-term economic benefits across various sectors but also establish itself as a reliable and progressive leader in shaping the future of one of the world's most dynamic and value-driven markets. It will effectively take advantage of its Halal strengths for the benefit of everyone.

14

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