

The background image is a black and white photograph of a large, ornate interior space, likely a synagogue or a grand hall. It features a high, vaulted ceiling with intricate architectural details, including columns and decorative railings. The floor is covered in a black and white checkered pattern. Several people are visible in the distance, standing near a large, ornate structure that appears to be an altar or a large window. The overall atmosphere is one of grandeur and historical significance.

Kosher

And Halal

MARKETS

Benchmarking

ATIP GROUB OF COMPANIES

2018

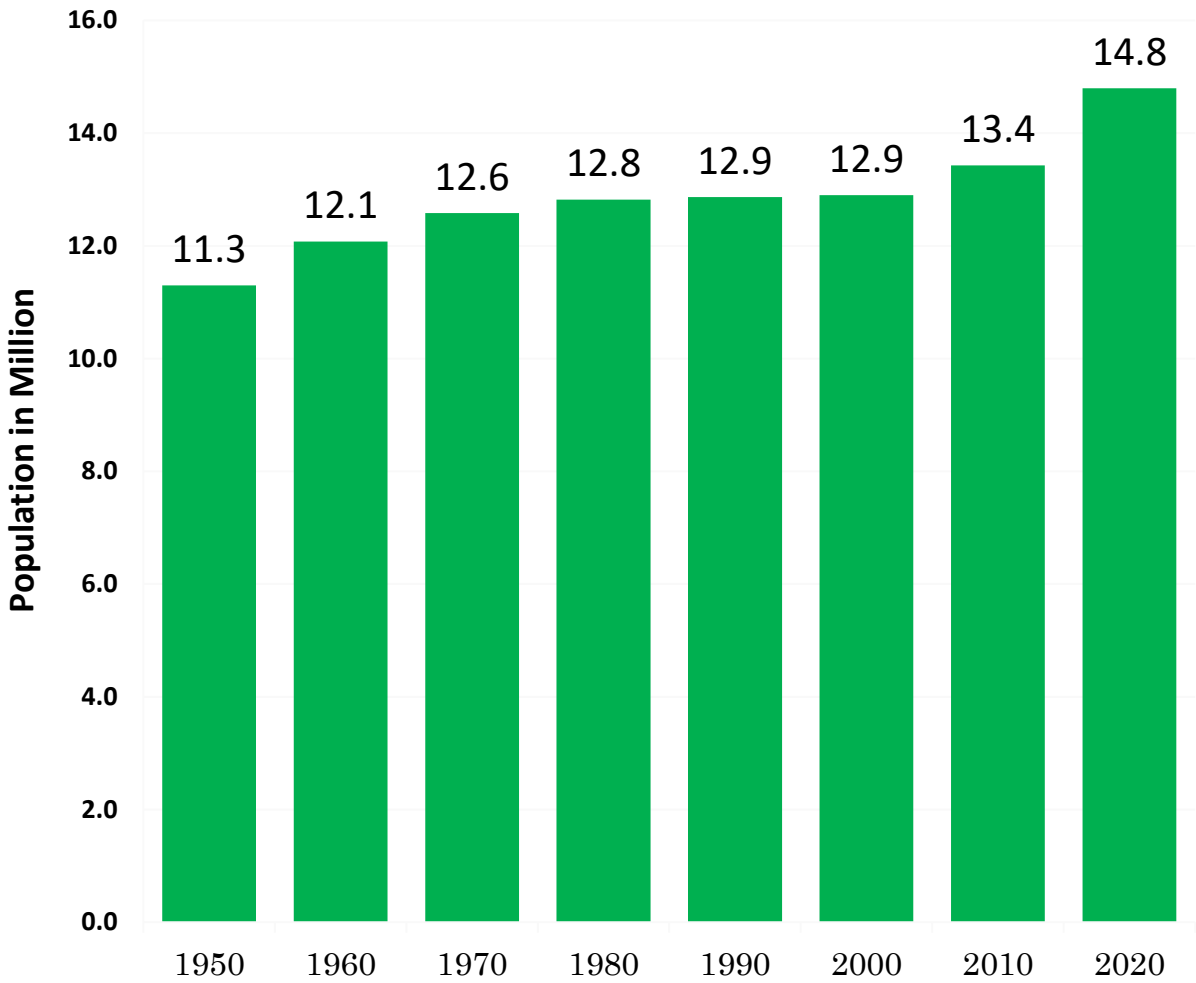
Kosher

Industry Overview

The Kosher industry and certification initiated in the US back in 1898 when the Union of Orthodox Jewish Congregations was established. In 1918 The New York State Legislature enacted the nation's first Kosher Food Law. Nearly a decade after that, in 1924, the Union of Orthodox Congregations introduced an official kashrut supervision and certification program.

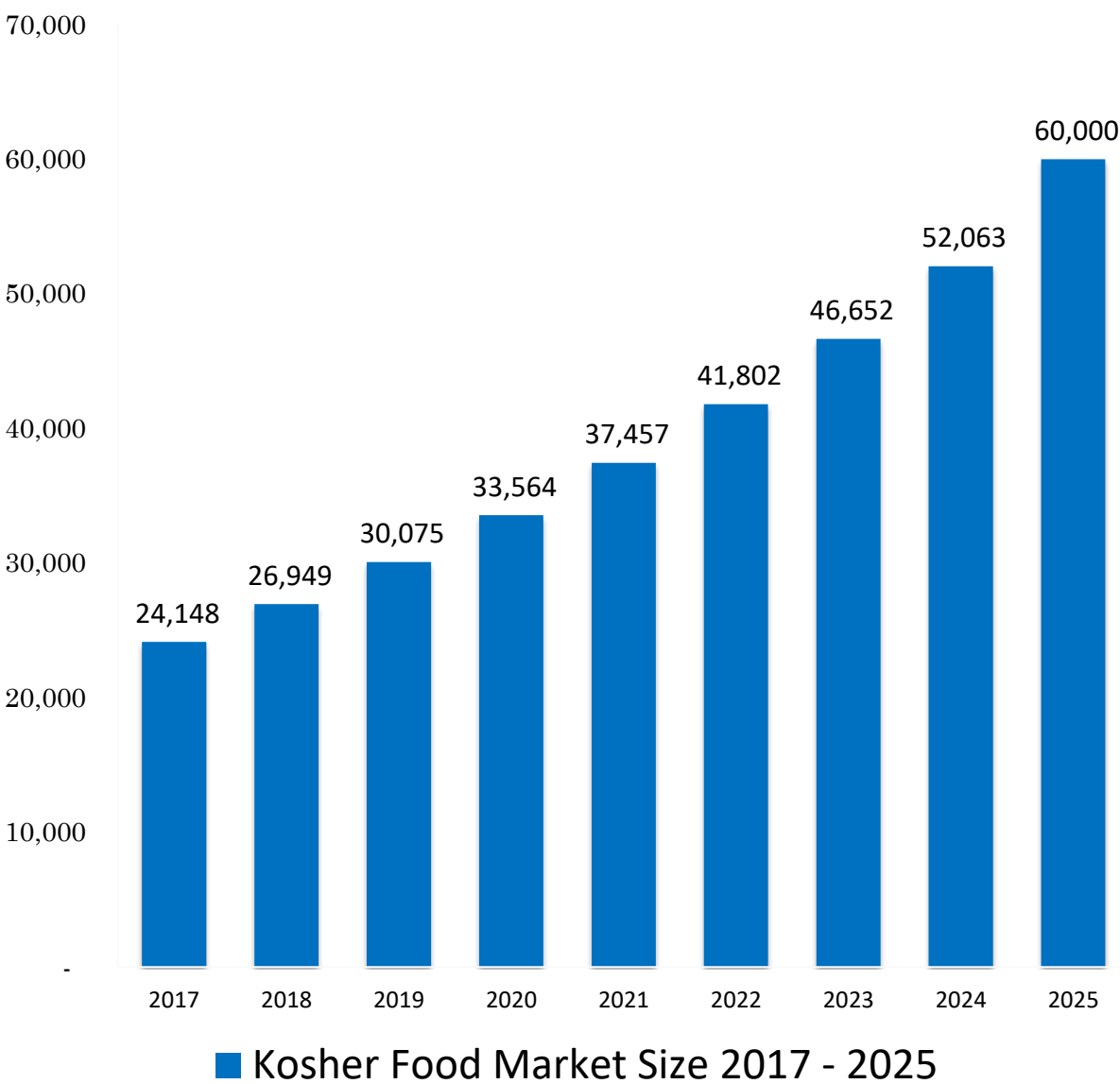
Today, the US has more than 12 million kosher consumers, including many non-Jewish consumers. For the non-Jewish population, there are several motives other than religious concerns to buy kosher products – these include Islam, veganism, eating healthier and safer, as well as overall animal welfare. In total, the OU Kosher – the largest kosher certifying agency- has almost 1,500 kashrut supervisors worldwide, 1,000 in the US and another 500 working abroad. The US is also home to nearly 40% of the global Jewish population - 30% of which are kosher consumers.

Jewish Population Growth



Although, the global Jewish population is relatively small (only 14.5 million in 2017) and has been growing at a very moderate pace since 1950, the Kosher Market has proved to be very successful and has achieved wide-spread growth both in the US and globally.

Today, the global kosher food market size is estimated at \$24 billion. It is rapidly growing at a CAGR of 11.6% and is expected to reach \$60 billion by 2025. Kosher's successful model serves as a great benchmark for the food certification market globally.



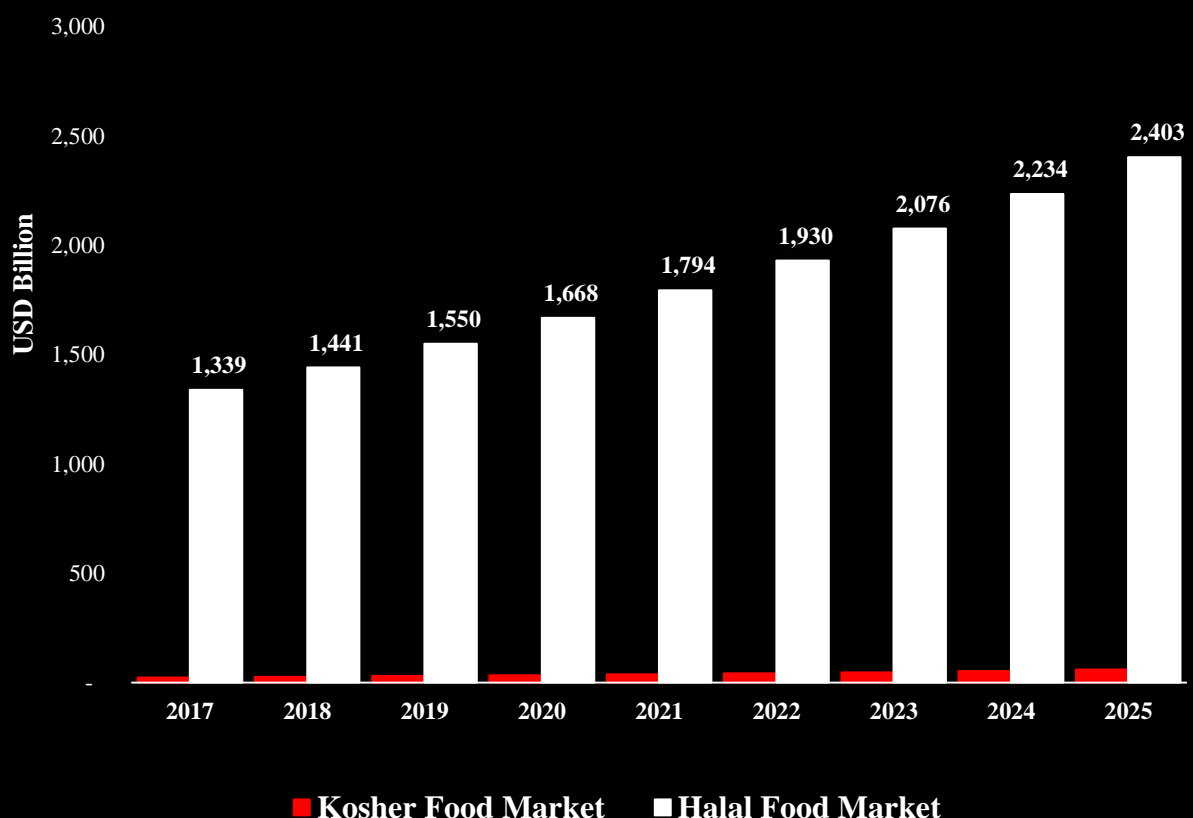
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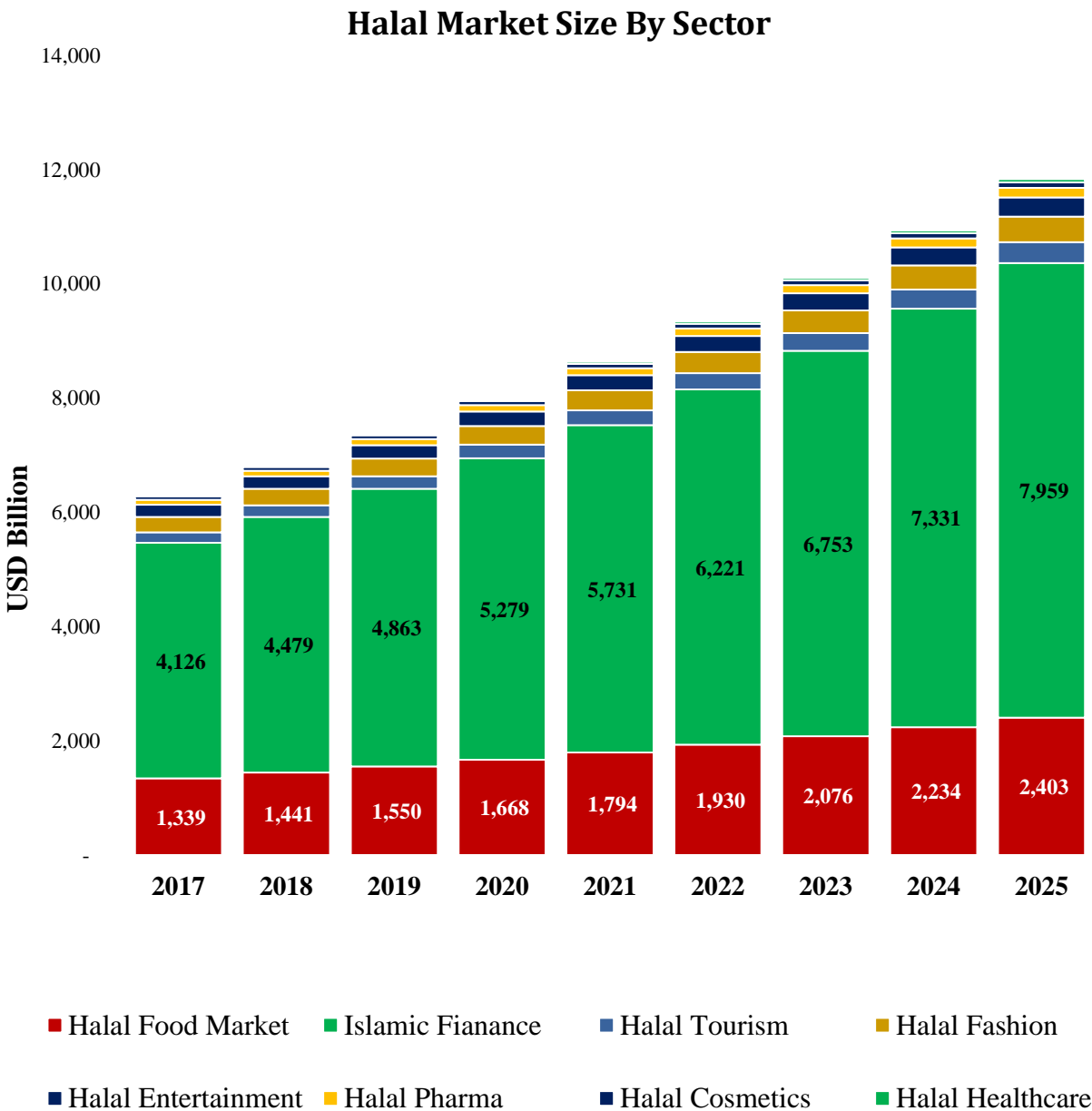
Industry Overview

While the Kosher food market is a successful and rapidly growing market, it remains small and incomparable to the Halal Food market – a market estimated at \$1.3 trillion in 2017. The Halal Food Market is, in fact, 50 times as big as the Kosher Food Market and is also continuing to grow at CAGR of 7.6%.

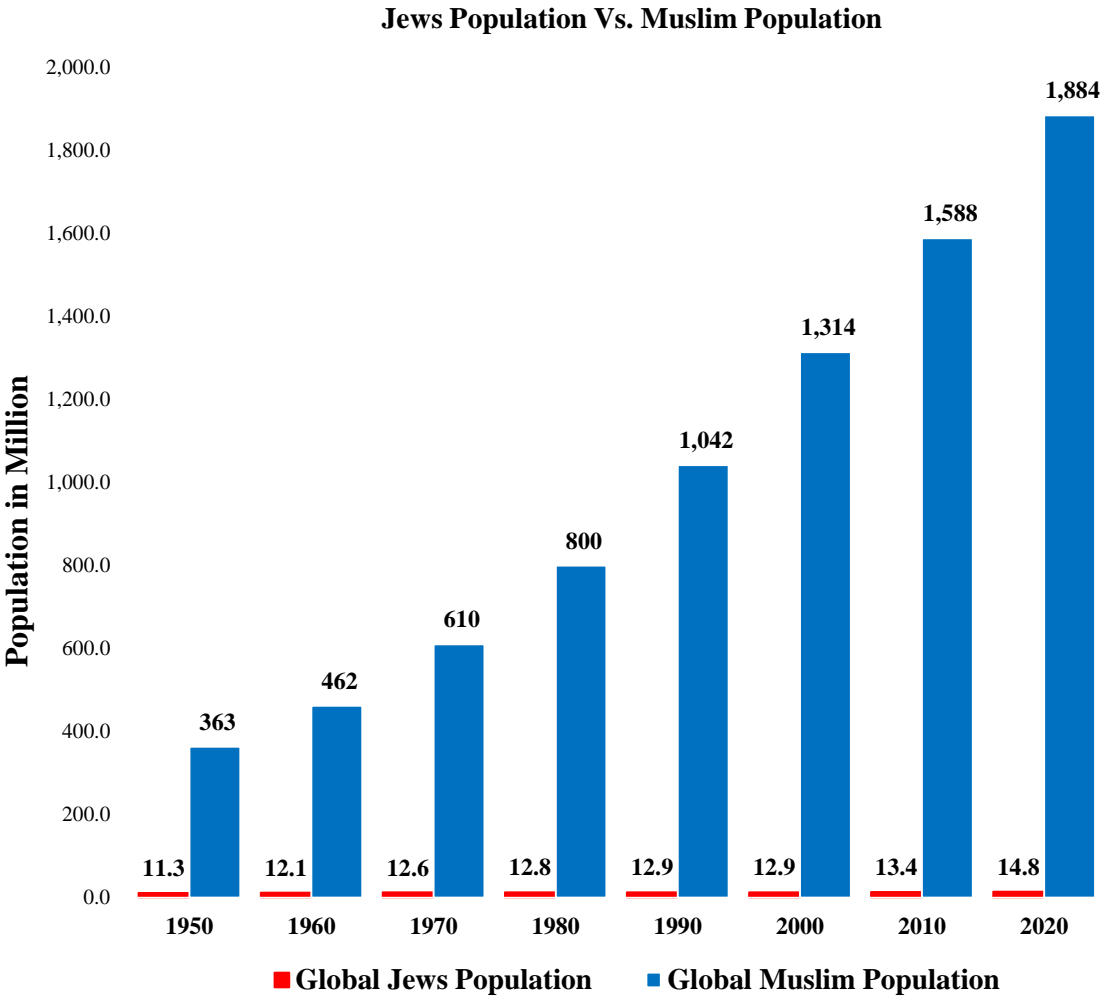
Kosher Food Market Size Vs. Halal Food Market Size



In addition to this, unlike Kosher, the Halal Market is not restricted to food. It widely involves seven other sectors, including Finance, Fashion, Tourism, Media, Pharmaceuticals, Cosmetics, and Healthcare, which bring up its combined market size to \$6.3 trillion in 2017 and average CAGR across sectors of 7.9%. The eight sectors will combine to reach a market of almost \$10 Trillion by 2022.



Moreover, the global Muslim population today stands at 1.8 billion, more than 120 times larger than the current global Jewish population of 14.5 million. These indicators collectively show a growing potential demand for Halal certified products and services, increasing the probability of success for Halal certification opportunity, given the success of Kosher certification market.



Kosher Business Model

Initial Inspection

Assessing the current status of a product and preparing the right certification package

Kosher Advisory/Consultation

Assisting and supporting the production site to reach adherence to kashrut

Certification

- ▶ General Kosher Certificate
- ▶ Special Kosher Certificate (Kosher for Passover, Kosher-Dairy, Kosher-Meat)

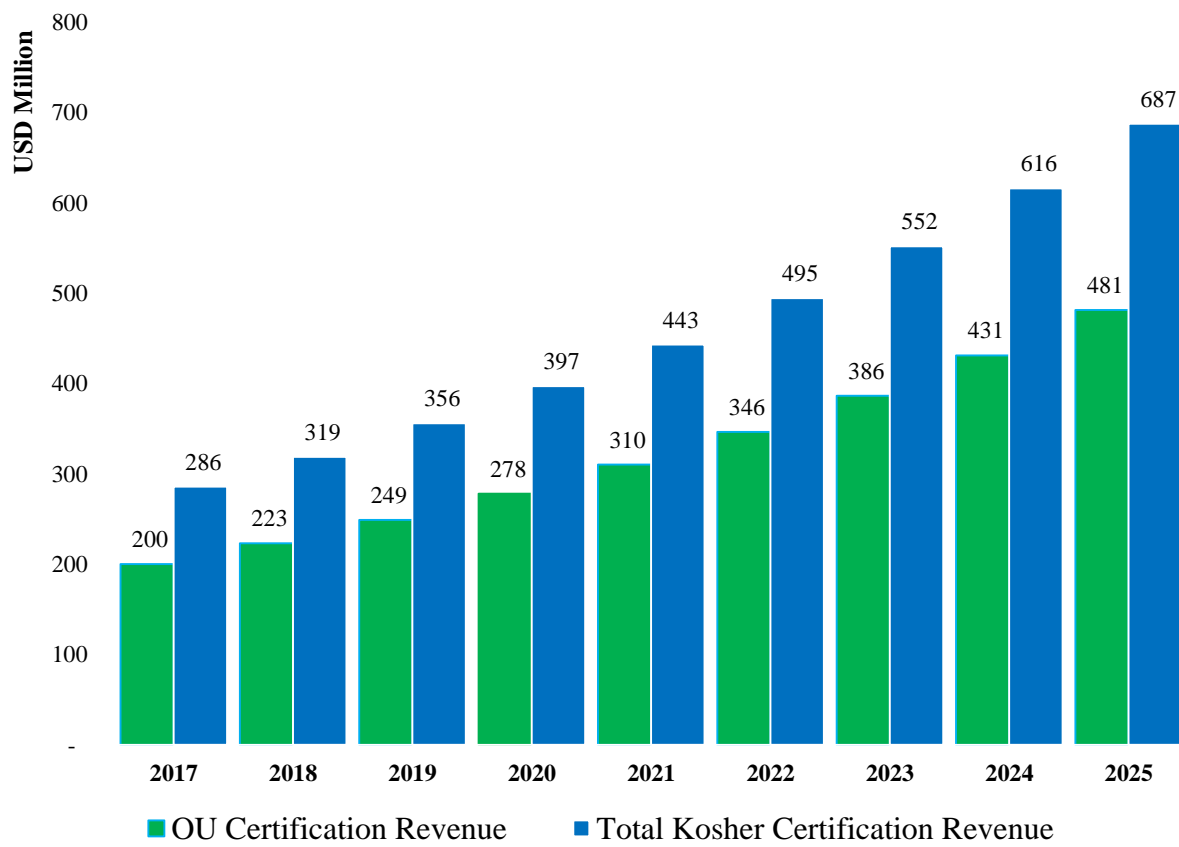
Kosher Periodic Supervision:

Maintaining Kosher Certification requires regular periodic kosher supervisory visits

Kosher Certification Market

In 2017, the Kosher Certification Market revenues was estimated to be \$286 million and is expected to grow to \$687 million by 2025. OU Kosher is the market leader with a market share of 70%.

Kosher Certification Market



A Brief Overview of OU Kosher

About the Organization

- ▶ The Union of Orthodox Jewish Congregations of America was founded in 1898
- ▶ Based in New York, the OU Kosher is an arm of the larger OU organization that was founded in 1924. It is the world's largest and most widely recognized kosher certification agency – it is the market leader with 70% market share
- ▶ Kosher OU offers the service of granting kosher certificate to products after the inspection of ingredients and process by their rabbinic representatives. They offer different services through their website and mobile application to allow the consumer to verify if a product or restaurant is kosher certified

Quick Facts:

- ▶ OU Certified over 1 million products and ingredients on nearly 9,000 plants in 104 countries
- ▶ OU has nearly 1,500 rabbinic field representatives located across North America and throughout the world
- ▶ The Orthodox Union database contains information on more than 256,402 food ingredients





ATIP GROUP OF COMPANIES

company offices

155 Morris Avenue , Suite 201 , Springfield , NJ 07081

T: +(917)-388-2377 , (212)-775-6666

F: 973-379-4620

Websites

WWW.ATIP-GROUP.COM

WWW.ATIPhalal.COM

WWW.ATIPtransfers.COM

E-mail

info@ATIP-GROUP.CoM