



# Halal Tourism Study

The Potential for Halal Tourism in South Africa  
and the Western Cape  
2023

# About this report:

This report offers valuable insights for tourism operators, Destination Marketing Organisations (DMOs), business leaders, and government officials in South Africa and the Western Cape. The goal is to help them develop effective marketing strategies for promoting Halal Tourism.

This research report focuses on the Muslim travel market, including key demographic segments, their needs, required services, and travel motivations. It aims to provide insights into the viewpoints of different demographic segments, on the key sectors influencing the economy of Muslim travellers and how these factors impact their decisions and travel habits outside their places of origin. In addition, it examines the barriers to growth, global trends, and opportunities for promoting and positioning South Africa and the Western Cape as preferred halal tourism destinations.

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# 1. Key terms and definitions

- **Muslim:** An individual who subscribes to the religion of Islam (CrescentRating Pte Ltd. 2015).
- **Muslim travellers:** Muslims who travel (CrescentRating Pte Ltd. 2015).
- **Muslim-friendly destinations/Halal-friendly destinations:** Destinations that provide services and facilities catering to at least some of the faith-based needs of Muslim visitors to the destinations (CrescentRating Pte Ltd. 2015).
- **Halal:** The Arabic term for permissible. In Islamic terms, it means permissible according to the rules of Islam. It is most frequently referred to with regard to food, but it includes any type of action permissible in Islam (CrescentRating Pte Ltd. 2015).
- **Halal tourism** is used to refer to the tourism segment which caters to the faith-based needs of Muslim travellers (CrescentRating Pte Ltd. 2015).
- **Halal-conscious traveller:** Muslim travellers who do not wish to compromise their faith-based needs while travelling (CrescentRating Pte Ltd. 2015).
- **Responsible Tourism** is tourism which minimises negative social, economic and environmental impacts. It generates greater economic benefits for local people and enhances the well-being of communities (UNWTO, 2014).
- **Sustainable Tourism** is tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities (United Nations Brundtland Commissions, 1987).
- **Destination Management and/or Marketing Organisations (DMOs)** are dedicated entities that are established to take on some of the functions of destination management directly, rather than relying on the partners to execute these functions (Global Sustainable Tourism Council, 2022).
- **Crescent Rating:** A proprietary rating system developed by CrescentRating to rate travel services on how Muslim-friendly they are (World Bank Group. 2022).

- **Tourist Arrivals to Cape Town (via air)** display statistics obtained from Statistics South Africa's (Stats SA) monthly International Tourism statistical releases.
- Tourist (overnight visitor) is a visitor who stays at least one night in the place visited. (obtained from South African Tourism)
- Region refers to the following country classification (Stats SA):
  - **Overseas:** Europe, North America, Central and South America, Australasia, the Middle East and Asia.
  - **Africa:** SADC and 'other' Africa (East and Central Africa, West Africa and North Africa).
  - **Country** refers to individual countries within a region. The country of residence is used. The country of residence should not be confused with the country from which the visitor travelled.
  - **SADC** refers to the 14 countries, excluding South Africa, which belong to the Southern African Development Community.
  - **Overseas** refers to all continents outside Africa.

An aerial photograph of a coastal landscape. In the foreground, the ocean is a deep blue with white foam from a boat's wake. The middle ground shows a coastline with a town and a prominent, dark, rocky mountain peak. In the background, more mountains are visible under a clear, light blue sky. The overall scene is bright and scenic.

## 2. Overview of Halal Tourism

# Overview of the global Islamic economy sector

The DinarStandard 2023/24 report on the Global Islamic Economy focuses on the Halal lifestyle market, which encompasses the global Islamic economy.

The report indicates that the Halal lifestyle market has grown from an estimated US\$1.62 trillion consumer spending market in 2012 to US\$2.29 trillion in 2022 across six real-economy sectors. These sectors include halal food, modest fashion, halal pharmaceuticals, Muslim-friendly travel, halal cosmetics, media, and creation.

The growth of the Halal lifestyle market is attributed to a young and rapidly expanding global population, which extends beyond the core 2 billion Muslim consumers to encompass a broader global ethical consumer market.

The report projects that consumer spending in the Halal lifestyle market will reach \$3.1 trillion by 2027, with a Cumulative Annual Growth Rate (CAGR) of 4.8%.

## Halal Food

*Muslim spending on food increased by 9.6% in 2022, reaching US\$1.4 trillion, an increase from US\$1.28 trillion in 2021, and is forecasted to reach US\$1.89 trillion by 2027, growing at a CAGR of 6.1%.*

## Travel

*Muslim spending on travel in 2022 reached US\$133 billion, up 17% from US\$114 billion in 2021, and is forecasted to reach US\$174 billion in 2027 at a CAGR of 5.5% between 2022 and 2027.*

## Modest fashion

*Muslim spending on fashion reached US\$318 billion in 2022, up by 8.4% from US\$293 billion in 2021, and is forecasted to reach US\$428 billion by 2027, growing at a CAGR of 6.1%.*

## Pharmaceuticals

*Muslim spending on pharmaceuticals reached US\$108 billion in 2022, up by 7.8% from US\$100 billion in 2021, and is forecasted to reach US\$142 billion in 2027 at a CAGR of 5.7%.*

## Cosmetics

*Muslim consumer spending on cosmetics reached US\$84 billion in 2022, up by 14.3% from US\$74 billion in 2021, and is forecasted to reach US\$129 billion by 2027 at a CAGR of 8.9%.*

## Media and Recreation

*Muslim spending on media and recreation reached US\$247 billion in 2022, up by 6.4% from US\$233 billion in 2021, and is forecasted to reach US\$344 billion in 2027 at a CAGR of 6.8%.*

# Outlook for the global Muslim travel market, as per the Muslim travel index for 2023

The Muslim consumer market is growing rapidly, and tourism operators and DMOs cannot overlook it.

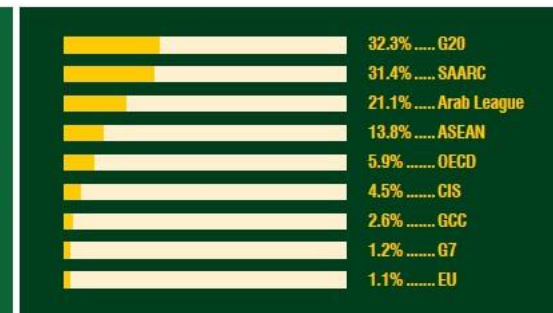
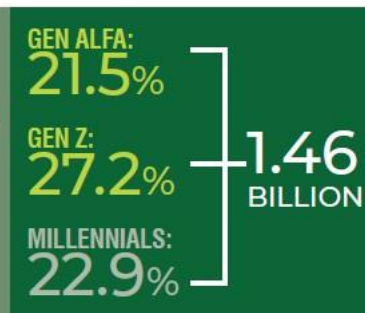
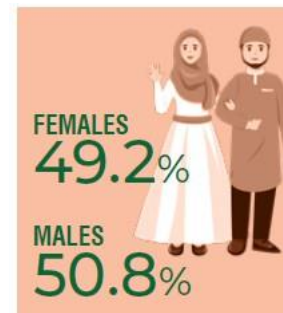
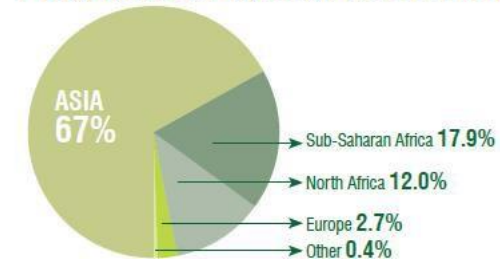
According to the *Mastercard-CrescentRating Global Muslim Travel Index 2023* report, there were 110 million international Muslim traveller arrivals in 2022, which was 68% of the pre-pandemic levels in 2019 (160 million travellers).

International Muslim traveller arrivals are projected to increase to 140 million in 2023, which is 87% of the 2019 levels, and a full recovery is expected by 2024.

By 2028, it is estimated that international Muslim traveller arrivals will grow to 230 million, generating a revenue of US\$225 billion.

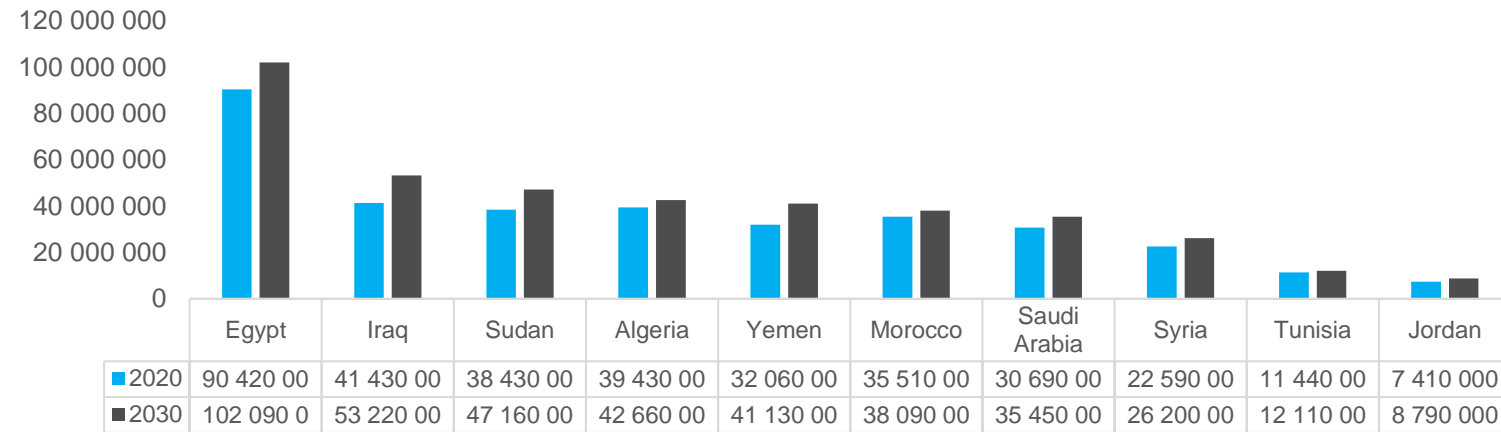


PERCENTAGE OF MUSLIM POPULATION

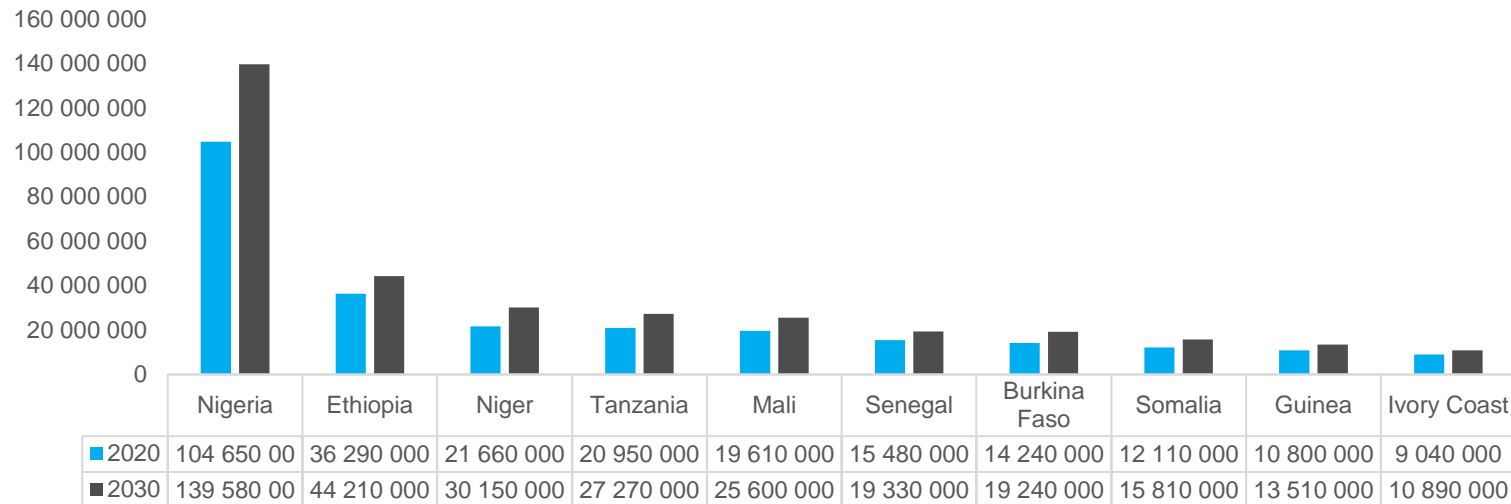


# Muslim population growth projections 2020 vs 2030

**Figure 1: Middle East-North Africa Muslim Population Growth Projections, 2020(E) vs 2030(F)**



**Figure 2: Sub-Saharan Africa Muslim Population Growth Projections, 2020(E) vs 2030(F)**



Data Source: Pew Research Center (2022)

This section provides a comprehensive overview of the religious composition by country, specifically focusing on the Muslim population and its projected growth. This section examines the estimated size of the Muslim population in various countries, focusing on those with the highest figures for the years 2020 and forecast for 2030.

Data sourced from the Pew Research Center (2022) forms the foundation of this analysis. Figures 1 to 4 illustrate the estimated Muslim populations in 2020, grounded in demographic projections that utilise 2010 baseline estimates and various population growth scenarios for 2030 (Pew Research Centre, 2022).

The projections highlight the top ten countries with the most significant anticipated growth of the Muslim population across the following regions in 2020 and forecast for 2030:

- **Middle East-North Africa (Figure 1):** This figure shows the countries within this region projected to experience the highest growth rates in their Muslim populations.
- **Sub-Saharan Africa (Figure 2):** This figure examines the countries in Sub-Saharan Africa that are predicted to see notable increases in their Muslim demographics.
- **Asian-Pacific (Figure 3):** This region's trends are explored, revealing the countries likely to experience substantial growth in their Muslim communities.
- **Europe (Figure 4):** This figure focuses on European nations with significant Muslim population growth projections.
- **North America (Figure 5):** Finally, this figure identifies the top two countries in North America that exhibit noteworthy projected growth in their Muslim populations.



# Muslim population growth projections 2020 vs 2030

Figure 3: Asia-Pacific Muslim Population Growth Projections 2020(E) vs 2030(F)

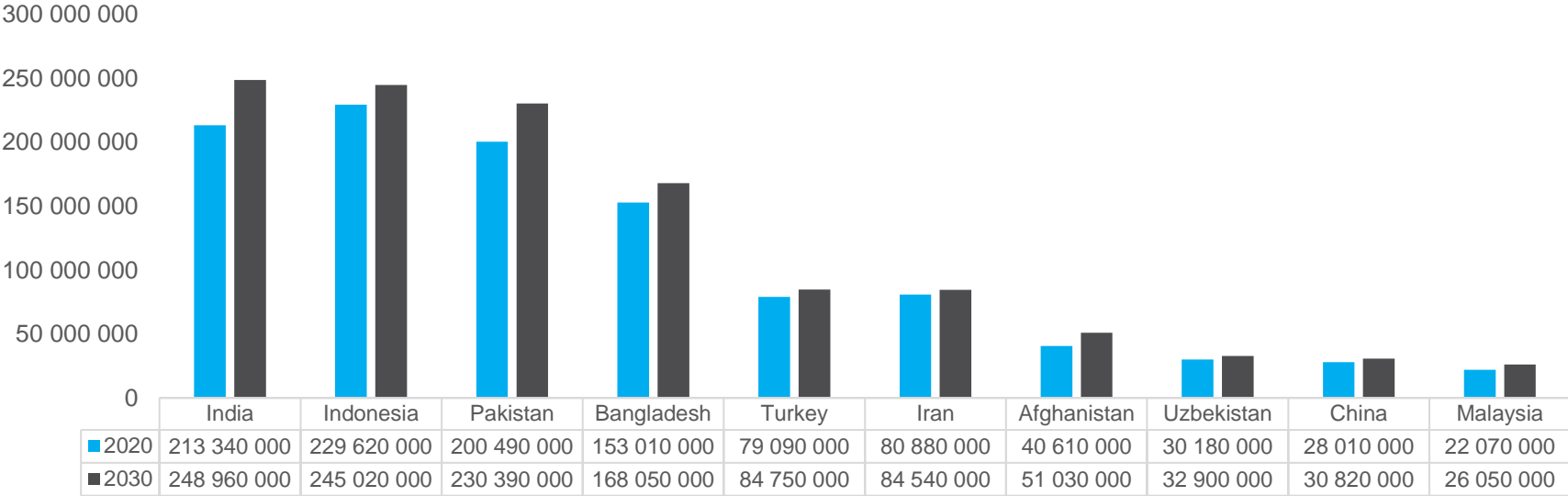


Figure 4: Europe Muslim Population Growth Projections 2020(E) vs 2030(F)

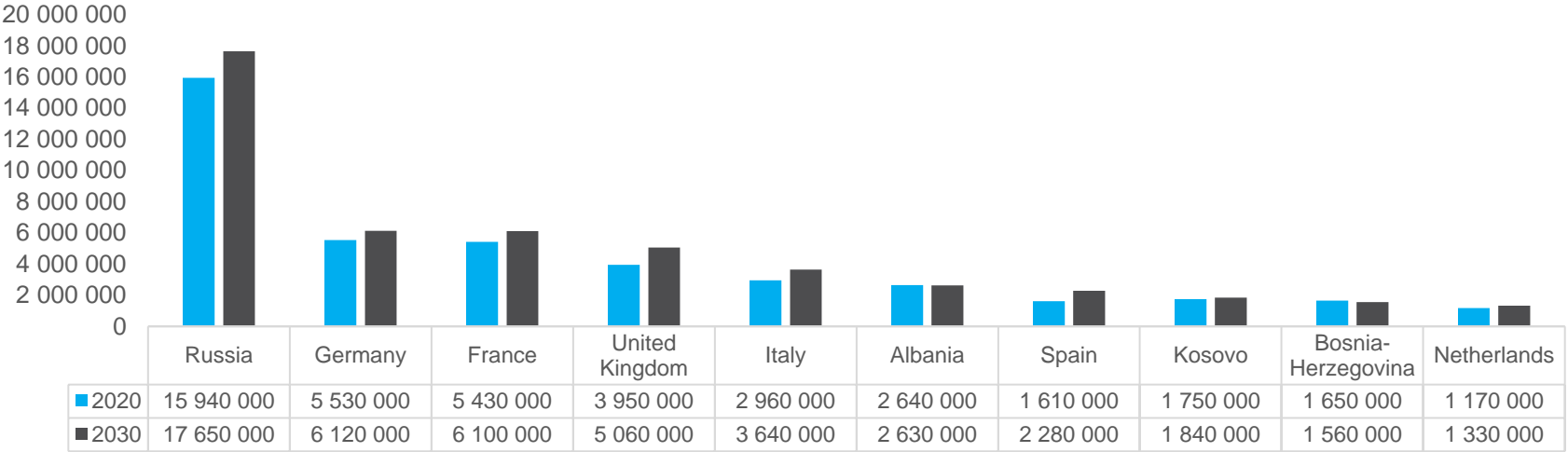
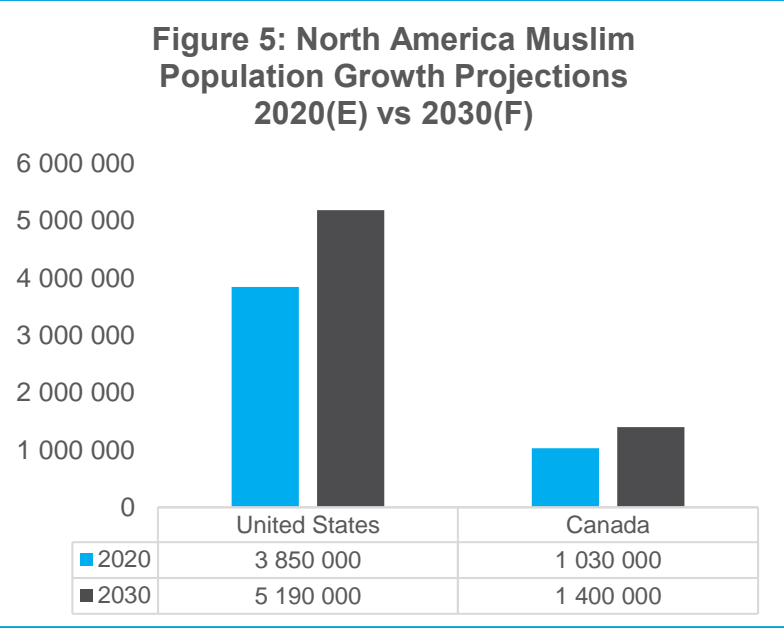


Figure 5: North America Muslim Population Growth Projections 2020(E) vs 2030(F)



Note: All figures shown for 2020 are estimates (E) and 2030 are forecast (F) of the projected Muslim population growth. This data is available on the Pew Research Center website.

Data Source: Pew Research Center (2022)

An aerial photograph of a coastal landscape. In the foreground, the ocean is a deep blue with white foam from a boat's wake. The middle ground shows a range of mountains, with a prominent, dark, rocky peak on the left. The background features more distant, hazy mountain ranges under a clear, light blue sky. The overall scene is bright and scenic.

### **3. Tourist Arrivals to South Africa, Western Cape and Cape Town (via air)**

# Top destinations for Muslim travellers

Table 1: Top 10 destinations for Muslim travellers and tourist arrivals to SA and Cape Town (via air)

Destinations for Muslim travellers	Projected Muslim population growth		Tourist arrivals in SA	Tourist arrivals in Cape Town (via air)	Tourist arrivals in Cape Town (via air)	Y-o-Y % Change
	2020 (E)	2030(F)	2023	2022	2023	2022 vs 2023
Saudi Arabia	30 690 000	35 450 000	16 351	7 565	13 040	72%
United Arab Emirates	6 420 000	6 940 000	5 408	1 611	4 405	173%
Singapore	950 000	1 190 000	6 778	1 198	2 827	136%
Malaysia	22 070 000	26 050 000	5 659	834	1 998	140%
Turkey	79 090 000	84 750 000	2 827	909	1 148	26%
Egypt	90 420 000	102 090 000	5 859	675	1 135	68%
Morocco	35 510 000	38 090 000	1 662	276	453	64%
Jordan	7 410 000	8 790 000	426	44	191	334%
Indonesia	229 620 000	245 020 000	0	0	0	0%
Qatar	1 490 000	1 820 000	0	0	0	0%

- South African Tourism's 2017 report identifies the top ten destinations favoured by Muslim travellers as Malaysia, Indonesia, Turkey, the United Arab Emirates, Saudi Arabia, Morocco, Egypt, Qatar, Jordan, and Singapore. According to the report, these destinations are appealing for their unique Islamic heritage, rich history, modern amenities, Islamic architecture, halal dining options, shopping experiences, accommodations, and numerous mosques.
- The data in Table 1 further illustrate changes in the growth of the Muslim population in these countries, rather than the arrival of Muslim travellers to these destinations. Data from the Pew Research Center (2022) indicates that Indonesia is expected to experience population growth in the Muslim community by 2030, which can be attributed to natural increases and migration patterns. Other countries expected to see an increase in their Muslim populations by 2030 include Egypt, Turkey, Morocco, and Saudi Arabia.
- Understanding the above trends is essential for evaluating the potential for the Western Cape to attract Muslim tourists from these specific regions. An increase in the Muslim population in these countries may indicate a growing market of potential travellers who may seek destinations that accommodate their cultural and religious needs. This assessment aims to identify strategic opportunities for tourism development in the Western Cape that align with these demographic changes.
- In terms of local tourism, data from Stats SA's monthly International Tourism statistical releases on tourist arrivals to Cape Town by air for 2022 and 2023 (January to December) indicates notable levels of interest from certain countries in visiting the Western Cape, all of which have a notably sized Muslim population. Specifically, Saudi Arabia contributed a total of 13,040 visitors (75% y-o-y increase from 2022), followed by the United Arab Emirates, with 4,405 arrivals (173% y-o-y increase), Singapore, with 2,827 arrivals (136% y-o-y increase), Malaysia with 1,998 arrivals (140% y-o-y increase), and Turkey with 1,148 arrivals (26% y-o-y increase).
- Interestingly, despite Indonesia being home to the largest Muslim population as seen in Table 1, it recorded only 2,235 tourist arrivals in South Africa during the period from 2017 to 2022. Within this timeframe, the Western Cape welcomed 738 Indonesian visitors. *(Data not included in Table 1 and the report).*
- Notably, there were no recorded tourist arrivals from Indonesia to South Africa and the Western Cape in the years 2022 and 2023, raising questions about the factors influencing travel patterns from this populous nation.

# Other countries with large Muslim population

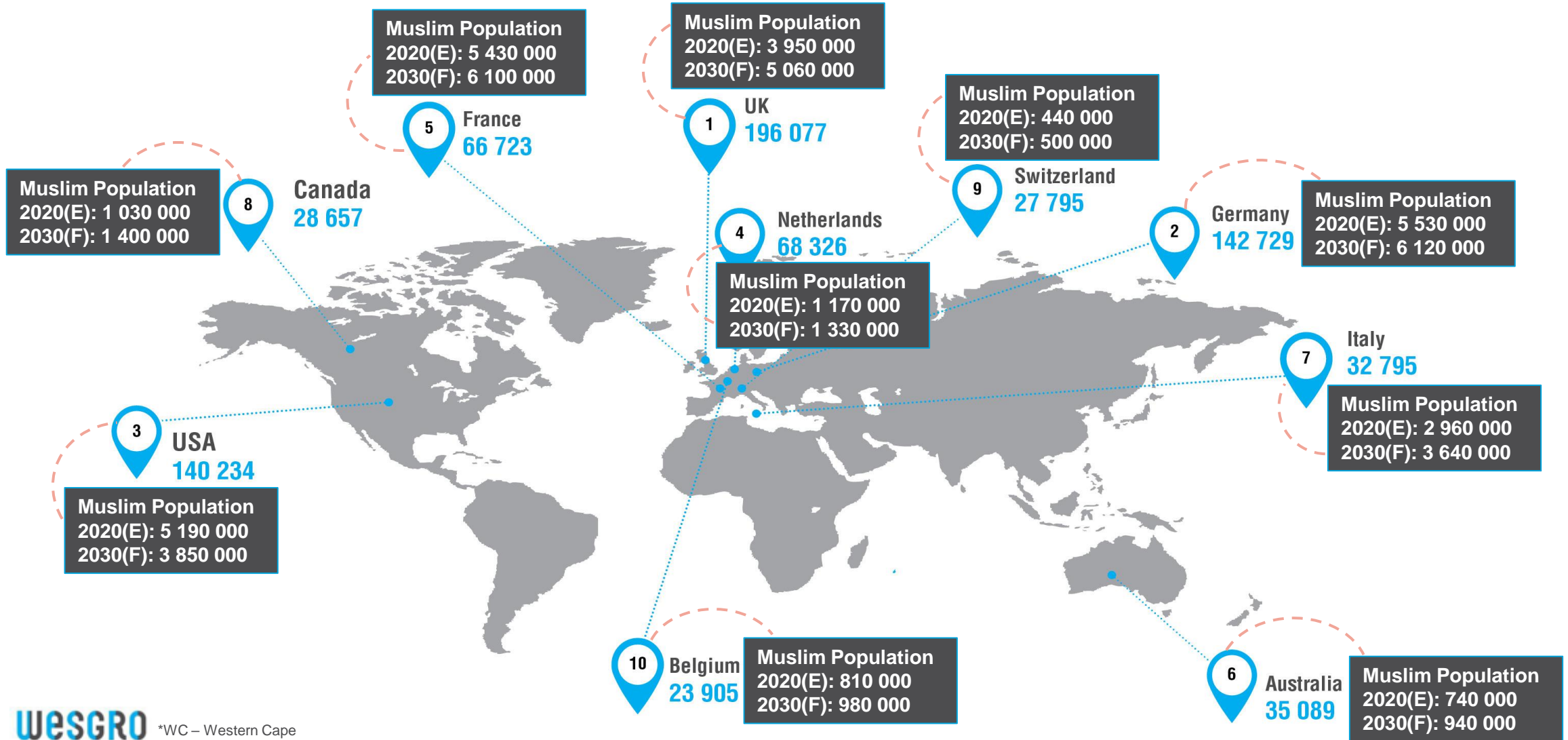
**Table 2: Other countries with large Muslim population and tourist arrivals to SA and Cape Town (via air)**

Other countries with large Muslim population	Projected Muslim population growth		Tourist arrivals in SA	Tourist arrivals in Cape Town (via air)	Tourist arrivals in Cape Town (via air)	Y-o-Y %Change
	2020 (E)	2030(F)	2023	2022	2023	2022 vs 2023
India	213 340 000	248 960 000	79 774	10 817	21 380	98%
Nigeria	104 650 000	139 580 000	18 809	1 511	2 903	92%
Pakistan	200 490 000	230 390 000	12 718	923	1 308	42%
Bangladesh	153 010 000	168 050 000	7 849	1 070	1 279	20%
Iran	80 880 000	84 540 000	1 125	385	410	6%
Algeria	39 430 000	42 660 000	1 113	163	122	-25%

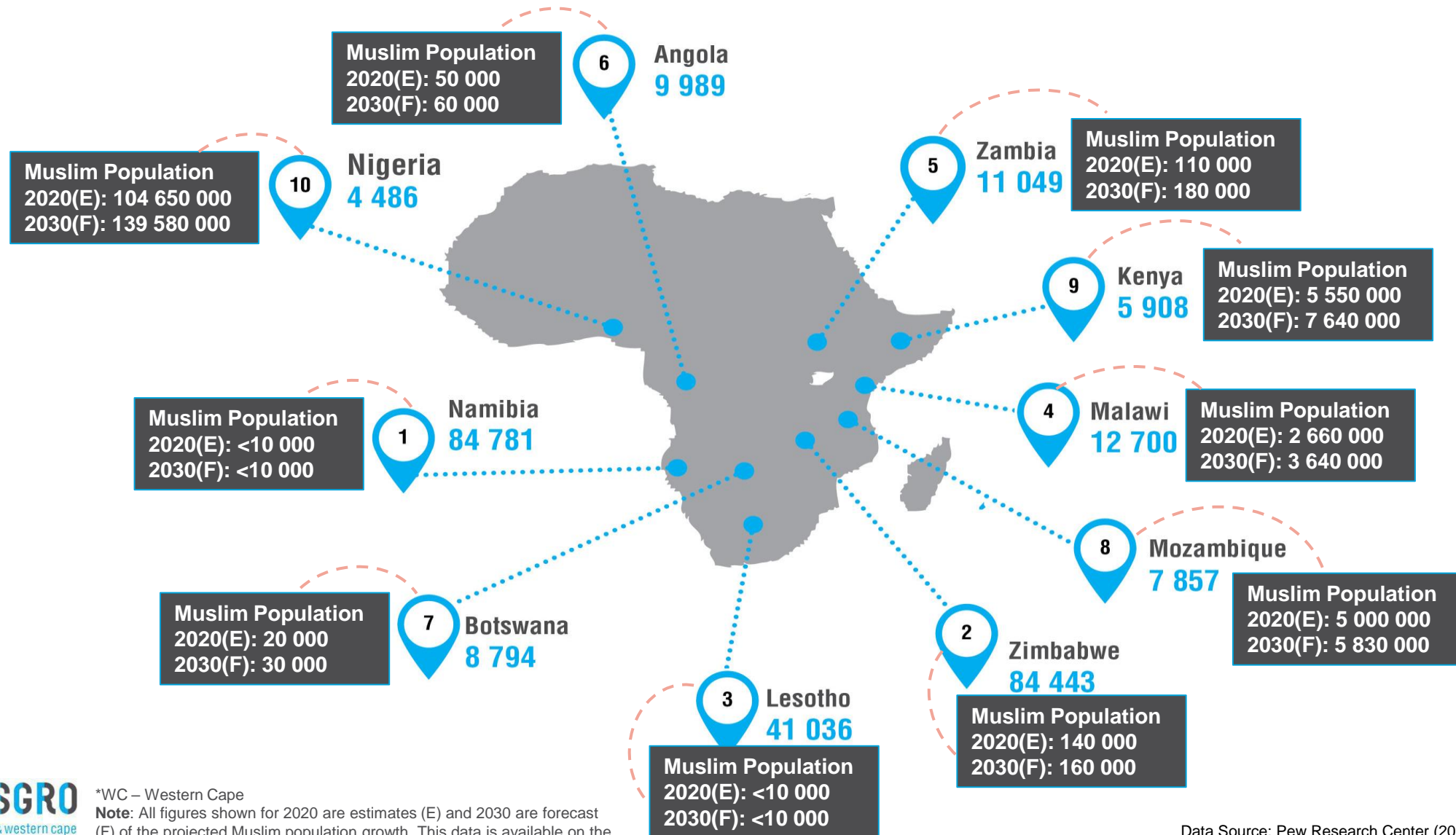
- The South African Tourism report (2017) not only identified the top 10 destinations popular among Muslim travellers but also highlighted the importance of various countries with substantial Muslim populations. Among these nations are India, Nigeria, Pakistan, Bangladesh, Iran, and Algeria.
- When examining the projected demographic trends, data from the Pew Research Center (2022) reveals important projected estimates about the growth of the Muslim population in these countries. India, for instance, is forecast to record a notable demographic expansion by the year 2030. In addition, Pakistan, Bangladesh, and Nigeria are also expected to see a rise in their Muslim populations.
- Focusing on tourism in the Western Cape, data from South African Tourism (not included in Table 2) and the data from Stats SA's monthly International Tourism statistical releases for 2023 highlight the following:
  - A total of 23,155 Indian tourists travelled to the Western Cape in 2023, reflecting a y-o-y (year-on-year) increase of 58%.
  - In terms of arrivals to Cape Town International Airport, 21,380 Indian tourists visited the province in 2023, equivalent to a y-o-y growth of 98% when compared to 2022.

❖ The data presented in Tables 1 and 2, along with the 2023 data on the top overseas and African markets for tourist arrivals to the Western Cape (seen in the next pages), highlights a significant opportunity to cultivate strong tourism and trade relationships with countries that have substantial Muslim populations. This trend underscores the importance of cultural and religious factors in shaping travel preferences and behaviours.

# Top overseas markets for tourist arrivals to the Western Cape in 2023 & respective Muslim population sizes in 2020 and 2030 (F)



# Top African markets for tourist arrivals to the Western Cape in 2023 & respective Muslim population sizes in 2020 and 2030 (F)



An aerial photograph of the Cape Peninsula in South Africa, showing the iconic Table Mountain and other peaks overlooking the ocean. The scene is captured from a high angle, with the water in the foreground and the mountains in the background under a clear sky.

## 4. Muslim Travel Market Behaviour

# Empathising with the service needs of Muslim travellers

Figure 6: Requirements for faith-based services



- The CrescentRating Faith-Based Service Needs model was developed in 2009 and updated in 2019. It is a framework that outlines the essential needs of Muslim travellers in various categories. The different categories help travel service providers prioritize the implementation of key strategies.
- Common needs for Muslim travellers include access to halal food, prayer facilities, washrooms, Ramadan services, halal-friendly activities, and recreational facilities. It is important to note that the extent of these needs may vary based on gender and age.

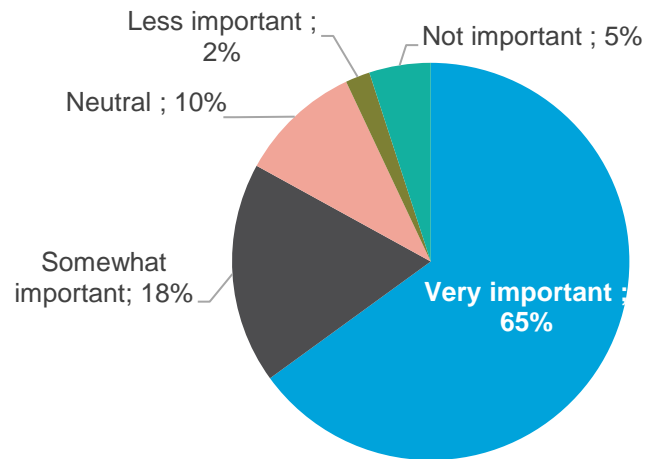
Source: CrescentRating- Muslim Gen Z: The Next Generation of travellers (2023)



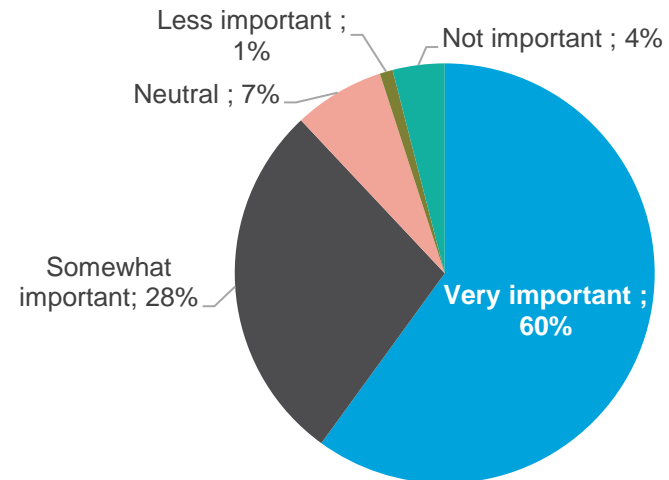
# Muslim travellers needs to have services

- Based on Figure 7, a significant percentage (65%) of Gen Z Muslim travellers considered the availability of halal food as a crucial factor when selecting accommodations. The proximity to restaurants and stores that offered halal food was also important to 60% of the respondents (Figure 8).
- This indicates that halal food is the most important requirement for Muslim travellers. To attract a diverse range of Muslim and non-Muslim customers, accommodations must increase their offerings of different types of Halal food.

**Figure 7: Accommodation offering Halal food**



**Figure 8: Proximity to Halal food eateries**

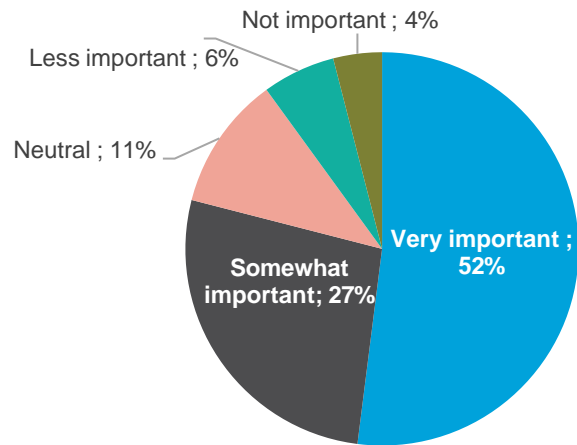


Source: CrescentRating- Muslim Gen Z: The Next Generation of travellers (2023)

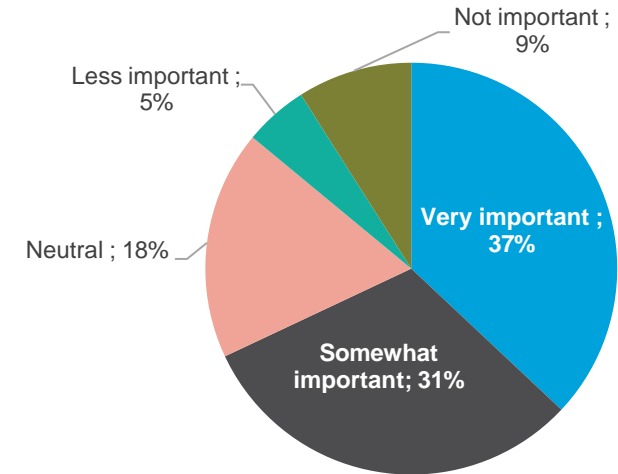
# Muslim travellers needs to have services

- Over 50% of Muslim travellers belonging to Gen Z consider water-friendly washroom facilities as a crucial service while travelling. This group also places high importance on being in close proximity to mosques, with almost 40% considering it as a vital factor. This can be seen in Figures 9 and 10.
- Additionally, destinations perceived to have Islamophobic sentiments have a negative impact on almost 60% of Gen Z Muslims (Figure 11), which highlights the significance of safety and security for Muslim travellers, especially women.
- Availability of travel bidets and proximity of mosques, as well as accommodations offering prayer rugs, are some other important factors that this group considers while traveling.

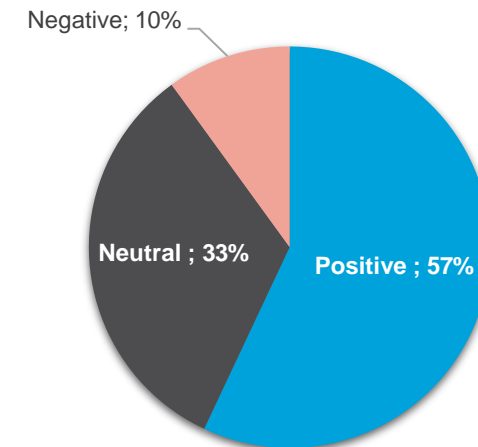
**Figure 9: Water-friendly washrooms (e.g. availability of bidet sprays)**



**Figure 10: Prayer facilities in proximity to mosques**



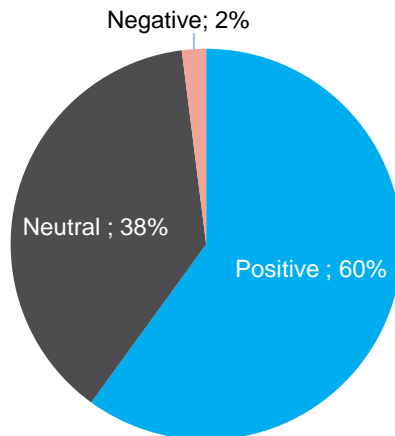
**Figure 11: Attractive destinations but with no Islamophobic sentiments**



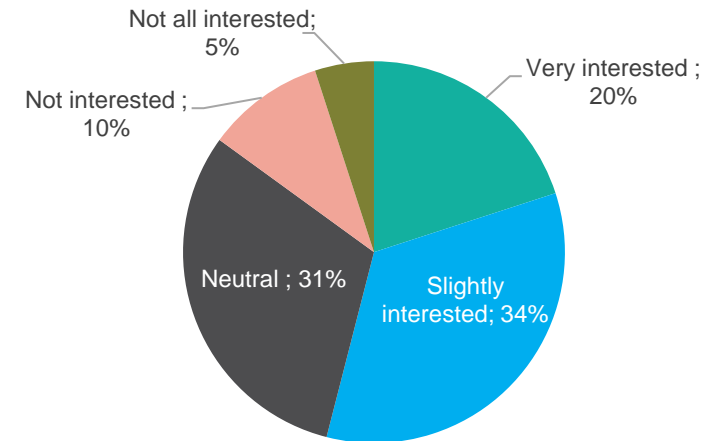
# Good-to-have services for Muslim travellers

- According to Figure 12, 60% of Muslim travellers belonging to Gen Z consider visiting destinations that offer experiences which can connect them with their Muslim heritage.
- This factor has a positive influence on their decision and planning process. Additionally between 20% and 34% of Gen Z Muslim travellers as seen in Figure 13, prioritise participating in social causes while visiting destinations.
- This indicates that destinations which provide opportunities for Muslim travellers to engage in sustainable causes and connect with the local community will be able to meet the needs and demands of these travellers.

**Figure 12: Local Muslim experiences**



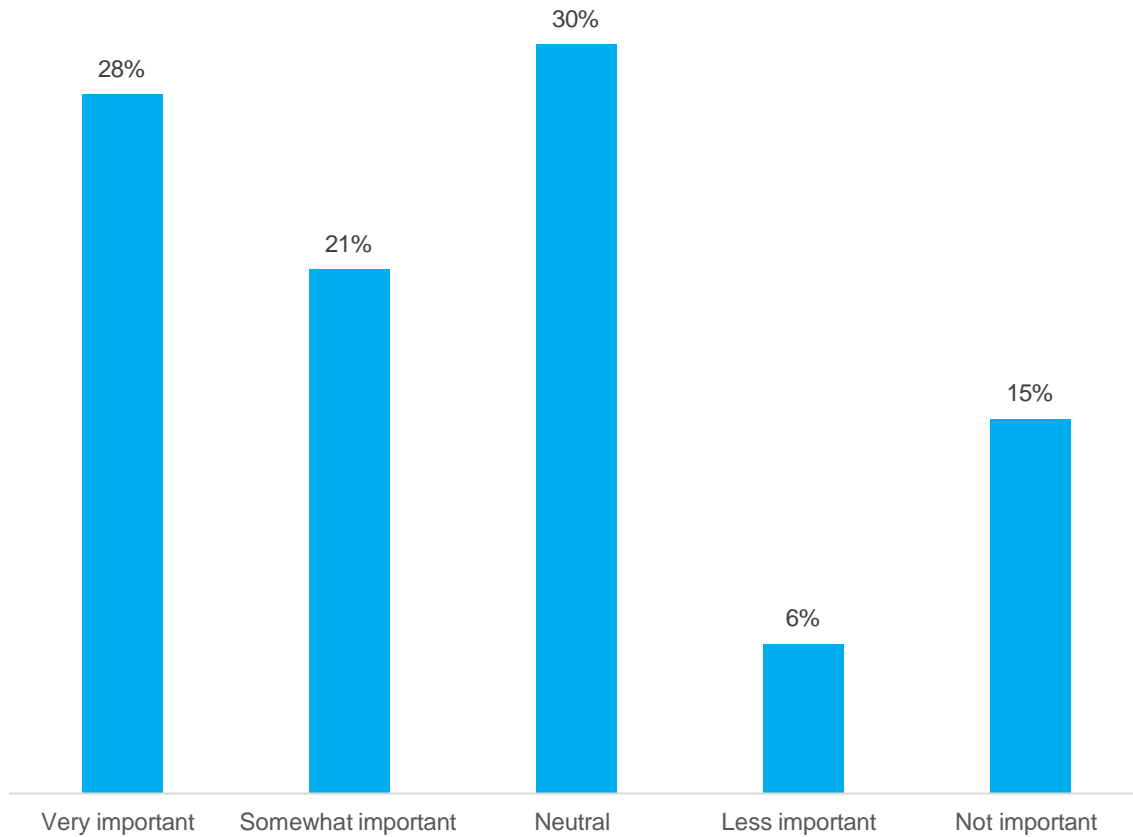
**Figure 13: Social causes**



Source: CrescentRating- Muslim Gen Z: The Next Generation of travellers (2023)

# Nice-to-have services for Muslim travellers

Figure 14: Recreational spaces with privacy



Source: CrescentRating- Muslim Gen Z: The Next Generation of travellers (2023)

- Halal tourism has been identified as a key area for growth in the Western Cape. Insights from the Tourism Blueprint 2030, developed by the Western Cape Government's Economic Development and Tourism Department, highlight the specific needs of faith-based Muslim travellers.
- It is noted that recreational areas offering privacy such as swimming pools, gyms, beaches, spas, and beauty salons are particularly important for these travellers. This emphasis on privacy is especially crucial for women, as they require an appropriate level of modesty.
- Figure 14 shows that nearly 30% of Gen Z Muslim travellers consider recreational spaces with privacy to be important. Research also indicates that 80-90% of women require a female-only prayer room, 60% require women-only spas, and 40% require women-only beaches.

# 5. Key Muslim Demographic Segments

## 14.1 How to segment Muslim travellers

A market segment refers to a collection of individuals, groups, or organisations that share similar interests, traits, and characteristics. These consumer segments may have comparable needs, wants, and expectations (Camilleri, 2018).

Based on the *CrescentRating Playbook, 5<sup>th</sup> Edition* (2023), the Muslim market can be segmented according to culture (Western Europe, Middle Eastern countries and South East Asia), demographics, purpose of visits and budget.

For the purpose of this report, the halal tourism market will be categorised according to their demographic profile. This division can help stakeholders better understand the needs and wants for each segment.

This would include the spending behaviour of the targeted Muslim market highlighted through their demographic profiles. Stakeholders would also then be able to tailor tourism experiences for each segment.

The Muslim Gen Z travellers, Muslim Millennial travellers, and Muslim female travellers are three key markets that have been given prominence due to their potential for growth.

Source: Mastercard-CrescentRating | Global Muslim Travel Index (2023); CrescentRating- Muslim Gen Z: The Next Generation of travellers (2023)

### 14.1.1 Muslim Gen Z travellers

Gen Z Muslims are seeking 3 main attributes in travel offerings. These should be:

1. **Adoptable:** They wish to immerse themselves in new cultures and be aware of their spending limitations.
2. **Authentic:** They value authentic experiences and information/stories.
3. **Affordable:** They seek affordable accommodation and transportation and are willing to take alternatives.
4. **Accessibility:** They look for real-time information and convenient digital travel services.

### 14.1.2 Muslim millennial travellers

The following are the 3 main attributes in travel offerings that these travellers seek:

1. **Authenticity:** They seek to discover new destinations, local cuisines and flexible itineraries.
2. **Affordability:** They look for affordable accommodation, transportation and unique experiences.
3. **Accessibility:** Visible and easily accessible online information is highly important.

### 14.1.3 Muslim women travellers

Muslim women are driven by 3 characteristics that fuel their passion for travel. They wish to:

1. **Explore:** They are highly dependent on digital trends.
2. **Be energised:** Muslim women travellers seek to connect and be energised by like-minded individuals through online and offline exploration at the destination.
3. **Empathise:** Finding social causes is very important.

In addition to the above characteristics, factors such as faith-based restations, and safety and sustainability play a major role in influencing the way Muslim women travellers experience travelling to different destinations. This indicates that Muslims prefer to visit women-friendly destinations.

An aerial photograph of a coastline featuring a prominent mountain range on the left and a large body of water in the foreground. The sky is clear and blue. The text '6. The Global Islamic Economy Sectors' is overlaid in the center of the image.

## 6. The Global Islamic Economy Sectors

# Key sectors that speak to the Muslim travel market



## 15.1 Travel & Tourism

Gen Z and Millennials' perspectives on Muslim-friendly travel

For Gen Zs and Millennials, Muslim-friendly travel means being able to enjoy fully the activities of their destination while still adhering to their religious obligations and needs, such as having access to mosques and halal food.

According to these demographic segments, content on social media and TV shows is considered an important factor in determining which destination to travel to. This provides them with information about the food experiences, the people, and the destination.

When visiting a destination, some Muslims prioritise finding nearby mosques. Next in importance are hotels, clean bathrooms and bidets.

When Muslims travel to a new place, they want to know where they can find halal food, and how safe the destination is, and they prefer personalised messages that cater to their needs. Accurate information on how the country or destination can meet their needs is also important.

As part of compiling the ***State of the Global Islamic Economy report***, DinarStandard in 2022 conducted a focus group discussion with nine Muslim influencers.

The aim was to gain insight into their perspectives on the global halal economy, including their travel behaviour, spending habits, and challenges related to these six sectors: travel and tourism, halal food, media and recreation, cosmetics and personal care, pharmaceuticals, and fashion.

These valuable perspectives can help tourism stakeholders and DMOs better understand the needs of the potential Gen Z and Millennial Muslim travellers to South Africa and the Western Cape.

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# Key sectors that speak to the Muslim travel market



## 15.2 Halal food

Gen Z and Millennials' perspectives on halal food when travelling to a new destination

There are four challenges that Muslim Gen Zs and Millennials encounter when it comes to buying halal food in non-Muslim destinations.

These challenges include the following:

1. This segment does not feel comfortable buying food online unless it is a halal food product they have tasted before and if they trust the services of the provider.
2. When it comes to eating out at restaurants, the challenge they encounter is not knowing if halal food is available or whether there is a Muslim staff member who can assist.
3. There is a lack of accessibility to halal food at local stores and a lack of 100% Muslim-owned stores that sell halal food such as halal meat in the destination visited.
4. Halal food like meat is seen to be very expensive in comparison to the price of non-halal meat.



## 15.3 Media and recreation

Gen Z and Millennials' perspectives on Islamic-themed media and recreation

There is no doubt that Gen Zs and Millennials are the main target demographic for advertisements, the reason being that they are tech-savvy and the most users of social media platforms such as Instagram, Twitter, and YouTube. However, Muslim apps seem to be an important factor for this segment when travelling.

In relation to recreation, Gen Z and Millennial women voiced the importance of having more women-only spaces, such as gyms and women-only days at water parks.

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# Key sectors that speak to the Muslim travel market



## 15.4 Cosmetics and personal care

Gen Z and Millennials' perspectives on cosmetics and personal care when traveling

According to Muslim Gen Zs and Millennials, halal cosmetics are defined “as products that don’t have ingredients derived from pig, blood, non-halal gelatin, or animals not slaughtered in the Islamic way”.

The challenge that this market encounters is false advertising from a number of brands that say they are halal-certified but have no certification.

Nonetheless, due to the lack of knowledge about the difference between products listed with ingredients that are considered to be organic, vegan, and even halal, most Muslim Gen Zs and Millennials do not place too much focus on the labelling of cosmetic products



## 15.5 Pharmaceuticals (medicines and supplements)

Gen Z and Millennials' perspectives on shopping for pharma products that are halal when travelling

According to the Muslim Gen Zs and Millennials who were interviewed, governments in regions such as Indonesia and Malaysia are said to be actively promoting halal medication and supplements. This makes it easy to access and purchase halal-certified products at local pharmacies.

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# Key sectors that speak to the Muslim travel market



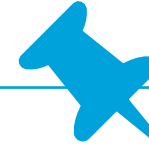
## 15.6 Fashion

Gen Z and Millennials' perspectives on modest fashion

Regarding modest fashion, Muslim Gen Zs and Millennials were asked if they pay attention to sustainability factors when shopping because the fashion industry has the largest environmental impact. This segment's response to this question is related to their becoming more aware of the current state of climate change and the negative environmental and social effects on the local and global economy. Thus, purchasing organic materials and sustainable clothing is becoming an important factor.

Online shopping for clothes and accessories seems to be something this segment prefers from time to time; however, this is dependent on available options online vs in-store or vice versa.

Quality over a brand name and discounts are important deciding factors when purchasing clothes and accessories for this segment.




## 15.7 Finances

Gen Z and Millennials' perspectives on spending habits

A trend that has been growing for years, even pre-Covid-19 and the travel bans in the tourism industry is the use of a cashless system. Cashless payments refer to transactions made without physical cash and mainly through the use of cards or electronic methods (Rahman, Ismail & Bahri, 2020). The adoption of this type of method offers tourists/consumers convenience and speed during purchases.

Thus, the use of debit cards and credit cards is important for Muslim Gen Z and Millennials. However, the use of e-wallets for transactions is one of the main factors that influence these segments' spending habits/behaviour.

Among millennials and Gen Zs in Indonesia, there is an increasing trend of using e-wallets for transactions, as opposed to using credit or debit cards. This trend presents an opportunity for South Africa to adopt and promote the use of e-wallets safely and effectively within the country.

An aerial photograph of a coastal landscape. In the foreground, the ocean is a deep blue with white foam from a boat's wake. The middle ground shows a coastline with a town and a prominent, dark, rocky mountain peak. In the background, a range of green mountains stretches across the horizon under a clear, light blue sky.

## 7. Barriers, Global Trends and Opportunities to Growth

# Muslim travel market: barriers to growth

**The following are the key barriers identified in the Western Cape Government (2023) *Tourism Blueprint 2030*, the DinarStandard (2022) *State of the Global Islamic Economy* report and the Mastercard-CrescentRating *Global Muslim Travel Index 2023* report.**

1. There is a shortage of tourist guides and hospitality workers who understand the religious needs of Muslim travellers.
2. There is a need for better WiFi coverage as Muslim travellers prioritise staying connected when choosing a destination.
3. There is a lack of halal certification and rating for Western Cape products, limiting the region's ability to attract halal travellers.
4. There is a lack of tailor-made marketing collateral and online content aimed to reach the Asia Pacific region and improve its overall global Halal destination branding.
5. There is a lack of reliable and good Muslim/halal apps in the market that travellers can use to obtain content or resources related to their religious and cultural needs and wants.
6. There is a need to increase the number of stores offering halal food, at a reasonable price and easily accessible in the Western Cape.

# Global trends that are shaping the Muslim travel market

## 1. Sustainable and eco-friendly tourism

Tourism can have a negative impact on the environment and local communities, and both Muslim and non-Muslim travellers are becoming more aware of this. As a result, there is now a growing demand for sustainable and eco-friendly options when travelling. In light of the Covid-19 pandemic and the travel restrictions it caused, responsible and sustainable travel has become even more important for those seeking to enhance their spirituality through travel. This segment of travellers is increasingly looking for destinations, accommodations, and activities that prioritise environmental conservation, ethical practices, and the well-being of local communities.

## 2. Health and wellness tourism

Muslim travellers are increasingly seeking destinations that cater to their religious and cultural beliefs, providing health and wellness experiences. They are opting to visit places that offer spa treatments, wellness retreats, and outdoor activities to rejuvenate their minds and bodies.

## 3. Experiential and authentic travel

As Muslim travellers seek more authentic experiences, creating unique, culturally sensitive offerings will be essential.

## 4. Personal development travel

The travel industry is changing as more people combine work with leisure and personal growth. With remote work becoming more common, travellers are looking for destinations that allow them to fulfill their professional responsibilities while also enjoying personal development experiences. Destinations and businesses can create programmes that cater to the specific needs of Muslim travellers, including spiritual growth and skill-building.

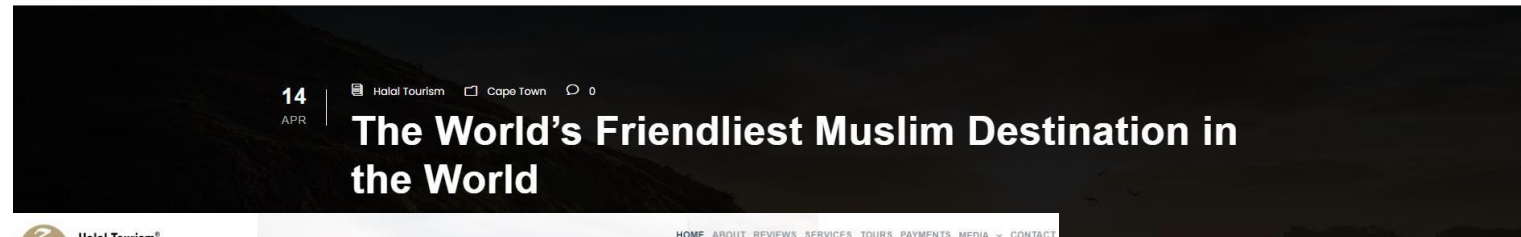
# Halal tourism resources in South Africa: travel experiences

Halal Tourism South Africa is a travel management company that specialises in offering a wide range of tours and travel packages with a focus on halal tours.

Their primary goal is to provide seamless access for their Muslim clients to explore South Africa while maintaining their religious values. They also cater to clients from all communities who desire to experience a unique journey at the tip of the African continent.

The Western Cape has recognised that the Muslim travel market is rapidly growing and has placed importance on increasing awareness about the dietary requirements of this market, developing infrastructure, and creating experiences that cater to the faith-based needs of the Muslim market within the tourism industry.

Halal Tourism South Africa is a proud member of Cape Town Tourism.



Ranked as one of the top 10 Muslim-friendly travel destinations in 2018, South Africa, especially Cape Town, shines as being one of the most hospitable countries in the world.

The country has been rated in a category amongst the non-organisation of Islamic Co-operation, also known as the OIC, in the yearly Mastercard-Crescent Rating for the Global Muslim Travel Index (GMTI).

Not only does this add an immense boost in Cape Town's tourism industry, which is good for various sectors in the mother-city, but it also aids in a friendlier environment amongst residents and tourists, setting an even bigger example for the rest of the world. This rating has also added a boost to the city's ongoing tourism campaign, to seek growth within the market, which again aids in lower unemployment rates, and even bigger opportunities within the country.

The OIC has established a certain total of initiatives and rules, that is aimed at the development of a more Muslim-friendly tourism market. The fact that the city rates as one of the top ten most Muslim-friendly cities in the world, also says a lot about how far the Western Cape has come, since the commencement of democracy.

It's difficult to believe that a severe state Apartheid reigned on the streets of Cape Town, which was even worsened by excessive violence and explicit acts of inequality. With an increasing Muslim-friendly tourism market, and added awareness focused on the travel preferences for Muslims in the mother-city, it has become the ideal destination for Muslim tourists all around the globe.

## Cape Town Tourism for All

According to tourism statistics in Cape Town, a total of 26-percent of the population in the world, will live as Muslims by the year of 2020.

Hence, there is a reason why Cape Town has made an effort to implement an equal-like type of city for all tourists visiting around the world, and especially for countries with Muslim residents.

Studies have also shown, in both Cape Town and abroad, that tourism is considered one of the sectors that have the highest incline growth rate for the global traveling industry.

It is also estimated that 220-billion dollars, will be spent in the industry, within the next three years, which adds to a

Source: Halal Tourism South Africa (2022)

# Halal tourism resources in the Western Cape: travel experiences

TOURISM  
EXPERIENCES ACROSS  
CAPE TOWN AND  
THE WESTERN CAPE

Wesgro—the official agency responsible for promoting tourism, trade, and investment in Cape Town and the Western Cape—created and released a guide called *Tourism Experiences across Cape Town and the Western Cape*. The guide was designed to showcase the various attractions and experiences available in the region, with the aim of promoting Cape Town and the Western Cape to tourists, including Muslim tourists.



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## Discover Cape Malay Experiences in Cape Town and Western Cape

The Cape Malay community is rich in culture and religious traditions that have played a major role in shaping the history and diversity of Cape Town.

### Cape Town Itinerary

#### Day 1

Discover Bo-Kaap's colourful houses and cobbled streets

##### Morning

Discover the colourful, vibrant and historic Bo Kaap. Experience the best Malay cuisine can be found in the Bo Kaap. Go on a cooking tour and learn how to fold samosa's and mix masala for that perfect pot of Cape Malay Curry.  
[www.bokaapcookingtour.co.za](http://www.bokaapcookingtour.co.za)

##### Afternoon

Discover the Bo-Kaap on foot with a traditional Bo-Kaap tour! Visit the Bo Kaap Museum which showcases local Islamic culture and heritage. Walk down cobbled street ways and meet friendly locals.

##### Evening

Enjoy shopping at the Cape Quarter for exclusive boutique stores.  
[www.capequarter.co.za](http://www.capequarter.co.za)

Have a delicious traditional meal at the Atlantic Express Train Restaurant in Sea Point Cape Town for a unique Malay experience.  
[www.trainrestaurant.mycylex.com](http://www.trainrestaurant.mycylex.com)

#### Day 2

##### Kramats

Kramats is referred to the burial sites of Muslim Saints. These beautiful burial sites can be visited on a day trip.

##### Morning

Discover the Kramat of Sheikh Yusuf in Faure Macassar near Cape Town. Sheikh Yusuf, known as the Father of Islam in South Africa, was an Indonesian Muslim first exiled to the Cape as a prisoner by the Dutch settlers. He was also the first to read the holy Qur'an in South Africa and shortly thereafter the first Muslim community was created in South Africa.

The Kramat of Sheikh Mohammed Hassen Ghaibie Shah al Qadri at Signal Hill Road in Cape Town. This beautiful Kramat is situated at the top of Signal Hill. The white square structure with a green dome was built to look like a mini mosque.

##### Afternoon

The Kramats of Sheikh Abdurahman Matebe and Sayed Mahmud in Constantia Cape Town were two religious leaders who were exiled to the Cape as prisoners of the Dutch settlers. Enjoy gourmet dining at Taj Mahal in Hout Bay  
[www.tajmahalrestaurant.co.za](http://www.tajmahalrestaurant.co.za)

The Kramat of Tuan Guru in Bo Kaap cemetery was a prince from the Trimate islands who was exiled to Robben Island, where he wrote a book on Islamic Jurisprudence as well as several copies of the holy Qur'an from memory.

##### Evening

Enjoy a shopping experience at Canal Walk shopping mall just outside of Cape Town CBD with a number of boutique, and retail stores to shop at. Enjoy gourmet cuisine at an array of restaurants and delicious local dishes.  
[www.canalwalk.co.za](http://www.canalwalk.co.za)

#### Day 3

##### Koeksister Run

##### Morning

The Cape Flats described as the Apartheid dumping ground from the 1950's and beyond this area became known to a people's group called "non-white".

This unique route kicks off with traditional Koeksister and coffee at a Guest House or a local home

Visit the Freedom Fighters memorials such as Trojan Horse, Robert Waterwick & Coline Williams and The Memorial Park paying homage to these brave men and women who fought the fight against Apartheid, this is where a poet will tell real life stories of these heroes.

The Cape Flats is a hub where children and adults dance from Ballet to Hip hop and perform for audiences local and abroad.

##### Afternoon

Lunch break either at a local eatery or with a local family

A walk through the Spice Route-Gatesville to experience local culture at its best to taste see and smell the spices

Also visit a local school in the area depending on availability or an Old Age Home where seniors living in the area may come for a daily meal and entertainment

The day ends with a home-made meal with a family or one of the many traditional takeout dens like Wembley or Golden Dish  
[www.rhondastourscapetown.co.za](http://www.rhondastourscapetown.co.za)

Source: Wesgro (2023)



# Muslim travel market: opportunities for growth

The Western Cape presents significant opportunities for boosting the demand for halal tourism by appealing to Muslim Gen Zs, millennials, and women. These growth prospects stem from the primary economic sectors and travel trends that impact decision-making, travel patterns, expenditure tendencies, and destination preferences of the mentioned demographic groups.

## (A) Opportunities based on key economic sectors:

### 1. Halal Food

The Western Cape is one of the famous gastronomic destinations in South Africa, with the Cape Town Metro demonstrating a growth in halal restaurants that can cater to the dietary needs of the Muslim market. However, there is a need to increase the visibility of Muslim staff in restaurants, as well as certified halal food and beverage options on menus. This will address the challenges Muslim travellers encounter in purchasing halal food when travelling to a non-Muslim country.

There is a growing demand for convenience, which is a trend that played a significant role in the food sector during the Covid-19 and the travel ban period. This has thus created a demand and opportunities for businesses to start offering a variety of certified halal food options at reasonable prices, including ready-to-cook, ready-to-eat meals, frozen food, and healthy and sustainable sourced alternative proteins. Closely related to convenience is the accessibility or proximity to stores that offer halal food options which is very important for this market. Therefore, there is a need to increase the number of stores and accommodation establishments in all the regions of the Western Cape that can cater to the needs of this market.

As per the ***State of the Global Islamic Economy report (2022)***, South Africa boasts a strong halal certification industry, featuring multiple certification bodies that enjoy international recognition. The South African National Halaal Authority (SANHA) is a registered non-profit organisation that certifies halal food and products in the country. This makes South Africa an attractive potential export destination for countries like Indonesia, which has stringent halal import regulations.

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Source: DinarStandard (2022)

# Muslim travel market: opportunities for growth

## (A) Opportunities based on key economic sectors (*continuing*):

### 2. Media and recreation

There is a growing demand for high-quality Muslim-themed content and entertainment. Key information sources that Muslim Gen Zs, millennials, and women frequently use for their decision-making in visiting a destination are YouTube, Instagram, and TikTok, with Google reviews and word of mouth being the sources of information. The Muslim travel market across different ages is tech-savvy, which creates an opportunity for tourism stakeholders to develop key strategies and adopt the Red Ocean or Blue Ocean strategies to target key segments other than just the Gen Z market (DinarStandard, 2022).

The Red Ocean strategy is used to “outperform rivals to grab a greater share of existing demand”. The Blue Ocean strategy on the other hand is used to create demand rather than seeking a share of existing demand, which in return offers profitable growth opportunities (Chan Kim & Renee Mauborgne, 2023).

Furthermore, there is a need to enhance the portrayal of Muslims in mainstream media and content platforms to better represent their diverse experiences and perspectives, thereby fostering a cultural shift towards greater inclusivity and understanding (DinarStandard, 2023/24).

### 3. Recreation

Muslim women need proximity to services and want to see more women-only spaces in order for their Islamic recreation needs to be fulfilled. This indicates that tourism operators and DMOs, together with the government, can adopt strategies that cater to Muslim women’s needs, which have been implemented in the United States (DinarStandard, 2022).

### 4. Travel and tourism

*The Mastercard-Crescentrating Gen Z: The Next Generation of Travellers* report features interviews with experts on the travel preferences of Generation Z. One of the experts, Sadiq Dindar, who serves as the Manager of Marketing & Promotions for the Middle East & Turkey at South Africa Tourism, shared his insights on why South Africa is a popular destination among Muslim Gen Z travellers. Dindar highlighted that South Africa has welcomed all religions since the new South Africa era began. He mentioned that Muslim travellers find traveling within the country easy and comfortable.

# Muslim travel market: opportunities for growth

## (B) Opportunities based on travel trends:

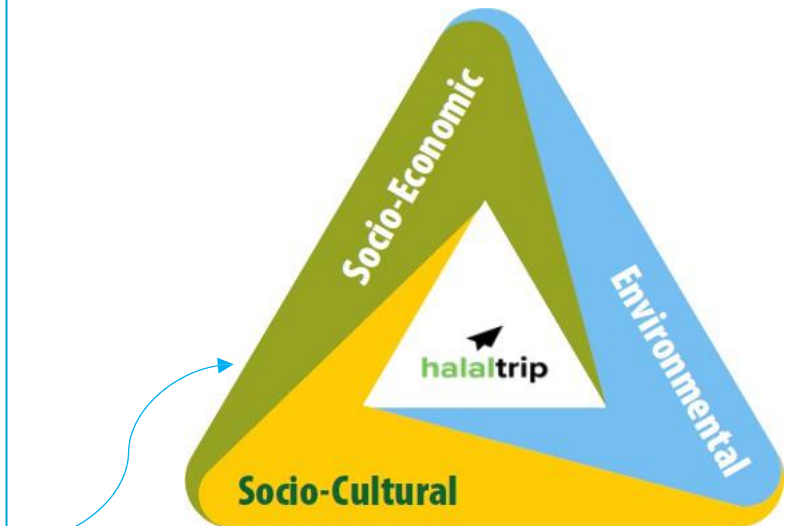
### 1. Sustainability and social causes

The tourism industry can become a valuable tool in driving sustainability. The Muslim Traveller Responsible Tourism Framework has been introduced to guide travellers on how to be responsible during their travels. The framework provides practical tips such as supporting local communities, opting for fair trade and ethical consumption, showing compassion towards animals, and exhibiting public interest.

According to Deloitte's 2022 and 2023 Gen Z and Millennial Survey, protecting the environment is the top priority for Gen Zs and Millennials. The findings of Deloitte's 2023 Gen Z and Millennial Survey revealed that 69% of Gen Zs and 73% of Millennials indicated they were actively making at least some effort to reduce their own negative environmental impacts. In addition, 59% Gen Zs and 60% of Millennials indicated their willingness to pay more and purchase environmentally sustainable products and services. However, the majority of respondents from these generations are finding it challenging to prioritise environmental sustainability due to financial concerns caused by the instability of the economy.

During the interviews conducted for the *Mastercard-CrescentRating Gen Z: The Next Generation of Travellers* report, Dr. Barkethunnusha, Co-Founder of World Women Tourism, pointed out that Gen Z travellers prioritise socially and environmentally responsible travel experiences. They prefer low-impact travel and aim to positively impact the communities they visit (CrescentRating Pte Ltd. 2023).

### Muslim Traveller Responsible Tourism Framework



Source; Mastercard-CrescentRating Global Muslim Travel Index (GMTI) 2023 report

# Opportunities for Halal tourism in the Western Cape

- The insights provided in Figures 1 to 4 and Tables 1 and 2 are not only crucial for understanding demographic trends but also play a vital role in strategic decision-making regarding trade and tourism opportunities. By analysing this data stakeholders and DMOs in the Western Cape can identify which countries to engage with for potential economic partnerships and market expansion, thereby enhancing their overall business strategies.
- In addition, to expanding the market share and driving growth in the tourism sector, stakeholders and DMOs can potentially tap into the ten leading source markets for overseas visitors and those from Africa to the Western Cape. This approach should not only emphasise increasing tourist arrivals but also involve a strategic segmentation of the incoming visitors, particularly focusing on the Muslim/Islamic community and the Halal market. By understanding the unique preferences and needs of these segments, stakeholders can tailor their marketing efforts, create culturally relevant offerings, and ensure the provision of appropriate services and facilities that align with Islamic values. This targeted strategy can foster a more inclusive tourism environment, ultimately boosting visitor numbers and contributing to the region's economic growth.
- To create tourism experiences that attract and engage tourists, DMOs and key stakeholders need to understand the values that motivate them to engage in activities of interest. According to research conducted by Valuegraphics Global Value Guide, identifying these key values is essential in developing successful tourism strategies.
- Compassion is a deeply ingrained value in many Asian cultures, and it is considered one of the top 10 values. It is a quality that is highly respected and valued, and it plays a significant role in the daily lives of people in most Asian countries. Compassion is exemplified in the way they treat others, and it is a key factor in building strong relationships. For halal tourism in the Western Cape to appeal to the Asian market, it is crucial to offer experiences that evoke compassion. This means providing activities and services that are not only enjoyable but also promote kindness, empathy, and understanding. Visitors from Asia will be more likely to choose the Western Cape as their preferred travel destination if they feel that they are welcomed with warmth and compassion.
- The Middle East region places a strong emphasis on morality, ranking it among their top 10 values. This presents an opportunity for DMOs and other key stakeholders to craft experiences and marketing messages that align with these values. By focusing on moral values and ethical principles, DMOs can create a more meaningful and impactful connection with visitors from the Middle East. This can lead to increased trust, loyalty, and positive word-of-mouth promotion, ultimately driving greater visitor numbers and economic benefits for the province.
- To attract the African market towards halal tourism in the Western Cape, it is important to provide experiences that are in line with their cultural values and beliefs. One such value is patience, which is highly regarded in African culture. Therefore, it is crucial to offer tourism experiences that evoke patience, such as guided tours that allow visitors to take their time and appreciate the beauty of the surroundings.

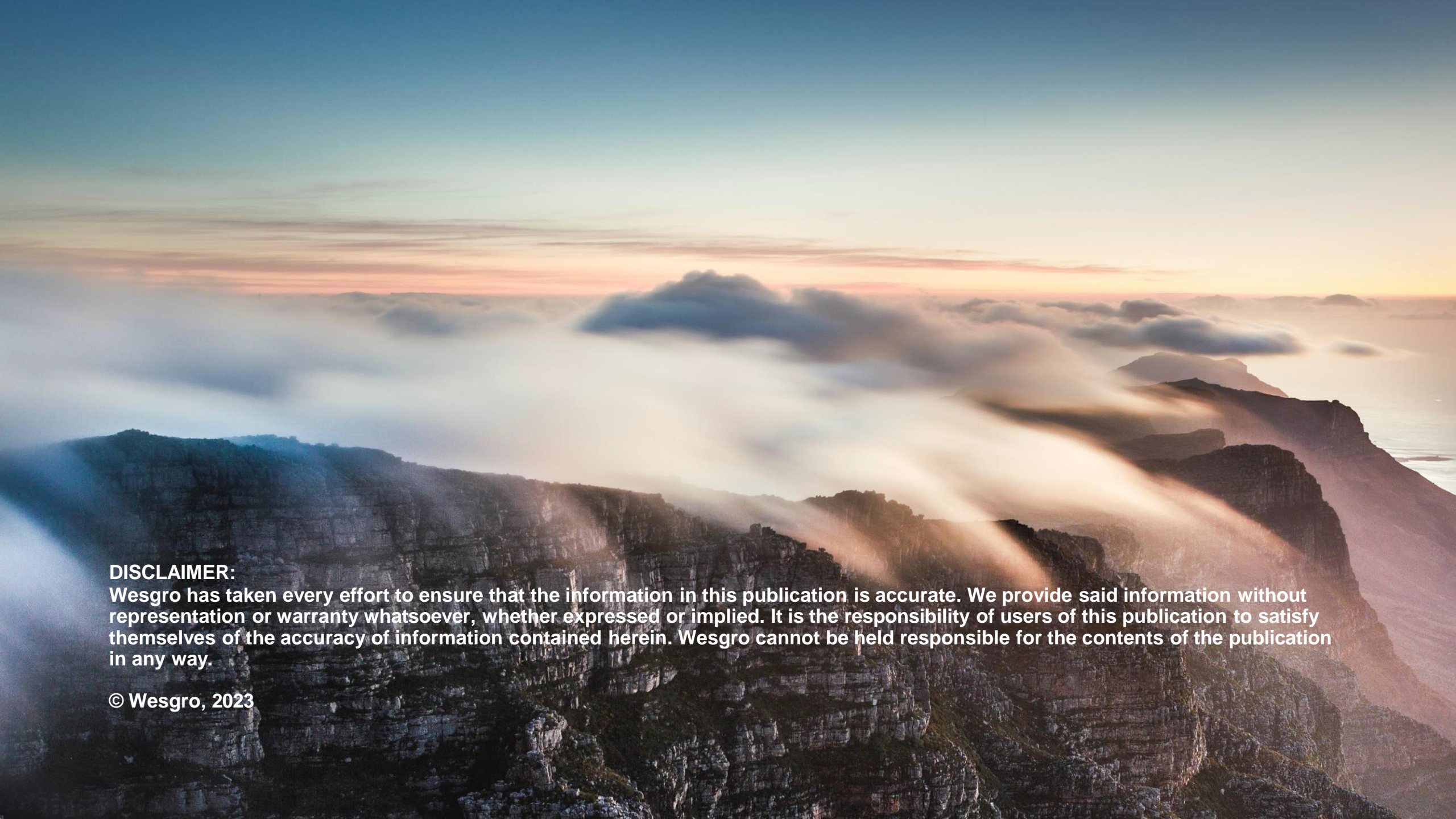
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# Opportunities for Halal tourism in the Western Cape

- The Islamic Tourism Centre (2023), part of the Ministry of Tourism, Arts & Culture in Malaysia, provides valuable insights regarding the potential of Europe's Muslim travel market indicating that there is a significant opportunity for industry stakeholders and DMOs to capitalise on the growing Muslim travel sector in Europe. These insights highlight the growing potential to engage with European Muslims as they are experiencing increased financial resources, leading to a demand for travel services tailored to their unique needs. A key strategy for effectively engaging this demographic is the use of storytelling in marketing. Many Muslim travellers, including those in Europe, seek authentic experiences and heavily rely on social media platforms for trip planning. This trend emphasises the need for key stakeholders and DMOs to enhance their presence and interaction on these channels. Additionally, ensuring accurate representation is crucial for the engagement of European Muslim travellers. This calls for strategic marketing efforts that position the Western Cape as a welcoming and inclusive destination for Muslim visitors.
- In promoting halal tourism experiences in the Western Cape, authenticity, digital personalisation, and accessibility of information work together as three crucial strategies. Authenticity refers to providing tourists with genuine, culturally immersive experiences that reflect the Islamic ethos. Digital personalisation involves tailoring the tourism experience to the needs and preferences of individual tourists through social media platforms. Accessibility of information refers to the availability of comprehensive and accurate information or content about halal-certified eateries, faith-based facilities, dining options, and activities, enabling Muslim tourists to make informed decisions. By implementing these three strategies, the Western Cape can establish itself as a top destination for Muslim tourists seeking halal-friendly travel experiences
- Muslim travellers are known for being environmentally conscious and advocating for sustainable tourism practices. They are aware of the potential impact that their travel habits might have on the environment, local communities, and cultural heritage, and hence, they are willing to take active steps to mitigate these negative effects.
- Muslim travellers have made sustainable travelling a priority, and this is reflected in their travel choices. They are increasingly seeking out destinations that have responsible and sustainable practices, and they are willing to pay more for eco-friendly options. Additionally, they are also willing to pay for sustainable practices, highlighting the importance of their faith in promoting sustainable tourism practices.
- In particular, the Western Cape has taken a leading role in promoting sustainable and responsible travel among tourists. The province has made significant strides in implementing eco-friendly practices and initiatives, such as reducing plastic waste, promoting renewable energy, and supporting local communities. As a result, this can potentially lead to Muslim travellers increasingly choosing the Western Cape as their preferred destination for sustainable travel.
- The State of the Global Islamic Economy report (2023/24) identifies several key trends that are expected to shape the global tourism landscape in the coming years. These include health and wellness tourism, adventure tourism, bleisure (business and leisure travel), culture and heritage tourism, nature-based tourism, ecotourism, sports tourism, and luxury tourism. South Africa and the Western Cape are well-positioned to attract the Muslim market due to their diverse range of tourism offerings and experiences.

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