



DOCKLANDS ACADEMY
LONDON

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Acknowledgement

Kebab businesses currently have an annual contribution over £2.2 billion to the British economy. Not a fact that many are aware of, even though this delicious cuisine is very well known. The increasing consumption of kebab in Britain means that it is now a household food for more families than ever before.

The British Kebab & Retail Awards aims to shed light on this established industry, to recognise the cultural and economic contributions that the various restaurants, suppliers and workers make to the UK. Our first event will be held in January 2013 and will take place every year thereafter. The attendees of the inaugural event will converge on Parliament to honour the best in the business. Among them will be the best of the British kebab industry, dignitaries, and celebrities, along with other notables.

In view of the challenges that have beset the catering industry as a whole recently, this year's winners will be applauded not only for their catering prowess but also their ability to keep an industry going in tough times and laying the ground for a new generation. Robustness and versatility is in the DNA of the kebab industry which, in part, grew out of economic turmoil in the 1980s and often employed those taking a giant leap into a new country and way of life.

These awards are the first steps toward rationalising the Kebab industry's contribution to the UK; to research, measure and represent findings in statistical form. This is the norm in other catering sectors. We have worked towards continually measuring the size of the market while also analysing the economic and social impacts that the industry has on the UK.

We would like to say a special thank you to Mr Nadhim Zahawi MP and Docklands Academy, London (DAL) for his patronage and great support. We would also like to thank Mr Onder Sahan - founder of the DAL - and Mr Osman Cinik and Mr Altan Kemal as members of the panel.

We also would like to thank all the Members of Parliament who have taken the time out to vote towards these awards and for recognising the contribution that the kebab outlets and workers have made to their constituencies.

Timur Ekingen
on Behalf of the British Kebab & Retail Awards
www.britishkebabawards.co.uk

Foreword

Docklands Academy, London (DAL) is proud to be sponsoring the inaugural British Kebab and Retail Awards together with the publication of this Information Booklet.

The Kebab industry plays an important role in the UK economy. With a turnover of £2.2 billion and over 70,000 employees, it is clear that it has become a part of the UK's social fabric. Over the years, the consumption of Kebabs in their many varieties has made them an accepted and popular part of Britain's food culture and we are grateful to all those who have supported this industry in the previous years. These Awards are recognition of the industry's achievements and successes.

DAL is a recently established, educational Institution and is in an excellent position to support this industry and assist in its further development. DAL's new state of the art premises, in the Docklands, are in the heart of this vibrant city and the Academy offers not only Undergraduate and Postgraduate Diploma Programmes in areas such as Business Management, Strategic Management and Leadership, Marketing, Human Resource Management, Hospitality, Travel and Tourism but also English Courses from Basic to Advanced Levels.

DAL also provides a Catering and Restaurant Management Diploma Programme, which combines academic theory with work-based learning. This is a unique programme, designed for those with an entrepreneurial mindset, which hopes to cultivate the next generation of culinary talent. The resources and expertise provided by this programme will lead the way for the restaurant industry, including the Kebab industry, to equip its staff with the skills needed in a very competitive market.

DAL's partnership with 15 highly regarded 5* Restaurants, cafes and bars (comprised of the Haz, Hazev and Tas Restaurant Groups) allows students to gain the experience they need in a busy and demanding working environment. Students are able to take on the role of managing a restaurant; communicating with

customers, liaising with suppliers and keeping an eye on financial performance, as well as ensuring premises are maintained to the highest quality. They are therefore privileged to receive first-hand experience of what it takes to achieve the smooth, effective and profitable running of a high-end restaurant.

We thank you for participating in the growth and development of this special industry and hope that this is the first of many Awards Ceremonies to come.

Onder Sahan

Founder

Docklands Academy, London and

Tas, Haz and Hazev Restaurants Group

KEY FACTS

- The origin of the word kebab - the Turkish word - is from kabāb can be traced back to Mesopotamia. The word doner, comes from the Turkish verb donmek, or to turn, because it is grilled for hours on a spit before being cut off in razor-thin slices when the meat is crisp and brown.
- Various sources often point to the 1970s for the introduction to the UK of doner. The claims are often linked to the arrival of Turkish and Greek Cypriots along with migrants from Turkey. In fact, Hodja Nasrettin was the first doner kebab enterprise on record in the UK having opened on Newington Green in 1966.
- In the late of the 1990s kebab became extremely popular and today you'll find a doner stand in almost every single British town. There is even a kebab shop in Manningtree which has traditionally claimed to be the smallest town in England, with the population just 700 people. There is also a kebab shop in Thatcham, Berkshire, often claimed to be the oldest town in Britain.
- The British Kebab & Retail Awards's team research shows that there are an estimated 17,000 kebab shops around the UK; Turkish, Kurdish, Asian, and Greek entrepreneurs where the main drivers of the increase in doner kebab shops around the country.
- In interviews conducted in various major cities in the UK via telephone and online, this report found that manufacturers in the UK produce approximately 2,000 tonnes of lamb doner meat and 700 tonnes of chicken every week. There are around 200 doner kebab manufacturers in the UK.
- There are nearly 1.3 million portions of doner kebabs being sold by static and mobile vendors every day. The average price, which is also the median, of a kebab in the UK is £3.50 for a small portion and £4.50 for a large portion. The annual retail value of the doner market in the UK is around £2 billion.



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Definition of Kebab

Oxford dictionary definition: a dish of pieces of meat, fish, or vegetables roasted or grilled on a skewer or spit.

The origin of the word kebab - the Turkish word - is from kabāb and can be traced back to Mesopotamia. The word itself, therefore, would have arrived in Turkey through the Urdu and Persian languages before finding common pronunciation in the Turkish language. Its original meaning, in its simplest form is: meat cooked with flames.

Doner kebab is defined in the Oxford Dictionary as a Turkish dish consisting of spiced lamb, cooked on a spit and served in slices, typically with pitta bread. The term, and the style of cooking, is widely believed to have originated from Bursa. Hacı İskender, whose family still serves the dish, was said to have come up with the vertical cooking technique during the late-Ottoman period.

By then kebabs were already very much part of Turkish cuisine with Fatih Sultan Mehmet known to eat a kebab a day. A special section of the Topkapı Palace kitchen was separated for the specific task of cooking this new delicacy.

The word is also Arabic word, šawirma (shawarma), originating from the Turkish word döner kebab which means ‘rotating’ / ‘roast meat’. Shawarma is a combination of these two roots.



In English, kebab, with no qualification, generally refers more specifically to shish kebab, derived from the Turkish şış kebab, which again owes its roots to the Middle Eastern word kabāb, passed into the Turkish language through the Persian sheesh kabob. Again the meaning is literal: chunks of meat on a skewer. This is paired with the second part of the term kabob which means cooked over or next to a flame. There can be an emphasis placed on the meat being “small”, which hints at the origins of the dish itself, believed to be a method born out of necessity. Cooking fuel, like wood, was sparse in the Middle East hence the meat was cut up in smaller pieces to save on energy.

The cooked meat has long been served on plates, in sandwiches, or in bowls. The traditional meat for kebab is lamb, although local tastes and religious prohibitions mean that it may now be beef, goat, chicken or fish. Like many other dishes, kebab has become an international cuisine, finding popularity around the globe.

Today the meat is often marinated in yogurt and flavoured with bell pepper flakes, salt and black pepper. Cinnamon, coriander seeds and pomegranate juice might also be added for extra flavour. There are similar dishes cooking methods across Europe but there are distinctions. For instance, doner is different to gyros - the Greek pork spit that contains ample amounts of oregano and is served in bigger chunks than doner which is cut very thinly. An important factor in cutting doner, is to avoid pressing the knife on the spit otherwise the fat will be pushed out and the meat will become dry as it rotates.

The Multicultural History of British Foods

Migration to the UK

It goes without saying that the popularity of the kebab is linked to migration to the UK. As different cultures have moved to these shores, so have different flavours and textures of food. This short history will chart this process. The kebab itself has a history which dates as far back as the Mesopotamia, moving across shores in order to become one of the UK's favourite dishes.

The population of England and Wales has reached 56.1 million, up from 3.7 million in a decade according to the 2011 census. According to these statistics, one in eight people were born abroad. This is a total of 7.5 million residents which represents 13 per cent of the population, up from 9 per cent a decade ago.

According to official figures, London is the destination of most migrants, with 37 per cent of the capital's residents born abroad, 24 per cent is not UK citizens. The engine of migration is predominantly economic need (Office for National



Statistics (ONS). The UK experienced a particularly fast population increase between 1946 to 1948, mainly made up of Polish and Italian immigrants, to supplement a depleted workforce, ravaged by the Second World War. Migrants also arrived from further afield, such as the Caribbean. In 1948, for instance, the ship *Empire Windrush* docked in London after carrying hundreds of men from the West Indies - an arrival which served to capture the popular imagination.



On the 22 June 1948 the ship docked at Tilbury carrying almost 500 passengers, most of whom were ex-servicemen, from Jamaica.

Mass immigration continued into the 1950s as citizens of the Empire and Commonwealth were granted English passports on the condition that they had a work permit and that their parents or grandparents had been born in the UK. In 1972, the government restricted immigration, but still 83,000 immigrants from the Commonwealth settled in the UK between 1968 and 1975. This trend continued throughout the 1970s and 1980s, with people arriving from Africa, the Indian subcontinent, the Far East and the Americas; and of course Eastern Europe and the Middle East.

Impact on British Diet

50 years of migration has had an impact on the UK, and in particular on British cuisine; its influence has been both outward, as well as inward. There has been internationalisation of British dishes as well as an impact on what dishes served within the UK. Britain has long been an exotic mixing pot of new ideas and trends - owing for the most to the growing cultural diversity - and has embraced as well as crafted new tastes. London, now, is one of the most lively and multi-cultural cities in Europe, most visibly reflected in its wide selection of cuisines, shops and markets. There are over 12,000 restaurants in London alone serving food from over 60 different countries (Greater London Authority).



In 1809 The Hindostanee Coffee House opened for business at 34 George Street, Portman Square, central London. Despite the name, it served Indian food rather than coffee. The visionary who first offered Indian cooking in Britain was a noble from Patna called Deen Mohammad (or Dean Mahomet), born in 1759.

Lunchtime snacks might now include ciabatta sandwiches, samosas, kebabs or pizza, to go alongside the longer serving sausage rolls. Supermarkets stock food from around the globe, with tropical fruits like mango and passion fruit sold alongside British apples. Many of the foods we take for granted, such as curries and kebabs, have only been widely available for the past thirty years or so. The demand for such foods, often supplemented by holidaymakers who want to re-experience the tastes they found on holiday, has not only been steadily increasing but has become a way of life.

With flights becoming ever cheaper, British palates are constantly bringing new experiences back to the UK's shores. Where some dishes, like the kebab, were often seen as fast food, the slow food experience abroad means that people are more likely to make time to sit in at a restaurant for the same dish in an attempt to recreate the same ambience. To a large extent, as British fast foods are adopted onto menus around the world - such as the British burger - fried chicken, and pizza have displaced fish and chips, Cornish pasties and sausages at home.

Doner Kebabs Introduced to London

As Germany recently marked the 50th Anniversary of the Guest Worker Agreement with Turkey that attracted hundreds of thousands of Turkish workers its land, cultural commentators have also taken to remembering the introduction of kebabs to Europe. The post-war boom fuelled by migrant workers also brought with it cultural traits that are now very much part of the fabric of European life. The kebab has, in essence, become a symbol of Turkish migration to German with around 15,500 doner retail outlets selling some 400 tons of doner meat every day, according to the Association of Turkish Doner Producers in Europe. The industry employs around 60,000 workers to cut, process and delivery, with annual sales of around €2.5 billion (£2 billion).



German Chancellor Angela Merkel sliced a döner in Berlin in 2009.

Various sources often point to the 1970s as the introduction to the UK of doner. These claims are often linked to the arrival of Turkish and Greek Cypriots along with migrants from Turkey. In fact, Nasrettin Hoca was the first doner kebab enterprise on record in the UK having opened on Newington Green in 1966. Owners Cetin Bukey and wife Konjay Huseyin believed doner would be as popular in the UK as it was in Turkey, Cyprus and Germany. They were right. Nasrettin Hoca was to become something of a bohemian food outlet for those looking for a different eating experience. The Turkish presence was not as visible as it was in Germany at the time and the unmistakable image of the spinning meat was much slower to take hold, which added to the restaurant's allure as an alternative spot.

First Ever Doner Kebab Shop In The UK



Hodja Nasrettin was the first ever kebab shop to hit the UK high street when it opened in 1966. Owner, Cetin Bukey was, at the time, playing clarinet and saxophone on the London circuit with the likes of Barbra Streisand when the idea came to him. He and his wife Konjay looked across at Turkey and noted the popularity of Ottoman style doner kebab shops, a restaurant and food that was missing in London. They were certain that London would fall in love with the dish.

Konjay's parents had made it over to London in the 1950s - before the first wave of Turks started coming over from Cyprus - and provided the young couple the support and advice that they needed. With their help, Bukey found and purchased a small shop in between a fish and chip shop and pub. After some refurbishment they opened Hodja Nasrettin. Although pubs and fish and chips were later to become common associations with the doner kebab, Hodja Nasrettin was anything but just a fast food joint. In fact, the concept that Bukeys reproduced, which included shisha, was to attract a bohemian crowd rumoured to have included Tom Jones and George Harrison. Hodja Nasrettin's menu also

included lahmacun and baklava - traditional Turkish dishes which were rare at the time in London. Today, of course, there has been something of a renaissance in Ottoman style traditional kebab shops on UK streets. Then, however, the restaurant was a rare piece of the east in the heart of north London.



Cetin and Konjay in their second restaurant which was called Kasimpasa in Upper Street, 1977.

According to Konjay, coal was used as cooking fuel out of necessity because there was not any electricity available. There was never a shortage of work to be done and it was a tough slog to make the restaurant a success. Konjay Huseyin, was constant support throughout, especially as Cetin continued playing London's music scene. His musical artistry was never exhibited at the shop but he did get innovative in introducing another element to his menu: pitta bread. Pitta bread, now common feature of kebabs, is unique to the UK compared to normal fresh baked bread that Turkey's kebab shops serve. It is hard to find a contemporary UK kebab shop which will not serve their doner meat and salad in pitta bread. This is owing to Bukey's introduction of the pitta onto their menu.

Cetin Bukey recalls that it took a while for the local community to get used to doner meat but soon he was doing good business with queues stretching along the outside. Hodja Nasrettin was, however, closed to make way for Bukey's second restaurant, Kasimpasa, on Upper Street in 1977.

Turkish Migration to the UK

It is no coincidence that what was to be one of many such outlets in the UK opened in Green Lanes where Turks, predominantly from Cyprus, had settled in concentrated numbers. Great many Turkish Cypriots moved to London after the tensions in post-colonial Cyprus. Cyprus was a British colony between 1878 and 1960, however when this influence ended with the withdrawal of troops between 1960- 61, well-paid jobs tied to the army also disappeared. The implementation of the Commonwealth Immigration Act of 1962 saw a great many former British subjects take up the economic opportunities presented in the UK. The factors influencing Turkish Cypriot migration were not just economic: inter-communal violence and a new situation of being a minority on an island, was also decisive. It was not only Turkish Cypriots who made the move, Greek Cypriots also started to occupy the more northern parts of Green Lanes, which stretches from central to north London.



An elderly women from south-eastern Turkey at Alevi Cultural Centre in North London

Turkish Cypriots were not alone in driving the kebab trade. Mainland Turks and later Kurdish refugees also began arriving in the 1970s and 1980s. However, these new arrivals followed a large number of Turkish Cypriots into the textile industry centered around Hackney and Dalston. Existing support networks meant that newcomers were able to survive tough economic conditions. Previous settlers with an entrepreneurial spirit laid the groundwork and were able to provide jobs and much needed direction.

The pattern of arrivals from mainland Turkey was slightly different to the Cypriots who preceded them. Often, Turks arriving from Turkey were single men who came to the UK for predominantly economic reasons and were only joined by their wives and children around a decade later once they had managed to establish a life for themselves. This trend was, in some ways, more akin to the Turkish and Kurdish movement of guest workers to Germany, Netherlands, France, Belgium and Austria in the 1960s and 1970s. Most of the young men arriving in the UK in the 1970s were from rural areas and arrived in London after a short period spent in one of Turkey's major cities. Their first move was national before they took the second major step of moving internationally in search of a living outside of their rural environment. The second-wave of migration from Turkey was in 1980 after the military coup. In contrast to the first group, this group was largely made up of intellectuals, students, trade union activist and professionals who were living in Turkey's urban centres. The end of the 1980s saw a third wave of predominantly Kurdish migrants as Turkey's Kurdish issue boiled over into one of its more sustained periods of conflict.

(Ref: Turks in London: Shades of Invisibility and the Shifting Relevance of Policy in the Migration Process by University of Sussex - Sussex Centre for Migration Research).

Increase In Kebab Shops In The UK

As noted above, the doner's impact has always been as much cultural as culinary, representing, in the main, Turkish and Kurdish migration and integration into Britain. Although figures are hard to come by, research conducted through doner producers, suggests that Turkish and Kurdish outlets are still by far the most prominent.

Doner kebab shops soon began to gain popularity, although they were still something of an exotic and rare presence on London's high streets. The concept soon started spreading. Wardour Street saw its first kebab shop open in the 1970s, following the hugely popular Sultan Ahmet which had already opened in Islington. The relatively cheap price of the kebabs and the novelty meant that long queuing customers were the norm. The fast preparation time only just allowed restaurant staff to keep pace.



Kebab legend Osman Cinik founder of Best Kebab in Stoke Newington used to work at Niyazi Usta, Mare Street, Hackney in 1977.

The 1980s also saw the introduction of kebabs into fish and chips shops, albeit often a smaller 5-6” doner, as supplement to the main menu. Fish and chip shops, in the main, were run by Greeks of both Cypriot and mainland descent who already had a large presence in London’s main towns. It was not only London where doner was available. Birmingham had restaurants offering doner alongside other dishes, two of them were owned by Greeks and one by a Turk. It was not, however, until the 1990s when the explosion in kebab shops began.

London’s textile industry, which by this point was mostly employed the Turkish-speaking community, was in steep decline due the deep recession -black Monday’s repercussions were felt for a few years thereafter. With the recession reaching its height in 1992, entrepreneurially minded Turkish and Kurdish workers were quick to set up small food and drink outlets. This had a knock on effect as employment prospects for newcomers proportionately increased for mainland Turks. As noted, the second-wave of Turkish migration was mainly



from the mainland and included both ethnic Turks and Kurds. Willing and skilled in the retail trade, these workers found new opportunities in the life that the first wave of migrants had created. The high demand for kebabs was now met with sufficient supply; it was at this point that the UK's love for kebab becomes visible with a doner shop in nearly every town.

The trend of Turkish speaking communities moving to the UK has not abated and they now play an active part in the character of many a town centre, most

popularly Dalston, Haringey and Islington; each area is known for its high-quality kebab shops. The 2011 census records show that there are 91,115 Turkey-born residents in the UK - a figure which is far short of the estimated 300,000 Turkish-national UK residents currently residing in the UK. The census excludes second-generation Turks and Kurds (Ref : ONS and Consulate General of the Republic of Turkey in London).

With the London market now well established, demand began developing elsewhere; doner kebabs began to spring up all over the UK. Turkish and Kurdish immigrants, who by now had a firm controlling stake in the retail side of the industry, began to spread the concept, either as new ventures or micro enterprises for the existing family run business.



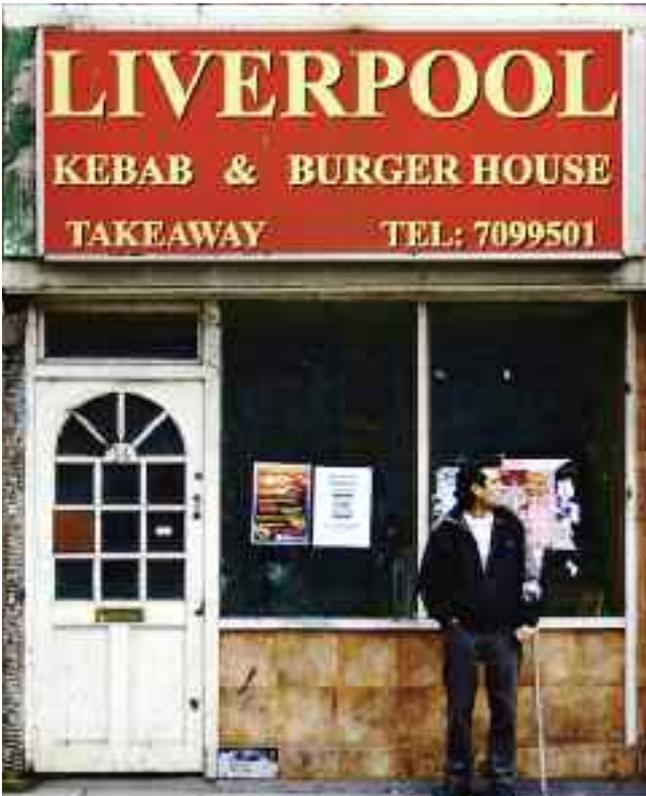
Manningtree is claimed to be in the smallest Town in England that has a Kebab Shop.

In the last 40 years, doner vendors have refined the taste and presentation of the meat. Chopped lettuce, tomatoes, cucumbers and red onions now accompany razor-thin slices of crispy chicken or lamb. Customers can also choose between garlic, yogurt or spicy dressing. New branding and traditions from Turkey also started to find their way onto the menu. Lahmacun, a Turkish type of spicy mince Pizza, began to appear alongside kebabs, as did more intricate starters and soups. And, last but not least, the meat is more than often served in pitta bread - a distinctly British trait.

Of course, the doner is not just a Turkish produce. Birmingham, for instance, now has predominantly Pakistani outlets which sell halal and other doner meat, Bolton similarly. The name differs slightly – it is called Shawarma - but the essence of the dish, its general appearance and cooking technique is the same. Around 70 per cent of fish and chips shops are estimated to have the rotating meat for sale. There is also a kebab shop in Manningtree which has traditionally claimed to be the smallest town in England, with the population just 700 people in 19 hectares (www.visitmanningtree.co.uk).

Today, doner kebab, is one of the most popular fast-food snacks in the UK, undoubtedly as popular as McDonalds and other fast food chains, with around 17,000 kebab vendors spread across the nation and sales of around £2.2 billion per annum. A quintessential UK high street would not be complete without a

kebab shop, moreover trendier areas in London are now replete with restaurants for those wanting to enjoy their meal at a slower pace and in often traditionally inspired settings. This, as anyone who has ventured to Europe will testify, is not just a British trend.



“Czarina Wilpert, a well known social scientist at the Berlin University of Technology writes that the doner kebab was “invented in Berlin. Leaving aside that a doner could have been had in Hackney, East London in 1972, what the “Doner Revolution” represented was the commodification of “traditional” ethnic food. In other common example is the “Italian” pizza.

Doner kebab takeaways have been the single most significant source of enterprise formation for Turkish immigrants in Germany and throughout Europe. The “Doner Revolution” can be seen as the selective adaptation of traditional and now commoditised Turkish cuisine. The doner revolution would not have been possible in Germany (or elsewhere) without the economic differentiation of Turkish entrepreneurs.”

(Turkish immigrant entrepreneurs in the European Union: A political-institutional approach, Prodromos Ioannou Panayiotopoulos Department of Sociology and Anthropology, Swansea University, 2008).

Doner Kebab Manufacturers

The increasing number of retail outlets has inevitably been met with an increase in factories producing doner meat. Whereas shops might have imported or produced their own meat - a practice that still occurs - today, for the most part, retail outlets rely on producers to help meet the demand. Today there are around 200 producers in Britain and thousands of shops. Wholesale dealers who offer meat already on a spit - weighing around 22 to 175 pounds - have also mushroomed.

With over 2,000 tonnes of doner meat and over 700 tonnes of chicken produced a week and turnover in excess of at least £750m, the industry has a substantial impact on the UK economy, providing UK farmers with expanded markets for their lamb and meeting the demands of an industry that continues to grow and prosper.



Kismet Kebabs which based in Essex created one of the largest doner kebab in history. The giant doner standing at 6ft 3ins tall and produced by a team of 42 people, weighs in at more than 2,000kg. Staff celebrated after took over a week for staff to hand make the lamb kebab.

Passers-by study the menu on the facade of the Doner Kebab House, a fully licensed Turkish restaurant in Wardour Street, Soho, London in 1977.

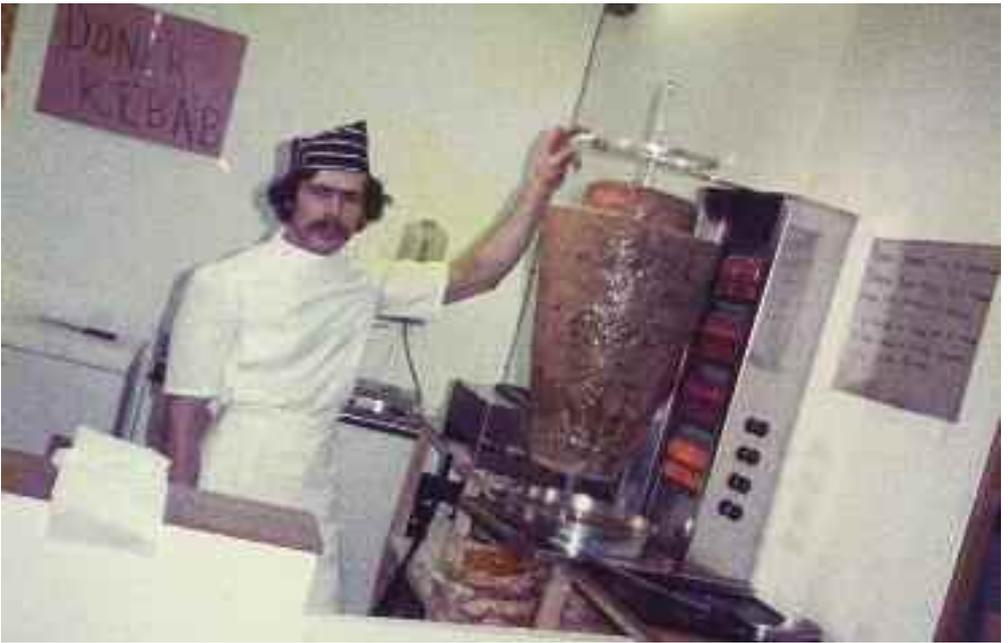


Kebab House

*Fully Licensed
Turkish Restaurant*

PE





Halil Zurnacioglu 30 years before and after...



32 Years' Industry Experience

Halil Zurnacioglu, born 1957 arrived in the UK in 1977. He started life, like most Turkish Cypriots, in and around Green Lanes where he had secured a job at Sultanahmet and other kebab shops. Unlike most Turkish Cypriots however, he did not set up a life for himself in the north London but instead moved to Burton-on-Trent. It is here that his and his business partner, Halil Ahmet, doner kebab factory now sits and produces around 40 tonnes of meat per week.

After spending two years in the midlands in 1981, Zurnacioglu opened his first business, a fish and chips and kebab shop. Although London was by now getting used to doner kebabs, the midlands were a little less acquainted with the dish.

The successful entrepreneur looks back on those days with fondness, even though he put in a lot of hard work and late nights. Doners, he said, were cheaper than chips at the time, costing around £1 for a small and £1.15 for a large. It was not too long before the queues that were there norm in London were being replicated in the midlands. Zurnacioglu remembers queues stretching out of the shop and to the next corner and the fact that he used to find it hard to keep up with the demand.

The move into manufacturing happened largely by accident, according to Zurnacioglu. His future business partner Halil Ahmet was also running a kebab shop his wife Emel after moving to Birmingham in 1960. The husband and wife partnership built up their business from scratch and, out of necessity, began to produce their own doner meat on site. It was at this point in 1989 that the partnership with Halil Ahmet and Halil Zurnacioglu was formed. Zurnacioglu and Ahmet saw an opportunity to take the process one step further and they were soon supplying meat to not only the Midlands, but all over the country.

Social Impact of the Kebab

It is hard to find a town centre in the UK without a kebab shop. The social impact of the food, especially doner kebab, is palpable. Whereas London was the hub of the branching out of the UK kebab, all cities are now a hub in their own right. The taste and flavour also differs region by region, with the midlands preferring a more garlicky variant of the archetypal north London doner kebab. There are now 20 different variants of doner meat produced for the UK market.

It is fair to say that the UK has something of a love for the sliced and diced piece of meat from the east. Aptly reflected on by comedian Arthur Smith who claims he first fell in love with doner kebabs in Paris, before the dish became more common in the UK. Popular TV culture, an apt reflection of societal values, replete its reference to kebab, note Harry Enfield's character "Stavros the kebab shop owner" which was popular in the 1990s.



As reflected upon in previous sections, this popularity owes a great part to migration of Turkish Cypriot, and late mainland Turkish and Kurdish workers in search of opportunities. Utter the phrase, “do you want chilli sauce with that?” and few Brits will not be able to designate who might have uttered the phrase and at what location. Most will be able to tell you that it was a Turkish chap in a kebab shop, or a Greek and middle to far eastern for that matter.

Stereotypes are indicative of an intuitive identification by a mass of people, often conveyed, especially in the UK with warm affection. This is just the case with those stereotypes held in regard to the doner kebab. One episode of the BBC’s BAFTA nominated 2007 series, *Pulling*, has an episode where Sharon Horgan’s character, Donna, has a kebab stolen from her but no one takes her lament seriously.

There are traces in the sketch of the doner kebab’s struggle to forge something of an identity as a serious food after often being equated as a late night after party food. Of course, this is largely true and is part of the affinity that Brits have with the kebab. Where would they be if after a drink they did not have a filling and tasty dish to counteract the effects of a drink? Often consumed as a forward looking cure for a hangover, the kebab is held aloft after hours as much as it is during diner hours and, more often and not nowadays, lunch.

The razor sliced thin meat, doner, is now frequently served with or as an aside with shish kebab. There is, amongst the growing eating out culture in the UK, a growing number of kebab shops taking their place in trendier areas where slow food is more common than the faster variant. Upper Street, Islington, north London for instance has a number of kebab outlets offering both the ambience and setting of a more traditional Istanbul kebab restaurant.

Haringey, borough of North London, also has a number of now established outlets which are full to the rafters throughout the week with people looking to eat in and take away. These are the very same areas, starting from the top of Green

Lanes and heading central, where kebabs began their life in London. This is where kebab took hold and has grown up and branched out into British culture. There still remains enough of an exotic nature to the dishes to keep British culture interested. New recipes, as part of the innovations taking place alongside older traditions that are introduced into the UK new. That Haringey is often called little Istanbul is testament to the sights and aroma created by the kebab shops that line the high street.

You cannot go much further north in England than Newcastle. Here again, the kebab has taken hold with a number of establishments dotting the high street. It is no surprise then that local icon, Cheryl Cole, recently exclaimed that she is going to show Will-I-Am, the RnB producer, what the north East is about in terms of a night out, she said: “I’m taking Will to Bigg market for a kebab. I’m planning to take him out up there.”



Harry Enfield appearing on Saturday Live in 1987 as “Stavros, a Greek kebab shop owner”

There is a distinctive taste, preparation and presentation to the UK kebab. Meat served in pitta, for instance, is a UK trait. The chilli sauce has a different taste than the Anatolian variant. There are also variations of doner kebab, the middle-eastern shawarma, and the Greek gyro, with each taking hold in different areas of the country.

Value is, of course, still a major factor in the kebab's popularity and is surely one of the reasons which now means that kebab is possibly the most popular fast food dish in the UK. With most kebab shops keeping prices below £5, consumers often find more value in the ready to eat kebab than they might in buying and preparing meat with a side salad.

The continued migration from Turkey in particular supplements the workforce in the UK in order to meet growing demand. As with the first and second wave immigrants into the UK from Anatolia, Turks and Kurds find ready employment and a stepping stone into the UK life through these establishments. The restaurants are a bridge into economic and possibly more importantly cultural life in Britain. They are becoming ubiquitously British, kebab outlets provide a two-way contact between the vendor and the local community. It is a mutual situation as cross-culturing channels, promoting the sharing of ideas and traditions. This communication and the food provided in the process is part of the furniture of UK life - a feature that is continuing to grow culturally and economically.

Economical Impacts

Eating Out, a Growing Market

Dining out has become a large part of British culture, a trend that has been confirmed by various surveys. As part of this increase, and due to a mixture of economic, social and cultural factors, taking away and eating at ethnically themed restaurants is also on the rise.



Today there are an estimated 226,000 food outlets in the UK. The eating out market is worth £52 billion a year, with the total food service market estimated to now be worth around £75 billion per year. Furthermore, research from Allegra Strategies predicts that the eating out market is expected to go from strength to strength and will total £65 billion by 2017. This is in spite of the fact that consumers (including those in full-time work and students) are spending less per head on their lunchtime meal. Lunchtime spend has fallen to £7.07 on average, compared to £7.34 in 2011, whereas dining out spend has risen from around £13.11 to £14.34 over the same period.

Fast Food Dominates the UK's Eating Out Market

More than half of all meals eaten out in Britain are from fast food restaurants according to another research company, NPD (The NPD Group, is a leading North American market research company).



According to NPD's latest findings, fast food outlets are also showing the fastest

comparable market growth, meaning they could soon dominate the market share. Burgers, fried chicken, pizzas, kebabs and take out curry now account for 50.4 per cent of meals bought outside the home, up from 47.3 per cent in 2008. This is a total of 5.54 billion fast food meals a year, with a total of 11 billion meals eaten outside the home - be it at a work canteen, restaurant, pub or sandwich shop.

The money spent on dining has been falling since the banking crisis in 2008. It has fallen from £50.8 billion in September 2008 to £49.2 billion in September 2011.

The concentration of fast food outlets and takeaways varies by local authorities in England, with deprived areas having more fast food outlets per 100,000 of population. The average for England as a whole is 77.9 outlets per 100,000 people, with London (25) boroughs having a disproportionately higher number than other parts of the country (www.london.gov.uk).

Number of Kebab Shops



The doner kebab has overtaken fish and chip shops in number with an estimated 17,000 kebab shops compared to 11,500 fish and chip shops with around 8,000 of these also selling doner. The highest proportion of fish and chip shops selling doner is in London,

Birmingham and Manchester. The remaining 9,000 vendors of doner are shops selling kebabs as their main product, or mobile vans that have fried chicken, pizzas and burgers on their menu.

As reflected in previous sections, the increase in doner kebab shops was driven predominantly by Turkish, Kurdish, Asian and Greek entrepreneurs around the country. The number of kebab shops increased in the 1990s as migration from Turkey peaked. These shops employed in mainly urban areas and supplied, in



the main, areas where there was a concentration of Turkish and Kurdish population nearby. The same pattern was followed where there was a concentration of Asian communities such as Birmingham and Leicester. The late 1990s, however, saw something of a loosening of this trend with doner kebab outlets spreading across the UK.



Kebab Consumption

Figures for the retail industry are often patchy, and there is currently no concerted research or statistical information for the UK outlining the vast size of the kebab industry to the UK. This pamphlet is a first step to address this.

In interviews conducted in various major cities in the UK via telephone and online, this report found that approximately 2,000 tonnes of lamb doner meat

and around 400 tonnes of chicken is produced by manufacturers in the UK every week. There are around 200 doner kebab manufacturers in the UK. Some of the producers also export to Spain, France, Poland and other European countries. Few doner retail outlets purchase their meat from Germany and France, amongst other nations. A number of kebab shops still prepare their own meat.

From our sample, we found that the 17,000 doner kebab outlets in the UK sell around 300 tonnes of lamb doner meat and between 50 and 65 tonnes of chicken doner every day, amounting to 2,500 tonnes a week. Chicken doner is a relatively recent dish on the market after becoming readily available in the mid-1990s. This has certainly had an impact on sales with nearly 1.3 million portions of doner kebab being sold by static and mobile vendors every day.

The average price of a kebab in the UK is £3.50 for a small portion and £4.50 for a large portion. The annual retail value of the doner market in the UK is around £2.2 billion with the sector providing around 70,000 jobs across the UK.

The size of the industry, in terms of total takeaway food outlets in the UK is substantial. Local Data Company (LDC) figures state that there are 47,000 takeaway food outlets in the UK with less than a third being operated by big brands. Retail food outlet figures are more often than not an exact science. For instance, the National Federation of Fish Friers figures show that there are currently around 10,500 fish and chips shops in the UK but other sources have the figure at around 11,500. This is due to the often transient nature of startups and because of the recent tough economic conditions. In order to capture a comprehensive picture of the UK's kebab market, this report will track figures annually. However, the same margin of 1% error is to be taken into consideration.

A Young and Successful Entrepreneur

It is a bit of an enigma. Not only because Zeliha Aygun is a woman that cuts doner meat at a shop front - a role usually filled by men - but because she does so even though she is the owner of three doner kebab shops in, of all places, the Isle of Man.

Aygun, 32, is originally from Malatya, a city in the eastern Anatolia, Turkey, and arrived in the UK aged 9. Her business career started with her brother who later pulled out of the venture leaving her in sole charge of the doner kebab shop that they both started. To her credit, Aygun not only made a success of her first venture but added to it, creating a mini chain.

Aygun loves her job, as is evidenced by her continued presence in her shops-front. Customers, especially those coming from further afield, are still pleasantly surprised by not only her presence, but the fact that there is a kebab shop on the Island at all.



Zeliha Aygun is the owner of three doner kebab shops in, of all places, the Isle of Man.

Panel Members` Biographies



Onder Sahan was born in 1966 in Kars, in the east of Turkey. He did his secondary education in his hometown and finished his high school in Ankara. He came to London while he was in his second year of Management Studies at Anadolu University in Eskisehir.

... He is the owner of 15 restaurants, cafes and bars, all of which are based around Central London. He personally trains the head chefs at each of his establishments and takes an active role in their professional development.

Tas, Sahan's first restaurant, was opened in 2000 and is based at The Cut in Waterloo. It was awarded as the best vegetarian restaurant in its neighbourhood within the first year of opening. Hazev, his most recent venture, and where he is also the Head Chef, opened its doors in 2009. Hazev is an elegant restaurant, bar and cafe in Canary Wharf.

Sahan has been living in London for 22 years, together with his wife and two daughters. Opening 15 high end restaurants, cafes and bars over a thirteen year period is a testament to his entrepreneurial skills. Whilst keeping up with the needs of his growing enterprise, he contributes to the UK economy as well as tries to give back to his native country. He is in an ideal position to build a bridge between Turkish and British businesses through his expanding networks. Sahan is a philanthropist. He sponsors a school in a village close to Kars and, more recently, established the Docklands Academy, London (DAL).

DAL is the first Higher Education College privately sponsored by a restaurant group, it provides excellent opportunities for both practical and academic training in all areas of hospitality, particularly catering and restaurant management. An important feature of its provision is the work-based learning and real-life experience of a busy restaurant environment, factors which will help students become the leaders of the future in their chosen field.



Osman Cinik is one of the most well know men in the UK doner industry. As founder of hugely succesful The Best Kebab, he has become known as something of a pioneer in the local community and beyond. The Best Turkish Kebab opened in Stoke Newington in 1984 and soon became one of London't fast-food success stories.



Altan Kemal is a Chartered Accountant. He came to the UK in 1973, graduating in Business Management before qualifying and working in accountancy.

... Ask any resident who knows the area well and they will definitely know Cinik's restaurant. Furthermore, Best Turkish Kebab has made a name for itself further afield.

The success can be measured in the amount of doner they produce. Best Kebab uses its own recipe in producing kebabs up to an enormous 150kg. Cinik himself is the man behind the different ingredients that make up the kebab.

Cinik has since stopped working in the shop and takes care of his property business. His mark is however still very much imprinted in the shop as the staff are his own apprentices operating within his tutelage. Some have even gone on to open succesful shops using the same methods that Cinik taught them.

Cinik arrived in the UK from Turkey as a student in 1975. He started to work as a chef at a prosperous kebab shop on Mare Street, north London, called Niyazi Usta before opening his own outlet.

He has since had offers of partnership to spread the Best Kebab brand but Cinik wants to retain the charm and quality of having one outlet. The brand has however been copied elsewhere, with other shops borrowing the "best" part of his shop name in their own ventures - a testament to the impact his shop has had.

... He subsequently founded his own firm of accountants in 1983, namely Alton & Co. (Chartered Accountants & Statutory Auditors). Based in London, Kemal currently has a team of 26 people of whom 12 are qualified and all very adept in advising a variety of clients including those in the catering industries.

Altan has worked with hundreds of small and medium businesses as well as big companies in his career. He has witnessed many of his clients' growth in the food and drink industry. He observed, as a Londoner, how the kebab industry grew in past 30 years and has advised many entrepreneurs and firms working in the field. His clients include restaurant chains, catering companies, and food and drink suppliers from all around the UK.

Outside of work Altan is family orientated, enjoys skiing, watching Arsenal with his sons and is a qualified football referee.