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Transformation of Halal Industry in Indonesia: From Religious Compliance to A New, Competitive Economic Paradigm

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Abstract

The global halal industry trend has become a crucial issue to be discussed among Islamic economic scholars, as halal is no longer merely related to fulfilling the needs and compliance of Muslims with sharia principles. Instead, it has evolved into a globally recognized standard. The purpose of this study is to examine the role and comprehensiveness of halal certification as a driver of the halal industry in Indonesia, thereby producing findings that can serve as references in the development of the halal industry in Indonesia. This study employs a qualitative descriptive approach using a literature review method by utilizing secondary data collected from books, scientific journals, articles, and various related reports. The findings indicate that Indonesia has significant opportunities to become a leader in the global halal industry by implementing sustainable halal industry development strategies. Overall, the findings provide implications for the government to continuously improve synergy among institutions and strengthen policy implementation that not only focuses on legality aspects, but also on the enhancement of technology infrastructure. For industry practitioners, this study emphasizes the importance of adopting global halal standards as a benchmark for improving export competitiveness. Academically, this study reinforces the theory that halal has shifted from being merely a religious requirement into a new competitive economic paradigm. Therefore, achieving this vision requires collaboration and participation from various parties to ensure the successful realization of these objectives.

Keywords:
Halal Industry, Islamic Economics, Economic Potential, Development Strategy

INTRODUCTION

Indonesia actually possesses significant potential for the development of the halal industry in various sectors. This is due to the fact that the majority of Indonesia's population is Muslim, making Muslims the primary market. This includes sectors such as the food industry, the fashion industry, and even sectors related to media and medicine, as various products consumed by Muslims are now increasingly experiencing halalization. The development is not only driven by halal products themselves, but also by global halal issues that have emerged following the transformation of Islamic economics into a global trend. The government has provided considerable attention to this issue through the establishment of regulations aimed

at strengthening halal industry development, both at the central government level and within provincial administrations seeking to achieve the halal industry agenda. The limitations of knowledge regarding the ecosystem and the lack of attention from institutions and the public toward halal products have become one of the major challenges in building a halal product industry capable of functioning as a catalyst, particularly in the year 2020. (Ilmiah, 2020).

In Indonesia, the COVID-19 pandemic had a significant impact on the halal product sector, which experienced a substantial decline in business activities. Data from the Ministry of Cooperatives and SMEs in 2022 indicated that only 83.33% of business actors remained operational. Based on these data, the halal product industry plays a major role. This study aims to determine the potential development of the halal industry in Indonesia in order to formulate strategies that can serve as references, thereby encouraging the government, business actors, communities, and all stakeholders to address the existing gaps in the development of the halal product industry ecosystem (Fathoni & Syahputri, 2020).

The objective of this study is to examine the development of the halal industry in Indonesia, particularly halal products, considering that the halal product industry includes an extremely broad scope. In Indonesia, the potential halal industry and global halal standards have become significant issues, particularly in relation to serving as a reference for government policy and the interests of stakeholders in developing the halal industry in Indonesia. Given the vast opportunities presented by the halal industry globally, it is necessary to conduct a comprehensive analysis of the halal industry. These steps are crucial in accelerating Indonesia's progress, particularly through strengthening the halal product ecosystem.

METHODS

This study employs a qualitative research method using a descriptive approach conducted through a literature review. The study utilizes secondary data obtained from books, journals, articles, reports, and various other relevant sources. Data and information were collected from a wide range of literature and secondary sources, including journal references, reports, web-based information, and other materials related to the topic under discussion in this study. Furthermore, the collected data were processed and analyzed to generate comprehensive conclusions.

RESULTS AND DISCUSSIONS

The halal industry is a term used to describe activities ranging from the procurement of raw materials and processing stages to the production of halal products by utilizing resources and methods permitted under Islamic law (sharia) (Nurdin et al., 2019).

1. Halal Product Industry

The description of halal products refers to Law of the Republic of Indonesia Number 33 of 2014 concerning Halal Product Assurance. In accordance with Article 1, the terminology of products encompasses a broad spectrum, including goods and services related to the food, pharmaceutical, cosmetic, chemical, and biological sectors. This definition also includes genetically engineered products and various consumer goods utilized by society. Products and services that comply with Islamic principles are commonly referred to as halal industry products. Halal products are products that have been officially declared halal in accordance with Islamic law (Madjid, 2022).

In its implementation, Law Number 33 of 2014 concerning Halal Product Assurance regulates various aspects of the halal industry. The law aims to guarantee every

individual's freedom to practice their religion, while the state is responsible for providing protection and assurance regarding product halalness. The regulation emphasizes that products circulating in Indonesia are not limited to food and beverages, but also include cosmetics, pharmaceuticals, chemical products, skincare products, and other cosmetic products. In addition, the law also regulates halal-related sectors such as tourism, travel, media, and entertainment.

At present, halal has evolved into a lifestyle among society. Promoting a halal lifestyle may begin by ensuring that selected products are guaranteed halal through the presence of halal labels on product packaging. Halal labels may serve as guidance for consumers when purchasing products. This condition highlights the urgency of establishing a reliable, resilient, and competitive framework in accelerating the development of the domestic halal product sector. By positioning halal as a lifestyle, Indonesia is expected to achieve success in the development of the halal product industry .(Rozalinda et al., 2019).

The government's contribution in accelerating the halal industry in Indonesia is manifested through various strategic policies and supporting instruments, including regulatory frameworks, incentives, and technical assistance. Such interventions are expected to generate significant implications for national economic growth, employment expansion, and the strengthening of Indonesia's competitiveness in the global market ((Herianti et al., 2023)

2. Scope of the Halal Product Industry

The halal industry ecosystem in Indonesia is currently experiencing massive expansion beyond the food sector and primary consumption orientation. At present, halal sector diversification has extended into various strategic sectors, ranging from Muslim fashion and beauty products to lifestyle services such as Muslim-friendly tourism and hospitality. Furthermore, its scope also includes media, healthcare through pharmaceutical products, and significant strengthening within the Islamic finance sector.

a. Islamic Finance

   In 1991, Bank Muamalat was established as the first Islamic bank in Indonesia, initiating banking operations based on profit-sharing systems, including financing contracts, insurance, and Islamic investment schemes. A historic milestone in the national Islamic financial landscape was marked by the establishment of Bank Syariah Indonesia (BSI) in February 2021, which has become the largest Islamic banking institution in Indonesia. BSI plays a crucial role as both a bridge and a primary driver of economic dynamics, particularly in strengthening the supply chain within the halal industry ecosystem.

b. Muslim Fashion

   Muslim fashion has transformed into a distinctive identity for Indonesian Muslim society and has developed into a contemporary lifestyle phenomenon. The urgency of wearing Islamic attire has transcended beyond mere religious obligations and has shifted into a representation of popular culture aligned with modern developments.

c. Halal Pharmaceuticals and Cosmetics

   Within the halal cosmetics sector, essential elements in production such as halal raw materials and the use of permitted substances must comply with sharia provisions in terms of production, storage, packaging, and distribution. Producers are also required to pay greater attention to the halal status of ingredients used in

product development. In addition, consumer awareness regarding the importance of halal certification for maintaining health, safety, and compliance has become a major consideration in product consumption.

d. Travel
   In line with the increasing Muslim population in Indonesia, public interest in performing Hajj and Umrah pilgrimages has also continued to grow. The increasing demand for religious travel has been positively responded to by travel business operators through the provision of religious travel services.
e. Hospitality
   Alongside travel trends, hotels have become an essential necessity for Muslim communities during travel activities. The interest of business actors and investors in the hospitality sector toward developing sharia-compliant hotels has significantly increased, as evidenced by the emergence of various Islamic-themed hotels.
f. Media and Film Recreation
   The film and entertainment industry has experienced significant growth in Islamic-themed productions, marked by the popularity of Islamic films and entertainment programs that have successfully attracted large audiences, including animated films such as Nusa and Rara.
g. Halal Products
   The halal product industry has become a new lifestyle trend and cultural phenomenon in Indonesia. This development indicates that the market potential for the halal industry is becoming increasingly large and open for business actors. Furthermore, the existence of halal product assurance regulations and free halal certification programs launched by the government has expanded opportunities for business actors to produce halal-certified products.
h. Halal Tourism
   The performance of Indonesia's tourism sector has become increasingly promising, as Indonesia successfully achieved fourth place as the world's best Muslim-friendly tourist destination according to the Global Muslim Travel Index (GMTI) 2021 (Maulana & Zulfahmi, 2022).

3. Current Conditions of the Halal Product Industry in Indonesia

The halal industry plays a strategic role in improving the national economy. The urgency of accelerating the halal industry in Indonesia is based on its tangible contribution to the macroeconomy, where the sector contributes approximately USD 3.8 billion annually to the national Gross Domestic Product (GDP). According to data from the Ministry of Finance (2019), the sector has also attracted foreign capital inflows amounting to USD 1 billion and absorbed approximately 127 thousand workers annually. With more optimal governance, the halal industry is projected to strengthen the trade balance through increased export volume and foreign exchange accumulation (Ministry of Finance of the Republic of Indonesia, 2019). Therefore, Indonesia should further develop the halal industry to maximize economic growth (Samsul et al., 2022).

However, despite its enormous potential, Indonesia's halal industry has not yet been fully optimized. Existing data indicate that the output of halal industries in Indonesia remains relatively limited. Based on the State of the Global Islamic Economy Report (2019), Indonesia ranked fifth in the Top 15 Global Islamic Economy Indicator with a score of 49.

Meanwhile, across various halal industry sectors, Indonesia ranked fifth in the Top 10 Islamic Finance, fourth in the Top 10 Muslim-Friendly Travel, and third in the Top 10 Modest Fashion. However, Indonesia did not enter the top ten rankings for the Halal Food, Media and Recreation, and Pharma and Cosmetics sectors.

This condition is highly ironic considering Indonesia's status as the country with the largest Muslim population globally. Unfortunately, this demographic dominance has not yet been transformed into a major production force within the global halal supply chain. Indonesia's absence from the top ten rankings across several industry sectors, including the fundamental food sector, highlights a significant discrepancy between expected potential and actual realization.

This gap has resulted in Indonesia remaining merely a market for the international halal industry. Therefore, Indonesia must undertake a significant transformation to become a global reference point within the halal ecosystem. The government's ambition to position Indonesia as the world's halal hub represents a strategic target that is highly achievable. Consequently, this imbalance must be addressed to realize such aspirations. Considering Indonesia's vast potential, the halal industry should be optimized further to strengthen the economy and improve public welfare, given its highly strategic economic role (Qoniah, 2022).

Despite its substantial prospects, the national halal sector continues to face several fundamental challenges. The primary obstacles include limited literacy and awareness among business actors regarding halal certification, compounded by insufficient understanding of operational standardization procedures. This condition is further complicated by inadequate technological infrastructure and limited investment allocation in research and development (R&D) to stimulate product innovation (Wulandari & Pradesyah, 2023).

4. Potential of the Indonesian and Global Halal Industry

The halal industry and halal products in Indonesia possess enormous potential both nationally and globally. This is because halal products encompass a broad range of lifestyle-supporting aspects and cultural trends that align with market demand, particularly due to the large Muslim population. According to the Mastercard and Crescent Rating Report (2022), the global Muslim population has reached approximately 2 billion people, accounting for around 25% of the world's population, with the largest Muslim population concentrated in Asia. This potential is strongly influenced by Indonesia's position as the country with the largest Muslim population. The potential of Indonesia's halal industry can be observed across several sectors, including halal food, Islamic finance, halal tourism, and Muslim fashion (Adamsah & Subakti, 2022).

a. The Largest Muslim Population in the World

Indonesia is recognized as the country with the largest Muslim population globally, amounting to approximately 237.53 million people or 86.9% of the total population of 273.32 million (Kemendagri, 2021). Consequently, public demand for halal products is also significantly high. The rise of the Islamic economy, including the halal industry, has become momentum for business actors to seriously develop the halal industry at domestic, national, and global levels. The implementation of sharia principles has now transformed into a new lifestyle paradigm emphasizing hygiene, safety, and product integrity. Alongside the rapid acceleration of the domestic halal industry, Indonesia is projected to establish itself as a central figure within the global halal ecosystem. Moreover, halal products are no longer merely

associated with Muslim consumers, but have become part of the international production system as halal standards are regulated within international trade codices.

b. Indonesia Golden Vision 2045
Indonesia is expected to experience a demographic bonus in 2045, where approximately 70% of the population will belong to the productive age group (Indonesiabaik.id, 2021). Based on this potential, public demand for various categories of halal products is projected to continue increasing significantly in the future.

c. High Consumption Value of Halal Products
Indonesia's halal industry sector has recorded a highly significant transaction value reaching approximately USD 220 billion. This figure is projected to continue increasing in line with the growth of the Muslim population and rising public awareness regarding the added value of halal products. If managed strategically, this economic potential provides Indonesia with broad opportunities to strengthen its position as a leader in the global halal market.

d. Legal Regulations and Halal Product Assurance Law
The enactment of the Halal Product Assurance Law represents the government's proactive effort in safeguarding and promoting the national halal industry sector. This legal instrument establishes reference frameworks and standard parameters for business actors in obtaining certification certainty through transparent and accountable governance principles. Such regulations are expected to provide information certainty and transparency for both business actors and consumers while encouraging the growth of Indonesia's halal industry market. The legal framework also serves as the basis for establishing standard protocols and accreditation mechanisms within the national halal sector. The implementation of this regulation aims to ensure that every stage of halal certification aligns with the government's strategic objective of transforming Indonesia into a global halal industry hub.

e. Import Substitution Policy
The government supports the replacement of imported goods with domestic products. Along with population growth in Indonesia, demand for halal products has continued to increase. Therefore, the government seeks to substitute imported halal products with locally produced products to reduce dependence on foreign countries.

f. Establishment of the National Committee for Islamic Economy and Finance (KNEKS)
Another effort in supporting halal industry development is reflected through the establishment of KNEKS under Presidential Regulation Number 28 of 2020. The institution aims to support national economic development, accelerate Islamic economic and financial growth, and strengthen coordination, synchronization, and synergy among authorities, ministries, institutions, and stakeholders within the Islamic economic and financial sector.

g. Stakeholder Synergy
Various institutions have contributed to the development of Indonesia's halal industry. First, in order to support BPJPH under the Ministry of Religious Affairs as the primary stakeholder in the implementation of halal product assurance, synergy among various parties is required, including the Minister of Health, Minister of

Agriculture, Minister of Foreign Affairs, Minister of Research, Technology, and Higher Education, Minister of Finance, Minister of Communication and Information Technology, the Chief of the Indonesian National Police, the Head of BPOM, the Head of BSN, and MUI, who signed a Memorandum of Understanding concerning the Implementation of Halal Certification Services (PLSH) for products required to obtain halal certification at the Vice President's Office on Wednesday, October 16, 2019. Second, the *Badan Perencanaan Pembangunan Nasional* (Bappenas) and KNEKS formulated halal industry development strategies through MEKSI 2019–2024. Third, educational institutions such as universities established halal study centers, initiated halal industry-based study programs, and adjusted several courses related to halal industries and products in response to the implementation of the Halal Certification (UU JPH).

h. *Badan Penyelenggara Jaminan Produk Halal* (BPJPH) and LPH
In addition to strengthening the regulatory framework for the halal sector, the government's commitment is also reflected in the establishment of special authority institutions and strategic stakeholders responsible for managing and supervising the implementation of national halal standards. BPJPH was established on October 11, 2017, under Law Number 33 of 2014 under the Ministry of Religious Affairs. BPJPH is responsible for halal registration, halal certification, halal verification, guidance, supervision, cooperation with stakeholders, and determining halal standards and policies.

i. Simplification of Halal Certification for MSMEs
Through free, accessible, professional, and integrity-based services aligned with Sharia Governance standards and international quality standards for halal certification institutions, the government seeks to ensure that halal certification services are accessible to all MSMEs in accordance with applicable regulations.

j. Free Halal Certification Program (SEHATI)
To support the target of 10 million halal-certified products, BPJPH together with ministries, local governments, and partners has assisted business actors in obtaining free halal certification. In 2022, the program targeted 324,834 products beginning on August 24, 2022, as stated in Announcement Number 1479 of 2022.

k. Community Support
The government's efforts in developing Indonesia's halal industry have been positively welcomed by academics, religious leaders, and the wider public, as demonstrated by the establishment of halal communities and halal study centers, such as the Halal Care Community of West Sumatra and UKM Halal Bogor.

l. Indonesia's Achievements in the Halal Industry
Indonesia's existence within the global Islamic economy has been demonstrated through remarkable achievements. According to the State of the Global Islamic Economy Report 2022, Indonesia successfully secured a top-four global position. Indonesia ranked second in halal food, sixth in Islamic finance, third in halal fashion, and ninth in halal pharmaceuticals. Indonesia also became one of the largest producers of halal products for OIC countries in 2022 and ranked fourth as the world's best Muslim-friendly tourist destination according to the Global Muslim Travel Index (GMTI) 2021 (Maulana & Zulfahmi, 2022).

5. Strategies for Halal Product Industry Development

The major aspiration of Indonesia's halal industry focuses on transforming the Islamic economy into a fundamental pillar of national financial stability. This objective aims to strengthen Indonesia's position in achieving national economic independence while reinforcing national sovereignty within the global arena. The mission of Indonesia's halal industry includes:

a. Achieving national economic stability through independence in fulfilling domestic halal product consumption;
b. Improving the quality and competitiveness of Indonesian halal industry products and services in order to achieve a trade balance surplus and enhance Indonesia's competitiveness in global trade; and
c. Positioning Indonesia as a global leader in halal industry development through a trustworthy and inclusive assurance system.

The strategies for halal industry development are formulated by considering the vision and mission of Indonesia's halal industry, the conditions and potential of domestic and global halal markets, as well as the halal ecosystem framework and gap analysis in Indonesia. Based on these considerations, a halal industry development strategy approach known as Halal GRIPS has been developed with specific targets, objectives, and strategic initiatives (Kamila, 2021).

Furthermore, the Indonesian Sharia Economic Masterplan (MEKSI) identifies halal product industry development as part of the government's efforts to improve national industrial performance. With the objective of positioning the halal industry as one of the pillars of the national economy and establishing Indonesia as a global halal industry center, the primary focus of halal product industry development during 2020–2024 includes the establishment of halal industrial clusters and infrastructure, the development of a comprehensive halal assurance system that supports nationwide halal product growth, and increasing the contribution of halal industries to the national trade balance within strategic sectors (Astuti, 2020).

In addition, other literature highlights several strategies for halal industry development, including strengthening export products and import substitution. As previously discussed, Indonesia possesses significant opportunities to develop its halal industry by increasing domestic halal production through export expansion and the substitution of imported products. Another strategy involves the development of Halal Special Economic Zones and Halal Industrial Areas. The government has introduced Special Economic Zone (SEZ) policies to encourage economic growth, equitable development, and enhanced national competitiveness. Through these halal industrial zones, products are expected to comply with halal product assurance standards according to their intended purposes.

Another important strategy is the establishment of specialized institutions dedicated to halal industry development. As the implementing agency of the Halal Product Assurance Law, BPJPH may serve as one of the primary institutions in supporting halal industry advancement in Indonesia. In addition, strengthening the halal value chain is considered essential, as the halal value chain encompasses every stage that must be considered in building the halal industry, ranging from inputs to outputs within the halal production process. Finally, strengthening collaboration among halal industry stakeholders, including the government, consumers, industries, and investors, is also

regarded as a crucial component in accelerating the sustainable development of Indonesia's halal industry (Mursidah & Fartini, 2023).

CONCLUSION

The development of the halal industry in Indonesia is highly significant, not only in the food and beverage sector, but also in the Muslim fashion industry, halal pharmaceuticals, halal cosmetics, Islamic finance, tourism, hospitality, travel, media, recreation, and entertainment sectors. Indonesia possesses substantial potential for the development of the halal industry, considering that it has the largest Muslim population in the world, amounting to approximately 237.53 million people or 86.9% of the total population of 273.32 million. In addition, Indonesia also demonstrates high levels of halal product consumption and receives support from various institutions, including the government, BPJPH, and several other strategic stakeholders, which collectively contribute to the development of a globally competitive halal industry ecosystem in Indonesia.

If managed and developed effectively, Indonesia will no longer merely serve as a market for halal products from exporting countries. Therefore, all related stakeholders, including the government, halal product business actors, academics, and society, must collaborate in order to optimize the substantial potential of the halal industry. Education regarding the importance of halal consumption should also be enhanced to ensure that communities become increasingly aware of halal products available in the market. Improving public awareness toward halal products can directly function as a protective mechanism for the sovereignty of the domestic halal market.

Accordingly, Indonesia can become a center for the development of the Islamic economy and halal industry if optimized in sectors such as finance (monetary), halal food products, fashion, halal cosmetics and pharmaceuticals, Muslim-friendly tourism, media and halal recreation, as well as by strengthening all stakeholders involved in halal industry development in Indonesia, including the government, consumers, businesses, and investors. Indonesia has the opportunity to become a global halal industry leader through the implementation of halal industry development strategies in Indonesia. Therefore, to achieve the government's vision, synergy and participation among various stakeholders are essential to ensure the successful realization of these objectives.

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