



Unlocking Indonesia's Halal Potential: Policy, Certification, and International Alignment

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Abstract. This study aims to examine the various potentials and enduring difficulties that influence Indonesia's ambition of becoming a global Centre for halal. It focuses on the development of key halal industries and explores governance and regulatory challenges in achieving global halal competitiveness. This research is grounded in the conceptual understanding of halal ecosystem development, involving the relationship between regulatory governance, industry competitiveness, international standards alignment, and multi-stakeholder collaboration. It also explores the role of institutions like the Indonesian Ulema Council (MUI) and the Halal Product Assurance Agency (BPJPH) in shaping the national halal framework. This study adopts a qualitative approach, using content analysis of academic publications, regulatory documents, and strategic policy reports. It synthesizes perspectives from industry stakeholders, policymakers, and regulatory institutions to understand Indonesia's readiness and challenges in becoming a global halal hub. Indonesia has enormous potential to lead the global halal market, given its demographic advantage and industry diversity. However, challenges persist in the form of fragmented governance, inconsistent certification processes, limited SME support, and a need for harmonization with international standards. MUI and BPJPH are undergoing a functional transformation to meet global expectations but require stronger coordination and policy integration. The research highlights the significance of integrated policymaking, digital transformation, international standard harmonization, and inclusive support for SMEs. These elements are critical for enhancing Indonesia's competitiveness and realizing its goal of becoming a global halal Centre. This study provides a comprehensive analysis that bridges institutional, economic, and regulatory perspectives. It offers a strategic roadmap for positioning Indonesia in the global halal economy, emphasizing the importance of a cohesive national strategy and cross-border collaboration.

Keywords: Indonesia, Halal industry, Halal certification, Regulatory governance, SMEs.

1 Introduction

With more than 230 million Muslims, Indonesia has a cultural and strategic edge in the worldwide halal market. Beyond religious duty, the halal industry—which includes the food and beverage, cosmetics, pharmaceutical, tourism, logistics, and financial sectors—has grown to become a significant force in the world economy. The demand for certified halal goods and services is rising

in both Muslim and non-Muslim countries, contributing to the growth of the global halal market, which was estimated to be worth over USD 2.3 trillion in 2022 (Ma'arif, 2024).

The Indonesian government has developed a plan to turn the nation into a global center for halal production in recognition of this potential. National strategic initiatives like the "Masterplan Ekonomi Syariah Indonesia 2019–2024" and the creation of the Halal Product Assurance Agency (BPJPH) under Law No. 33 of 2014 both reflect this goal. The nation wants to become a significant exporter and producer of halal instead of just a major consumer (Prathama et al., 2024).

However, there are several obstacles in the way of realizing this objective. Despite having the biggest Muslim population in the world, Indonesia struggles with insufficient infrastructure, disjointed halal certification systems, regulatory obstacles, and little participation from MSMEs. Additionally, it falls behind nations like Malaysia in terms of ecosystem integration and international recognition of halal certification requirements (Maflahah et al., 2025).

By identifying important industries with room to grow, assessing the efficacy of regulatory frameworks, and examining the institutional, financial, and cultural issues that need to be resolved, this study seeks to understand Indonesia's current standing in the global halal economy. In order to determine what Indonesia needs to do to reach its full potential as a global halal hub, the study also makes use of foreign standards and comparative perspectives (Kurniawati & Cakravastia, 2023).

Indonesia's standing is further complicated by the comparative dimension. Cohesive halal ecosystems that combine certification, logistics, research, and marketing under unified policies have been built by nations like Malaysia and, more recently, Thailand and the United Arab Emirates. Because of the legitimacy of its halal certification system, Malaysia in particular has gained international reputation, making it easier for its products to reach foreign markets. An unequal playing field results from Indonesia's halal certification system, which is still working to achieve comparable worldwide acceptability. This circumstance emphasizes how urgent it is for Indonesia to develop its domestic institutions and align its systems with international norms (T. A. M. Alwy Ahmed Mohamed & Mahmudulhassan, n.d.).

Cultural and social factors are important in addition to institutional and legal issues. Beyond its religious commitments, halal has a wider economic relevance that has to be made known to companies and consumers. Repositioning Indonesia in international markets may be facilitated by presenting halal as a force behind innovation, sustainability, and ethical consumerism. In a similar vein, the halal economy has the ability to unite the country by fusing tradition with contemporary economic goals. However, this cultural narrative necessitates internal consensus-building, foreign diplomacy, and constant promotion (Md. R. H. Alwy Ahmed Mohamed & Alaa Alkhateeb, n.d.).

This study attempts to offer a thorough examination of Indonesia's present position in the global halal economy in light of these complications. It aims to determine which vital industries have the most room to grow, how well regulatory frameworks operate, and what institutional, monetary, and cultural obstacles need to be addressed. The study will provide comparative viewpoints to highlight Indonesia's advantages and disadvantages by referencing global experiences and best practices from other top halal economies. In the end, the study will not only describe the challenges Indonesia confronts, but it will also lay out a plan for how the country can use its advantages in terms of population, culture, and religion to become a global center for halal (A. E.

Alwy Ahmed Mohamed, 2025).

By doing this, this study advances our knowledge of how religion, the economy, and globalization interact. It emphasizes how halal encompasses larger issues of ethical commerce, cultural diplomacy, and sustainable development as both a religious requirement and a business norm. Being a worldwide leader in halal is more than just a commercial endeavor for Indonesia; it is a declaration of identity, sovereignty, and soft power in a world growing more linked by the day (Nashir et al., 2019).

2 Research Method

In order to investigate the dynamics of Indonesia's halal industry, this study employs a qualitative descriptive research design that integrates comparative policy analysis with a comprehensive literature review. The methodology is aimed at synthesizing findings from national and international scholarly sources to identify trends, gaps, and strategic opportunities within Indonesia's halal ecosystem. Data were collected from a carefully selected set of peer-reviewed academic articles, policy documents, and reports published between 2020 and 2025, totaling twenty scholarly works sourced from Indonesian academic repositories, ResearchGate, and Google Scholar. Keywords such as "halal industry Indonesia," "halal certification," "BPJPH," "halal tourism," "Islamic finance," and "global halal economy" guided the search. Inclusion criteria required that studies focus on or compare Indonesia, be published in English or Bahasa Indonesia between 2020 and 2025, and address at least one of the following: international trade, market development, consumer behavior, certification, or regulation (Vanany et al., 2019).

Data were analyzed using thematic analysis, with findings categorized into five dimensions: governance and regulatory frameworks; sectoral expansion in food, tourism, and banking; standards and certification systems; consumer awareness and behavior trends; and international comparisons. Additionally, Indonesia's halal policies were benchmarked against those of Malaysia and Thailand, focusing on certification efficiency and global market integration. However, the study is limited by its reliance on secondary data, which may not reflect the most recent policy changes or SME-level experiences, and by language constraints that excluded non-English and non-Bahasa literature, while comparative depth was limited to a few selected countries for practical reasons (Fadhilah & Syamsuri, 2022).

2.1 Formulation for the Research Question

- What institutional, regulatory, and governance challenges affect Indonesia's readiness to position itself as a global halal hub?
- How can Indonesia strengthen its halal ecosystem—through integrated policymaking, SME support, digital transformation, and alignment with international standards—to enhance global competitiveness?

3 Result

3.1 Formulation for the Research Question

The introduction of mandatory halal certification in Indonesia, as established by Law No. 33/2014, has led to a significant increase in institutional involvement, particularly through the establishment of the National Halal Product Assurance Agency (BPJPH). This agency is tasked with overseeing and facilitating the halal certification process, ensuring that food and products meet the necessary religious requirements. However, the system is not without its challenges. Coordination issues often arise between BPJPH and the Indonesian Ulema Council (MUI), which plays a crucial role in determining halal standards and issuing certificates. This lack of seamless collaboration can result in confusion and inconsistencies for producers seeking certification, particularly for micro, small, and medium enterprises (MSMEs)(Wardhana et al., 2019). These businesses often face procedural inefficiencies that complicate their ability to navigate the certification landscape, ultimately hindering their competitiveness in both domestic and international markets. As the demand for halal products continues to grow, addressing these coordination and procedural issues is essential for creating a more efficient and effective certification system(Suhartanto et al., 2023).

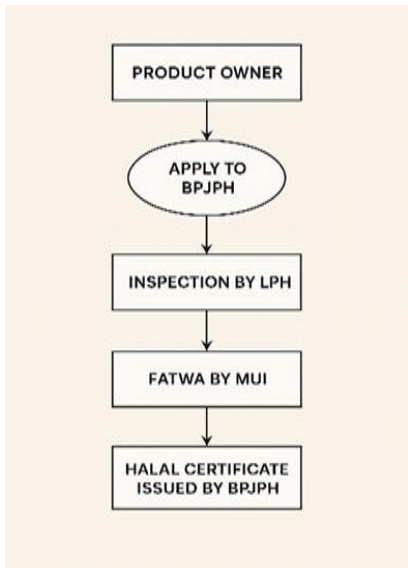


Figure 1. Process Flow of Halal Certification in Indonesia

3.2 Halal Industry Shows Uneven Sectoral Growth

The halal industry demonstrates a varied growth pattern across its different sectors. The food and beverage sector stands out as the most developed segment of the industry, showcasing significant advancements in product offerings and market penetration.

However, despite this progress, Indonesia continues to rely heavily on imports of halal products, indicating that there is still room for improvement in local production capabilities. In contrast, other sectors such as halal tourism, Islamic finance, and halal cosmetics/pharmaceuticals are emerging as promising areas with considerable growth potential. These sectors are gaining traction as consumer awareness and demand for halal-compliant products and services rise, presenting opportunities for businesses to innovate and expand. Nevertheless, small and medium-sized enterprises (SMEs) find themselves underrepresented in the halal market landscape(Marzuki & Nurdin, 2020). This is largely due to the challenges they face in understanding and navigating the complexities of halal compliance requirements. Limited access to resources and support systems often hinders these businesses from fully capitalizing on the opportunities within the halal industry. As such, addressing these gaps could lead to a more inclusive and robust growth trajectory for the halal market as a whole(Azizah, 2022).

Table 1. Sectoral Development Status

Halal Sector	Current Development Stage
Food & Beverage	Developed
Tourism	Emerging
Finance	Emerging
Cosmetics	Emerging
Pharmaceutical	Emerging

3.3 The Demand for Halal Assurance is Growing Significantly

In recent years, there has been a marked increase in public demand for halal certification, as consumers come to regard it as an important indicator of trustworthiness and high quality in food products. This surge in interest reflects rising awareness and understanding of halal principles, which encompass not only dietary laws but also ethical considerations surrounding food production. A particularly strong push for mandatory halal labeling has been observed, especially among younger, urban Muslim populations who prioritize transparency in food sourcing and preparation. These consumers are not only looking for compliance with religious dietary requirements but also seek reassurance that the products they purchase align with their values. As a result, many are advocating for clearer labeling standards to help them make informed choices. This trend highlights the growing intersection of food ethics, cultural identity, and consumer behavior in today's marketplace(Kasdi et al., 2018).

3.4 International Competitiveness is Limited by Lack of Global Recognition

One of the significant challenges faced by Indonesia in expanding its halal product market is the absence of globally recognized halal certification. Unlike Malaysia, which boasts the credibility of the Jabatan Kejuan Islam Malaysia (JAKIM), Indonesia’s halal certification does not yet enjoy the same level of international acceptance. This disparity hampers the country’s ability to competitively export halal products to key markets

around the world, where consumers and businesses often prioritize certifications that are widely recognized. Furthermore, there is a critical gap in the harmonization of international halal standards. Indonesia has yet to align its halal certification processes with the standards set forth by the Organization of Islamic Cooperation (OIC) and the Standards and Metrology Institute for Islamic Countries (SMIIC). This lack of alignment not only affects Indonesia's credibility in the global halal market but also creates challenges for exporters seeking to navigate varying regulations and consumer expectations in different countries. Without addressing these issues, Indonesia risks falling behind in the rapidly growing global halal industry (Kusnadi et al., 2024).

3.5 Inconsistencies in Stakeholder Engagement and Ecosystem Integration

Despite the introduction of multi-stakeholder strategies, such as the Penta helix model, the actual implementation of these approaches across the various sectors of government, academia, and industry has proven to be limited and uneven. This inconsistency hampers collaborative efforts and the cohesion needed for effective policy-making and innovation. In addition, the uptake of halal certification among micro, small, and medium enterprises (MSMEs) remain quite low. Several factors contribute to this trend, including high costs associated with the certification process and the complex procedural requirements that deter many businesses from pursuing certification. As a result, many MSMEs struggle to access new markets and opportunities that halal certification can provide, thereby hindering their growth and competitiveness in a global economy that is increasingly focused on halal products (Putri et al., 2024).

4 Discussion

4.1 Regulatory Overlap and Institutional Fragmentation

The transition from a largely clerical system to a state-regulated framework for halal administration in Indonesia was significantly highlighted by the establishment of the Halal Product Assurance Agency (BPJPH). This agency was created to enhance the regulation and certification processes for halal products, ensuring they meet the necessary standards set forth by Islamic law. However, the effectiveness of BPJPH's mandate is often undermined by persistent process delays, primarily due to the overlapping jurisdictions and responsibilities between BPJPH and the Indonesian Ulema Council (MUI) (Sumaryadi et al., 2020).

This overlap raises challenges, particularly concerning the issuance of fatwas (Islamic legal opinions) and the control over certification processes. The MUI plays a crucial role in determining the halal status of products, and its influence can complicate the regulatory landscape. As a result, companies seeking halal certification may find themselves navigating a complex web of regulations and authority, which can lead to confusion and inefficiencies in the certification timeline. This fragmentation of authority and responsibility ultimately poses challenges for stakeholders aiming for a streamlined and effective halal certification process in the country (Limenta et al., 2018).

Table 2: Comparison of Institutional Roles in Halal Certification

Institution	Mandate	Challenges
BPJPH	Regulatory oversight and certificate issuance	Bureaucratic delays, limited digital access
MUI	Issuance of halal fatwa	Dual authority confuses stakeholders
LPH	Inspection and audit of products	Capacity limitations, especially outside Java

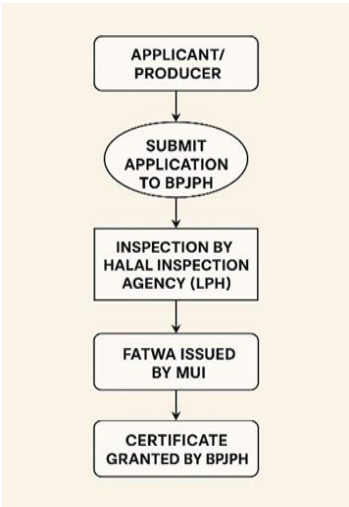


Figure 2. Image Flowchart: Current Halal Certification Journey in Indonesia

4.2 Certification Barriers for MSMEs

Digital technologies have significantly transformed SME operations, contributing to cost reduction, revenue growth, and enhanced competitiveness. The journey toward achieving industry-wide halal compliance is fraught with challenges, particularly for micro, small, and medium-sized enterprises (MSMEs). In Indonesia, these enterprises represent over 90% of all business units, underscoring their critical role in the economy. However, several significant barriers impede their ability to obtain halal certification, which is essential for accessing broader markets and catering to the demands of consumers who prioritize halal products (Wiwoho et al., 2024).

1. Cost

One of the foremost challenges faced by MSMEs is the prohibitive cost associated with obtaining halal certification. The financial burden encompasses various aspects, including certification fees, the costs of mandatory audits, and the expenditures involved in preparing documentation and compliance measures. For many small businesses, these costs can represent a substantial portion of their operating budget, discouraging them from pursuing certification and limiting their growth potential (Darmawan & Wandirah, 2025).

2. Knowledge Gap

Another critical barrier is the knowledge gap that many MSMEs encounter regarding the halal certification process. Many small business owners are either unaware of the specific requirements and procedures needed to achieve certification or lack access to reliable information and resources. This lack of awareness can result in confusion and uncertainty, preventing them from taking the necessary steps to comply with halal standards (Alim et al., 2024).

3. Geographic Disadvantage

The geographic distribution of certification infrastructure also poses a significant challenge. In Indonesia, most certification agencies and resources are concentrated in Java, leaving MSMEs located in other regions, particularly those in more remote areas, at a distinct disadvantage. This geographic disparity can complicate access to certification services and information, making it even more challenging for non-Java MSMEs to navigate the certification process and establish compliance (Martaleni et al., 2025).

In conclusion, to foster a more inclusive and equitable halal certification landscape, it is essential to address these barriers faced by MSMEs. Considerations such as reducing costs, enhancing education and awareness, and expanding certification infrastructure beyond Java could significantly empower small businesses and enable them to thrive in a market increasingly oriented towards halal compliance.

Table 3: Barriers Faced by MSMEs in Obtaining Halal Certification

Barrier	Impact
High Cost	Discourages certification application

Barrier	Impact
Complex Bureaucracy	Creates delays and deters renewal
Limited Regional Access	MSMEs in Eastern Indonesia are underserved by halal services
Lack of Awareness	Producers unaware of benefits or necessity of halal labeling

4.3 Ecosystem Disconnection: Penta helix Model Still Underused

The Penta helix model, which emphasizes collaboration among five key stakeholders—government, academia, the private sector, civil society, and media—has gained significant attention in policy discussions. However, its practical implementation remains limited, particularly in the field of halal projects. Many initiatives in this area tend to be structured in a top-down manner, which often overlooks local innovation, neglects stakeholder input, and fails to create a cohesive marketing strategy (Novianti et al., 2022).

Example Shortcomings:

1. **Limited Collaboration Between Universities and MSMEs:** There is a noticeable gap in partnerships between higher education institutions and micro, small, and medium enterprises (MSMEs) that focus on halal innovation. Universities, which should be engines of research and development, often operate in isolation from the challenges faced by MSMEs, resulting in missed opportunities for practical solutions and advancements in the halal sector (Alhamudi et al., 2023).
2. **Civil Society's Role Is Reduced:** The involvement of civil society organizations in halal initiatives is often limited to promoting consumer awareness of halal products rather than engaging in broader community-building efforts. This narrow focus restricts the potential for civil society to contribute meaningfully to a more vibrant halal ecosystem that empowers local communities and fosters collective growth (Affa & Khasanah, 2025).
3. **Inconsistent Media Campaigns:** Media efforts surrounding halal are frequently characterized by sporadic and reactive strategies rather than well-planned, proactive campaigns. This lack of strategic direction leads to ineffective communication, which fails to educate the public or create a sustained dialogue about the importance and benefits of halal practices (Mahardhani et al., 2024).

5 Conclusion

Being the most populous Muslim-majority nation in the world, Indonesia has a remarkable potential to emerge as a major global halal economic force. Through a synthesis of recent research and policy reviews, this study has examined Indonesia's halal industry from a number of angles, including regulatory frameworks, sectoral growth, certification systems, consumer behavior, and international positioning. The results show an ecosystem that is underleveraged but promising. Institutional advancements include the creation of BPJPH and the introduction of required halal certification. However, Indonesia's capacity to efficiently expand its halal infrastructure is hampered by regulatory overlap, ineffective procedures, and fragmented governance. While the food and beverage industry is somewhat developed, other industries, especially halal tourism, Islamic banking, and halal pharmaceuticals, are still in their infancy. At the consumer level, growing halal awareness—especially among urban and younger populations—demonstrates strong domestic demand for certified products. Yet, the lack of international recognition of BPJPH's certification, compounded by limited alignment with global standards like those of JAKIM and OIC/SMIIC, restricts Indonesia's global competitiveness. Indonesia's ambition to become a global halal hub is therefore not guaranteed, but achievable—provided that key reforms, ecosystem integration, and strategic positioning are urgently and systematically pursued.

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