



Competitiveness Analysis of the Halal value Chain in the Global Market

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ABSTRACT

The halal industry has experienced exponential growth in recent decades, with a global market value reaching trillions of dollars and projected to continue increasing in line with the world's growing Muslim population. This study aimed to analyze the competitiveness of the halal value chain in the face of increasingly fierce and complex global market competition. The research methodology employs Porter's value chain analysis approach, integrated with the Diamond Model of Competitiveness framework, to identify and analyze key factors that determine competitive advantage in the halal industry. This research involves an in-depth analysis of various halal industry segments, ranging from food and beverages, cosmetics, pharmaceuticals, to Islamic financial services. The results indicate that credible and internationally recognized halal certification, the integration of digital technology into production and distribution processes, qualified human resources competent in halal standards, and adequate infrastructure support are key determinants of competitiveness in the halal industry. The findings of this study provide significant strategic implications for industry players in designing competitive strategies and for policymakers in developing a competitive and sustainable halal ecosystem in the evolving global market.

Keywords: *Competitiveness; Halal value chain; Global market; Halal industr.*

INTRODUCTION

Over the past two decades, the global halal industry has experienced significant growth, becoming one of the fastest-growing and most promising economic sectors globally (Putra et al., 2023). This surge in growth is fueled not only by the growing Muslim population, projected to reach 2.2 billion by 2030, but also by the growing awareness of non-Muslim consumers regarding the quality standards, safety, and values inherent in halal products.

According to the State of the Global Islamic Economy Report 2023, the global halal market is expected to reach approximately \$4.96 trillion by 2030, a sharp increase from \$2.4 trillion in 2020 (Azam & ABDULLAH, 2020). This increase represents a compound annual growth rate (CAGR) of 7.5%, significantly outpacing global economic growth. Among the various sectors, halal food and beverages are the largest contributors, with a market value of approximately \$2.6 trillion, followed by Islamic finance (\$3.7 trillion), Muslim fashion (\$361 billion), halal cosmetics (\$90 billion), and halal pharmaceuticals (\$180 billion). This rapid growth opens up significant business opportunities, but also poses complex challenges for industry players. In increasingly fierce market competition, the ability to maintain a competitive advantage is key to

long-term success (Farida & Setiawan, 2022). Several countries such as Malaysia, Indonesia, Turkey, and the United Arab Emirates have taken on the role of global halal market leaders, while other countries such as Singapore, Thailand, and even Australia and the Netherlands, despite not being Muslim-majority countries, are beginning to occupy strategic positions in the international halal industry supply chain (Akbar et al., 2023).

Globalization has revolutionized the way we view competition in the halal industry. Competition that was once confined to the local or regional level has now expanded to the global realm, demanding stricter standards (Hayatul Ikhsan et al., 2024). Therefore, industry players are required not only to understand the various halal regulations and standards in various countries, but also to be able to adopt technological innovations, improve operational efficiency, and respond to changing consumer preferences (Fathoni et al., 2023).

The halal value chain is more complex than the typical value chain because it integrates spiritual and ethical aspects that must be consistently maintained throughout the production and distribution process (Idris et al., 2025). This concept encompasses all stages, from upstream to downstream, to ensure that products not only meet standard quality standards but also strictly adhere to Islamic Sharia principles. At the upstream stage, the process begins with the selection of raw materials, the halal status of which must be guaranteed. In the context of food products, this includes selecting animals slaughtered according to Islamic law, using agricultural materials free from fertilizers or pesticides containing haram substances, and preventing cross-contamination with non-halal ingredients.

The process of obtaining halal certification for raw materials requires rigorous audits and comprehensive documentation, often involving multiple certification bodies from each country (Ma'wa & Alim, 2024). The complexity increases as all production activities, including equipment and facilities, must comply with halal requirements. This includes implementing sharia-compliant cleaning and sanitation procedures, separating production lines for halal and non-halal products, training employees on halal principles, and implementing a quality assurance system integrated with the halal audit process. Factories producing halal products must allocate significant resources to obtaining and maintaining halal certification from globally recognized institutions (Akhmad Rifqi Zain et al., 2024).

Distribution and logistics processes present unique challenges in maintaining product halalness (Munthe et al., 2023). The cold chain for halal food products must ensure no contamination during transportation and storage. Every facility, such as warehouses, transportation facilities, and distribution centers, must adhere to strict halal standards. The use of blockchain technology is increasingly widespread to ensure traceability and transparency within the halal supply chain, allowing consumers to fully understand the origin of products (Alamsyah et al., 2022).

The success of the halal value chain depends heavily on solid coordination among the various parties involved (Rohaeni & Sutawijaya, 2020). These parties include farmers and livestock breeders, raw material suppliers, producers, halal certification bodies, distributors, retailers, and end consumers. Each has a specific role and responsibility in maintaining the halal status of products. If any one party fails to perform its function properly, the entire value chain system can be disrupted. Halal certification bodies play a crucial role in this system (Japar et al., 2024). However, differences in certification standards and procedures across countries add to the complexity. For example, Malaysia has JAKIM (Jabatan Pengembangan Islam

Malaysia), Indonesia has MUI (Majelis Ulama Indonesia), and other countries have their own certification bodies, each with its own set of standards that do not necessarily adhere to uniform standards.

The process of harmonizing international halal standards through bodies such as the Standards and Metrology Institute for Islamic Countries (SMIIC) and the International Halal Accreditation Forum (IHAF) is still ongoing. In the era of globalization, effective management of the halal value chain is a key factor in creating competitiveness (Masruroh, 2020). Companies that are able to adopt advanced technology in line with halal principles, establish partnerships with trusted suppliers, and build optimal distribution systems will have an advantage in the global market (Riani et al., 2025). To achieve this, significant investment is required in information technology, human resource training, and the development of infrastructure supporting the halal ecosystem.

The level of competitiveness in the halal value chain is influenced by various interrelated and highly complex factors. These factors can be divided into several key dimensions, such as regulations and standards, technological advancements, operational process efficiency, workforce quality, and infrastructure availability (Harsanto et al., 2024). Among these factors, regulations and standards are fundamental elements that significantly determine a country's competitiveness. Countries with a clear and comprehensive halal industry regulatory framework tend to have a stronger competitive position. For example, Malaysia has established the Halal Industry Development Corporation (HDC) as a central agency to encourage the growth of the halal industry. Supporting regulations include the development of halal certification standards, alignment with global standards, and streamlined licensing processes and tax policies for halal industry players (Prasetyanti et al., 2025).

The role of technological innovation is increasingly crucial in strengthening the competitiveness of the halal value chain. The use of blockchain technology supports traceability of origin and increases transparency in the halal supply chain (Vikaliana & Komala, 2021). Furthermore, the Internet of Things (IoT) enables real-time monitoring of product conditions throughout production and distribution. Artificial Intelligence (AI) and machine learning technologies are utilized to improve production efficiency and predict market demand, while RFID technology plays a role in tracking and inventory management.

Operational efficiency means the ability to optimally manage production costs without compromising product quality or halal certification (Vikaliana & Komala, 2021). This involves effective supply chain management, sound inventory management, and the use of technology to automate production processes. Companies that successfully achieve economies of scale in halal product production will gain a competitive advantage in terms of pricing and profitability (Rusmita et al., 2023). Furthermore, the quality of human resources is a crucial aspect that is often overlooked. The halal industry requires a workforce that is not only technically proficient but also possesses a deep understanding of halal and sharia principles. Therefore, halal training and certification are crucial long-term investments. Countries with strong halal education and training institutions will excel in producing competent human resources (Cunayah et al., 2024). Meanwhile, infrastructure support includes the availability of halal industrial areas, halal testing facilities and laboratories, supportive transportation and logistics systems, and access to technology and information. Good infrastructure can reduce operational costs and improve overall efficiency (Manullang, 2023).

The global halal industry faces various obstacles that could potentially hinder its growth and competitiveness. One major obstacle is the differences in halal standards across countries, which create complexities in cross-border trade. Variations in sharia interpretations, certification processes, and regional requirements create subtle yet significant trade barriers. Furthermore, there is a perception that halal products are typically more expensive due to the additional costs of certification, audits, and stringent quality control systems. Therefore, the halal industry needs to develop strategies to achieve cost efficiency without compromising halal quality and authenticity. However, behind these challenges lies a significant strategic opportunity. Rising global consumer awareness of food safety, sustainability, and ethical consumption opens up opportunities for halal products to expand their market share. The growing demand for clean-label products and natural ingredients among millennials and Gen Z also aligns with halal principles that emphasize cleanliness and purity.

Digitalization and e-commerce provide new opportunities to more effectively reach consumers worldwide. Through digital platforms, halal brands can increase awareness and engage with customers across multiple regions without the need for significant resource expenditure on a physical presence. The development of halal centers and industrial parks in several countries opens up opportunities for cluster formation and collaboration, which can increase efficiency and competitiveness. The concept of an integrated halal ecosystem, where all stakeholders in the halal value chain gather in one location, can reduce transaction costs and improve coordination.

This research aims to explore the factors influencing the competitiveness of the halal value chain in the face of global market competition. A comprehensive understanding of these dynamics is crucial for formulating effective strategies to strengthen the competitive position of the halal industry at both the national and regional levels. By systematically analyzing the various elements that contribute to competitiveness, this research is expected to provide valuable insights for policymakers, industry players, and academics in developing a competitive and sustainable halal ecosystem. The study focuses on comparing countries that have successfully established competitive advantages in the halal sector, identifying best practices in halal value chain management, and developing strategic recommendations to enhance competitiveness. A multidisciplinary approach combining economic, management, and Islamic studies perspectives will be applied to provide a comprehensive overview of the complexities of the global halal industry.

LITERATURE REVIEW

The level of complexity of competitiveness in the halal industry is higher than in conventional industries, as it focuses not only on economic efficiency but also requires compliance with Islamic sharia principles. Competitiveness is an entity's ability to create and maintain a competitive advantage by providing superior value to consumers. In the context of the halal industry, this value encompasses spiritual aspects, product quality, and the level of trust among Muslim consumers in the halal nature and integrity of the products they consume (Del Rosa et al., 2019).

The concept of halal competitiveness is further strengthened by Rochmawati's concept of "shared value," which has strong relevance to the halal industry sector (Rochmawati, 2025). This concept emphasizes that companies can simultaneously generate economic value while creating social benefits for the community. In the context of the halal industry, the application of shared value is reflected in corporate

efforts to meet the spiritual needs of Muslim consumers without neglecting profit and business growth. This approach creates a win-win solution, where companies gain economic benefits while contributing to the fulfillment of the religious needs of the Muslim community.

The global halal value chain is a highly complex system, encompassing a range of activities across countries with varying standards and regulations. There are four main stages in the halal value chain, each interconnected and influencing others (Retnowati et al., 2023). The first stage is the procurement of halal raw materials, where companies are required to ensure that all inputs used meet halal requirements from their source. The second stage encompasses the halal production process, which requires the implementation of production procedures in accordance with Sharia principles, including the use of equipment free from contamination by non-halal elements.

The third stage in the halal value chain encompasses distribution and logistics, which require assurance that the product's halal status is maintained during transportation and storage. The next stage is marketing and sales activities, which must be accompanied by transparent information provided to consumers regarding the product's halal status. Each stage in this process requires rigorous halal verification and certification to maintain product integrity from start to finish. In a global context, the complexity of the halal value chain is further increased by differences in halal standards across countries, which poses challenges to harmonization and mutual recognition. Differences in sharia interpretation, certification systems, and regulations across countries can be barriers to international trade in halal products. Therefore, more comprehensive standardization and harmonization measures are needed to ensure the global halal system can operate effectively and in an integrated manner (Yuliawati et al., 2022).

According to the diamond model introduced by Porter in 1990, an industry's competitiveness is influenced by four main elements that interact to create competitive advantage. First, the condition of production factors, including the quality and availability of human resources, natural resources, capital, and supporting infrastructure. Second, domestic demand conditions, namely the characteristics and level of domestic demand for related industry products or services. Third, the existence of supporting and interrelated industries, particularly those capable of competing in the international market. Fourth, corporate structure and strategy, encompassing the internal aspects that shape how a company is designed, managed, and competes in the market.

In the halal industry, Porter's four determinants have their own characteristics that require in-depth analysis. Production factors in this sector not only rely on conventional resources but also require a workforce with a deep understanding of Sharia principles, the availability of infrastructure that complies with halal standards, and easy access to halal-certified raw materials. Demand in the halal industry is strongly influenced by the demographic composition of the Muslim population, the level of consumer literacy and awareness of the halal concept, and the purchasing power of the Muslim community (Maulana & Zulfahmi, 2022). Related and supporting industries include halal certification bodies, Sharia-based financial institutions, and various other sectors that support the formation of a halal industry ecosystem. Furthermore, corporate structures and strategies within this industry are

required to consistently align with Sharia principles, both in daily operations and in strategic decision-making (Yuliawati et al., 2022).

METHOD

This research adopted a qualitative approach using an exploratory case study method to gain a deep understanding of the dynamics of halal value chain competitiveness within a complex and multidimensional context. Data were collected through in-depth interviews with 25 informants, including halal company executives, regulators, academics, and halal industry consultants. This data collection was also strengthened by document analysis, including industry reports, government regulations, and relevant academic publications.

The researchers applied a thematic analysis approach to processing the obtained data, utilizing NVivo software. The analysis was conducted systematically through a three-stage coding process: open coding to identify initial codes, axial coding to group and connect relevant categories, and selective coding to formulate key themes related to competitiveness in the halal value chain. The selection of this research design was based on its ability to provide a deep and comprehensive understanding of the phenomena under study.

FINDINGS AND DISCUSSION

Global Halal Value Chain Structure

The global halal value chain is complex, characterized by a multi-tiered verification system encompassing several critical stages. This process begins with upstream activities, such as the procurement of halal-certified raw materials, integrated management of halal suppliers, and quality control of raw materials in accordance with Sharia principles. At the core stage, the primary focus is on the production process in halal-certified facilities, the implementation of a quality assurance system, monitoring compliance with halal standards, and packaging and labeling processes that comply with halal regulations. Meanwhile, downstream activities include distribution through a halal-certified logistics network, marketing strategies and brand placement that emphasize halal values, and the provision of after-sales services that maintain consumer trust. This systematic, multi-tiered approach aims to ensure the integrity and authenticity of halal values from the beginning to the end of the supply chain.

Key Factors of Competitiveness

Based on data analysis, five key factors influence the level of competitiveness in the global halal value chain. First, the existence of halal certification and standards is a key factor, acting as both an entry barrier and a competitive advantage. Companies certified by internationally recognized institutions tend to have broader market access, although differences in standards between countries remain a barrier to achieving economies of scale. Second, the adoption of advanced technologies such as blockchain, the Internet of Things (IoT), and artificial intelligence (AI) is increasingly crucial for ensuring traceability and transparency, thereby increasing consumer confidence in a product's halal status. Third, competent human resources who understand halal principles and possess adequate technical expertise are crucial; therefore, investment in

halal training and skills development, specifically, provides a long-term competitive advantage. Fourth, the existence of halal infrastructure such as certified slaughterhouses, cold chain facilities, and halal logistics centers significantly determines operational efficiency and can reduce costs. Fifth, the government's active role through supportive policies, fiscal incentives, and export promotion programs, coupled with collaboration between government, industry, and academia, creates a synergistic ecosystem and supports the competitiveness of the halal industry.

Challenges in Global Competition

Global competition in the halal industry faces several crucial challenges. One major obstacle is the fragmentation of halal standards, where differences in interpretation and implementation between countries create barriers to international trade. Products that meet halal criteria in one country may not be recognized in another, hampering the smooth distribution of halal products across borders. Furthermore, high compliance costs—including certification processes, periodic audits, and system updates—are a significant burden, especially for small and medium-sized enterprises (SMEs). Limited market access also poses a challenge, despite growing demand for halal products. Regulatory barriers, the lack of mutual recognition agreements, and information asymmetry further limit opportunities for global halal product market expansion.

Competitiveness Enhancement Strategy

To enhance competitiveness in the halal industry globally, comprehensive strategies are required. Strengthening the harmonization of international standards, including through the role of organizations such as SMIIC, is crucial, particularly through mutual recognition agreements between countries to reduce the costs of dual certification. The use of digital technology should be a priority to increase transparency and efficiency in the halal value chain; in this regard, blockchain technology can be leveraged to provide an immutable record of halal compliance throughout the entire supply chain. Furthermore, the development of halal industry clusters that synergize producers, suppliers, supporting industries, and research institutions has the potential to create competitive advantages through knowledge spillover and cost efficiencies. Capacity building efforts are also needed through training and certification programs for the halal sector workforce, supported by collaboration with educational institutions in designing curricula that specifically emphasize halal aspects, to ensure the availability of competent human resources.

Managerial and Policy Implications

Implications for Companies

Businesses in the halal industry are required to design a comprehensive, integrated halal strategy, encompassing every stage of the value chain, to optimally enhance competitiveness. A primary focus should be placed on investment in halal certification, the use of cutting-edge technology, and human resource development, as crucial strategic elements. Partnerships and synergies with stakeholders in the halal ecosystem will strengthen a company's competitive position. This comprehensive approach not only ensures compliance with halal standards but also enhances the added value offered to Muslim consumers globally. However, implementing this strategy requires a long-term commitment and substantial resource allocation across various operational lines.

Implications for Policy Makers

Implications for Policy Makers The government needs to formulate a comprehensive halal industry policy, encompassing a regulatory framework, infrastructure development, and international cooperation. Establishing an integrated halal service center will facilitate efficient access for businesses to various halal-related services.

CONCLUSION

This study examines the competitiveness of the halal value chain in the face of increasingly fierce global market competition. The global halal industry has experienced exponential growth with a projected market value of \$4.96 trillion by 2030, driven by the growth of the Muslim population and the increasing awareness of non-Muslim consumers regarding the quality and safety of halal products. The halal value chain has a higher complexity than conventional industries because it must consistently integrate spiritual aspects and sharia ethics from upstream to downstream, including the procurement of halal raw materials, certified production processes, distribution that maintains halal standards, and transparent marketing.

The study identified five key factors that determine the competitiveness of the global halal value chain: first, credible and internationally recognized halal certification as an entry barrier and competitive advantage; second, the adoption of digital technologies such as blockchain, IoT, and AI to ensure product transparency and traceability; third, competent human resources who understand halal principles and have adequate technical expertise; fourth, the availability of halal infrastructure that includes certified production facilities, cold chains, and logistics centers; and fifth, government support through policies, fiscal incentives, and collaboration between stakeholders. However, this industry faces significant challenges in the form of fragmented halal standards across countries, high compliance costs, especially for SMEs, and limited market access due to regulatory barriers and information asymmetry.

Recommended strategies for enhancing competitiveness include harmonization of international standards through organizations such as SMIIC, investment in digital technology for supply chain transparency, development of synergistic halal industry clusters, and strengthening human resource capacity through specialized training programs. Companies require an integrated halal strategy that encompasses the entire value chain, focusing on certification, technology, and human resource development. The government needs to formulate comprehensive policies, including the establishment of one-stop halal service centers. This research makes an important contribution to understanding the dynamics of halal industry competitiveness and provides a strategic framework for the future development of this sector. Further research is recommended on digital transformation and the role of Islamic finance in supporting the halal value chain.

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