

## Portraits and Challenges of Indonesia's Modest Fashion Industry on the Halal Industry Competition in the World

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**Abstract:** *The Muslim population is spread all over the world, and the majority of Indonesia's population is Muslim. The market segmentation for the halal industry, one of which is modest fashion, has a lot of competition globally. This study describes the development and challenges of Indonesia's modest fashion industry in the global halal industry. The research method is qualitative with a descriptive approach, with data collected from reports and related documents. The results show the simple fashion sector score of Indonesia's Global Islamic Economic Indicator increased from 2018 to 2021 and is ranked in the top 10. Similar development trends occurred in competing countries. Indonesia faces many challenges and stiff competition in the modest fashion sector of the halal industry, including accessing financing and international markets, meeting market needs, receiving government support/related policies, implementing technology in marketing, research and development, and setting competitive prices. However, Indonesia's modest fashion sector is growing.*

**Keywords:** *challenges, halal industry, modest fashion*

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## 1. Introduction

The halal industry is growing globally. According to the State of the Global Islamic Economy Report (2021), about USD 2.2 trillion in total funds was spent by around 1.9 billion consumers of the halal industry. Based on projections of the Compound Annual Growth Rate, the halal industry will reach 2.4 trillion in 2024. Indonesia ranks fourth in the Global Islamic Economy Indicator (GIEI) of the halal industry after Malaysia, Saudi Arabia and the United Arab Emirates (UAE) (State of the Global Islamic Economy, 2021).

Indonesia has great potential to develop and have the best halal industry in the world. This refers to the majority (approximately 87.2%) of Indonesia's population being Muslim. Thus, Islam has had a significant impact on its culture and lifestyle (Huda et al., 2022). The command to use halal products and avoid forbidden things is written in the Qur'an and Hadith, increasing Muslim consumer awareness of their religious obligations, which creates a huge demand for halal products (Hamid et al., 2019). Thus, optimizing the development of the halal industry can improve the country's economy.

One of the growing halal industries in Indonesia is the modest fashion industry. Modest fashion, from an Islamic point of view, is an emerging phenomenon that offers non-stick and non-transparent clothing that covers the body as per religious injunctions and is seen as a thriving industry in the fashion sector (Radwan et al., 2019). Muslim dress is no longer a Muslim identity; rather, it has become a social identity in the community, not only in Indonesia, but also globally (Martiana et al., 2018). Currently, Indonesia is ranked third after the UAE and Turkey in the Top 10 in Modest Fashion (State of the Global Islamic Economy, 2021). The achievement and development of this achievement are not easy because the modest fashion industry is growing yearly. Although Indonesia is experiencing growth, other countries such as the UAE, Turkey and Malaysia, which are included in the four top levels of modest fashion, also continue to grow.

Various factors influence the development of modest fashion, which can be a challenge for the development of modest fashion in a country. The fast pace of fashion is rapidly becoming a new phenomenon with a significant impact on the modest fashion industry (Gazzola et al., 2020; Sumarliah et al., 2022). In addition, the competition between modest fashion brands is increasing along with the emergence of new local and international designers. In addition, health insurance for cheap raw materials in Vietnam and China contribute to the development of modest fashion (Zainudin et al., 2020). The concept of fashion awareness requires the industry to follow fashion trends that are in demand by consumers (Baharuddin et al., 2021; Lang & Liu, 2019). This means the target market for modest fashion is extensive, not only in Indonesia.

The tight competition in the modest fashion industry and various challenges faced make it essential to conduct a portrait analysis of the developments and challenges faced by Indonesia in the modest fashion industry. Previous research related to modest fashion explains the implementation of the development model for the halal fashion industry in Indonesia (Faried, 2019), consumer perceptions of Muslim fashion brands in Indonesia (Purwanti & Adinugraha, 2021), factors influencing the modest fashion market (Radwan et al., 2019), servicing modest fashion markets (Bardakcı et al., 2021), and research on portraits (challenges and opportunities) of the Indonesian halal industry, but the halal industry in general and not in the modest fashion industry (Fathoni, 2020). Previous research related to the development of the modest fashion industry evaluates its development and challenges to win global competition. This research contributes to the development of the Indonesian halal industry, especially in the modest fashion sector, so it continues to grow and can win the competition with related sector industries by implementing strategies based on the existing challenges. Therefore, this study determines the portrait and challenges of the Indonesian modest fashion industry in facing global competition.

## 2. Materials and Methods

This research is qualitative and quantitative with a descriptive approach. The study was conducted with secondary data: documents and reports related to the developments and challenges of the modest fashion industry in Indonesia. The data collected is presented in tables and graphs, which are explained narratively and compared with related theories and literature.

## 3. Results and Discussion

The halal industry processes goods based on sharia guarantees, so the products are good, healthy, safe and harmless; therefore, halal to consume, enjoy or use (Peristiwo, 2019). Based on data from the State of the Global Islamic Economy Report, there are seven types of halal industries: halal food, Islamic finance, halal travel, modest fashion, halal media and recreation, halal pharmaceuticals, and halal

cosmetics (Akram, 2022; Ikhwan, 2021). This article focuses on modest fashion. Modest fashion is a closed clothing style with character, does not expose the body, is not transparent and does not expose excess skin, so it is a fashion that is categorized as halal. The term modest fashion originates from the idea of a young generation of fashion designers who create clothing that is modest but has a high fashion factor (Lewis, 2013; Ajala, 2017; Rosenberg, 2019). The increase in demand for modest fashion has occurred as a result of the growth in the Muslim population worldwide, the development of social networks, and the emergence of the modern fashion designer mindset (Lekhdar et al., 2021). Thus, the growth of modest fashion in recent years must have been greatly influenced by the high demand for Muslim clothing (Farrag & Hassan, 2015; Khurutul et al., 2019).

The Muslim fashion industry in Indonesia has been growing since 2010. This industry is growing with a lot of demand due to the many opportunities as most of the Indonesian population is Muslim. Demand is increasing along with increasing awareness of the Muslim community to enjoy the halal lifestyle, including wearing clothes. Modest fashion has developed in Indonesia. Achievements of Indonesia's modest fashion industry based on Indonesian Islamic Economic Masterplan 2019–2024 is shown in Table 1.

Criteria	Achievement
Employment	29%
GDP	28.6%
Export value	USD 7.18 billion

Labor absorption is the number of workers working in and available for a business. (Amalia & Woyanti, 2020). It is also job seekers' acceptance to do the work or conditions, which illustrates the availability of jobs. In general, labor absorption shows how much a company needs to deliver a product (Maulana et al., 2020). The high absorption of labor indicates the business/industry is growing. With the increase in the number of businesses, there will be many new opportunities (Amalia & Woyanti, 2020).

In the halal industry, GDP is a measure of economic growth and financing is a significant factor in the effectiveness of Islamic finance (Boukhatem & Ben Moussa, 2018; Ledhem & Moussaoui, 2021). The modest fashion industry's 28.6% contribution in Indonesia means it has been able to contribute a lot to the country's economy. Meanwhile, its enormous export value (USD 7.18 billion) added value and increased the country's income (Bohn et al., 2021). Thus, the modest fashion industry in Indonesia has contributed significantly to the Indonesian economy by improving the welfare of its citizens by creating employment opportunities and increasing state income. The modest fashion sector score based on GIEI for 2017–2021 and the State of the Global Islamic Economy Report 2017–2021 is shown in Table 2.

Country	2017	2018	2019	2020	2021
Indonesia	21	20	34	37.9	57.9
Malaysia	31	31	33	35.6	43.7
UAE	67	63	106	95.2	235.6
Turkey	29	37	32	50.0	75.1

The modest fashion sector score in Table 2 and Figure 1 is calculated on indicators like supply drivers relative to country size (clothing exports to Organisation of Islamic Cooperation countries), awareness (number of news articles and events), and social (clothing prices and labor equity index). Data from 2017 to 2021 shows the scores of the Indonesian and Malaysian sectors from 2018 to 2021 tended to increase. Similar results are also found for UAE and Turkey. However, the UAE fell in 2020 and Turkey fell in 2019. The achievement of the modest fashion sector score in the UAE was very high, with an insignificant decline in 2020, which then increased sharply in 2021 (Table 2 and Figure 1). This condition helped the UAE to hold the top rank for many years in the field of modest fashion.

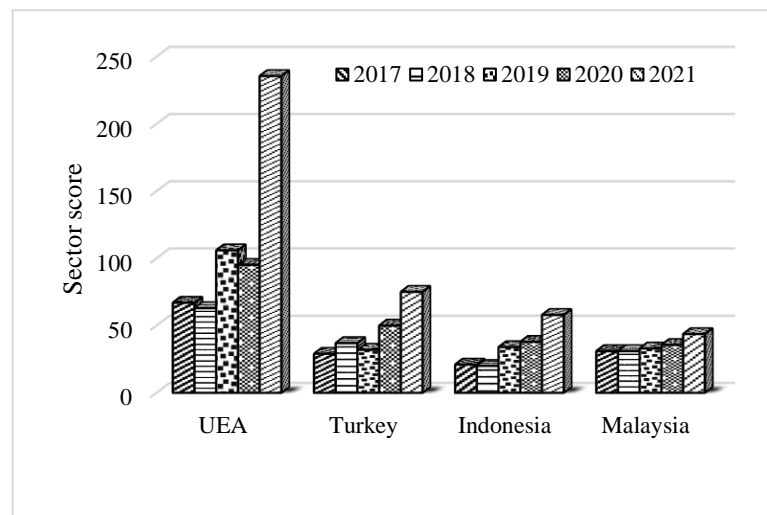


Figure 1. Score chart for the modest fashion sector for 2017–2021.

Based on Law No. 33 of 2014, halal products mean those that have been declared halal by Islamic law. Halal products are goods or services related to food, beverages, drugs, cosmetics, chemical products, biological products, genetically engineered products, and goods used by the public that have been declared halal by Islamic law. Meanwhile, based on the GIEI, there are halal pharmaceuticals and cosmetics, halal food, Islamic finance, halal travel, modest fashion, and halal media and recreation sectors. A good achievement for Indonesia in the modest fashion industry sector is that the modest fashion sector score according to GIEI has increased yearly since 2018. However, other countries have also experienced similar developments, so the Indonesian fashion industry faces stiff competition among other countries, especially the UAE, Turkey, and Malaysia.

Based on the global Islamic economy index score of the modest fashion sector, the top ranked countries in the modest fashion sector in 2017–2021 are summarized in Table 3.

Table 3. Achievements in the Top 10 Ranks in the Modest Fashion Sector for 2017–2021

Country	2017	2018	2019	2020	2021
UAE	1	1	1	1	1
Turkey	2	2	5	2	2
Indonesia	-	-	2	3	3
Malaysia	-	7	4	4	4

The GIE ranking of modest fashion is based on aspects of sector score, clothing export to OIC countries, awareness score and social score (Table 3). From the results of the analysis of the four countries, which now have the best rankings in modest fashion, Malaysia modestly entered the top 10 countries in 2018 and Indonesia only joined in 2019. An extraordinary achievement was made by Indonesia, which immediately ranks second best in the modest fashion sector based on GIEI. The top rank in the modest scoring sector has been occupied by the UAE from 2017 to 2021. Turkey also ranked second-best in the modest fashion sector from 2017-2021 except in 2019 when it dropped to fifth place. Malaysia ranks fourth best in modest fashion consecutively from 2019 to 2021.

Modest fashion has offered modesty in clothes that can be easily associated with Islam and has proven to be an effective strategy for creating a global Islamic identity (Radwan et al., 2019). UAE, as the best modest fashion industry, has fashion trends that will not dispel the evolutionary forces influencing norms and ideas regarding women's empowerment and practicality in the future. The UAE's mode of fashion has not changed significantly with globalization. This is related to the ability of designers to avoid using Western styles and fabrics but create modern designs and draw inspiration from the West (Gupta, 2021). Meanwhile, Turkey is declared as a country that has a natural bridging function between European and Asian markets. The development of modest fashion in Turkey is also supported by the quality of the design and fabrics used and applied (Bardakçı et al., 2021). Along with the development of technology, online sales and marketing also contribute to the increase in the development of modest fashion in addition to the launch of new brands and varied models from designers with different tastes. In addition, the emergence of new products in modest fashion such as sportswear, and competitive price competition are essential aspects of the development of modest fashion (Hwang & Kim, 2021; Radwan et al., 2019). Models vary from designers with different tastes.

Indonesia, which is currently ranked third best in modest fashion, has to face competition from other countries, which are also developing continuously, and its score is still far from the UAE. This is a challenge for Indonesia, especially in achieving the best ranking in this sector. Various challenges faced by Indonesia in the modest fashion sector are presented in Table 4 based on forum group discussion results from the Indonesian Ministry of Industry in 2018.

Table 4. Challenges faced by Indonesia's Modest Fashion

Aspect	Challenge
Demand and Market	<ol style="list-style-type: none"> <li>1. Many western brands are developing in Modest fashion</li> <li>2. Weak access to international markets</li> <li>3. China offers modest fashion products at more competitive prices</li> </ol>
Technology and Information	Implementation of the use of information technology is still low
Regulation	Not yet uniform policies of the central government and local governments
Financing	<ol style="list-style-type: none"> <li>1. Financial institutions don't understand the creative industry</li> <li>2. Financial institutions still need tangible guarantees, most of which cannot be met by business actors</li> </ol>
R&D	Lack of research on market movements, segmentation, and market tastes

The challenges faced by Indonesia in the modest fashion industry are related to market aspects, information technology, government regulations or policies, financing, and research and development. Related marketing aspects and market demand related to models, prices and target markets. The broader target to the international market is still weak and needs to be optimized. A further challenge relates to the existence of technological developments through the use of social media influencing trends in the fashion industry. These conditions led to the revival of Islamic fashion culture that has penetrated Western countries (Kamarulzaman & Shaari, 2020).

Modest fashion has a broad target market because the Muslim population is spread worldwide. There are obstacles in the development of modest fashion in a country, one of which is Italy where most Muslims in the Italian market adopt traditional ways to meet their needs through traditional marketing such as magazines, television and radio advertising, direct mail, billboards; and Italian designers have not taken advantage of the market in other Islamic countries. (Radwan et al., 2019). The size of the international target market is supported by data related to the five top consumers of modest fashion in the world in 2019 based on the State of the Global Islamic Economy Report 2020–2021, as shown in Table 5.

Table 5. Highest Consumers of Modest Fashion in the World in 2019

Rank	County	Consumption (\$ billion)
1	Iran	53
2	Turkey	28
3	Saudi Arabia	21
4	Pakistan	20
5	Indonesia	16

Consumption of modest fashion in the world in 2019 was \$277 billion, whereas, in Indonesia, modest fashion consumption was only \$16 billion. Indonesia ranks fifth largest as a modest fashion consumer, but it is only about 5.78% of all modest fashion consumption. Another 94.22% of consumption is spread across various countries in the world, which means enormous market potential. This result is supported by previous research, which reports that the economic potential in the halal fashion industry sector in Indonesia is promising as can be seen from the consumption of Muslims in Indonesia towards halal fashion, which continues to increase year on year. Indonesia's demographic bonus, which is dominated by Millennials and Gen Z who are familiar with technology and the increasing use of e-commerce, provides a great opportunity for this industry to develop even further (Jailani et al., 2022). This means more extensive segmentation in the international scope becomes a challenge to develop better.

Modest fashion models that change and begin to follow simple Western models and lower prices for Chinese products are challenging for Indonesia to develop this modest fashion. The low price of fashion in China is related to the low cost of production. This can be explained by the results of previous

studies comparing manufacturing costs between South Korea and China, where the two countries have significant differences in the number of employees, monthly wages, factors that affect the lowest cost price period during the year; time of making the garment, and cost of making the basic design and details of the blouse, pants and jacket design (Kim et al., 2016). In addition to cheap labor, technology is also a factor affecting price competitiveness in the Chinese clothing sector. Nonetheless, China faces challenges in the fashion sector related to a lack of design capacity and human resources, which require strong institutional support from the government (Zhang et al., 2016).

Information technology, which is developing rapidly, must be used as best as possible to study the latest fashion models facing the market, and creating marketing and use is still low in Indonesia. This is also a challenge in research and development. Information technology can facilitate marketing activities (Bessen, 2020). Information technology in marketing helps gather information about consumer preferences and needs, and assists in digital promotion and advertising (Leonow et al., 2019). Previous studies report that information technology had a positive and statistically significant effect on the productivity of the manufacturing industry. This relates to the time effectiveness of using the technology (Abri & Mahmoudzadeh, 2015).

Regulations in Indonesia relating to modest fashion are also not uniform. For example, Law (UU) Number 33 of 2014 on Halal Product Assurance (JPH) states that products that must be certified halal consist of goods “worn, used, or utilized”, originating from and/or containing animal elements. Other areas have regulations, such as the Regional Regulation of the Province of the Special Region of Aceh Number 5 of 2000 concerning the Implementation of Islamic Sharia Article 15, which explains that every Muslim man and woman is obliged to dress according to the guidance of Islamic teachings, in family life and community association. This government institutional support is especially needed for new industries. Regulations that benefit a newly created industry can help it to take root and allow it to grow further (Georgallis et al., 2019).

Concerning financing, financial institutions in Indonesia do not yet understand the creative industry and financial institutions need tangible guarantees, such as diplomas, certificates and business plans, most of which business actors cannot fulfill. Financing is proven to have a significant positive effect on industrial performance (Rita & Wahyudi, 2019). Financial barriers, difficulties in accessing bank financing and legal problems harm the growth of an industry. This relates to the industry's ability to invest in large projects as well as the ability to stimulate the growth of new projects. The ease of financing is also an advantage of the development of the modest fashion industry in the UAE (Zarrouk et al., 2020).

#### 4. Conclusion

In the marketing aspect, Indonesia's halal modest fashion industry has not used much of the global market and only focused on fulfilling the national market. In addition, government policies do not support international marketing and the lack of technology development to support broader marketing is a challenge. With regard to the financial aspect, the lack of capital as a result of complicated access procedures and the cheaper cost of raw materials in other countries makes the selling price of Indonesian modest fashion industry products less competitive if they want to market to other countries. Connected to this is product development in accordance with market desires and the lack of development of innovative new products that are different from products from similar industries. Besides that, the lack of utilization and development of technology for product marketing. The large number of target markets in a wider scope and existence of technology that continues to develop should be put to good use to develop the Indonesian modest fashion industry. These challenges can be used as the basis for developing strategies to develop modest fashion in Indonesia in the future.

This research provides an overview of the challenges faced by the Indonesian modest fashion industry to develop and win global competition. The results of this research are expected to provide an overview of the strategies that will be carried out by Indonesia's modest fashion industry to move forward and be at the forefront of the world's halal modest fashion industry.

The limitations of this research are related to the lack of related data and only conducting research based on secondary data. Future research can explore more deeply the challenges of the modest fashion industry with primary data by taking samples from several related industries.

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