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DOMESTIC TRADE DYNAMICS AND GLOBAL COMPETITIVENESS OF INDONESIAN HALAL PRODUCTS

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Abstract

The global halal market has expanded rapidly, positioning halal products as strategic assets in international trade beyond their religious significance. This study examines how domestic trade dynamics and institutional conditions shape the international competitiveness of Indonesian halal products. The study employs a systematic literature review (SLR) following the PRISMA 2020 guidelines to identify, screen, assess, and synthesize relevant academic studies on halal trade, certification, governance, market dynamics, and competitiveness. The analysis is theoretically informed by Porter's Diamond Model and Institutional Theory. The findings indicate that Indonesia's mandatory halal certification framework can strengthen consumer trust, institutional legitimacy, and market credibility, while simultaneously creating compliance challenges, particularly for micro and small enterprises with limited financial and organizational capacity. The synthesis further identifies domestic market conditions, MSME participation, institutional governance, regulatory coherence, international market access, consumer trust, and Islamic economic principles as interconnected dimensions of halal trade competitiveness. Comparative evidence from the reviewed literature suggests that effective certification systems, institutional coordination, industrial capability, innovation, and alignment between domestic halal policies and international market requirements are important factors in strengthening export competitiveness. The study concludes that enhancing regulatory efficiency, strengthening MSME capabilities, improving institutional coordination, and aligning domestic halal governance with international trade requirements are essential for strengthening Indonesia's position in the global halal market.

Keywords: Halal trade competitiveness, Domestic trade dynamics, Halal certification governance, Islamic economics, Global halal market.

Introduction

The global halal market has undergone substantial transformation over the past decades, evolving from a niche segment associated primarily with religious consumption into a major pillar of the global economy. Recent estimates place the value of the global halal market at approximately USD 2.41 trillion, with strong projections for continued expansion driven by rising global demand and a steadily increasing Muslim population, expected to reach around 2.2 billion by 2030 (Azam & Abdullah, 2021; Rahim & Sulaiman, 2023). Beyond food and beverages, halal-oriented production has expanded into cosmetics, pharmaceuticals, fashion, finance, and tourism, positioning the halal industry as a strategic driver of inclusive and ethical economic development across diverse regions (Alamsyah et al., 2022; Aulia & Azizah, 2023).

The expansion of the global halal market has been reinforced by diversification across sectors, increasing consumer awareness, and the growing participation of non-Muslim consumers who associate halal products with quality assurance, safety, and ethical standards (Sunarta & Maulana, 2024). The halal market's estimated annual growth rate of around 20 percent underscores its role as a significant contributor to global economic dynamics. At the same time, this rapid growth has intensified the importance of regulatory credibility and certification systems in ensuring market trust. Countries with mature halal ecosystems, particularly Malaysia, have demonstrated how institutional coordination and internationally recognized certification can translate domestic strengths into global competitiveness. In contrast, Indonesia has yet to fully convert its demographic advantage into sustained leadership in global halal trade (Hidayat et al., 2024; Rahman & Razak, 2024).

Indonesia's domestic trade structure constitutes a critical foundation for understanding its halal product competitiveness. The enactment of the Halal Product Assurance Law (Law No. 33 of 2014) institutionalized mandatory halal certification across a wide range of products, aiming to protect consumers and strengthen domestic market confidence (Pietersz et al., 2025). While this framework enhances consumer trust, it also introduces structural complexity, particularly for micro, small, and medium enterprises (MSMEs), which dominate Indonesia's production landscape. The involvement of religious institutions such as the Indonesian Ulema Council in certification processes reflects a distinctive trade structure in which religious norms intersect with economic governance (Nihayati, 2025).

Despite Indonesia's vast halal market potential, a persistent gap remains between domestic capacity and actual global trade performance. Indonesian halal products continue to occupy a relatively limited share of global halal exports, even as domestic demand expands rapidly (Anggarkasih & Resma, 2022). This disparity reflects intertwined challenges, including fragmented regulatory implementation, limited international market access, uneven consumer awareness, and operational constraints faced by MSMEs (Masruroh, 2020; Rusydiana, 2024). Differences in halal standards across countries and incomplete mutual recognition arrangements further elevate compliance costs and complicate export processes (Fauzi et al., 2022; Rahman & Razak, 2024).

In response to these challenges, the literature highlights several policy-oriented and institutional approaches aimed at strengthening halal competitiveness. Regulatory simplification, enhanced mutual recognition agreements, and improved governance transparency are frequently identified as critical enablers of international market access (Azizah et al., 2024; Pietersz et al., 2025). Technological innovations, particularly digital and blockchain-based halal assurance systems, have been proposed to improve traceability, efficiency, and global trust in halal certification (Azwar et al., 2022). Concurrently, government initiatives supporting infrastructure development, MSME capacity building, and collaboration with universities and research institutions indicate a strategic shift toward strengthening the domestic halal ecosystem (Risza, 2024; Syamsu et al., 2022).

To better understand how domestic trade conditions influence international halal competitiveness, this study is grounded in two complementary theoretical perspectives. First, Porter's Diamond Model of National Competitiveness explains that national competitive advantage is shaped by interconnected determinants, including factor conditions, demand conditions, related and supporting industries, and firm strategy supported by government policies (Aini & Go, 2026). Within the halal industry, this framework provides a useful lens for analysing how domestic institutional quality, certification infrastructure, MSME capabilities, and market demand collectively influence export competitiveness. Second, the study draws upon Institutional Theory, which argues that regulatory frameworks, governance mechanisms, and institutional legitimacy significantly shape organizational behaviour and market performance (Budi, 2025). In the context of halal trade, certification systems, regulatory coherence, and institutional coordination constitute essential mechanisms for building consumer trust while simultaneously affecting firms' ability to compete in international markets. These complementary perspectives provide the conceptual foundation for analysing the interaction between Indonesia's domestic trade dynamics and its global halal competitiveness.

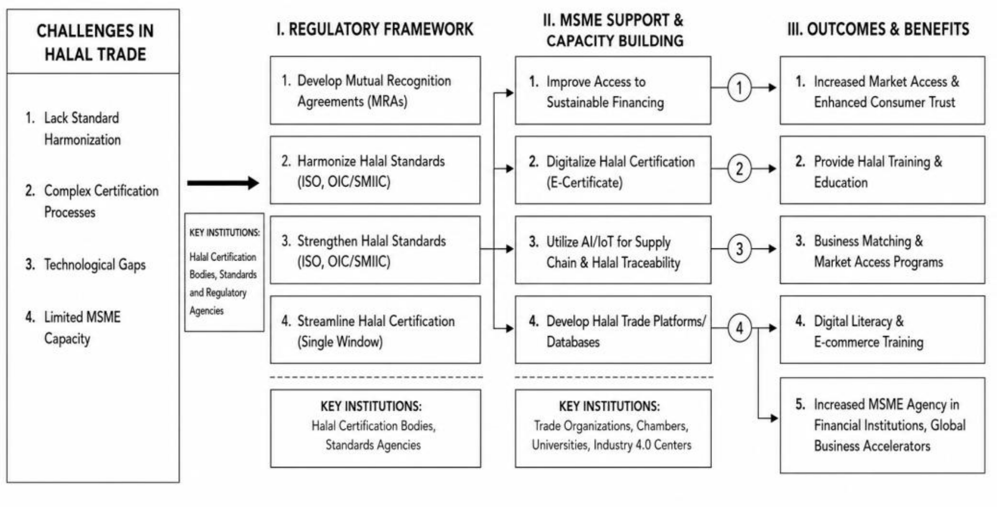

Figure 1. Policy and Institutional Responses to Halal Trade Challenges
(Azizah et al., 2024; Johan, 2018; Kurniati et al., 2022; Ngah et al., 2021a)

Figure 1 presents a conceptual framework outlining policy and institutional responses to the major challenges in halal trade through three interconnected pillars: regulatory framework, MSME support and capacity building, and expected outcomes. The framework identifies four primary challenges lack of standard harmonization, complex halal certification procedures, technological gaps, and limited MSME capacity that hinder the development of the global halal industry(Johan, 2018). To address these issues, the regulatory pillar emphasizes the establishment of Mutual Recognition Agreements (MRAs), harmonization of halal standards based on international frameworks (ISO and OIC/SMIIC), strengthening halal governance, and streamlining certification processes through a single-window system(Azizah et al., 2024; Ngah et al., 2021b). These regulatory reforms are complemented by MSME-focused initiatives, including improved access to sustainable financing, digitalization of halal certification, adoption of AI and IoT for halal traceability and supply chain management, and the development of integrated halal trade platforms(Kurniati et al., 2022). The successful implementation of these strategies, supported by collaboration among governments, halal certification bodies, trade organizations, universities, and industry stakeholders, is expected to enhance market access, strengthen consumer trust, improve halal literacy and digital capabilities, facilitate business matching, and increase MSMEs' participation in both domestic and international halal markets, thereby fostering a more competitive and sustainable halal trade ecosystem.

Previous studies have investigated halal competitiveness from various perspectives, including halal certification systems, consumer behaviour, export performance, halal supply chains, and sector-specific industries such as food, cosmetics, and agriculture (Destiarni et al., 2021; Elpawati et al., 2024; Pratiwi, 2021). These studies have generated important insights into the determinants of halal market development and regulatory implementation. Nevertheless, most of them examine these issues in isolation, focusing either on certification, consumer demand, or individual industrial sectors without considering how domestic trade structures collectively shape international competitiveness. Furthermore, studies addressing Indonesia's halal industry tend to emphasize policy implementation or certification compliance while paying comparatively limited attention to the interaction among institutional governance, MSME readiness, domestic market dynamics, and international trade performance. Consequently, the existing literature provides only a partial understanding of the structural mechanisms through which domestic trade influences Indonesia's position in the global halal market.

Accordingly, three important research gaps can be identified. First, existing studies predominantly analyse halal competitiveness from fragmented perspectives, giving limited attention to the interdependence between domestic trade structures and global market performance. Second, although institutional issues such as halal certification and regulatory governance have received considerable scholarly attention, their combined interaction with MSME capabilities, consumer trust, and export competitiveness has not been systematically examined within a single analytical framework. Third, only a limited number of studies explicitly employ competitiveness and institutional perspectives simultaneously to explain Indonesia's relatively modest position in the global halal market despite possessing one of the world's largest halal consumer bases. Addressing these gaps requires a more integrated conceptual approach capable of linking domestic trade dynamics with global halal competitiveness (Abdullayev, 2025; Nihayati, 2025).

Addressing this gap, the present study aims to systematically synthesize and map the existing literature on the structural and institutional dimensions of Indonesia’s halal trade competitiveness through a systematic literature review (SLR) following the PRISMA 2020 guidelines. By synthesizing relevant academic studies, this review identifies recurring themes, structural challenges, institutional conditions, and emerging opportunities discussed in the literature concerning Indonesia’s halal trade performance. Unlike previous studies that tend to examine halal certification, specific industrial sectors, MSME development, consumer trust, or export policies separately, this study provides an integrated synthesis of how these dimensions are discussed across the existing literature on halal trade competitiveness.

Rather than testing causal relationships or estimating interaction effects among these factors, the study maps and compares the patterns of relationships and conceptual linkages reported in the reviewed studies. The analysis is theoretically informed by Porter's Diamond Model and Institutional Theory, which provide complementary perspectives for interpreting the evidence concerning competitive conditions, domestic market structures, firm capabilities, supporting industries, institutional governance, regulatory arrangements, and halal assurance mechanisms. By integrating these perspectives through thematic synthesis, the study develops a comprehensive conceptual understanding of the factors and institutional conditions associated with Indonesia's halal trade competitiveness. The principal contribution of the study is therefore an evidence-based synthesis and conceptual mapping of the existing literature, rather than a causal explanation or empirical estimation of the determinants of halal trade competitiveness.

Methodology

This study employs a qualitative research design based on a Systematic Literature Review (SLR) guided by the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA 2020) framework. The SLR approach was selected to systematically identify, evaluate, and synthesize existing evidence regarding the relationship between domestic trade dynamics and the global competitiveness of Indonesian halal products. Considering that halal trade is shaped by economic, institutional, regulatory, and socio-cultural dimensions, a qualitative synthesis enables a comprehensive understanding of conceptual relationships rather than statistical generalization. To strengthen analytical depth, the study combines systematic literature review procedures with thematic synthesis, allowing both comprehensive evidence mapping and conceptual interpretation (Alam et al., 2024; Carroll et al., 2023; Judijanto, 2025).

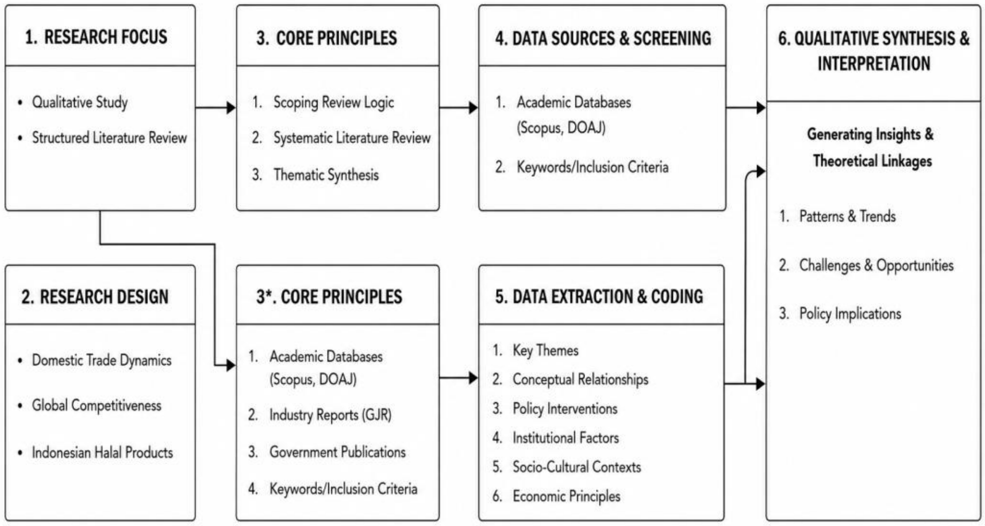

Figure 2. Structured Literature Review & Qualitative Synthesis

Figure 2 illustrates the methodological framework of a structured literature review integrated with qualitative synthesis to examine the dynamics of halal trade and the competitiveness of Indonesian halal products. The framework begins by defining the research focus as a qualitative study employing a structured literature review, followed by the identification of the research design, which emphasizes domestic trade dynamics, global competitiveness, and the development of Indonesian halal products. The review process is guided by core principles, including scoping review logic, systematic literature review procedures, and thematic synthesis, while relevant evidence is collected from academic databases such as Scopus and DOAJ, industry reports, and government publications using predefined keywords and inclusion criteria. Subsequently, the selected studies undergo data extraction and coding to identify key themes, conceptual relationships, policy interventions, institutional factors, socio-cultural contexts, and economic principles. Finally, the qualitative synthesis integrates these findings to generate theoretical insights, identify emerging patterns and trends, evaluate existing challenges and opportunities, and formulate policy implications that contribute to the advancement of halal trade research and evidence-based policymaking.

Literature Search Strategy

The literature search was conducted between January and March 2025 using four internationally recognized academic databases: Scopus, Web of Science, ScienceDirect, and PubMed (Mahadi, 2023; Mokti et al., 2023). The search strategy employed predefined keywords and Boolean operators to maximize the relevance and accuracy of the retrieved literature. The primary search string combined keywords related to the halal industry, trade, and competitiveness, as follows: ("halal competitiveness" OR "halal products" OR "halal industry" OR "halal trade") AND ("domestic trade" OR "international trade" OR competitiveness OR export) AND Indonesia.

Additional combinations of keywords were applied when necessary to identify relevant interdisciplinary studies addressing halal industry development, trade competitiveness, Islamic economics, governance, and Indonesia's position in the global halal market. The search strategy was subsequently refined based on the scope and relevance of the research objectives to ensure that the selected studies provided substantive contributions to the analysis.

Eligibility Criteria

To ensure consistency throughout the review process, explicit inclusion and exclusion criteria were established prior to article screening. The inclusion criteria are peer-reviewed journal articles; publications written in English; studies published between 2020 and 2025; articles focusing on halal trade, halal products, halal certification, trade competitiveness, Islamic economics, or related institutional issues; and full-text articles available for review. The exclusion criteria are conference proceedings, book chapters, editorials, dissertations, and reports; duplicate records; articles unrelated to halal trade or competitiveness; and studies lacking sufficient methodological information.

Study Selection Process

The article selection process followed the PRISMA 2020 guidelines through four sequential stages: identification, screening, eligibility, and inclusion. During the identification stage, a total of 623 records were retrieved from three academic databases, comprising 286 records from Scopus, 194 records from Web of Science, and 143 records from ScienceDirect. After removing 97 duplicate records, a total of 526 records remained for the screening stage.

The titles and abstracts of the 526 records were screened against the predefined eligibility criteria, resulting in the exclusion of 421 records that were considered irrelevant to the research objectives. Subsequently, 105 reports were sought for retrieval, of which 8 reports could not be retrieved. The remaining 97 full-text reports were assessed for eligibility based on their relevance to halal trade and competitiveness, geographical context, Islamic economics and governance, methodological appropriateness, and contribution to the research objectives.

Following the full-text assessment, 72 reports were excluded for specific reasons. These included insufficient relevance to halal trade and competitiveness (n = 31), studies conducted outside the Indonesian context (n = 16), insufficient relevance to Islamic economics or governance (n = 12), failure to meet the methodological criteria (n = 8), and duplicate or overlapping publications identified during the full-text assessment (n = 5). Finally, 25 studies that satisfied all predetermined inclusion and exclusion criteria were included in the systematic literature review. The complete selection process and the number of records at each stage are presented in the PRISMA 2020 flow diagram (Figure X).

Quality Assessment

To enhance the credibility of the review, each eligible article underwent a quality assessment before inclusion in the synthesis. The assessment considered four criteria are relevance to the research objectives; methodological transparency; credibility of data sources and analytical procedures; and contribution to understanding halal trade competitiveness. Only studies satisfying these quality criteria were retained for the final analysis.

Data Extraction and Thematic Analysis

Relevant information from the selected studies was extracted using a standardized data extraction matrix comprising publication year, authors, research objectives, methodology, geographical context, principal findings, and theoretical perspectives. To enhance the transparency and reproducibility of the qualitative synthesis, an additional coding framework was developed to systematically organize findings related to Indonesia's halal trade competitiveness.

The extracted findings were analysed using a three-stage thematic synthesis process comprising open coding, thematic categorization, and conceptual abstraction. In the first stage, open coding was conducted by identifying recurring concepts, issues, relationships, and explanatory patterns reported across the selected studies. Initial codes included, among others, halal certification, regulatory support, institutional coordination, MSME participation, market access, export barriers, consumer trust, Islamic business principles, and trade competitiveness.

In the second stage, conceptually related codes were compared and grouped into broader analytical categories. For example, codes concerning halal certification, regulatory support, institutional coordination, and governance mechanisms were grouped under the category of halal certification and institutional governance. Similarly, codes related to export barriers, international market penetration, market information, and trade facilitation were categorized under international market access and regulatory challenges.

In the third stage, conceptual abstraction was undertaken by examining relationships among the categories and identifying broader themes that could explain the determinants and structural dimensions of Indonesia's halal trade competitiveness. This process resulted in seven major themes: (1) domestic trade structures; (2) halal certification and institutional governance; (3) MSME participation; (4) international market access; (5) regulatory challenges; (6) consumer trust; and (7) Islamic economic principles and competitiveness.

The relationship between the coding process and the resulting themes was documented through a coding framework and theme-to-source matrix. The coding framework provided an audit trail from extracted findings to initial codes, analytical categories, and final themes. Meanwhile, the theme-to-source matrix was used to identify which selected studies contributed evidence to each theme and to compare convergent and divergent findings across the literature. Illustrative findings from the selected studies were retained during the synthesis process to ensure that the final themes remained grounded in the reviewed evidence rather than being derived solely from researcher interpretation.

Analytical rigor was further strengthened through systematic comparison of findings across studies, transparent documentation of coding decisions, and iterative refinement of codes and themes. Rather than treating thematic synthesis as a purely interpretive process, the analysis maintained an explicit link between source evidence, initial codes, analytical categories, and conceptual themes. The synthesis was not intended to produce statistical generalization; instead, it sought to achieve analytical generalization by integrating findings from diverse studies into a comprehensive conceptual understanding of the factors shaping Indonesia's halal trade competitiveness.

Result and discussion

Result

Comparative Overview of Halal-Exporting Countries

The comparative analysis of halal-exporting countries reveals that competitiveness in the global halal market is not determined by a single factor, but rather by the interaction between regulatory quality, industrial capacity, market perception, and trade diplomacy. Malaysia, Turkey, and Thailand demonstrate distinct yet converging strategies that enable them to position halal products competitively in international markets. These countries have successfully transformed halal compliance from a purely religious requirement into a strategic economic asset, supported by coherent policies, institutional coordination, and international engagement. For Indonesia, these comparative insights highlight structural strengths alongside persistent bottlenecks that constrain export performance despite substantial domestic market potential.

Table. Comparative Overview of Key Characteristics in Global Halal: Malaysia, Turkey, Thailand, and Indonesia

Country/ Economy	Regulatory System & Halal Certification	Regulatory Body & Key Certification Features	Key Industrial Focus	Export Orientation & Global Positioning
Malaysia	Government-led and well-established halal regulatory and certification system, supported by internationally recognized standards and mutual recognition agreements (MRAs).	JAKIM (Jabatan Kemajuan Islam Malaysia); internationally recognized, robust, and trusted halal certification authority.	Halal food and beverages; Islamic finance; halal tourism; logistics; harmonization of halal standards.	Major global halal leader with extensive halal export promotion and strong presence in Islamic Economic Organisation (OIC) markets; aims to strengthen its position as a global halal hub.
Türkiye	Developing halal regulatory and certification structures covering food, beverages, finance, tourism, and logistics.	Halal certification and regulatory mechanisms are developing alongside the expansion of the halal industry.	Halal food and beverages; Islamic fashion; halal tourism; logistics.	Major halal market with growing export potential and increasing integration with Islamic and European markets.
Thailand	Halal certification	CICOT; provides halal	Halal food; OIC markets;	Emerging halal exporter

	system supported by the Central Islamic Committee of Thailand (CICOT), with growing market-oriented regulatory structures.	certification and supports the development of halal industry standards and market access.	industry-driven halal production; expanding market volumes.	with growing focus on OIC markets and increasing halal export opportunities.
Indonesia	National halal assurance and certification framework supported by government institutions and the growing domestic Muslim consumer market.	BPJPH (Badan Penyelenggara Jaminan Produk Halal); supported by relevant Islamic organizations and certification institutions within the national halal assurance ecosystem.	Halal food; Islamic finance; logistics; cosmetics; Muslim-friendly tourism.	Emerging global halal player with a large domestic market and substantial potential to become a major halal producer and exporter; supported by significant government initiatives.

Table 1 presents a comparative overview of halal industry development across selected countries, highlighting differences in regulatory systems, halal certification institutions, industrial priorities, and global export orientation. The comparison indicates that countries differ considerably in their institutional arrangements and strategic approaches to halal industry development. Malaysia demonstrates a relatively established institutional framework, whereas Indonesia, Türkiye, and Thailand reflect different stages and strategies of halal industry development. These variations provide an important basis for understanding the institutional and market factors that shape the global competitiveness of halal products.

Regulatory Frameworks and Certification Processes

Malaysia stands out as a global benchmark in halal governance due to its centralized and internationally recognized certification system. The Malaysian Department of Islamic Development (JAKIM) administers a streamlined halal certification process that has earned high credibility among importing countries, enabling Malaysian manufacturers to penetrate global markets with relative ease (Malini et al., 2022; Mutmainah & Romadhon, 2023). This effectiveness is reinforced by a well-defined regulatory framework that promotes continuous improvement, clear compliance guidelines, and strong public–private partnerships, all of which contribute to regulatory certainty and business confidence (Anggarkasih & Resma, 2022).

Turkey presents a different yet effective regulatory model characterized by strong state involvement and harmonization with international standards. Halal governance in Turkey is coordinated through state-led regulatory bodies that align national halal standards with global requirements, thereby facilitating smoother export procedures (Anggarkasih & Resma, 2022). The Turkish Standards Institute plays a strategic role by collaborating closely with producers and engaging in international standard-setting forums, which enhances both compliance and international recognition of Turkish halal products (Malini et al., 2022; Mutmainah & Romadhon, 2023).

In contrast, Indonesia's halal certification system, administered by the Halal Product Assurance Agency (BPJPH), continues to face structural challenges. These include bureaucratic complexity, overlapping institutional roles, and the coexistence of multiple certifying bodies, which can create uncertainty and increase compliance costs for businesses (Akmal et al., 2021; Hasan & Hamdi, 2022). While regulatory reforms have strengthened the legal foundation of halal assurance, the findings suggest that further simplification and institutional streamlining drawing lessons from Malaysia's centralized model are necessary to enhance the export readiness of Indonesian halal products.

Industrial Capacity and Innovation

Industrial capacity and innovation emerge as critical determinants of halal export competitiveness. Thailand exemplifies how a non-Muslim-majority country can successfully integrate halal standards into its industrial strategy, particularly in the agri-food sector. By leveraging its strong agricultural base, Thailand has positioned itself as a major exporter of halal food products, supported by significant investments in research and development and the adoption of best practices along the halal value chain (Ruangkanjanases & Sermsaksopon, 2021). Technological adoption and continuous innovation have enabled Thai producers to enhance efficiency, product quality, and responsiveness to global market trends.

The findings indicate that Indonesia possesses comparable potential, especially in agriculture and food processing, yet has not fully capitalized on it. Limited investment in R&D and uneven technological capabilities across firms constrain product diversification and value addition(Jaaffar et al., 2024). Lessons from Thailand suggest that targeted innovation policies and stronger linkages between industry and research institutions could significantly enhance Indonesia's halal industrial competitiveness(Nurdiana et al., 2025). Moreover, human capital development through education and skills training is identified as a key factor influencing productivity and quality within the halal sector.

Table 2. Comparative Overview of Industrial Focus, R&D Intensity, and Noteworthy Initiatives in Selected Halal Economies

Country / Economy	Industrial Focus & Key Halal Sectors	R&D Intensity & Innovation Development	Noteworthy Initiatives & Trends
Malaysia	Halal food & beverages, Islamic finance, cosmetics, pharmaceuticals, tourism, logistics, digital halal services.	High R&D investment focused on scientific validation, food production systems, and the use of blockchain for traceability.	- Halal Industry Masterplan (2030) - Halal Parks - Global Halal Economy Blueprint
Turkey	Halal food, Islamic finance, modest fashion, tourism, and logistics.	Moderate R&D, with strong emphasis on quality assurance, agriculture, and food-related sectors.	- Halal Accreditation Agency (HAK) - Istanbul Halal Summit - Global Halal Ambition
Thailand	World's largest halal consumer market; halal food, modest fashion,	Increasing R&D focus on food science, MSME-driven local products, and	- Halal Product Assurance Act - Technical Innovation Hub

	cosmetics, and wellness.	new industry development.	- Thailand Halal SME Empowerment
Indonesia	Halal food & beverages, Islamic finance, logistics, cosmetics, pharmaceuticals, and digital services.	Moderate R&D, focusing on food science, MSMEs, and the large domestic market.	- Halal Product Assurance Act - Halal Development Acceleration Agency - Indonesia Halal Hub - MSME Empowerment

Table 2 presents a comparative overview of the industrial focus, R&D intensity, and major initiatives shaping the halal economy in Malaysia, Turkey, Thailand, and Indonesia. The comparison demonstrates that each country adopts a distinct development strategy. Malaysia emphasizes an integrated halal ecosystem supported by relatively strong R&D and digital traceability, while Türkiye focuses on quality assurance and the expansion of halal-related sectors. Thailand emphasizes food science, MSME-based production, and technical innovation, whereas Indonesia combines its large domestic Muslim market with MSME development, halal product assurance, and digital halal services. These differences indicate that R&D capacity, institutional initiatives, and sectoral priorities play important roles in shaping the development and competitiveness of national halal economies(Amanullah & Dzikri, 2025; Femdika et al., 2025; Nada & Adinugraha, 2025; Saifuddin & Setiawan, 2025; Syakirunn'iam et al., 2025)

Market Perceptions and Consumer Awareness

Market perception and consumer trust play a decisive role in determining the success of halal products in global markets. Malaysia has been particularly effective in positioning halal products as symbols of quality, safety, and ethical production. Strong branding strategies, clear halal labeling, and consistent participation in international trade exhibitions have reinforced the credibility of Malaysian halal certification and strengthened consumer confidence worldwide (Malini et al., 2022). These efforts demonstrate how halal branding can transcend religious boundaries and appeal to broader consumer segments.

Turkey similarly invests in shaping positive market perceptions through government-led promotional and educational initiatives. Public campaigns emphasize the universal values embedded in halal products, such as hygiene and ethical standards, thereby expanding consumer acceptance beyond Muslim markets (Anggarkasih & Resma, 2022; Masruroh, 2020). These strategies have contributed to growing international demand for Turkish halal products.

Indonesia, despite its large domestic halal market, has yet to fully translate this advantage into strong international branding. The findings suggest that limited global marketing efforts and weak international brand recognition hinder export expansion. Strategic branding initiatives targeting international consumers drawing on successful practices from Malaysia and Turkey could enhance awareness of the quality and authenticity of Indonesian halal products.

Strategic International Trade Agreements

International trade agreements constitute an important structural enabler of halal export competitiveness. Malaysia and Turkey have effectively leveraged Free Trade Agreements (FTAs) to support halal product exports by ensuring mutual recognition of halal standards and facilitating market entry. Malaysia's FTAs, in particular, incorporate provisions that accommodate halal compliance requirements, granting exporters a competitive advantage in accessing markets in the Middle East and other regions (Nihayati, 2025; Ruangkanjanases & Sermsaksopon, 2021).

Indonesia has begun to pursue similar strategies; however, the integration of halal certification within trade agreements remains limited. The findings indicate that stronger alignment between halal assurance systems and international trade diplomacy could enhance market access and build confidence among importing countries (Muchtar, Rodoni, et al., 2024). Embedding halal recognition mechanisms within FTAs is therefore identified as a strategic priority for expanding Indonesia's halal export channels.

Overall, the comparative analysis demonstrates that Malaysia, Turkey, and Thailand have successfully combined regulatory coherence, industrial innovation, strategic marketing, and trade diplomacy to strengthen their positions in the global halal market. Indonesia shares many of the foundational assets required for competitiveness, including a large domestic market and abundant resources, yet faces institutional and strategic gaps that limit export performance. These findings provide an empirical basis for identifying priority areas for policy reform and strategic intervention, which are further elaborated in the Discussion section.

Discussion

The findings of this study indicate that the relationship between domestic trade dynamics and the global competitiveness of Indonesian halal products is more complex than can be explained solely by market size or export capacity. The thematic synthesis shows that regulatory quality, institutional governance, domestic market development, and international trade architecture frequently co-occur as interconnected dimensions in the literature on Indonesia's halal trade competitiveness. Rather than establishing causal or interaction effects among these dimensions, the reviewed studies collectively highlight recurring conceptual linkages between institutional conditions, market development, and international trade performance. These patterns suggest that Indonesia's halal competitiveness can be understood as a multidimensional and institutionally embedded phenomenon, in which production capabilities, domestic market conditions, regulatory arrangements, institutional coordination, and access to international markets are repeatedly discussed in relation to competitiveness. Accordingly, the Indonesian case highlights the importance of considering halal trade competitiveness from a systemic perspective while recognizing that the thematic synthesis does not establish causal relationships among the identified dimensions (Muchtar, Asy'ari, et al., 2024; Naisabur & Putra, 2024; Sari et al., 2024).

From a theoretical perspective, the findings support and extend existing explanations of trade competitiveness through the lens of Porter's Diamond Model and Institutional Theory. In relation to Porter's Diamond Model, the reviewed studies indicate that Indonesia's halal trade competitiveness is shaped by the interaction of domestic market conditions, firm capabilities, supporting and related industries, and institutional factors that influence the development of competitive advantages. The findings further demonstrate that the competitiveness of Indonesia's halal industry cannot be understood solely through firm-level capabilities or market conditions, but must also be considered in relation to the institutional environment in which halal trade operates.

Institutional Theory provides an additional explanation for the role of halal certification, regulatory arrangements, governance mechanisms, and institutional legitimacy in strengthening Indonesia's position in halal trade. Across the reviewed literature, halal certification repeatedly emerges as an institutional mechanism that enhances trust, reduces informational uncertainty, and facilitates market acceptance by providing credible assurance of compliance with halal requirements. These institutional mechanisms can therefore strengthen market confidence and support the internationalization of halal products, particularly where consumers and trading partners face information asymmetry regarding the halal status and integrity of products.

Taken together, the findings extend the application of Porter's Diamond Model by demonstrating that institutional legitimacy and halal assurance constitute important dimensions of the competitive environment surrounding Indonesia's halal trade. The synthesis further suggests that competitiveness in the halal economy is not determined exclusively by conventional economic resources and firm capabilities, but also by the credibility of institutions, regulatory support, certification systems, and the ability to translate Islamic principles into market-based sources of trust and competitive advantage.

A similar pattern emerges when interpreting the findings through Porter's Diamond Model. The reviewed literature consistently identifies Indonesia's large Muslim population as a strong domestic demand condition while simultaneously emphasizing the importance of government intervention through halal certification, regulatory enforcement, and institutional support (Aini & Go, 2025; Naisabur & Putra, 2024). Nevertheless, the synthesis demonstrates that the role of regulation extends beyond the supporting function proposed in the original Diamond framework. Rather than serving solely as an enabling environment, regulatory institutions actively shape competitive advantage by enhancing international credibility and reducing market uncertainty. This indicates that, within halal industries, regulatory quality becomes a strategic economic asset capable of generating reputational value. Consequently, competitiveness in value-based industries cannot be adequately explained without considering institutional legitimacy as an integral component of competitive advantage.

The analysis likewise provides important implications for Comparative Advantage Theory. Classical trade theory attributes competitiveness primarily to differences in production costs, factor endowments, and technological efficiency. However, the reviewed evidence demonstrates that Indonesia's halal competitiveness increasingly depends upon intangible institutional resources, particularly consumer trust, ethical assurance, and internationally recognized halal certification (Rahman & Razak, 2024; Yusoff et al., 2022). The convergence of findings across food, cosmetics, and pharmaceutical sectors suggests that halal certification enhances product differentiation by increasing perceived quality and legitimacy rather than by lowering production costs. This synthesis therefore extends the notion of comparative advantage from an economic perspective toward an institutional and reputational perspective that is particularly relevant for industries characterized by strong ethical and religious values.

Beyond supporting existing theories, the reviewed studies also reveal structural tensions that challenge conventional explanations of trade competitiveness. A recurring pattern across the literature concerns the unequal capacity of micro and small enterprises (MSEs) to comply with increasingly complex halal certification requirements. While mandatory certification enhances overall market credibility, it simultaneously creates disproportionate compliance burdens for smaller producers with limited financial, managerial, and technological resources. This paradox demonstrates that institutional policies may simultaneously promote and constrain competitiveness depending on firms' absorptive capacities. Therefore, improvements in export competitiveness require not only stronger regulatory enforcement but also institutional mechanisms that ensure inclusive participation of MSMEs within global halal value chains.

Another important insight emerging from the synthesis concerns the strategic role of domestic demand. Existing trade literature frequently treats domestic consumption as secondary to export-oriented growth. In contrast, the reviewed studies collectively indicate that domestic halal consumption functions as an important learning environment where firms develop product quality, innovation capability, consumer trust, and brand legitimacy before entering international markets (Forte & Carvalho, 2022; Wahab et al., 2022). The interaction between domestic demand and export readiness therefore appears considerably stronger than suggested in conventional trade models. This finding implies that strengthening domestic consumer awareness and purchasing power contributes indirectly to international competitiveness by improving firms' institutional and commercial readiness for global markets.

The discussion also reveals that trade liberalization generates both opportunities and vulnerabilities for Indonesia's halal industry. Although free trade agreements (FTAs) and mutual recognition arrangements reduce trade barriers and facilitate international market access, the reviewed literature consistently shows that these agreements also intensify competition from countries possessing more advanced halal ecosystems, including Malaysia and Turkey. Consequently, the benefits of trade liberalization cannot be realized automatically. Instead, the evidence indicates that domestic institutional capacity, innovation systems, logistics infrastructure, and MSME development determine whether liberalization produces competitive gains or exposes structural weaknesses. This interaction highlights the importance of viewing trade openness and domestic institutional development as complementary rather than independent policy agendas.

The policy implications derived from the reviewed studies reinforce the importance of adopting an integrated governance approach toward halal industry development. Rather than viewing certification, infrastructure, innovation, and consumer awareness as separate policy domains, the synthesis demonstrates that these elements collectively constitute an interconnected competitiveness ecosystem. Streamlining halal certification procedures, harmonizing standards with international partners, strengthening halal logistics, and enhancing institutional coordination are therefore not merely administrative reforms but strategic investments that reinforce international competitiveness (Hadi, 2023; Sazali & Ligte, 2021). Likewise, initiatives promoting halal literacy and ethical consumption strengthen domestic market resilience while simultaneously increasing firms' export preparedness (Budiyoko et al., 2022).

Finally, the synthesis identifies several important limitations within the existing body of literature. Most reviewed studies employ cross-sectional designs and focus on isolated dimensions of halal competitiveness, such as certification, consumer behaviour, or export performance, without examining their dynamic interrelationships over time (Morais et al., 2024; Wong & Mahmud, 2020). This fragmentation restricts theoretical understanding of how institutional reforms, market evolution, and changing consumer behaviour collectively shape competitiveness. Future research would therefore benefit from longitudinal, comparative, and mixed-methods approaches capable of explaining the evolving interaction among domestic institutions, international trade, and halal market development.

Overall, the findings indicate that Indonesia's halal competitiveness should be understood as an institutionally embedded and demand-driven phenomenon rather than solely as an outcome of economic efficiency or market size. While established trade theories remain relevant, the synthesis demonstrates that they require further refinement to incorporate institutional legitimacy, ethical value creation, consumer trust, and regulatory governance as central determinants of competitiveness in halal industries. By integrating these dimensions within a single analytical framework, this study advances the existing literature and provides a more comprehensive explanation of how domestic trade dynamics shape the global competitiveness of Indonesian halal products.

Conclusion

This study demonstrates that the global competitiveness of Indonesian halal products cannot be adequately explained solely through conventional trade determinants such as production capacity, market size, or export performance. Instead, competitiveness emerges from the dynamic interaction among domestic trade structures, institutional governance, halal certification, consumer trust, and international market integration. The findings indicate that halal certification serves a dual role by enhancing institutional legitimacy and market confidence while simultaneously creating structural challenges for micro and small enterprises due to compliance costs and administrative complexity. Consequently, strengthening Indonesia's global halal position requires an integrated approach that balances regulatory credibility with inclusive institutional support.

From a theoretical perspective, this study contributes to the literature by extending conventional trade competitiveness theories to the context of value-based industries. While the findings generally support the explanatory relevance of the Gravity Model of Trade, Porter's Diamond Model, Comparative Advantage Theory, and Institutional Theory, they also demonstrate that these frameworks require further refinement to accommodate the unique characteristics of halal markets. Specifically, the study highlights that institutional legitimacy, ethical value creation, halal certification, and domestic consumer trust constitute strategic sources of competitive advantage that complement traditional economic determinants. By integrating these dimensions within a single analytical framework, this research advances scholarly understanding of how domestic trade dynamics shape competitiveness in institutionally mediated markets.

The findings also generate important practical implications for policymakers, regulatory agencies, and industry stakeholders. Improving Indonesia's halal competitiveness requires not only expanding certification coverage but also simplifying certification procedures, strengthening institutional coordination, harmonizing halal standards with international markets, enhancing halal logistics and digital traceability systems, and increasing MSME capacity through technical assistance, financing, and export facilitation. These integrated policy measures are essential to ensure that regulatory compliance functions as a driver of international competitiveness rather than as a barrier to market participation.

Despite these contributions, this study is subject to several limitations. As a systematic literature review based on secondary evidence, this study synthesizes and maps the patterns, recurring themes, and conceptual linkages identified across the reviewed literature rather than empirically testing causal relationships or interaction effects using primary data. In addition, the review focuses primarily on the Indonesian context, limiting broader cross-country comparison. Future research should therefore employ longitudinal, comparative, and mixed-methods approaches to examine the evolving relationship between institutional governance, domestic trade, consumer behaviour, and global halal competitiveness across different national settings. Further investigation into digital technologies, blockchain-enabled halal assurance systems, and artificial intelligence applications in halal governance would also enrich the theoretical and practical understanding of competitiveness within the rapidly evolving global halal economy.

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