

# COMPARATIVE ANALYSIS OF POTENTIAL HALAL PRODUCT EXPORTS OF INDONESIA IN ASEAN COUNTRIES

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## ABSTRAK

Penelitian ini bertujuan untuk meneliti perbandingan potensi ekspor produk yang berpotensi halal di beberapa negara ASEAN dan beberapa negara Islam di luar ASEAN. Adapun komoditi yang digunakan dalam penelitian ini terdiri dari daging, kopi, produk turunan susu, gula, sereal dan buah-buahan. Untuk mendukung tujuan penelitian ini, data yang digunakan bersumber dari UN Comtrade dengan periode penelitian dari tahun 2009 hingga 2019. Negara yang menjadi sampel pada penelitian ini terdiri dari Indonesia, Turki, Arab Saudi, Thailand, Singapura, Philipina, Brunei Darussalam, Malaysia dan India. Penelitian ini menemukan bahwa Indonesia memiliki keunggulan dalam hal komoditi kopi. Hal ini dapat dilihat dari nilai RCA sebesar 4.29. Sedangkan untuk komoditi buah-buahan dan kacang, Indonesia memiliki nilai indeks spesialisasi paling kecil yakni sebesar 0.95. Pesaing Indonesia yang paling kuat di ASEAN adalah Malaysia dan Thailand untuk produk komoditi gula dan produk turunan susu. Namun, ketika dianalisis dengan memasukkan negara India, Turki dan Arab Saudi menunjukkan bahwa India merupakan kompetitor yang paling kuat dan menguasai pangsa pasar. Selanjutnya, jika di bandingkan dengan negara ASEAN, ekspor komoditi Indonesia masih menguasai pangsa pasar dibandingkan negara Philipina dan Brunei Darussalam. Hal ini dapat disimpulkan bahwa produk ekspor Indonesia masih memiliki kemampuan bersaing dan memiliki pangsa pasar yang tinggi di ASEAN +3. Jika Indonesia gencar memberikan label halal, hal ini tidak hanya meningkatkan ekspor tetapi juga untuk memenuhi kebutuhan WNI sendiri yang mayoritas beragama Islam.

*This study aims to examine the comparison of potential halal product exports in several ASEAN countries and several Islamic countries outside ASEAN. Commodities used in this study consisted of meat, coffee, dairy products, sugar, cereals and fruits. To support the purpose of this study, the data used were sourced from the UN Comtrade with a research period from 2009 to 2019. The countries sampled in this study consisted of Indonesia, Thailand, Singapore, the Philippines, Brunei Darussalam, Malaysia, Turkey, Saudi Arabia, and India. This study found that Indonesia has an advantage in terms of coffee commodity. This can be seen from the RCA value of 4.29. Meanwhile, for the commodities of fruits and nuts, Indonesia had the smallest specialization index value, namely 0.95. Indonesia's strongest competitors in ASEAN are Malaysia and Thailand for commodity sugar products and dairy products. However, when analyzed by including India, Turkey and Saudi Arabia, it shows that India is the strongest competitor and controls market share. Furthermore, when compared to ASEAN countries, Indonesia's commodity exports still dominate the market share compared to the Philippines and Brunei Darussalam. It can be concluded that Indonesia's export products still have the ability to*

*compete and have a high market share in ASEAN +3. If Indonesia intensively provides the halal label, this will not only increase exports but also to meet the needs of Indonesian citizens who are predominantly Muslim.*

## **I. INTRODUCTION**

The trading system and the changing paradigm of society demand protection for the products they consume. Today, the demand for high quality standards has become a concern of the international community. This happens to the international Muslim community which is increasingly critical to get products that are guaranteed quality and halal (Purnomo, 2011). Therefore, this requires producers to be able to produce halal products with halal certification standards recognized by their respective countries.

Che-man (2006) explains that the rapid development of the Muslim population, even reaching a quarter of the world's population, has made the halal market begin to have a significant impact on the global market. The new market forces are driven by several factors, namely; (1) The number of Muslim countries that have reached a development stage that can begin to influence the world market, both as producers and consumers, (2) Significantly, goods such as halal meat and Islamic banking services are increasingly popular among non-Muslims so that they can rapidly expand. and increase the growth of the industrial sector.

In the Southeast Asia (ASEAN) region, Malaysia, Brunei Darussalam and Thailand are countries that are very active in taking advantage of the global halal market opportunities. Malaysia as a pioneer of ASEAN as a center for the production and marketing of global halal products carried out in cooperation between ASEAN countries or known as the ASEAN Halal-Hub (Gumbira-Sa'id, 2008). In the ASEAN region, Malaysia is the first country to have a halal industry management body and a blueprint that provides clear objectives and guidelines for its halal industry (Che-man, 2006). Meanwhile, Thailand has become one of the main food producers in the Asian region, which has established a halal food industry in a Muslim-majority region, namely in Pattani province and has negotiated with Carrefour hypermarkets to supply halal food in its various branches in the Southeast Asia region (Musalman, 2009). This means that Indonesia is included in the main target market for halal products for global halal food producers.

The development and demand for halal products in the international market is a challenge for every country to compete and participate in filling the global market potential optimally (Zakaria and Abdul-Thalib, 2010). Especially with the Muslim population which always increases every year. This is evidenced by the increase in the world's Muslim population by 1.84 percent from 2018 to 2019, namely 2.14 billion in 2018 and increasing to 2.25 billion in 2019 ([www.muslimpopulation.com](http://www.muslimpopulation.com)). In addition,

it is estimated that the Muslim population in 2030 will increase by 1.5 percent annually, which is twice as fast as than non-Muslim population (Thomson Reuters, 2014). Bon and Hussain (2010) explain that Asia is the largest halal market in the world at 63 percent. Thomson Reuters (2014) states that the world's Muslim consumption for food and non-alcoholic beverages in 2012 was \$ 1,088 billion or 16.6 percent and is estimated to reach \$ 1,626 billion in 2018. This shows that the level of Muslim consumption for halal products is increasing in every year.

Therefore, free competition in ASEAN member countries will be tighter. To win the competition, competitiveness is the key to success. Countries with high competitiveness will open up greater opportunities to become winners. Vice versa, countries with low competitiveness will be increasingly left behind (Bangun, 2014). Indonesia is able to exploit a very large market potential by exercising a comparative advantage in the form of natural resource potential, the fourth largest population globally and has a Muslim population of 88 percent. This is an economic fundamental that needs to be utilized through economic development so that it becomes a competitive advantage and can be developed into a motor for the international economy (Purnomo, 2011). Combining rich natural resources with a large Muslim population can be realized comprehensively through the concept of developing halal products. This is the right form to exploit the potential that is owned so that it becomes a producer of value-added and highly competitive products.

Based on the World Trade Organization (2019), the largest average export volume since 2012 has been in Asian countries. This shows that the international trade carried out in Asian countries is very large and there are increasingly visible opportunities for halal products in the utilization of the global market. Trade activities between these countries, especially export activities, are the main objective of a country in order to increase economic growth. Therefore, this global development can be a challenge for every country in increasing its economic activity. This study aims to analyze the comparison of the export potential of Indonesian halal products in ASEAN countries, Turkey, Saudi Arabia and India.

## **II. LITERATURE REVIEW**

As a result of the increase in the number of the world's Muslim population, various factors have developed into driving factors in the world halal food business, as explained by Sungkar (2007) that concern for the consumption of halal products among the Muslim community has increased, the purchasing power of the Muslim community has increased along with the increase in the income of many Muslim communities. Muslim countries in the world, there is an increasing need for safe and high quality food consumption in the Muslim community and throughout the world and halal products are not only accepted by the global Muslim community, but also by non-Muslims globally.

Several empirical studies show that there is an influence between religion and a person's behavior (Delener, 1994 and Pettinger, et al. 2004). In addition, religion also plays an important role in the world community in terms of food selection (Dindyal, 2003 and Musaiger, 1993).

Muzakir, et al. found from several products used that the competitiveness of pharmaceutical products, animal fats, oils, cleavage products, and others has a higher level of competitiveness and has good prospects in the future. On average, it produces a comparative advantage value (RCA) of 3. Indonesia with large resources and the largest Muslim population should have the advantage of making halal products as a leading marketing strategy and developing halal brands into the ASEAN market. Farhan (2015), in his empirical study results indicate that Indonesia has the highest gross domestic product. However, from the other side, including the determinants of competitiveness, Indonesia is lagging behind Thailand, Malaysia and Singapore.

Purnomo (2011) in his research using data collected through interviews and questionnaires with 34 respondents showed that the development of agro-halal in Indonesia has strategic potential. Indonesia's halal agro-industry is in a strategic position, but is in fifth position among six other ASEAN countries. The development of Indonesia's halal agro-industry is formulated to protect the domestic halal market and gradually increase its national competitiveness to become an advantage in the global halal business. The strategy chosen was to develop a compatible halal logistics infrastructure, improve legislation and long-term development plans, improve coordination between policies and interests, develop trade and network skills advocacy, increase the competitiveness of domestic halal products, improve the halal agro industry in research mastery. and development, increasing public awareness and creation of halal industry champions.

### **III. RESEARCH METHODS**

This study uses secondary data published by UN Comtrade and International Trade Center. The research period was from 2009 to 2019. The countries that were sampled in this study were ASEAN countries consisting of Indonesia, Malaysia, Thailand, Philippines and Brunei Darussalam. The reason for choosing the 4 ASEAN countries is because in ASEAN countries, these 4 countries are the leaders in the export competition when compared with Vietnam, Myanmar and Cambodia. Apart from these countries, this study also included India, Turkey and Saudi Arabia. This is because these 3 countries are among the countries that have the largest Muslim population.

In order to see the potential of Indonesian halal products and ASEAN +3 countries, the method used is:

1. Market share
2. Revealed comparative advantage (RCA)
3. Trade specialization index

## Market Share

This market share indicator provides a contribution overview of the country's commodity exports to the world market, the following formula can be used:

$$\text{Share } iw = x_{iw} / x_{tw}$$

Where  $x_{iw}$  is the export of  $i$  commodity in a country to the the world and  $x_{tw}$  is the total export of commodity  $i$  in the world.

## Revealed Comparative Advantage (RCA)

RCA indikator yang digunakan untuk mengetahui daya saing komoditas suatu negara dengan negara lain. cara untuk mengukur Revealed Comparative Advantage (RCA), yakni sebagai berikut:

RCA is an indicator used to determine the competitiveness of a country's commodities with other countries. Ways to measure Revealed Comparative Advantage (RCA) are as follows:

$$RCA = \frac{\frac{X_{ia}}{\text{total } X_a}}{\frac{X_{iw}}{\text{Total } X_w}}$$

Where  $i$  is a symbol of commodity,  $a$  is a symbol of country and  $w$  is a symbol of the world. If the RCA value is  $<1$  or close to 0, means the competitiveness of the commodity is weak. If the RCA value is  $>1$ , the competitiveness is strong, the higher the RCA the stronger the competitiveness (Ridhwan et al 2015).

## Index of Trade Specialization

After knowing the market share and competitiveness of a product, it is necessary to discuss products that make Indonesia more inclined to be an exporter than an importer (Muzakkir, Andiyana and Ghandur 2017). The formula for calculating the trade specialization index is:

$$ISP = \frac{X_i - M_i}{X_i + M_i}$$

Where ISP is a trade specialization index,  $X_i$  is export of commodity  $i$  by a certain country,  $M_i$  is import of commodity  $i$  of a certain country. ISP values range from 0-1, if the ISP value is  $\geq 0.5$ , then a country tends to be an exporter. Conversely, if the ISP is  $\leq 0.5$ , then that country tends to be an importer.

## IV. RESULT AND DISCUSSION

### Prospects and Advantages of Potential Halal Products in Indonesia

In table 1, it can be seen that even though Indonesia's economic growth continues

to fluctuate, Indonesia's economic growth is still around 5%, meaning that Indonesia's economy is still showing good performance. One of the drivers of economic growth is exports. This is because the greater the openness of a country's economy will have a positive impact on expanding the marketing of domestic products. This means that domestic producers do not only carry out the production process in order to meet the needs of domestic consumers, but also to meet the needs of foreign consumers.

In addition, in table 1, it can also be seen that the contribution of exports to GDP is around 20-25%, meaning that a quarter of the value of Indonesia's GDP, the amount is determined by the value of exports. This means that when Indonesia's exports have decreased, this will have an impact on economic stability. However, on the other hand, if the government is able to support Indonesian products, they are not only oriented towards the domestic market, but also oriented towards the world market. Then the economic growth will increase, along with the increase in exports.

Table 1. Economic Growth and Contribution of Exports to Indonesia's GDP

<b>Year</b>	<b>Growth</b>	<b>GDP</b>
2009	5.500952	24.60116
2010	6.345022	25.10962
2011	6.013704	25.94328
2012	4.628871	22.39281
2013	6.223854	24.29903
2014	6.169784	26.26734
2015	6.030051	25.17203
2016	5.557264	24.84049
2017	5.006668	23.91032
2018	4.876255	22.31465
2019	5.015558	20.88019

Source : World Development Indicators 2021

One way to increase the competitiveness of Indonesian products not only abroad but also domestically is by providing halal labels. The labeling of halal is very important, this is because the majority of Indonesia's population is Muslim, as Islam recommends consuming goods that are *halalan thayyiban*, meaning that the goods consumed are not only halal in substance, but also halal in the way of obtaining them. With this order from the creator, the Muslim population will tend to prefer to consume halal products. Some countries that are likely to support the labeling of halal on consumer goods are ASEAN countries, in addition to India, Turkey and Saudi Arabia.

Table 2. Exports of Indonesian Products with the Potential Halal in the World

<b>Year</b>	<b>Fruit</b>	<b>Dairy</b>	<b>Cereal</b>	<b>Coffee</b>	<b>Sugar</b>
2009	225809	127364	8152	920560	111839

2010	279862	144333	32705	1036918	94177
2011	302104	305298	47611	1452556	147933
2012	261193	219239	22360	1252968	152994
2013	297906	246499	19917	1428830	174803
2014	435629	272875	10327	1676471	192355
2015	401863	232893	20293	2087471	200265
2016	418086	231094	11965	1948659	235471
2017	655209	221878	14125	1835143	284556
2018	776052	153037	57126	2196028	219473
2019	711519	229694	12084	1896531	224522

*Source UN Comtrade, data processed in 2021.*

In table 2, it can be seen that the export of products that have the potential to be halal for Indonesia to world exports, the largest number of exports is coffee, followed by fruit, dairy products, sugar and cereals. Furthermore, to see how the competitiveness of Indonesian products with products from ASEAN countries can be seen from the RCA value of each product.

Table 3. RCA of Indonesian Products with the Potential to be Halal

<b>Year</b>	<b>RCA of Meat</b>	<b>RCA of Coffee</b>	<b>RCA of Dairy</b>	<b>RCA of Cereal</b>	<b>RCA of Fruit</b>
2009	0.030631	4.866821	0.31871	0.019333	0.507628
2010	0.029937	4.688686	0.284885	0.054474	0.553252
2011	0.021953	5.170647	0.49497	0.053005	0.498462
2012	0.025354	4.350591	0.395129	0.030482	0.410696
2013	0.023081	3.69649	0.335582	0.022465	0.374391
2014	0.01616	2.899194	0.28946	0.007822	0.444079
2015	0.015633	4.162144	0.275707	0.016266	0.430347
2016	0.018825	4.484691	0.255078	0.010042	0.436194
2017	0.019524	3.952669	0.243307	0.012576	0.66794
2018	0.022589	4.961481	0.221841	0.059975	0.820312
2019	0.020221	4.29647	0.349135	0.013916	0.727235

*Source: UN Comtrade, data processed in 2021*

From table 3, it can be concluded that the most competitive Indonesian product is coffee. It can be seen that the RCA value of coffee is much greater than other commodities, with an RCA value of 4.29. followed by fruits, dairy products and meat, with RCA values of 0.72, 0.34 and 0.02. Meanwhile, Indonesian products with the lowest RCA value are cereals. One of these cereal products includes whole grains. This means that Indonesia's rice production, its competitiveness is still low in the world market. However, overall, the comparative advantage of Indonesian commodities is still

low because the RCA value is  $> 1$ , only for coffee. Meanwhile, for other commodities, the value of RCA is  $< 1$ , which means that the competitiveness of the export commodities of Indonesia's halal potential products is still low. This indicates the need for government attention to increase the competitiveness of Indonesian export commodities, especially those with the potential to be halal. One of the reasons, because it can be a distinct advantage for Indonesian export commodities.

Table 4. Indonesian Trade Specialization Index

Year	Meat	Coffee	Dairy	Sugar	Cereal	Fruits
2013	0.994080798	0.998741881	0.985967414	0.981699	0.990384486	0.968666683
2014	0.996266425	0.994576379	0.986976434	0.978808	0.990699183	0.947822451
2015	0.998257149	0.996603228	0.988367643	0.980526	0.991184152	0.961983081
2016	0.997299458	0.998617032	0.985773879	0.978971	0.992874218	0.961929583
2017	0.994983356	0.99808675	0.984692891	0.982558	0.991180172	0.960328042
2018	0.99634369	0.998202686	0.987302706	0.979214	0.990703578	0.956721288
2019	0.991490441	0.996637858	0.987802297	0.965693	0.98757317	0.954023067

Source: UN Comtrade, data processed 2021

It can be seen (see table 4) that the Indonesian trade specialization index for each commodity is at a value of  $> 0.5$ , meaning that Indonesia for commodities of meat, coffee, dairy products, sugar, cereals and fruits are more likely to be exporters than importers. This indicates that Indonesia's dependence on imports for these commodities is very low. In addition, the ISP value  $> 0.5$  indicates that there is a great opportunity for producers who produce these commodities to further increase production and give halal labels to the products they produce. In order to meet the needs of a large and export-oriented country.

Table 5. Market Share of Potentially Halal Products in Indonesia

Year	Meat	Coffee	Dairy	Sugar	Cereal
2009	0.02583	4.104006	0.268756	0.016303	0.428064
2010	0.024793	3.883022	0.235933	0.045114	0.458186
2011	0.018832	4.435601	0.424606	0.04547	0.427602
2012	0.023982	4.115277	0.373758	0.028833	0.388482
2013	0.024173	3.871344	0.351456	0.023528	0.3921
2014	0.018196	3.26441	0.325923	0.008808	0.500021
2015	0.016192	4.311034	0.28557	0.016848	0.445741
2016	0.018229	4.342806	0.247008	0.009725	0.422394
2017	0.018241	3.692985	0.227322	0.011749	0.624057
2018	0.020702	4.547103	0.203313	0.054966	0.751801
2019	0.01836	3.901153	0.317011	0.012636	0.660323

Source: UN Comtrade, data processed 2021

In table 5, it can be seen that the largest share of the Indonesian export commodity market is coffee, followed by meat and sugar. This means that there are very many foreign consumers who like Indonesian coffee products. Meanwhile, for meat and sugar commodities, their market share is still much lower than Thailand and Malaysia.

### Comparison of RCA for potentially halal products between ASEAN countries

Table 6. RCA for Export Commodities of ASEAN Countries

Years	Indonesia Coffee	Thailand Sugar	Thailand Sereal	Thailand Meat	Malaysia Dairy	Thailand Fruits
2009	4.866821	2.720431	0.524551	0.040579	0.28398	0.592834
2010	4.688686	4.172169	0.56766	0.056336	0.394248	0.614244
2011	5.170647	4.558339	0.505125	0.062665	0.466918	0.566281
2012	4.350591	4.718682	0.915048	0.061634	0.352333	0.667879
2013	3.69649	4.086643	0.780863	0.064967	0.316591	0.584690
2014	2.899194	5.699697	0.618779	0.112945	0.380491	0.904814
2015	4.162144	6.452715	0.624614	0.236848	0.431718	1.088900
2016	4.484691	5.021898	0.610746	0.279899	0.384146	0.906209
2017	3.952669	5.257919	0.643793	0.434309	0.460124	1.027339
2018	4.961481	5.520508	1.293857	0.476534	0.552364	1.008442
2019	4.29647	4.265193	1.26707	0.467289	0.515129	1.118133

Source: UN Comtrade, data processed 2021

From table 6 it can be seen that Thailand is Indonesia's strongest competitor, it can be seen that 4 Thai commodities have the highest RCA value compared to other countries in ASEAN. Thailand's top products are sugar, cereals, herbs and meat. Indonesian dairy products have the third comparative advantage after Thailand and Malaysia. As for fruits, Indonesia's exports have a relatively high comparative advantage, which is after Thailand and the Philippines. This means that the existence of products that have the potential for halal in Indonesia, although they do not have the highest competitiveness, Indonesian products are still able to compete in the ASEAN market.

Countries that support the halal labeling are not only in ASEAN. There are several countries that have a large number of Muslims and support the labeling of halal. As for these countries, namely India, Arabia and Turkey. The reason for choosing this country as a competitor to Indonesia, is not only because of the advancement of Islam in that

country, but also because of other considerations such as the country's export potential, which is quite large for world exports.

Table 7. RCA Commodities with Potential Halal in ASEAN + 3

Year	Meat (India)	Coffee (Indonesia)	Dairy (Saudi)	Sugar (Thailand)	Cereal (Thailand)	Fruits (Turki)
2007	1.012093	4.688686	0.56766	4.172169	0.56766	5.615581
2008	1.064787	5.170647	0.505125	4.558339	0.505125	4.88933
2009	0.931554	4.350591	0.915048	4.718682	0.915048	5.384074
2010	1.251227	3.69649	0.780863	4.086643	0.780863	6.078136
2011	1.379873	2.899194	0.618779	5.699697	0.618779	6.010622
2012	1.704294	4.162144	0.624614	6.452715	0.624614	5.080685
2013	2.154825	4.484691	0.610746	5.021898	0.610746	4.979695
2014	2.297973	3.952669	0.643793	5.257919	0.643793	4.926926
2015	2.372832	4.961481	1.293857	5.520508	1.293857	4.812299
2016	2.152033	4.29647	1.26707	4.265193	1.26707	4.012688

Source: UN Comtrade, data processed 2021

After being analyzed by including India, Saudi Arabia and Thailand. The comparative advantage of potential halal commodities in Indonesia and other ASEAN countries is inferior to commodities from India for meat, dairy products from Saudi Arabia and fruits from Turkey. However, Indonesian coffee is still superior. This means that Indonesia must pay more attention to commodities that have the potential to be exported. In order to be able to compete in the world market. There are several ways that can be done, namely by providing financing to producers with export potential, and always stabilizing the exchange rate.

## V. CONCLUSION

Indonesian commodities that have the potential to be halal can compete with commodities that have the potential to be halal from ASEAN and ASEAN +3. In general, the competitiveness of Indonesian commodities in ASEAN is after Thailand and Malaysia. In addition, Indonesia tends to export and is not dependent on imports for commodities such as meat, sugar, dairy products, fruits and cereals. The largest market share for Indonesia's export commodity is coffee. When analyzed using India, Turkey and Saudi Arabia, the competitiveness of Indonesia's sugar commodity is still superior to India and Saudi Arabia.

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