Positioning the Halal Food Industry: The Case of Malaysia

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Abstract

Malaysia is committed towards developing and promoting its halal food industry as clearly indicated in her Third Industrial Master Plan (IMP3) and the Halal Industry Master Plan launched in 2006 and 2008 respectively. In line with the plans, the Malaysia is focusing on increasing the local food production as well as developing her potential as a global halal food hub.

Estimates have shown that there are as many as 1.8 billion Muslims in the world and they are increasingly becoming more educated, earned higher income and thus having higher halal consumptions. On the other hand, more non-Muslims are consuming eat halal food too. Recent estimates as to the value of the global halal food market showed a considerable increase from USD587.2 billion in 2004 to USD641.5 billion in 2010.

In developing and promoting Malaysia's halal food industry, several strategies have been employed including improving the access to raw materials, developing the Halal Parks, improving the halal logistics services, enhancing halal related R&D, increasing the awareness on Malaysia as the center for halal products and services, promoting Malaysia Halal Standard, ensuring halal product quality and food safety, and building capacity.

However, there are challenges still as Malaysia continue her drive towards growing her halal food industry, including stiff competition from

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countries like Thailand, India and Australia, lack of halal certification standardization, shortage of raw materials, changing taste and demand of consumers, misunderstanding from the non Muslim societies and food safety and hygiene etc.

This case is on how Malaysia positions her halal food industry in the global market and maintains her halal food industry's competitiveness. How well has Malaysia's food industry performed and how is Malaysia going to position itself going forward?

Keywords: Malaysia, Halal, Halal Food Industry, Halal Industry Master Plan

Prologue

Mr. Ali had just flown back from Dubai after attending an international *halal* food expo. He saw a note on his office table at 9.00 a.m. in the morning that read:

> "Urgent. Stakeholders' meeting at 2 p.m. tomorrow. Prepare a paper to update on our current positioning in the halal industry. And the possible need to reassess and re-strategized. Sorry for the short notice."

Ali anticipated that such message was coming; only he felt glad it came sooner rather than later. What he saw during the *halal* food expo had really been an eye opening. He always understood that *halal* food industry was always a Malaysia domain, sort of her competitive advantages. However, the competitors, even from non-Muslim countries were catching up fast to grab bigger share of the huge international *halal* market. Hence, Malaysia could not sit on her laurels. Malaysia has to reassess and re-strategized its halal food industry fast.

As a senior official in the Halal Industry Development Corporation (HDC), Ali knew that these tasks of reassessing and re-strategizing are under his department's purview in which he was the HOD. He was filled with anxiety and could feel the adrenaline rushing in his body. Although he never liked short notice, he knew he had to prepare an excellent paper before the 2 p.m. meeting. He took a deep breath and began looking at the facts and figures.

Background

Working with the organization that was responsible in drawing the country's *Halal* Industry Master Plan, Ali knows that the government is committed towards developing and promoting the country's *halal* food industry, especially to turn Malaysia into a global *halal* hub. "All the strategic thrusts have been set under the plan, covering the value chain of the *halal* industry", he reaffirmed.

The plan is a comprehensive policy document that seeks to establish Malaysia as a global *halal* hub for production and trade by focusing on leveraging Malaysia's strengths in *halal* sector. As such, the food industry, i.e., specialty processed food; livestock and *halal* ingredient are one of

several industries that have been identified as having great potential to grow. The plan envisages three phases of rollout from 2008 to 2020.

Exhibit 1: Phases of the *Halal* Industry Master Plan

Phases		
I: 2008-2010	**II: 2011-2015**	**III: 2016-2020**
Develop Malaysia as a global center for *halal* integrity and prepare the industry for growth	Establish Malaysia as one of the preferred locations for *halal*-related business	Broaden geographic footprint of home-grown companies

This year 2011 marks the end of phase I, and beginning of the phase II of the Plan. Ali wondered: "How is Malaysia going to position itself going forward?"

Halalan Toyyiban

Halalan toyyiban means allowed and permissible for consumption under the Shari'ah law (Islamic law) and what is allowed and permissible for consumption under the law, generally follows the principle that everything is *halal* except impurity (or mixed with impurity), harmful and intoxicant. Thus for Muslims, it is compulsory upon them to eat only good and healthy food and to shun all that is forbidden.

Halal food does not contain non-halal and *najs* (unclean) ingredients and is processed and manufactured using equipment that is not contaminated with things that are *najs*. Thus, besides assuring the *halal* aspect, i.e., avoiding non-*halal* and *najs* ingredients, halal food also assured consumers of the food safety aspects, i.e., the toyyiban or wholesome (safe, clean, nutritious, quality) is achieved. There is a common misconception that only Muslims purchase and consume *halal* foods when in fact *halal* foods are good for non-Muslim too.

Overview of the Global *Halal* Food Market

Several researches that Ali had gathered shown that Islam is the fastest growing religion on earth, both by birth and covertion. The 2009 world population figures showed that about 25% of the world's population or 1.8 billion people are Muslims, of which 1.1 billion is from Asia, followed by Africa (461.8 million), Europe (51.2 million), North America (6.6 million),

South America (1.6 million) and Oceania (0.4 million). Over the last decade, Europe's Muslim population grew at a rate of 140%, America's by 25%, Australia's by 250% and Asia by 12% where a quarter of them are in India and China. Outside the Middle East, South East Asia and North Africa regions, Muslim populations especially in Europe, North America, and South America are very much fragmented.

Muslim populations are also increasingly more educated and earned higher income. Thus, these situations led to higher consumption rates and more opportunities for *halal* food producers. The largest *halal* markets are in South East Asia and West Asia. Several key *halal* markets include Indonesia, India, Pakistan, Bangladesh, Malaysia, Turkey, Saudi Arabia, Egypt and United Arab Emirates.

Exhibit 2: GDP Per Capita of Selected Muslim Majority Countries (USD)

Country/Year	2009 Population (Million)	2007 USD	2008 USD	2009 USD
Indonesia	230.0	1,923	2,245	2,349
India	1155.3	1,105	1,063	1,192
Pakistan	169.7	881	987	955
Bangladesh	162.2	434	497	551
Turkey	74.8	8,865	9,881	8,215
Egypt	83	1,630	1,997	2,270
Malaysia	27.5	7,028	8,212	7,030

Source: www.worldbank.org

"There are also more non-Muslims who eat *halal* food", he thought, "and many food producers have gone *halal* with their offerings and I know Nestlé, being the world's largest food and beverage company has been producing *halal* products since the 80s". Nestlé has 75 of its 456 factories *halal* certified. Estimates of the value of the global *halal* food market have shown a considerable increase from USD587.2 billion in 2004 to USD641.5 billion in 2010. The actual global *halal* food market value could be substantially higher if the growing numbers of non-Muslims who eat *halal* food were taken into account.

Exhibit 3: Estimated Global *Halal* Food Market Size (USD Billion)

Region/Year	2004	2005	2009	2010
Global	578.2	596.1	634.5	641.5
Asian	369.6	375.8	400.1	406.1
Africa	136.9	139.5	150.3	154.4
Indonesia	72.9	73.9	77.6	78.5
GCC	38.4	39.5	43.8	44.7
India	21.8	22.1	23.6	24
China	18.5	18.9	20.8	21.2
Malaysia	6.6	6.9	8.2	9.4

Source: WHF Secretariat/KasehDia Analysis

As the socioeconomic of the Muslim populations improves and Muslims become more affluent, their tastes and preferences also improve. More Muslims are becoming aware of the *halal* segment that they demand more products and services that are in line with the Islamic values. Hence, *halal* food producers have to continuously undertake research in product development on their own or in collaboration with research institutes. "Capabilities in emerging technologies such as biotechnology, nanotechnology and RFID should be developed to gain competitive advantage in developing new products and improving the technology in food processing, preservation, packaging, logistics, safety and hygiene", Ali reckoned.

Malaysia: Agriculture and Food Industry

Somehow, one particular concern took some of his optimisms away. Statistics that Ali received from the Ministry of Agriculture have shown that Malaysia has a total of 6.6 million hectare of agriculture area in which 77% is used for the industrial crops while collectively, 75% of the agriculture area is being operated by 1.03 million small holder farmers. This makes agriculture sector in Malaysia less commercialized and less efficient in management. "No surprise than why we are still a net importer of food and not self sufficient in many commodities. Worse, agriculture products being the most important input in the food industry", Ali sighed in frustration.

Exhibit 4: External Trade (RM Million)

Item	2008			2009			2010 (Jan-July)		
	Import	Export	Trade Balance	Import	Export	Trade Balance	Import	Export	Trade Balance
Total Malaysia Trade	519,804	663,014	143,209	434,940	553,295	118,355	301,890	371,259	69,369
(Manufacturing) Total Food, Beverages and Tobacco	30,085	20,283	-9,801	28,871	18,283	-10,588	18,755	11,684	-7,072
(Agriculture) Total Food Stuff	27,919	17,757	-10,120	26,690	15,722	-10,968	14,649	8,498	-6,151

Source: Department of Statistics

Exhibit 5: Major Food Commodities Lacks Self Sufficiency Level (%)

Commodity	2008	2009	2010
Rice	70.2	70.4	71.4
Vegetables	39.6	39.2	41.2
Fruits	63.7	67.7	65.8
Beef	25.4	27	28.6
Mutton	10	10.3	10.6
Milk	4.9	4.4	4.9

Source: Ministry of Agriculture and Agro-Based Industry

Key Agencies Related to Halal Malaysia

"Drives towards developing and promoting *halal* food industry have always been a coordinated effort by many parties; public and private sectors", Ali thought while reflecting on the advantages that Malaysia has. Several key agencies related to *halal* Malaysia are:

Ministry of International Trade and Industry (MITI)

In developing and promoting the Malaysia's halal industry, MITI and agencies under it are to encourage trade and investment in *halal* products and services by formulating strategies and providing incentives. MITI, together with the Ministry of Finance formulate and provide incentives and support along the whole chain of the *halal* manufacturing

process. In addition to that, MITI has also actively promoted the Malaysian *Halal* Standard to be used as a benchmark for the International *Halal* Standard.

Department of Islamic Development (JAKIM)

JAKIM is the government institution entrusted with the enforcement and the monitoring of the *halal* guidelines and its implementation. In this regard, JAKIM implemented the *Halal* Certification System, i.e., issuing of *halal* certificate and logo for local and export markets. JAKIM aspires to become a credible *halal* certification services center that is recognized domestically and internationally.

Halal Industry Development Corporation (HDC)

HDC, born out of one of the strategies under IMP3, is to coordinate the overall development of the *halal* industry in Malaysia. It focuses on the development of *halal* standards, audit and certification, plus capacity building for *halal* products and services. HDC also promotes participation and facilitates growth of Malaysian companies in the global *halal* market. HDC's vision is to turn Malaysia into a Global *Halal* Hub. As such, HDC sets the bar for *halal* best practices in Malaysia and at the same time improve the development of *halal* standards globally.

Current Strategies for Malaysia *Halal* Food Industry

Midway through his deep thinking, Ali started pondering the current strategies. "Have our strategies covered the whole value chain of the industry?" Ali wondered.

Access to Raw Materials

Given the lackluster agriculture productions and over reliance on imports goods, there has been real urge for Malaysia to increase the domestic production capacity. Indeed, several strategies have been drawn under the Third National Agricultural Policy (NAP3) and master plans of several economic regions to increase the agriculture production. Among the strategies are, to venture into large-scale commercial farming; to apply latest farm technology, mechanization and automation; to ensure quality of production through breeding quality improvement, better crop management, pest and disease control. Strategic joint ventures between Malaysian and

overseas companies are also encouraged. Several key projects are like the building of several breeding & research centers, beef valley projects, vegetables and fruits valleys/parks, and integrated fisheries parks.

Development of Halal Parks

One of the major strategies towards promoting growth in the *halal* food industry is the establishment of *halal* parks. *Halal* parks, which are dedicated to the downstream production of *halal* products, will constitute the manufacturing and service business players located in a common property. The *halal* parks, according to HDC will incorporate green design of park infrastructure, cleaner production, pollution prevention, availability and accessibility of raw material and ingredients, energy efficiency, inter-company linkages, consolidated services from public agencies and linkages for marketing. Key *halal* parks include the Port Klang Free Zone, Tanjung Manis *Halal* Hub and Selangor Halal Hub.

In effort to promote *Halal* Parks, potential operators and companies operating in the HDC designated *halal* parks are offered various attractive tax incentives. Besides that, incentives are further extended to the companies located in the *halal* parks by offering them preferential utility rates, facilitating access to quality raw materials through the establishment of disease-free agricultural zones and encouraging universities and research institutes to collaborate with in the area of R&D, as well as the commercialization of research findings. Companies parked in designated *halal* hub can also expect and enjoy fast-tracked approvals for their *halal* products. Ultimately, the *halal* parks aim at achieving better economic performance through synergies between all participating parties.

Logistics Services

The development of *halal* compliant logistics services is integral to the development of the *halal* products industry. This is especially so when the volume and movement of *halal* products increase and require specialized transport and logistic services. Malaysia has developed its logistic services that include handling, storage, shipping, airfreight, warehousing, road transport and container. Further development will emphasis on collaboration with relevant service providers to develop and promote further *halal* compliant services and providing support to ports and companies which develop *halal* compliant logistics.

Some notable improvements in the *halal* logistics services in Malaysia are: (1) the establishment of PKFZ, an integrated international cargo distribution and consolidation center situated on Pulau Indah, Port Klang; (2) the equipment of Northport, Port Klang which full facilities to support *halal* food trade; (3) the collaboration between Northport and the Port of Rotterdam, the sole certified *Halal* Hub that is the gateway to some 30 million Muslims in Europe; (4) the *halal* transportation services provided by the Malaysia International Shipping Corp. (MISC) throughout the world via its *Halal* Express Service; and (5) the *Halal* cold storage facility in Westport. By MISC integrated Logistic Sdn. Bhd.

R&D

Collaborations among agencies, research institutes and SMEs in *halal* product development and improvements as well as commercialization of findings in R&D are encouraged. Many of such collaborations have already materialized. One example is the collaboration between JAKIM and International Islamic University Malaysia (IIUM) to tap the former's expertise in identification of non-halal deoxyribonucleic acid (DNA) content in food. Besides local universities, other notable research institutes involved in the *halal* segment are like the Malaysia Agricultural Research and Development Institute (MARDI) and the Standards and Industrial Research Institute Malaysia (SIRIM).

Small and Medium Enterprises (SMEs) are also assisted in acquiring the necessary technological capabilities to upgrade their manufacturing processes, enhance product development and improvements and undertake research on their own. In this regard, the SME Corporation Malaysia which is a company fully owned by the Malaysia government, provides matching grants to SMEs for *halal* product development and product formulation, promotional activities, sample testing, machinery and equipment and related costs for *halal* certification compliance.

Malaysia also aims to be the leading global *halal* R&D center. This aim is achieved through hosting the World *Halal* Research (WHR) Summit which provides an international platform for intellectuals to discuss and exchange ideas on new research findings, emerging technologies, trends, issues and challenges in the global *halal* industry. Through WHR, Malaysia will be recognized as the center for *halal* innovation and R&D commercialization.

Awareness on Malaysia as the Center for Halal Products and Services

The growth of Malaysia's *halal* food industry depends not just on the local market but also the international market. Hence, to tap into the international market more effectively, awareness on Malaysia, as the center of *halal* products and services has to be enhanced. In achieving this, several strategies have been drawn and implemented.

Malaysia has to be positioned as the reference center for trade and investment promotion of *halal* products and services. The organization the annual Malaysia International *Halal* Showcase (MIHAS), an international platform for *halal* trade is one of the initiatives. MIHAS, which was inaugurated since 2004, had drawn more than 16,000 trade visitors from 32 countries in its 2011 event.

Malaysia has also been recognized as a center for global reference, discourse and deliberations on issues related to *halal* products and services through its direct involvement in hosting the annual World *Halal* Forum. The World *Halal* Forum gathers experts from around the world to develop standards and best practices to promote integrity throughout the *halal* supply chain.

Malaysia Halal Standard

Malaysia continues in promoting its certifications of *halal* standard, which so far have received widespread recognition. As a result, the Malaysia *halal* certifications and logo is now recognized and well accepted worldwide. However, to further promote the Malaysia *Halal* Standard in gaining wider global recognition and acceptance, industry leaders will be sought to assist in the development and promotion of the standard like the case of Nestlé Malaysia. Malaysia can also promote the acceptance of the Malaysia *Halal* Standard among the member countries of the Organization of the Islamic Conference (OIC) and continue seeking the acceptance by relevant international accreditation bodies through bilateral or multilateral arrangements. The institutional capacity, including human and physical resources will be enhanced to accommodate the drive towards gaining greater international recognition and acceptance of the Malaysia *Halal* Standard.

Product Quality and Food Safety

Product quality and food safety are two crucial factors in achieving competitiveness and Malaysia *Halal* Standard has already considered these two crucial factors when it incorporated the Hazard Analysis Critical Control Point (HACCP), Good Manufacturing Practices (GMP) and Good Hygiene Practices (GHP) requirements. However, the emphasis is to enhance the awareness and understanding of the importance of these particularly among SMEs and to provide support to facilitate compliance.

Capacity Building

To support the *halal* industry, several initiatives to build capacity have been identified under IMP3 such as identifying local universities to provide degree courses in *halal*, providing training for SMEs, providing consultancy services to foreign companies, upgrading JAKIM to enable it to provide more efficient services.

The Competitors

Ali knew that competition for *halal* market is increasing rapidly, not just from traditional Muslim countries but from non-Muslim countries too.

India

India has a population of over 1.15 billion people and in recent years has improved in the standard of living due to economic prosperity, making it one of the world's biggest and lucrative markets for food products. Of the total population, more than 160 million people are Muslims which according to one estimated, brings around 11 billion INR (USD248.4 million) and around 40 billion INR (USD903.2 million) to the domestic food processed market and domestic food market, respectively.

India is the leading producer and exporter of *halal* bovine meat in the world with annual growth of more than 10% since 1990. India estimated meat production was 2.6 million tonnes during 2007/08, mostly buffalo meat, mutton and poultry. Major importing destinations for India meats are Vietnam, Malaysia, Philippine, Germany, Denmark, Angola, Indonesia, Japan and Middle East countries. In contrast, food processing in the India is just round about 10%, which is much below than other countries. To mitigate, India allowed 100% foreign direct investment (FDI) in

processing sector, established mega Food Park, exemption from excise and others.

Thailand

Ali's special concerned is Thailand. Thailand has succeeded in becoming one of the world's largest and leading producers and exporters of processed food products. Thailand's achievement has been made possible by its abundant agricultural resources, deep agricultural roots supported by excellent R&D capabilities that produce products of international quality and safety standards.

Thailand has initiated several initiatives aimed at promoting the whole chain of *halal* food industry. Among the initiatives taken were the establishment of various organizations such as the Islamic Bank of Thailand, the Institute for *Halal* Food Standard of Thailand (Halal-Thai), the *Halal* Science Center (HSC-CU), and the *Halal* Food Industrial Estate in Pattani province as its *Halal* Food Hub. More recently, Thailand has launched a five-year *halal* industry strategic plan, which runs from year 2010 to 2014. Under the plan, as much as THB5 billion is to be invested to raise export shipments of *halal* food by 10 per cent each year of the plan. Also in 2011, as much as THB264 million is being allocated to develop nine food production projects in five southern provinces as Thailand's production hubs for *halal* products with the focus being on raw materials for *halal* food production, including livestock, fisheries, vegetables and fruit. Thailand's also pushed its *halal* agenda by having a strategic sub region alliance, i.e., The Indonesia, Malaysia, Thailand Growth Triangle (IMT-GT). The IMT-GT has held several *Halal* Expos.

Western Countries

The promising prospect of the *halal* food market has encouraged western countries to venture into supplying *halal* foods, with several indications showing that the ventures have been successful. There are several factors that contributed to the success. First, these western countries have their own Islamic societies or agencies that monitor the *halal* production and process which standards are recognized by the importing countries. Second, these western countries have stringent health monitoring systems, extensive food production industry and advanced food technology that allow them to provide reliable and uninterrupted supply of goods.

The Challenges

Despite all his optimisms, Ali recognized that several challenges are still fronting Malaysia. "How we address these challenges will largely determine the position of Malaysia in the world *halal* market in the near future", Ali reminded himself. Ali realized that:

Halal regulations are still lacking in clear standards, i.e., different countries have different definition and interpretation of *halal* compliance. For her part, Malaysia has tried to bridge these differences by creating a global standard for *halal* regulations, but thus far with little success. Currently, *halal* certification can be issued by any individual Muslim, Islamic organization or agency, but subjected to the acceptability of the certificate by the importing countries. For example, Muslim-majority countries like Malaysia and Indonesia have government agencies to manage *halal* compliance process, whereas other countries especially Muslim-minority have their own independent certification bodies.

Competition in the global *halal* industry has also stiffened. This was due to other countries – especially form the Asia Pacific like Thailand, the Philippines, Brunei, Singapore, China, Australia – have begun mounting serious challenge to supply the growing *halal* market by introducing various initiatives and capitalizing on existing advantages. Several of the initiatives have been similar to the ones offered by Malaysia especially in the trade and investment promotion, strengthening *halal* certification bodies, R&D and capacity building. Several competitors have better-developed food processing infrastructures and larger food processing companies' base.

Malaysia's *halal* industry was also facing shortages in the supply of raw materials, particularly meat. According to the 9th Malaysia Plan estimation, the country is unable to produce sufficient supply of most of its food products to cater for its own domestic consumption except for poultry, pork, eggs, and fruits. Given that the domestic food production is growing and there are shortages of raw materials, the country has to over rely on imports, which currently are supplying more than 70% of the needed raw material for the food processing industry. In fact, much of the imported raw materials are sourced from countries like Australia, Thailand, India, Indonesia and China, several of which are the competitors.

The ever changing taste and demands of *halal* food as well as to capitalize on the higher awareness of *halal* industry by consumers – Muslim and non-Muslim – have demanded the domestic *halal* food producers to be more extensive and innovative in its products offerings. This demand will challenge the readiness of the domestic *halal* industry to continuously invest on new processes to improve efficiency and productivity, product research and development, promotion, presentation, etc.

In the wake of several food health and safety incidents around the world, – incidents of food poisoning by Salmonella and E-coli, food contamination by toxic substances such as melamine and industrial plasticizers, and livestock infected with diseases such as the mad cow disease – product quality assurance and food safety have become paramount and put under intense scrutiny. In this respects, the heighten health awareness has provided *halal* food with a considerable potential to be further promoted as they undergo one of the safest method of production but at the same time post greater demand for the domestic food producers to meet the strict *halal* safety standards.

Lack of understanding among the non-Muslim societies about *halal* guidelines has also to certain extent affected their acceptance towards *halal* food products. Recently, there has been a controversy on ritual slaughtering in several western countries where it is deemed as torturous. Instead, animals are required to be stunned before they are slaughtered. However, the Islamic methods of slaughter require the animals to be fully conscious. The Netherlands has recently pushed a related legislation and if passed will joint countries like Switzerland, Sweden, Norway, New Zealand and Luxembourg in banning ritual slaughtering without first stunning the animals. In Australia, the South Australia Minister Michael O'Brien had pushed for a national policy for mandatory stunning while a survey on a sample of 1,500 people has revealed that 90% of the respondents agree that cattle should be stunned before slaughter while 10% say no.

Epilogue

Ali understood very well that a lot had been done in the *halal* food industry in Malaysia. However after looking at the figures he realized that there were still much more to be done to propel the country at the global forefront. Already, several questions came to his mind, which he had to address before the meeting.

Questions

i. What more can be done to establish Malaysia as one of the preferred locations for *halal*-related business?
ii. What are the international business strategies to expand Malaysia's *halal* market overseas?
iii. How can Malaysia further develop her own homegrown companies to compete in the *halal* food industry?
iv. What can Malaysia further increase non-Muslim societies' acceptance towards *halal* food products?
v. How can Malaysia and Thailand leverage on each other competitive advantages?

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