

Research Article

Halal Industry Development in Brunei Darussalam: Realities and Challenges

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The global halal market is witnessing significant growth, estimated at USD 2.41 trillion, and this upward trend is expected to continue due to increasing worldwide demand. In response to this lucrative opportunity, Brunei is actively supporting Micro, Small, and Medium Enterprises (MSMEs) and providing necessary facilities to foster the development of the halal industry in the country. This article aims to explore the current realities of Brunei's halal sector by examining the factors that contribute to the rising demand for halal products and the opportunities presented by recent market developments. The research employed a method of assessing secondary data from various sources to achieve its objectives. The results highlight several factors influencing the development of the halal industry in Brunei. It is evident that the future growth of this sector hinges on industry players' ability to expand their understanding of product sales and effective promotion strategies. The findings from this study can serve as a valuable resource for future researchers, academics, and policymakers when making informed decisions about the halal industry in Brunei.

Keywords: Brunei, challenges, development, halal industry, realities

1. Introduction

One of the factors responsible for the expansion of the halal market worldwide is the region's predominantly growing Muslim population. Muslims all over the world are constantly demanding halal products because they are required to consume halal by Islam, so the growing dominance of the Muslim population is a positive development for the halal market. Adams [2] found in his study that the demand for halal products remains consistent even during economic recessions as Muslims continue to purchase and consume halal products to satisfy their daily food intake and simultaneously adhere to the teachings of Islam.

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Knowledge E

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Selection and Peer-review under the responsibility of the 5th Sores Conference Committee.

People are drawn to halal products due to their healthfulness, cleanliness, and hygienic standards, in addition to their religious convictions [3] [1]. The halal market as a whole has expanded quickly in recent years, particularly the global halal food market, which is thought to be worth USD 632 billion annually. According to Ahmed [4], and Razzaque and Chaudry [5], Muslims must eat halal food whether they live in majority-Muslim or minority-Muslim societies. To better serve Muslim customers, some multinational corporations, including Tesco, McDonald's, Carrefour, KFC, and Nestle, have all expanded their "Muslim-friendly" offerings.

There are opportunities for Brunei to stabilize its economy by growing its halal industry as a result of the rising demand for halal goods globally. Brunei is currently preparing to take advantage of its halal market and try to further establish Brunei as the Global Halal Hub. The development of the Brunei halal industry through the promotion and development of a reputable organization is one way and is attainable if Brunei is serious about achieving *Wawasan Brunei 2035* (Brunei Vision 2035).

His Majesty the Sultan Haji Hassanal Bolkiah Mu'izzaddin Waddaulah, Sultan and Yang Di-Pertuan Negara Brunei Darussalam, unveiled the Brunei Vision 2035 in 2004. Brunei Vision 2035 is the country's long-term development plan, which is included in the *Rancangan Kemajuan Negara ke-11* (11th National Development Plan) and must be completed by 2035.

Three main visions must be realized before or by the year 2035: (1) producing educated, highly skilled, and accomplished people, (2) having a high quality of life among the top ten nations, and (3) having a dynamic and sustainable economy among the top ten nations [6, 7]. As a result, it is worth noting that for Brunei to have a sustainable, resilient, and dynamic economy, the nation's income must be diversified by generating economic activity in sectors other than oil and gas [8]. With a promising demand for halal products, the halal industry is poised to expand significantly, with a wide range of sectors in the halal economy. The development of forwarding linkages of each sector in the halal economy, from animal husbandry, food, and logistics to pharmaceutical, nutraceutical, cosmetics, and finance [9], as well as the booming tourism and hospitality, can be observed as economies of halal products. In short, the global halal market has enormous potential, and it has experienced tremendous growth in recent years not only in the halal food market but also in other business sectors and industries [10, 11].

Thus, the purpose of this paper is to discuss the current state and prospects of the Brunei halal industry. It also looks into the factors that are driving the halal market's rapid growth. The study's ultimate goal is to address some of the issues and challenges

faced by the Brunei halal industry and make recommendations as a result. The study's findings can be used to raise awareness about the realities and opportunities in the Brunei halal market. The findings can also be used by the government and policymakers to develop policies and programs to improve the country's halal markets.

2. Methodology

To achieve the study's objectives, a qualitative descriptive research method for analyzing secondary data was used in the paper. An extensive literature review, a library search, several different trustworthy websites, online journal publications, conference proceedings, and various institutional reports and publications were used to gather all secondary data and information. The argument for using this strategy is that the information obtained is more reliable, faster, and more efficient than primary data collection for preliminary research [12]. Furthermore, descriptive studies are also known as observational studies because they only observe the subjects without intervening in any way. A clear, specific, and measurable definition of the condition in question is an essential component of descriptive writing. In addition, the future of the halal industry can only be determined by examining what is currently happening.

3. Halal Industry Development in Brunei

Brunei has previously attempted economic diversification since the 2nd National Development Plan (1962-1966) and has been recognised as an important development agenda since the 3rd National Development Plan [13]. The reason for economic diversification is to reduce Brunei Darussalam's dependence on the oil and gas sector, which contributes more than half of the country's Gross Domestic Product (GDP) and government revenue [14, 15]. However, Brunei's current prosperity cannot be taken for granted because the country's economy is heavily reliant on the oil and gas sector, as His Majesty the Sultan Haji Hassanal Bolkhiah Mu'izzaddin Waddaulah, Sultan and Yang Di-Pertuan Negara Brunei Darussalam stated during the opening ceremony of the 18th Session of the National Assembly 2022 on Thursday, 23 Rejab 1443, equivalent to February 24, 2022: *"Everyone knows that national income is still based on oil and gas revenue,"* which is also unsustainable in the long run. As such, efforts to develop the economy to reduce this reliance must be implemented. Brunei must therefore improve and develop its halal industry to achieve both global halal hub status and a dynamic and

resilient economy. Diversifying the economy is a critical component of achieving long-term economic sustainability and a strategy for reducing Brunei Darussalam's reliance on the oil and gas sector, finding an alternate source of revenue for the government, and creating more job opportunities [13]. The halal industry, for example, is critical to the economy because it not only converts raw materials into finished products but also contributes significantly to the country's economy [16].

The halal industry was identified as a development resource in the 9th National Development Plan (2007-2012) [13]. The significance of halal was highlighted through the branding of *BruneiHalal* (now known as *bruneihalalfoods*), which ensures the validity of its halal industry, particularly food, which was officially endorsed in August 2007 with the initiative of several government agencies such as the Ministry of Industry and Primary Resources (now named Ministry of Primary Resources and Tourism (MPRT)), Brunei Islamic Religious Council (BIRC), Ministry of Religious Affairs (MoRA), and Brunei Islamic Religious Council (BIRC). Ghanim International Corporation operates the Brunei Halal brand, which is a halal industrial OEM (herein called Ghanim).

The *bruneihalalfoods* brand is one of the unique government projects established in 2009 as part of the Darussalam Assets group of companies to play a key role in the development of the food industry and economic diversification by developing, marketing, and promoting *bruneihalalfoods* products in Brunei and around the world. Ghanim's *bruneihalalfoods* brand is dedicated to being the global standard brand and the most trusted company for providing halal product solutions. Their product portfolio includes premium value-added chicken and beef, beverages, daily necessities, condiments, snacks, and a variety of other items manufactured by partners throughout Brunei Darussalam. Ghanim's vision is to be a globally recognised halal brand that excels in innovation and virtue. Its mission is to excel and lead the industry in raising the bar for society's lifestyle by providing solutions through accurate science and innovation, social responsibilities for health and well-being, quality, convenience, competitiveness, and long-term brand growth under one easily recognisable banner.

Furthermore, the *bruneihalalfoods* brand aims to serve as a platform for the development of Brunei's food industry. This project provides opportunities for local MSMEs, growers, 1K1P (1 Village 1 Product), and entrepreneurs to manufacture halal products. The *bruneihalalfoods* brand project also aims to fulfil the Islamic obligation of "*Fardhu Kifayah*", which is the duty to facilitate the supply of halal products to Muslims worldwide [17].

Aside from introducing the *bruneihalalfoods* brand, halal certification, halal logo, halal legislation, enforcement laws, halal certification guidelines and halal standards

all play important roles in the development of the halal industry [18]. According to Handriansyah [19], Aisyah, Suzanawaty, as well as Said [20], one of the major constraints to the development of the halal industry, particularly for food services competing in international markets, is the lack of standardization efforts and halal certification.

The administration of halal affairs in Brunei was overseen by MoRA. BIRC is the highest governing body in Brunei Darussalam with legal authority under the Islamic Religious Council Act and Kadis Court Cap 77 of Brunei Darussalam law [21, 22, 23]. The halal certification and the halal label are performed solely by the officers of the Halal Food Control Division (HFCD) starting from application to site auditing to certification and follow-up audit [24, 13, 21]. HFCD serves as a secretariat for the halal certification process. The Brunei government also established a committee comprised of officers from the BIRC, State Judiciary, Agriculture Department, Ministry of Industry and Primary Resources, Ministry of Health, Islamic Judicial, HFCD, and Shariah Affairs Department at MoRA to enforce halal certification [25, 21].

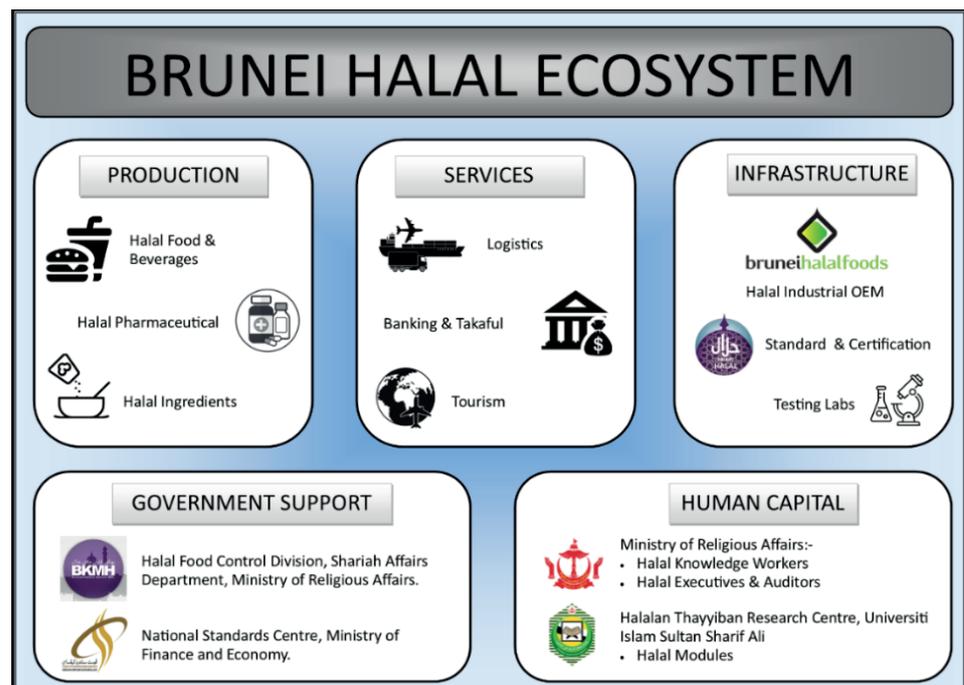
Owners of food businesses in Brunei Darussalam are required to apply for a halal certificate, but non-food businesses that sell things like medicines, cosmetics, consumables, and services can do so voluntarily. [21]. The government announced in July 2017 that it was determined to increase the production and distribution of halal food in Brunei by requiring all businesses involved in the food industry to obtain a halal certification or permit. [13]. To meet the requirements of Muslim consumers, who make up about 78% of Brunei's population, the majority of food products sold in local supermarkets are halal-certified goods.

Meanwhile, Wei Hin, *et al.* [26] mentions that it is undeniable that the development of SMEs contributes significantly to economic growth by raising national income, generating tax revenue, and creating jobs. Nurrachmi [27] also said that nations should embrace this industry as a new source of revenue in light of the global halal market trends. Therefore, during the Brunei Halal Exhibition 2017 (BruHAS 2017), Honourable Pehin Datu Singamanteri Colonel (Rtd) Dato Seri Setia (Dr) Haji Mohammad Yasmin bin Haji Umar, former Minister of Energy and Industry in the Prime Minister's Department, stated that halal food and lifestyle are anticipated to grow to up to USD 3 trillion by 2021. Honourable Pehin recommended that local Micro, Small, and Medium Enterprises (MSMEs) take advantage of this market trend and sell their goods in domestic, regional, and international markets up to a point because of this [28].

As asserted by Wardana, Liano, & Araz [29], by counting the number of halal certification holders, one can gauge the development of the halal industry. Haji Ibrahim [23] pointed out that since the mandatory application requirement was implemented in 2017,

there has been a significant rise in the number of businesses in Brunei Darussalam that have received halal certification. From 2008 to 2020, 376 local companies received a total of 2005 halal certificates and 9240 halal permits, while 29 international companies received a total of 405 halal permits [23]. MoRA revised its halal permit rate to account for the size and scale of businesses that manufacture and produce food for the supply, which increased the number of halal certifications [24, 21].

Additionally, Brunei Darussalam’s halal ecosystem is not covered by a single entity. Halal issues are handled by specific authoritative organisations. The HFCD, the BIRC, and the MoRA oversee and grant authorization for halal certification. The Ministry of Health, on the other hand, is in charge of overseeing the use of cosmetics, dietary supplements, and pharmaceutical products, whereas the National Standard Centre is in charge of issuing halal-related standards, while the Halalan Thayyiban Research Centre has managed the halal education, training and workshops. Lastly, Ghanim International Corporation is promoting Brunei Halal Brand around the world. Figure 5 below may serve as an illustration of the Brunei Halal Ecosystem. Both domestic and foreign markets should be able to be served by the halal ecosystem [30].



Source: Developed by the author for this study

Figure 1: Brunei Halal Ecosystem.

4. Opportunities of the Halal Industry in Brunei

The halal industry has become well-known as a new economic development sector with a significant presence in industrialised countries [31]. The halal sector is expanding quickly across the globe due to its vitality in satisfying Muslim consumers', which could include the world's Muslim population and developing halal markets, whose needs while promoting economic activity and growth. These motivating factors can provide opportunities for the halal sector in Brunei.

The factor driving the expansion of the halal market not only globally but also domestically is the rapid growth of the Muslim population worldwide [32] causing a massive demand for halal products [33], rising consumer awareness [34], and favourable acceptance among non-Muslims. The world's overall Muslim population is predicted to rise further by 35% by the year 2030, reaching 2.2 billion people of the world's population [35], indicating that demand for halal goods and services will continue to grow. Even though the COVID-19 pandemic has struck the growth performance and deteriorated prospects for the halal industry, it is estimated that the size of the global halal market will climb to the USD 6.0 trillion mark in 2024 [36]. The estimated Muslim population by 2050 could reach 2.6 billion, or nearly 30% of the projected global population [37].

Pharmaceuticals, cosmetics, health products, toiletries, and medical devices are now included in the halal industry, in addition to elements of the service sector like logistics, marketing, print and electronic media, packaging, branding, and financing [37, 38, 39, 40]. In recent years, with the increase in the number of affluent Muslims, the halal industry has expanded further into lifestyle offerings including halal travel and hospitality services as well as fashion. This development has been triggered by the change in the mindset of Muslim consumers as well as ethical consumer trends worldwide [38].

Despite the pandemic-related slowdown in global economic growth, OIC countries are predicted to experience faster GDP growth than the rest of the world, according to the State of the Global Islamic Economy Report 2022 [41]. Additionally, the GDP per capita of some OIC nations, including all six of the GCC countries and Brunei Darussalam, is higher than the global average, demonstrating the growing affluence of Muslims around the world [41]. In that case, businesses are beginning to recognise the enormous opportunity that the Muslim consumer represents.

But approaching this market in Brunei is more complicated than approaching other consumer markets with billion-person populations, like India and China [38]. Due to the sizeable and expanding Muslim consumer market around the world, the halal

industry will continue to experience double-digit growth, opening up a wide range of opportunities in the market for halal goods and services. Due to the growing demand for halal products in the international market and the industry's significant economic impact, it has gained national attention [13]. Brunei, therefore, has a chance to develop its halal industry and market the goods outside of Brunei to meet the demands of Muslims around the world.

In addition to the sizeable Muslim population, the industry players in many nations run extensive campaigns to raise indirect awareness of halal goods and services, creating a Halal market force [32]. Consumers all over the world are starting to understand how important Halal is—not just for eating, but also for the ethical principles it upholds. This new consumer need is what has led to the trillion-dollar halal industry.

Countries with a majority of Muslims, such as Saudi Arabia, Pakistan, Malaysia, Indonesia, and other non-Muslim nations, are also performing well in the GIE indicator score. On the other hand, developing markets in nations like Thailand, the Philippines, China, and Singapore indicate potential growth in the halal sector. The emerging markets of all these nations see halal as a way to boost the economy through exports, tourism, value-added services, trade, research, certification skills, training initiatives, a halal science symposium, raw material suppliers, and other factors [32].

The supermarket MyOutlets in Singapore, Nippon Express in Japan, the meat company Banvit in Turkey, Willobrook Farm in the United Kingdom, Halal Exotic Meats, Asada's, HonestChop in the United States, and many others are some examples of up-and-coming new players. A few initiatives have been implemented in the trading zone as a result of the realisation of the size of the halal industry, including the availability of goods that appeal to Muslim consumers, convenient commerce, a prayer hall for nearly 10,000 Muslims, and simple access to halal foods.

Another potential new market for the halal sector is the United States. In supermarkets, there are 86 Kosher products for every halal product. It also claims that because halal goods are unavailable there, US Muslims spend more than \$16 billion annually on Kosher goods. Similar trends can be seen in the UK's halal market, which is expanding at a rate of 15% compared to the country as a whole's average annual growth rate of 1%.

As exports are a significant part of a country's Gross Domestic Product (GDP), Brunei may therefore think about marketing or exporting its goods outside of the country. Unfortunately, as shown in Figure 2 below, Brunei imports more than it exports, especially in terms of food. Halal exports are expected to reach \$1 billion globally by 2030, up from a total of \$50 million in 2016 [32]. Brunei should therefore implement strict measures to increase local halal product production and distribution to both domestic

and international halal markets. A reduction in the reliance on imported goods will eventually result from increasing halal production, which will also indirectly boost export trends and visitor numbers to Brunei.

Other than that, Brunei also had cooperation efforts in halal industry, for example, a Memorandum of Understanding (MoU) on Syariah Compliance Products, Development and Trade between Brunei Darussalam BIMPEAGA Business Council (BD-BEBC) and Taiwan was signed to boost the development of the Halal Economy in the Brunei-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP-EAGA) region, with a focus on Halal products and certifications [42, 43, 44]. This serves as a catalyst and platform for improved connectivity and collaboration between Taiwan, Brunei Darussalam, and the global halal industry.

Furthermore, the individual in charge of overseeing Taiwan's exports of halal goods added that the development of the country's halal industry refers to both the export market and the domestic market [45]. The NSP encourages Taiwanese companies to acquire the required halal certification for the export market to make it easier for their halal-certified products to enter the global market. The NSP policy also seeks to increase the availability of halal-certified local goods and services to draw Muslim tourists and make Taiwan a more welcoming place for Muslims [45].

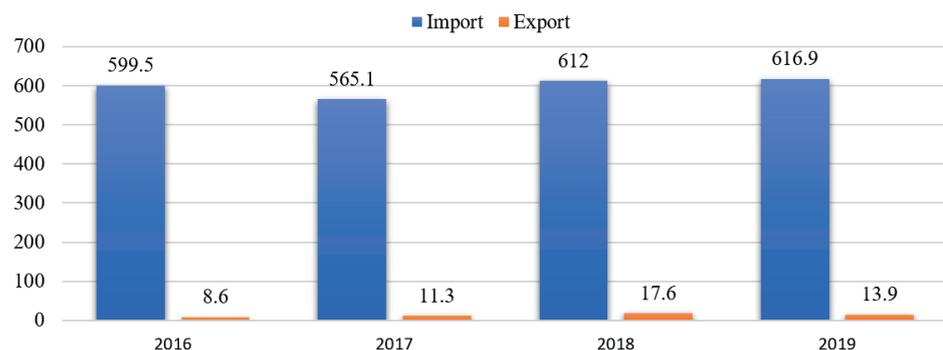


Figure 2: Import and Export of Food in Brunei Darussalam (BND Million).

The local halal industry may also export its goods under the *bruneihalalfood* brand. To pursue economic goals, the *bruneihalalfood* brand has been one of the forces behind encompassing halal industry products, particularly food [13]. It is hoped that the *bruneihalalfood* brand's success will establish Brunei Darussalam as one of the world's top players in the halal sector and help it to realise its objectives of generating employment opportunities for locals and promoting economic diversification.

Apart from that, collaboration with companies provides an excellent opportunity to enter the halal market. For example, projects with Saahtain Foods FZ LC and MPRT,

which specialise in processed ready-to-eat (RTE) food - MREs; were designed to establish a production plant in Brunei to support the development of the halal industry's production and market penetration to the global level [13]. Sahtaain, a Brunei-UAE joint venture, is launching plant-based RTE meals in select retail outlets and will export to Sweden [47].

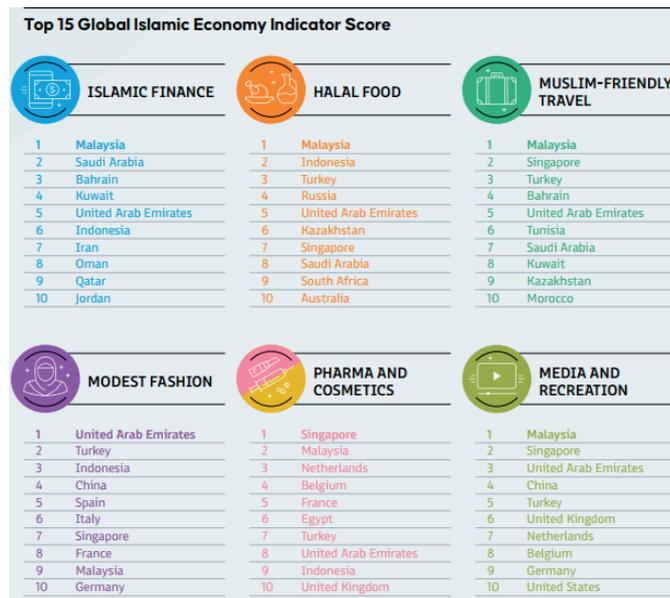
5. Challenges of the Halal Industry in Brunei

While the halal industry has a lot of potentials, it also has a lot of challenges to overcome in order to grow. Despite government initiatives to develop its halal industry, the country ranks low in the Global Islamic Economy Indicator (GIEI). The goal of GIEI is to benchmark the leading national ecosystems that are best positioned to support the development of Islamic economy business activity concerning their size, providing a comprehensive picture of countries that are currently best positioned to address the multi-trillion-dollar global halal economy opportunity [41]. GIEI is also a composite weighted index that measures the overall development of the Islamic economic sectors, i.e. Islamic finance, halal food, Muslim-friendly travel, modest fashion, media & recreation, and halal pharmaceuticals/cosmetics, by assessing the performance of its parts in line with its broader social obligations [41]. All in all, Brunei has dropped out of the top 15 in the GIEI score, from 10th in 2019/20 to not being listed in the Top 15 in 2020/21. Even so, the indicator score rank in the Halal Food sector dropped from 8th to 9th. While the Media and Recreation sector remains sixth. Brunei, on the other hand, is not among the Top 10 indicator score rank in the Pharma and Cosmetics sector in 2020/21. This was demonstrated in Figure 3 and Figure 4.



Source: [48, 49]

Figure 3: GIEI Score Rank 2019/20 & 2020/21.



Source: [41]

Figure 4: GIEI Score Rank 2022. Source: [41].

According to Figures 3 and 4, there are major global halal pioneers in the region, such as Malaysia, the UAE, and Bahrain, which consistently rank in the Top Three countries in GIEI. Malaysia remains in the lead [50] among 83 nations with a majority of Muslims in terms of global Islamic economies for many years based on the GIEI [30] as shown in Table 1. When compared to the halal industries of other countries, Brunei’s halal industry appears meagre [13].

Rank	2015/16	2016/17	2017/18	2018/19	2019/20	2022/21	2022
1	Malaysia (116)	Malaysia (121)	Malaysia (146)	Malaysia (127)	Malaysia (111)	Malaysia (290.2)	Malaysia (207.2)
2	UAE (63)	UAE (86)	UAE (86)	UAE (89)	UAE (79)	S. Arabia (155.1)	S. Arabia (97.8)
3	Bahrain (58)	Bahrain (66)	S. Arabia (67)	Bahrain (65)	Bahrain (60)	UAE (133.0)	UAE (90.2)

Adopted from [30, 41].

Figure 5: Global Islamic Economy Indicator, GIEI 2015-2020 (Top Three Countries). Adopted from [30, 41].

Looking at the supermarket shelves, one can see that there are very few options for local halal products to sell in the market. This is further proven during the COVID-19 global pandemic, from the limited availability of food products to the disruptions in the supply chain. Observing the shelf in the supermarket reveals that certain products are no longer available on the market. This could be due to the difficulty of producing the product in the origin country, as the country implements emergency and quarantine states, which restrict people’s ability to leave the house. Many businesses had their operations severely disrupted by the epidemic, pulling the proverbial rug out from

under them. Over the previous year, significant developments have been noted in the increased attention to food security [41].

Disruptions to the supply chain caused by the pandemic also provided opportunities for localization [41]. Even though some local industries produced a few varieties of frozen food during those difficult times, such as homemade nuggets, consumers still preferred imported products. According to a consumer behaviour survey, the main reason for the halal industry's slow growth is a lack of local halal product marketing and advertising [13]. Lack of promotion results in a lack of appeal to consumers, who prefer imported goods over locally produced goods, indicating Brunei's continued high reliance on imports 80 per cent of its food requirements are met by imports [51].

Furthermore, local halal products are more expensive than imported ones, and consumers believe local goods to be overpriced. Substantial food imports continue to be a disadvantage in a country with a low self-sufficiency rate and a slow development of the food manufacturing industry in Brunei [13]. Given the nation's low rate of food production self-sufficiency and high reliance on food imports, food security has long been a worry for the government and its people [52]. Given Brunei's dependence on imports, this might have influenced the overall price increase [53].

As a result, Brunei must devise stringent measures to address these challenges and turn them into opportunities for growth and development. There is room to improve, so it should look to the success stories of other countries' halal industries for inspiration and benchmarking.

6. Conclusion

Due to a lack of research on the halal industry in Brunei, data collection is unfortunately limited. Additionally, due to accessibility issues and confidentiality concerns, not much data was available for this study to provide details. There are few research works on this topic, and the author encountered difficulties with secondary data.

The current study provides an understanding of the current state or realities of Brunei's halal industry, and as such, future research should actively collect data from stakeholders such as government agencies, halal food manufacturers, halal industry players, and people involved in the sector. Future research also may concentrate on a specific segment of the halal industry, such as halal food, cosmetics, pharmaceuticals, or services. A comparative study of leading halal industries could provide a broader scope for investigating the impacts and viability of industry development.

This study is important because the Brunei government is interested in developing the halal industry as part of its economic diversification plan, which has been discussed as an agenda item in Legislative Council meetings and the National Development Plan. However, Brunei is still a long way from developing a thriving halal industry. Brunei must learn to devise strategies to develop and sustain the country's halal industry in the long run. As a result, every stakeholder, including the government, industry players, and customers, plays an important role in facilitating development, which is a challenge for the industry. Even though stakeholders are frequently competing for the same customers, collaboration and cooperation are also critical to the long-term success of the halal industry in Brunei.

Acknowledgements

We would like to express our gratitude to the Universitas Islam Bandung (UNISBA) as an esteemed organizer of the 5th Bandung Annual International Conference (BAIC) – Social and Humanities Research Symposium (SoRes) 2022 for the opportunity given.

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