
A LOOK THE HALAL FASHION INDUSTRY IN INDONESIA AND THE STRUGGLES IT FACES ON A GLOBAL SCALE

Mowafg Abraham Masuwd
University of Zawia, Libya
masuwd@zu.edu.ly

Abstract

The global Muslim population is widely dispersed, with Indonesia having the largest Muslim majority. The halal industry, including the modest fashion sector, operates within an increasingly competitive global market. This study examines the development and challenges of Indonesia's modest fashion industry within the global halal economy, addressing the critical barriers to its international expansion. Utilizing a qualitative research design with a descriptive approach, this study analyzes data from industry reports, policy documents, and relevant literature. The findings indicate that Indonesia's Global Islamic Economy Indicator (GIEI) score for the fashion sector improved significantly from 2018 to 2021, positioning the country among the top 10 globally. However, this growth aligns with similar trends observed in competing nations, indicating that Indonesia still faces substantial challenges in maintaining its competitive edge. Key barriers include limited access to financing, difficulties in penetrating international markets, evolving consumer demands, inconsistent government policies, and the need for technological advancements in marketing, research, and development. Despite these obstacles, Indonesia's modest fashion industry continues to expand, driven by increasing global recognition and ongoing industry innovation. The study highlights the need for strategic policy interventions and enhanced industry collaborations to strengthen Indonesia's position in the global halal fashion market.

Keywords: Halal Industry, GIEI, Fashion, Indonesia

INTRODUCTION

The halal industry is experiencing rapid global growth, driven by increasing consumer awareness and demand for halal products. In 2020, approximately 1.9 billion people spent around USD 2.2 trillion on halal products across various sectors, including food, fashion, cosmetics, and pharmaceuticals, according to the State of the Global Islamic Economy Report (2021). This figure is projected to reach USD 2.4 trillion by 2024, reflecting a steady compound annual growth rate (CAGR). Indonesia, despite having the largest Muslim population, ranks fourth on the Global Islamic Economy Indicator (GIEI), following Saudi Arabia, Malaysia, and the UAE (State of the Global Islamic Economy, 2021). This ranking highlights Indonesia's potential to strengthen its position in the halal economy while also underscoring the need for strategic development to enhance its competitiveness.

As the country with the world's largest Muslim population, with 87.2% of its citizens identifying as Muslim, Indonesia possesses inherent market advantages for halal industries (Huda et al., 2022). Islam plays a significant role in shaping cultural and economic behaviors, leading to a consistently high demand for halal-certified products. This demand is further reinforced by growing religious awareness and adherence to Islamic principles, as the Qur'an and Hadith explicitly encourage the consumption of halal goods and prohibit the use of non-halal materials (Hamid et al., 2019). Given these factors, the halal industry has the potential to become a crucial driver of national economic growth, provided that the sector is strategically managed to maximize its global reach.

One of the most rapidly expanding sectors within the halal industry is the modest fashion market. Radwan et al. (2019) highlight that a growing segment of the fashion industry adheres to Islamic principles of modesty, which emphasize loose-fitting and opaque clothing that aligns with religious values. Over time, modest fashion has evolved beyond its religious significance to become a distinctive global social identity (Martiana et al., 2018). According to the State of the Global Islamic Economy (2021), Indonesia currently ranks third in the global modest fashion market, behind Turkey and the UAE. However, sustaining and improving this ranking remains challenging due to intense global competition. Countries such



as the UAE, Turkey, and Malaysia are also experiencing substantial growth in their modest fashion sectors, further intensifying market competition.

The development and competitiveness of Indonesia's modest fashion industry are influenced by multiple factors. Research indicates that the rapid expansion of the global fashion industry significantly affects the modest fashion market (Gazzola et al., 2020; Sumarliah et al., 2022). The emergence of new domestic and international designers has heightened competition among modest fashion brands. Additionally, external factors such as raw material affordability contribute to market dynamics. For instance, Zainudin et al. (2020) note that Vietnam and China have strengthened their modest fashion sectors due to cost advantages in textile production, enabling them to offer competitive pricing. Meanwhile, research by Baharuddin et al. (2021) and Lang and Liu (2019) emphasize the importance of customer-driven trends in maintaining the relevance of fashion brands, further demonstrating the need for Indonesia's modest fashion industry to adapt to shifting consumer preferences.

Given the increasing competition and the structural challenges facing Indonesia's modest fashion sector, a comprehensive evaluation of its strengths and weaknesses is essential. Previous studies have examined various aspects of modest fashion, including its business development models (Faried, 2019), consumer perceptions of Muslim fashion brands (Purwanti & Adinugraha, 2021), market influences on the industry (Radwan et al., 2019), service strategies for modest fashion businesses (Bardakçı et al., 2021), and broader opportunities and challenges within Indonesia's halal industry (Fathoni, 2020). However, there remains a need for an in-depth analysis of the modest fashion sector within the framework of international competition, particularly in understanding how Indonesia can strengthen its global standing.

This study seeks to address this research gap by analyzing the key characteristics, competitive factors, and challenges faced by Indonesia's modest fashion industry on the global stage. By examining market trends, government policies, and industry strategies, this research aims to provide insights into how Indonesia can enhance its competitiveness and capitalize on its potential within the global halal fashion industry.

LITERATURE REVIEW

The Rise of Modest Fashion: Worldwide Trends

Modest fashion has become an essential element of the global fashion industry, propelled by a growing demographic of Muslim consumers desiring clothing that conforms to their religious and cultural principles (Al-Shehab, 2020). The global modest fashion market, encompassing Muslim-majority areas like the Middle East, Southeast Asia, and certain regions of Europe, is experiencing tremendous growth. Indonesia, the largest Muslim-majority nation, significantly influences this industry. The emergence of modest fashion is associated with significant changes in the societal understanding of modesty, as designers emphasize both aesthetics and modesty (Koch, 2020).

Tarmizi and Ahmed (2018) assert that worldwide modest fashion is motivated not only by religious requirements but also by an increasing demand for inclusivity and diversity in the fashion industry. Indonesia's fashion industry, which integrates contemporary aesthetics with Islamic traditions, significantly influences international trends.

The Role of Indonesia in the Halal Industry

Indonesia is a significant participant in the halal economy, which includes industries such as food, cosmetics, finance, and fashion. The halal economy, founded on Islamic concepts of purity and cleanliness, is experiencing rapid expansion, with fashion emerging as a significant industry (Omar & Ahmad, 2019). The modest fashion industry in Indonesia is bolstered by governmental assistance and a growing middle-class Muslim demographic that seeks fashionable yet modest apparel. The State of the Global Islamic Economy Report 2020 by Thomson Reuters indicates that Indonesia is a prominent nation in halal consumer expenditure, including halal fashion.

Research by Sari et al. (2020) indicates that Indonesia's modest fashion industry is poised for expansion, propelled by robust domestic demand and the global allure of its designers. Indonesian fashion manufacturers are incorporating traditional textiles such as Batik and Tenun into their designs, merging cultural history with modern modest styles, thereby appealing to global shoppers in search of authenticity in halal fashion.

Obstacles in Indonesia's Modest Fashion Sector

Although Indonesia has successfully expanded its modest fashion sector, certain hurdles hinder its worldwide competitiveness. A significant challenge is the fierce competition from other nations in the halal fashion industry, particularly Turkey, the United Arab Emirates (UAE), and Malaysia (Kadir & Nordin, 2020). These nations have already secured robust positions in the halal fashion business through innovation, branding, and global collaborations.

Mahmud and Ariffin (2017) contend that Indonesian designers face challenges in entering the international market due to insufficient global recognition, inadequate brand positioning, and restricted access to premium production networks. Notwithstanding Indonesia's abundant textile tradition, Indonesian fashion designers encounter considerable obstacles in expanding their enterprises globally, attributed to logistical impediments, variable quality standards, and insufficient formal education in international fashion business methodologies.

Ihsan and Rahman (2021) observe that despite the Indonesian government's progress in advancing halal certification, the absence of a cohesive norm for halal fashion remains a persistent obstacle. The absence of regulation and standardization may result in consumer misunderstanding and challenges in conforming to worldwide halal certification criteria, so impacting both domestic and international market access.

Prospects for Development and Market Proliferation

Indonesia's tiny fashion sector presents significant growth prospects, particularly in the international market. A notable opportunity is the digital transformation of the fashion sector. Hidayat & Fadilah (2019) assert that Indonesia's modest fashion firms have been utilizing e-commerce and digital channels to expand their customer reach. Platforms like Instagram and various social media outlets have empowered Indonesian designers to present their creations to worldwide audiences, dismantling conventional barriers to entrance into international markets.

A further interesting opportunity lies in collaboration with global retailers.

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Almashhuri and Ashari (2022) contend that collaborations with big fashion shops can enhance the international market presence of Indonesian companies. Furthermore, the growing global awareness of sustainably and ethically presents Indonesian modest fashion firms with a competitive edge, especially as numerous Indonesian designers prioritize eco-friendly and fair-trade procedures.

RESEARCH METHOD

This study employs a qualitative research approach with a descriptive methodology to examine the development and challenges of Indonesia's modest fashion industry within the global halal industry. The research is exploratory, aiming to provide an in-depth understanding of the sector's growth, competitive dynamics, and barriers to international market expansion.

The research relies on secondary data sourced from academic publications, industry reports, government documents, and global Islamic economy reports. Data from the State of the Global Islamic Economy Report (2021) and other relevant literature provide insights into market trends, economic indicators, and challenges faced by Indonesia's modest fashion industry. Additionally, statistical data from official sources, including trade and economic performance reports, are utilized to substantiate the analysis.

A content analysis method is employed to systematically examine the collected data. This involves categorizing the information into thematic areas such as market performance, regulatory challenges, technological adoption, and international competitiveness. Comparative analysis is conducted using Global Islamic Economy Indicator (GIEI) scores from 2017 to 2021, allowing for an assessment of Indonesia's positioning relative to other key players in the modest fashion industry, such as Turkey, the UAE, and Malaysia.

To ensure the reliability and validity of the study, data triangulation is applied by cross-referencing multiple sources, including peer-reviewed journal articles, industry white papers, and governmental reports. The study also incorporates trend analysis techniques to identify patterns in market growth and policy shifts that impact Indonesia's modest fashion



sector. Furthermore, findings are critically compared with prior research to validate conclusions and enhance credibility.

RESULTS AND DISCUSSION

Items prepared in the halal sector adhere to Sharia standards, guaranteeing they are helpful, healthy, safe, and non-harmful. As a result, they can be enjoyed or used without restriction (Peristiwo, 2019). Akram (2022) and Ikhwan (2021) cite the following seven areas of the halal economy as being important: halal food, halal finance, halal travel, halal modest fashion, halal media and recreation, halal pharmaceuticals, and halal cosmetics. What follows is an analysis of modest clothing. To be considered halal, modest fashion is easily identified by its distinctively non-revealing, opaque, and form-fitting garments. A group of modern fashion designers has emerged to create modest yet stylish clothing (Lewis, 2013; Ajala, 2017; Rosenberg, 2019).

The growth of social media, the emergence of a new ethos among fashion designers, and the increasing number of Muslims around the world are all factors that have contributed to the increase in demand for modest clothing (Lekhdar et al., 2021). Therefore, the high demand for Muslim clothing has probably played a major role in the recent growth of modest fashion (Farrag & Hassan, 2015; Khurotul et al., 2019).

Since 2010, Indonesia's Muslim fashion sector has grown. Since a large percentage of Indonesians adhere to Islam, this industry is booming to meet the huge demand. A halal lifestyle, which includes clothing choices, is becoming more important as Muslims become more conscious of the need to do so. In Indonesia, modest clothing has developed over time. According to the Indonesian Islamic Economic Masterplan 2019–2024, Table 1 shows the achievements of the modest fashion sector in Indonesia.

Table 1	
Achievements of Indonesia's Modest Fashion Industry	
Criteria	Achievement
Employment	29%
GDP	28.6%
Export value	USD 7.18 billion

The term "labor absorption" describes the number of workers that a company has on hand. (Woyanti and Amalia, 2020). Employment availability is shown by the level of acceptance of work circumstances by job searchers. A company's labor absorption rate is a measure of how much labor is required to make a product (Maulana et al., 2020). An increasing need for workers is a sign that the sector is growing. Amalia and Woyanti (2020) state that new opportunities will arise as a result of the proliferation of enterprises. According to Boukhatem and Ben Moussa (2018) and Ledhem and Moussaoui (2021), GDP is used as a measure of economic growth in the halal sector, and the effectiveness of Islamic finance is greatly affected by funding. The small fashion business has a big influence on Indonesia's economy, accounting for 28.6% of the total. Its high export value of \$7.18 billion increased both its worth and the money the country made (Bohn et al., 2021). As a result, Indonesia's modest fashion industry has greatly boosted the country's economy, benefiting the people through increased government income and job opportunities. Table 2 displays the GIEI score for the modest fashion industry from 2017 to 2021, together with the State of the Global Islamic Economy Report for the same period.

Table 2
Modest Fashion Sector Score based on GIEI in 2017–2021

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

Table 2 and Figure 1 show the modest fashion sector score, which is based on measures like awareness (number of news articles and events), social factors (clothing pricing and labor equity index), and supply drivers (country size concerning clothing exports to Organisation of Islamic Cooperation countries). The scores of the Malaysian and Indonesian industries showed a general improvement from 2018 to 2021, according to data from 2017 to 2021. Both Turkey and the UAE have similar results. However, 2019 was a slump for Turkey, and 2020 was a downturn for the UAE. With a small drop in 2020 and a large increase



in 2021, the UAE's modest fashion sector achieved a good grade (Table 2 and Figure 1). Because of this, the UAE was able to keep its crown as the world leader in a modest fashion for a while.

Products are considered halal if they have received the Islamic law certification in accordance with Law No. 33 of 2014. Products that have been certified as halal according to Islamic law include food, drinks, medications, cosmetics, chemical substances, biological products, genetically modified objects, and publicly used items. Following the GIEI, these domains encompass halal medicine and cosmetics, halal cuisine, halal banking, halal tourism, modest clothing, and halal entertainment. The modest fashion industry in Indonesia has been steadily improving its score according to the GIEI since 2018, indicating that the country has made significant strides in this area. However, similar developments in other countries have led to fierce rivalry for Indonesia's fashion business, especially from Turkey, Malaysia, and the United Arab Emirates. Table 3 shows the factors that go into determining the GIE rating for modest fashion, which includes sector score, awareness score, social score, and apparel exports to OIC nations. Malaysia and Indonesia joined the top ten in 2018 and 2019, respectively, according to an analysis of the top four nations for modest fashion. With its recent rise to number two in the modest fashion sector, Indonesia has achieved a remarkable milestone, as reported by the GIEI. In the small scoring area, the United Arab Emirates was the leader from 2017 to 2021. Except for 2019, Turkey ranked second in the modest fashion sector from 2017–2021. From 2019 through 2021, Malaysia remained ranked fourth in a reasonable fashion.

According to Radwan et al. (2019), modest fashion has successfully contributed to the formation of an Islamic identity on a worldwide scale by providing modest clothing that is closely associated with Islam. As a world leader in modest design, the United Arab Emirates (UAE) displays styles that will influence future norms and ideas about women's empowerment and practicality. There have been no major shifts in the UAE's fashion paradigm as a result of globalization. What this means is that despite drawing inspiration from the West, designers may create modern pieces without using Western-style fabrics or styles

(Gupta, 2021). It is well-known that Turkey acts as a bridge between the European and Asian markets. The use of high-quality materials and designs contributes to the progress of modest fashion in Turkey (Bardakcı et al., 2021). With the rise of e-commerce and other forms of digital marketing, modest fashion has flourished, giving rise to new brands and a wide range of styles from established designers. Critical aspects in the advancement of modest fashion include the introduction of new commodities like sportswear and fierce price rivalry (Hwang & Kim, 2021; Radwan et al., 2019). The models differ following the various tastes of designers.

With a score that is far lower than the UAE's, Indonesia has competition from other continuously developing nations and is currently ranked third in modest fashion. Getting to the top of this field is especially difficult for Indonesia. Table 4 shows the various problems that Indonesia has in the modest fashion industry, based on the results of the 2018 forum group discussions held by the Indonesian Ministry of Industry.

Table 4
Challenges Faced by Indonesia's Modest Fashion

Aspect	Challenge
Demand and Market	Many Western brands are developing in Modest fashion Weak access to international markets China offers modest fashion products at more competitive prices
Technology and Information	Implementation of the use of information technology is still low
Regulation	Not yet uniform policies of the central government and local governments
Financing	Financial institutions don't understand the creative industry Financial institutions still need tangible guarantees, most of which cannot be met by business actors
R&D	Lack of research on market movements, segmentation, and market tastes

Indonesia is confronted with difficulties in the small fashion sector due to issues with the market, IT, government rules and regulations, funding, and R&D. Models, pricing, and intended audiences are all facets of marketing that influence consumer demand. We still need to optimize the broader goal to the foreign market because it is weak. The fact that social media and other technical advancements are impacting fashion trends is another obstacle.

Islamic dress culture has made a comeback because of these factors, and it has even made its way to Western nations (Kamarulzaman & Shaari, 2020).

Because Muslims are found throughout the globe, modest clothing has a large potential customer base. The majority of Italian Muslims still rely on more conventional forms of advertising like magazines, radio, direct mail, and billboards to satisfy their needs, and Italian designers have failed to tap into the Muslim market in other Islamic nations, all of which pose challenges to the growth of modest fashion in Italy. According to Radwan et al. (2019). Information regarding the five most important buyers of modest clothing worldwide in 2023, as stated in Table 3 of the State of the Global Islamic Economy Report 2020–2021, provides credence to the magnitude of the worldwide target market.

Table 3
Highest Consumers of Modest Fashion in the World in 2023

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

Worldwide modest fashion consumption hit \$297 billion in 2023, with Indonesia's modest fashion consumption coming in at a pitiful \$16 billion. Approximately 5.78 percent of the world's modest fashion consumption occurs in Indonesia, making it the fifth biggest consumer in this category. The fact that 94.22 percent of consumption occurs in such a wide variety of worldwide regions suggests a sizable untapped market. This result is in line with previous research that shows the halal fashion industry in Indonesia has good economic potential, as seen by the increasing demand for halal fashion among Muslims. With a large Millennial and Gen Z population that is tech-savvy and e-commerce is on the increase, Indonesia has a demographic dividend that might propel its economy forward (Jailani et al., 2022). It can be inferred from this that more extensive segmentation on a global level hinders progress.

There are obstacles to the development of modest fashion in Indonesia from models who adopt plain Western patterns and lower pricing for Chinese products. The lower production costs in China are the reason why fashion there is so inexpensive. Research has shown that there are a lot of factors that contribute to the significant differences in manufacturing costs between China and South Korea. These include the number of employees, monthly wages, the duration of garment production, and the expenses related to the basic design and details of blouses, trousers, and jackets (Kim et al., 2016). Technology, in addition to cheap labor, is a key factor in China's garment industry's ability to maintain competitive prices. Due to a lack of skilled designers and other human resources, China's fashion sector faces challenges, calling for strong government support (Zhang et al., 2016).

Modern fashion models in the market can be better understood with the help of quickly developing information technology, but there is still a lack of adequate marketing and usage in Indonesia. For R&D purposes, this poses a problem. Better marketing campaigns are possible with the use of IT (Bessen, 2020). Data about customer tastes and needs can be more easily collected with the use of IT in marketing, which in turn helps with digital advertising and promotion (Leonow et al., 2019). The manufacturing sector's productivity was positively and statistically significantly affected by information technology, according to previous studies. This is related to how well the technology uses time (Abri & Mahmoudzadeh, 2015).

Inconsistent regulations govern modest fashion in Indonesia. Products that are "worn, used, or utilized," derive from animals, or contain animal components are required to have halal certification according to Law (UU) Number 33 of 2014 on Halal Product Assurance (JPH). As an example of a regulation from another jurisdiction, the Regional Regulation of the Province of the Special Region of Aceh Number 5 of 2000 Regarding the Implementation of Islamic Sharia Article 15 states that all Muslims, whether male or female, must dress according to Islamic teachings when interacting with family and neighbors. Emerging sectors greatly benefit from institutional support from the government. According to Georgallis et al. (2019), regulations that are conducive to a new industry's development can help it get off the ground and thrive.

Most entrepreneurs in Indonesia don't have the qualifications, certificates, or business plans that are required by Indonesian financial institutions since these institutions don't understand the creative industry. According to research (Rita & Wahyudi, 2019), financing has a significant positive effect on business performance. Problems with getting bank financing, legal concerns, and finances all work together to slow down the industry. Concerning the industry's ability to fund large-scale projects and encourage the creation of new endeavors, this is relevant. One advantage of the small fashion sector's expansion in the UAE is the accessibility of finance (Zarrouk et al., 2020).

CONCLUSION

Indonesia's halal modest fashion industry has demonstrated significant growth, driven by increasing global consumer awareness, design innovations, and government policies. However, this study identifies several challenges that hinder its global competitiveness, including limited access to international markets, inconsistent regulations, suboptimal adoption of technology, and inadequate research and development (R&D). Additionally, intense competition from other key players such as the United Arab Emirates, Turkey, and Malaysia further complicates Indonesia's efforts to establish a dominant position in the global modest fashion market.

Despite these challenges, substantial opportunities exist for further industry development, particularly through the utilization of e-commerce, digital marketing, and the integration of sustainability in design and production. A strong synergy between the government, industry stakeholders, and academia is essential to fostering policies that enhance innovation and competitiveness within Indonesia's modest fashion sector.

From both academic and practical perspectives, this study provides insights into strategies for strengthening Indonesia's position in the halal modest fashion industry, focusing on regulatory frameworks, market expansion, and product innovation. Furthermore, it highlights the need for future research employing primary data to gain deeper insights into market trends, consumer preferences, and other critical factors influencing industry growth.

By addressing key challenges and leveraging available opportunities, Indonesia has the potential to emerge as a global leader in the halal modest fashion industry. Implementing strategic and sustainable measures will be crucial in ensuring the continued growth and resilience of this industry amid the increasing competitiveness of the international market.

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