

Indonesia Halal Diplomacy: Strategizing Nation Branding to Win Global Market

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ARTICLE INFO	ABSTRACT
Date received: 29 August 2024 Revision date: 27 October 2024 Date published: 01 November 2024	Indonesia aspires to be the global champion in the halal industry. The growing domestic halal industry and halal economy lay the groundwork for entering the global halal market. The study examines Indonesian halal diplomacy by observing the halal industry's development and the progress of foreign relations to illuminate Indonesia's strategies to win the global halal market. The research method is qualitative, using pertinent publications and field observation. The findings indicate that, despite Indonesia's efforts to win the global halal market, it is still far from achieving its goal. The study posits that to enhance halal diplomacy, Indonesia has the opportunity to leverage its nation branding as a contemporary Muslim-majority nation, where the populace embraces a halal lifestyle. The study suggests that the consolidation of nation branding, fostering a domestic halal ecosystem, government orchestration, and public participation will develop and sustain halal diplomacy.
Keywords <i>halal industry;</i> <i>nation branding;</i> <i>global markets;</i> <i>halal diplomacy</i>	
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INTRODUCTION

Indonesia seeks to dominate the global halal market (Kemenag RI, 2022a; Kemenko Perekonomian RI, 2022; Sekretariat Wapres RI, 2021a). As a country with the largest Muslim population in the world, 231 million Muslims, Islamic lifestyles such as halal conduct influence Indonesian culture. Halal is a fundamental Islamic principleⁱ, that Muslims observe in their consumption and conduct. Indonesian Muslims also adhere to the halal protocol especially for food and beverages (hereafter F&B), resulting in a high market demand that creating a robust domestic industry. The Indonesian halal market strategy is market expansion, with global consumer spending revenue increasing to USD 3.1 trillion in 2027 (DinarStandard, 2023, p. 21). Without exclusively targeting Muslim-populated countries, the Indonesian president, Joko Widodo (2014–2024), proposes the halal industry in its bilateral and multilateral cooperation. Indonesia's global halal market expansion is supported by halal diplomacy.

Discussion on the Indonesian halal industry and lifestyle has been inundating the halal studies, such as studies by Adinugraha and Sartika (2019), Adriani and Ma'ruf (2020), Aisyah (2016), Amalia et al. (2020), Arsil et al. (2018), and Susilawati et al. (2024). However, the topic of Indonesian halal diplomacy remains largely unexplored. Akim et al. (2023), Anggara (2017), and Hidayati (2023)

ⁱ Halal is the foundation of Islamic faith mentioned in Islam's holy book, the Qur'an, and the Islamic corpus of Prophet Mohammad's sayings, the Hadith. Nafis (2019) defines halal as all that is good for the body, mind, and soul. The tenets of halal describe what is permissible to ingest and the lifestyle required to support it. Halal rigorously adheres to Sharia, the divination of Islamic law as defined by Allah or God (Nurhayati, 2018).

discuss the halal industry as an instrument to support trade relations between two countries. Studies by Abdullah and Azam (2020), Qolby and Astuti (2024), and Tajudin and Kaswoto (2023) discuss the halal industry in its potential for multilateral cooperation under economic diplomacy. Fithriana (2019) discusses the potential of halal food as a tool for soft power in public diplomacy. Indonesia's ambition to become a winner in the global halal market is discussed by Akim et al. (2024) and Wargi (2021), who review the Indonesian foreign policy and leadership to attain such ambition. Our study intends to explore halal diplomacy.

Halal diplomacy can be regarded as a subset of two primary streams of diplomacy: economic diplomacy and public diplomacy. Economic diplomacy is more conventional diplomacy with other governments or government-affiliated bodies as the actors and targets. The nature of the economic diplomacy affair is government-to-government (G2G), with the goal of enhancing the country's economy through cooperation with other countries. Public diplomacy, on the other hand, targets the public of other nations with non-state actors' active involvement in addition to the government's efforts. Public diplomacy sees government and public as both actors and targets, with two forms of relations that are government-to-public (G2P) and public-to-public (P2P). Snow, (2020, p. 11) suggests that public diplomacy has moved beyond one-way informational gestures to interactive and reciprocal information exchange with the public for influence and persuasion. Under economic and public diplomacy activities, halal diplomacy will strengthen Indonesia's economic growth and attract recognition towards Indonesia.

This study analyzes Indonesian halal diplomacy's strategy by observing the halal industry's development and the progress of foreign relations to explicate Indonesia's attempts to win the global halal market. In the process, we delve into how the halal lifestyle of Indonesian Muslims serves as the cornerstone of halal diplomacy. We offer the emulation of nation branding to enhance Indonesia's positioning in halal diplomacy. Halal in this study is perceived as a term that extends beyond its association with F&B (Nafis, 2019), and includes other the halal industry sectors: tourism, fashion, and cosmetic products, and the financial sector.

RESEARCH METHOD

This study employs qualitative research (Bloor and Wood, 2006), to identify how Indonesia's halal diplomacy is structured and influenced by actors that are mostly state. In specific, the qualitative evaluation approach is used to measure the efforts of developing the halal industry, its instrumentalization in halal diplomacy, and the interim result to date. The data collection method is case studies by reviewing relevant publications, including journal articles, reports, policy papers, and regulations concerning Indonesia's halal diplomacy development from 2013 to 2023, also observation of the halal diplomacy practices during 2020-2023. Time periodization applies to allow focus on recent developments of the global halal industry. The analysis methods is interpretive qualitative methods with triangulation to the findings of the literature review, grey literatures, and field observation. To evaluate the findings, the analysis follows the theoretical framework of nation branding that resulted in academic-based suggestions to improve the halal diplomacy practice.

Nation Branding

Nation branding seeks to construct an image through calculated messages that appeal to the international public, with the ultimate objective of leveraging the country's power and influence (Aronczyk, 2013). According to Dinnie (2009), nation branding encourages stronger international partnerships to strengthen nation-building and increase international political influence. Gudjonsson

(2005) asserts that nation branding occurs when a nation uses its power to positively influence, alter perception, and modify its behavior and identity. The purpose of nation branding is to entice and persuade the global public to accept a created message.

Nation branding also refers to the marketing notion of recruiting users. Countries disseminate nation branding to attract visitors, investors, and business partners. The nation brand generates international recognition through marketing strategies and media landscape penetration (Aronczyk, 2018, 2013; Fan, 2006). According to Viktorin et al. (2018), brands initiate popular recognition and resonance in collective understanding; then, the passing of a consistent message drives people's motivation. Moreover, nation branding intersects with markets, encouraging the propensity to monetize consumption of material commodities, investments, or in-depth knowledge about a country (Browning, 2016). To be successful, a nation brand must be in line with the milieu of the nation, such as the popular culture and trends in society (Dinnie, 2009). The embedded message may contain various facets such as place, people, history, culture, language, or well-known individuals (Fan, 2006). Therefore, in light of pursuing the ambition of becoming the global halal market's champion, nation branding is an in-line strategy.

Nation branding departs from the nation's uniqueness and identity. Indonesia's nation branding concerning halal lifestyle can be grounded on the fact that Indonesia is a democracy, home to the largest Muslim population globally that enjoys positive economic growth. The halal lifestyle started to grow during the post-Suharto's authoritarian regime, marking Indonesia's democracy era, in which the halal lifestyle became an alternative expression of Muslim politics (Halimatusa'diyah and Akmaliah, 2023; Hasyim, 2023). In 2024, population of Indonesian Muslim reaches 231 million, equal to 13% of the world's Muslim population and 86.7% of the nation's population (World Population Review, 2024). Correspondingly, Indonesia's peaceful multicultural communities are an asset to reinforce the nation branding as it sets Indonesia away from other Muslim populates nations. This combination of characteristics creates a brand or unique feature of halal lifestyle that sets Indonesia apart from other halal industry players and qualifies Indonesia's standing in the international community as the halal trendsetter. The people's halal lifestyle supports Indonesia's pioneer status in the global halal industry, and in times will garner recognition and enhance Indonesia's positive image.

RESULTS AND DISCUSSION

Market Driven Domestic Halal Economy

Domestic halal market burgeons due to the halal lifestyle of the population. Halal principle has influenced Indonesian Muslims' values, habits, and needs opening an opportunity for commercialization. Jailani and Adinugraha (2022) suggest that halal factors derived from religiosity, belief, or deliberate behavior become a tool for lifestyle commercialization. Adinugraha and Sartika (2019) find that a halal lifestyle becomes a need if it is required to ensure protection for Muslim consumers, and a want when it becomes a preference for a certain lifestyle. Thus, when halal lifestyle becomes Indonesian Muslims' need and the want, it influences their purchasing behaviors. The halal purchasing intent is influenced by Islamic religiosity, halal knowledge, and attitude (Adriani and Ma'ruf, 2020; Aufi, 2021; Kusumawati et al., 2020). Because religiosity influences purchasing decisions, Islamic religiosity will increase purchase intention and, simultaneously, halal knowledge and attitude towards halal products.

The Muslim population and their consumption preferences support the domestic halal market. Halal awareness is found among 98% of Indonesian Muslim customers (Bank Indonesia and DinarStandard, 2022). On food products, Amalia et al. (2020) study discovers that the Muslim millennial age group's purchases of food are shaped by their religion rule, which is halal. The Generation Z age group exhibits a similar preference for halal products (Febriandika et al., 2023). With Indonesian millennials and Generation Z, respectively, having reached 25.87% and 27.94% of the 270.20 million population in 2020 (BPS Indonesia, 2021), the potential for the halal food market is abundant.

The halal industry was, among others, a force behind Indonesia's economic recovery from the COVID-19 pandemic (Bank Indonesia, 2023b). The halal industry brought a positive recovery phase in food, fashion, and tourism that reached 2.11% of the national total number of 5.1% (Bank Indonesia, 2023a). Positively, domestic spending on halal products and services reached around USD 184 billion in 2020, with national domestic spending at USD 584 billion (Bank Indonesia, 2023a). It is predicted to continue growing by an estimated 14.96% to around USD 282 billion in 2025 (The Jakarta Post, 2022). From all of the halal industry sectors in Indonesia, the F&B holds the highest consumer spending value, with 135 billion USD in 2020 or around 73% (Bank Indonesia, 2023a). The halal economy is always a foundation of the Indonesian economic recovery, as the majority of the population embraces halal lifestyles.

Domestic Islamic Financial Ecosystem

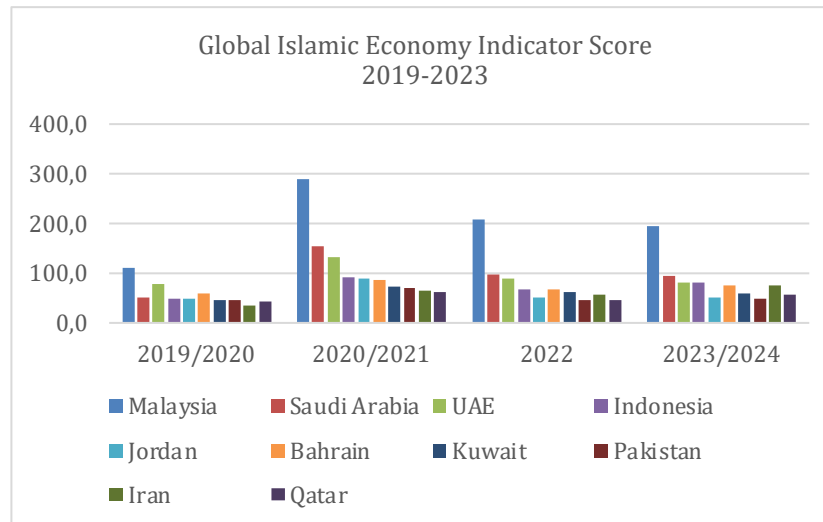
Indonesia, with the vast Muslim population and a growing economy, is fertile ground for the Islamic finance development. Islamic finance has distinctive instruments and features compared to conventional financial instruments as it is based on the Islamic rule or Sharia (Nurhayati, 2018). Sharia economy manifests through Sharia banks, Islamic mutual funds, and the Sharia capital market. Additionally, there are other instruments for Sharia's capital generation, such as Muslims' obligatory charity (zakat), Islamic philanthropy act (wakf), and the Islamic financial certificate or Islamic bond (Sukuk) (Meriyati et al., 2022).

Indonesia's global market entry strategy is driven by its halal ecosystem. Figure 1 shows Indonesia's Islamic economy growing consistently over time. Indonesia rose to third in 2023 (DinarStandard, 2023) from tenth in 2018 (DinarStandard, 2019, p. 5). Even though Malaysia has long led, Indonesia's halal ecosystem is growing. Due to its system, cooperation, and processes based on its huge Muslim population, the Indonesian halal market has helped domestic production expand.

Indonesia aspires to lead the global halal industry and the global center for the Sharia economy. The Sharia economy is the backbone of the halal industry ecosystem. In 2015, the government launched the Masterplan of Shariah Economy Architecture (Bappenas, 2016), and the Masterplan of Indonesia Sharia Economy 2019-2024 in 2018 (Kementerian PPN/Bappenas, 2018). The masterplans outline the Islamic finance ecosystem by addressing the roles of both state and non-state actors and identifying indicators, obstacles, and goals to achieve national-level targets. To carry out the plan, in 2016, President Jokowi established the National Committee on Islamic Finance (KNKS), transformed into the National Committee for Sharia Economics and Finance (KNEKS) in 2020. The Indonesian Central Bank listed Sharia finance economic development as one of four pillars in its 2024 economic policy direction to achieve an inclusive and green economic-financial policy (Bank Indonesia, 2023a, p. 115). Indonesia has seen the development of Islamic financial ecosystem as can be seen from Figure 1, in which in 2023 Indonesia ranks third out in Global Islamic Economy Indicator Ranking after ranks four in 2022, and fifth in 2019.

Figure 1. Global Islamic Economy Indicator Score from 2019-2023

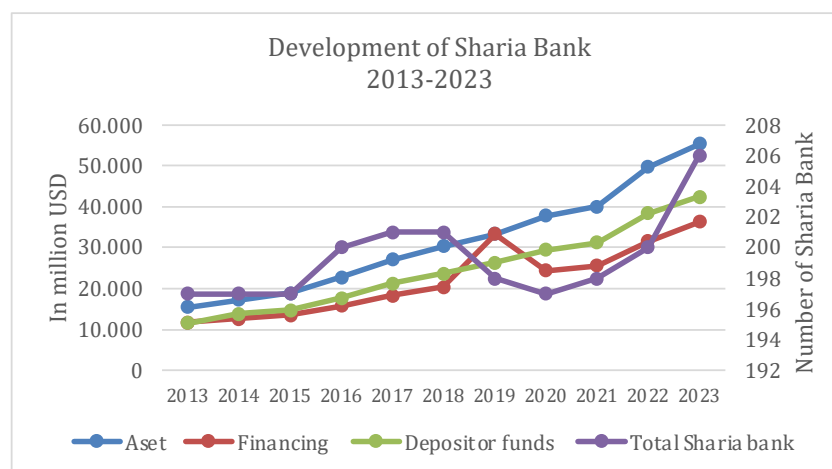
Source: The State of the Global Islamic Economy Report 2019-2024 processed (DinarStandard, 2023, 2022, 2020, 2019)



The growth of Indonesia's Islamic financial sectors can also be seen from the growth of Sharia banks in Figure 2. From the annual reports of the Indonesia Financial Service Authority (OJK) from 2013 to 2023, Indonesia's Sharia banks' assets have grown from USD 15.4 million in 2013 to USD 55.31 million in 2023. The increase is 7.27% based on the year-over-year market share of Indonesia's banking industry (OJK, 2023a). Similar trends happened to the financing and depositor funds, as can be seen from Figure 2 below.

Figure 2. Development of Sharia Bank

Source: OJK annual reports from 2013 to 2023ⁱⁱ, processed (OJK, 2023b, 2023c, 2022, 2021, 2021, 2020, 2019, 2018, 2017, 2016, 2015, 2013)

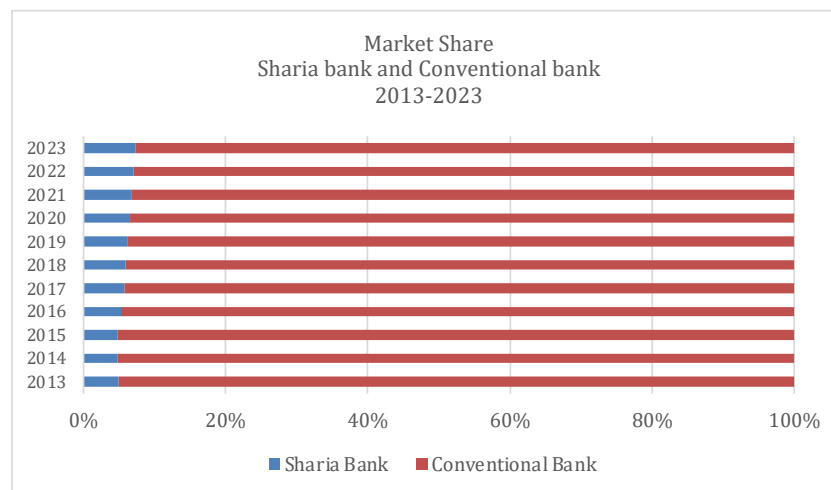


ⁱⁱ In addition to the amount of asset, financing and depositor funds, we also calculate all categories of Sharia banks.

Nevertheless, despite the positive growth of Indonesian Islamic finance, it is still far below its potential, considering the Indonesian Muslim demography and the market share with conventional banks (Figure 3). The situation shows Indonesia's domestic halal industry potential.

Figure 3: Market Share: Sharia Bank and Conventional Bank

Source: OJK annual reports from 2013 to 2023, processed
(OJK, 2023b, 2023c, 2022, 2021, 2020, 2019, 2018, 2017, 2016, 2015, 2014, 2013)



To lure halal industry investors, the government provides incentives and acknowledgement to the private sector. The Government Regulation Number 39/2021 concerning Halal Industrial Estate (HIE)ⁱⁱⁱ promulgated industrial areas as a one-stop-service to assist global investors in joining the industry and producing halal products, from standardization to market penetration. Festivals and awards are held to encourage businesses, social enterprises, micro, small, and medium enterprises (MSMEs), and other actors to contribute to the development of the halal industry. Since 2014, Bank Indonesia has held the annual Indonesia Sharia Economic Festival (ISEF), an international festival that promotes various activities under the sharia economy.

Certification

Product certification is indispensable for the halal industry, particularly in the F&B products. Halal-certified products validate a sense of security for the consumer as they are in line with religious teaching (Arsil et al., 2018). A certified product's logo helps consumers recognize its halal value. Indonesian consumers use the no-pork containment principle, validated by the product's certification, as the basis for halal value. A survey conducted by Populix (2023) shows that Indonesian Muslim customers prioritise the halal logo as a standard when buying their F&B products and believe that it is a must to improve halal food distribution in Indonesia.

ⁱⁱⁱ Three HIE were established, namely the Halal Modern Valley in Banten Province; Safe Lock Halal Industrial Park in East Java Province; and Bintan Inti Halal Hub in Kepulauan Riau Province. West Nusa Tenggara Province will also establish two HIEs.

To ensure the certification status on domestic products, the Law No. 33 of 2014, concerning the Halal Product Guarantee, stipulates the halal value. Further, the government issued Government Regulation Number 31/2019, which made halal certification and registration for F&B products mandatory. This regulation is followed by Government Regulation in Lieu of Law Number 2/2022 and Presidential Regulation Number 6/2023. An agency under the Indonesian Islamic Clerics Council, namely the Institute for the Assessment of Food, Drugs, and Cosmetics (LPPOM-MUI), conducts Indonesian halal standardisation. The Halal Product Assurance Organising Body (BPJPH) is responsible for implementing halal product guarantees. To support MSMEs accessing halal certification, the Ministry of Religion launched the SEHATI program. Indonesia aimed to achieve 10 million halal certifications in 2024, where all F&B products must bear the halal logo by October (Jurnal Halal, 2023). However, until March 2025, the number of halal certificates only reached 3.8 million, prompting the government to extend the obligation to have halal certification to October 2026 (RRI, 2025). Indonesia's halal certification efforts become a halal diplomacy tool as many cooperation are based on the certification process.

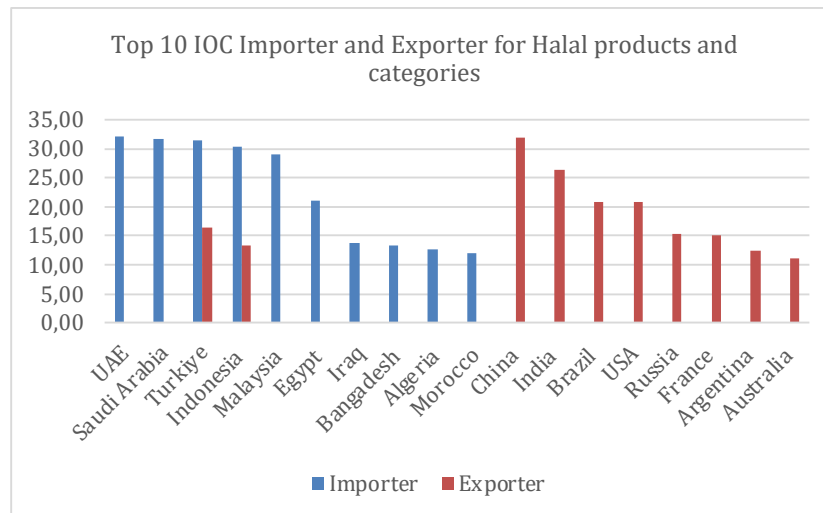
Global Market Pursuant

Global Halal Player

As a global halal industry player, Indonesian exports far surpass imports. In 2020, Indonesia exported halal products valued at USD 46.70 billion, while imports were valued at USD 14.51 billion from the F&B, modest fashion, cosmetics, and pharmaceuticals (Bank Indonesia and DinarStandard, 2022). However, Indonesia suffers trade deficit with the Organization of Islamic Cooperation (OIC) countries. The trade deficit exists because even though Indonesian exports to OIC member countries were valued at USD 13.38 billion in 2022, Indonesia's imports from OIC were valued at USD 30.29 billion. The majority of OIC countries are import-dependent, with a USD 47.2 billion trade deficit for halal products, most of which are sourced from non-OIC member countries such as BRIC nations, France, and Germany (DinarStandard, 2023). OIC imports are predicted to reach USD 492 billion in 2027, growing at a 7.6% CAGR in 5 years. Only Indonesia and Türkiye rank among the top 10 exporters to OIC countries across all halal categories. Indonesia will have to boost the national halal industry for export orientation to, at least, close the trade deficit gap with OIC countries.

Figure 4: Top 10 IOC Importer and Exporter for Halal Products and Categories

Source: The State of the Global Islamic Economy Report 2023/2024,
processed (DinarStandard, 2023: 79)



Global Level's Financial Sector

The growth of assets and the countries involved in the Islamic finance industry indicate the metamorphosis from a niche market to a mainstream finance industry in the global market. The Islamic finance industry reached a value of USD 3.96 trillion in 2021, grew by 11% to USD 4.5 trillion in 2022, and is expected to increase to USD 5.94 trillion by 2025–2026 in the global market (Mohamed and Al Taitoon, 2023). The Islamic banking sector and Sukuk market are the forces behind the development of Islamic finance. The industry expands towards non-Muslim countries like Russia, Australia, Uganda, Mexico, Philippine, and France that are developing their Islamic finance market through Islamic financial instruments and banks due to the high number of Muslim populations.

Islamic finance is also lining the industry to be in parallel with other global trends. For example, the UAE highlight the role of Sukuk in climate action by encouraging the private sector's participation in COP 28 in 2023 (DinarStandard, 2023). The Islamic Development Bank, a significant player in global Islamic finance, has also established a new strategic direction to align its value with the SDGs, Climate Action Commitment, and humanitarian initiatives (DinarStandard, 2022), as well as collaborating with UNHCR to promote a worldwide Islamic fund. The Islamic finance trend to follow the global agenda commitments is beneficial for both international organizations and countries, resulting in a higher reputation for its contribution to social and welfare development.

On the Islamic finance industry, Indonesia became the first-ranked country based on its number of merger and acquisition (M&A), venture capital (VC), and price-to-earnings (PE) ratio deals that increased from 2021 to 2023, from 41 to 48. Indonesia received 9 deals, above the Islamic countries that implement sharia law that are UAE with 8 deals and Malaysia with 6 deals (DinarStandard, 2023). It shows that Indonesia, a non-Islamic country, has the potential to emerge as a significant contributor to the halal industry. Therefore, the opportunities are limitless to explore, and the government should be able to highlight its commitment and maximize the current player and system for further development.

Nation Branding Incentives on Specific Industries

Food and Beverage (F&B)

F&B products primarily support halal market sectors from local to international markets. In the global food industry's investment, Indonesia ranks the highest after the UAE and Bangladesh, with a total of ten deals represented by two companies, Garuda Food and eFishery (DinarStandard, 2023, pp. 83–84). Global brands and producers, including Nestle, Unilever, Danone, and Glico, have also integrated their production management to produce halal-guaranteed products as part of their commitment to expand their market towards Muslim-populated countries, especially in Malaysia, Singapore, and Indonesia (Danone, 2023; Menpan, 2023; Nestle, 2009). Here, the Indonesian government and its private sector have the capacity to collaborate with both local and global stakeholders as the main leaders in maintaining the halal industry.

The demand for halal food worldwide has increased over the years compared to other industries. The F&B varied from farming, agriculture, meat production, and packaged food and drinks that received halal certification and logos. Seeing the increasing Muslim populations around the world, Italy, South Korea, and Japan also develop their halal F&B supply chains to fulfil the demand of Muslim tourists, immigrants, and citizens that come to their countries (Halkias et al., 2014; Rasyid, 2024; Rizki and Aminah, 2023). In addition, the non-Muslim consumers have also accepted halal food due to its positive image as high-quality, hygienic, and clean food (Mathew et al., 2014), as well as their trust and confidence in its halal value (Cruz and Billanes, 2021). The existing halal-guaranteed products and services in the domestic sphere, influenced by the lifestyle and culture of the Muslim majority population, will enable Indonesia to attract more Muslim tourists from other countries.

The Indonesian traditional cuisine presents a significant opportunity as a unique selling point within the halal food industry. Indonesia has initiated gastrodiploacy via the Indonesian Restaurant Fundraising (IndoStar) Programme, implemented by the Ministry of Tourism and Creative Economy. Gastrodiploacy is a subvariant of diplomacy that uses the nation's gastronomic heritage as an instrument (Trihartono et al., 2020). Gastrodiploacy is nothing new for the Indonesian government, since it has been part of the strategies to promote Indonesia on the global stage since the era of President Sukarno (1945–1967) (Trihartono et al., 2023). The IndoStar programme provides funding, training, and mentoring schemes for Indonesian culinary entrepreneurs abroad to achieve 4000 Indonesian restaurants worldwide and USD 2 billion in culinary exports in 2024. Interestingly, TasteAtlas, a global gastronomy website, ranks Indonesian cuisine at sixth out of 100 best cuisines in the world based on the website's audiences' 271,819 dish ratings and 80,863 food product ratings (TasteAtlas, 2024). The convergence of halal values and traditional culinary practices will differentiate Indonesian cuisine from other Southeast Asian countries with similar kitchen cultures, pursuing the same influence on the global public's palates through gastrodiploacy.

Modest Fashion

Modest fashion is a niche market opportunity as it only caters Muslim population. Modest fashion refers to a halal clothing that require the fabric to not transparent, does not expose the wearer's body and excess skin. Globally, it is expected that the industry will hit a market size of USD 375 billion by 2025 (DinarStandard, 2023). Among the OIC countries, Indonesia is one among two other OIC countries, Türkiye and Bangladesh, in the position of top exporters to other OIC countries. The largest exporter to the OIC is still China, with USD 18.85 billion in 2022, while Indonesia ranks nine with a value of USD 0.54 billion (DinarStandard, 2023, pp. 170–171). However, Indonesia also still on the trade deficit since as an OIC importer Indonesia's import of modest fashion worth of USD 1.6 billion in 2022 (DinarStandard, 2023, p. 171).

To build the modest fashion industry, skilled industry players who are designers and business practitioners have to be able to produce high-quality and sustainable fashion products. The Indonesian government attract more players in the industry by collaboration with the Indonesia Fashion Chamber. In 2022, Indonesia launched a world-renowned modest fashion event, namely the Indonesia International Modest Fashion Festival (IN2MOTIONFEST), later rebranded as IN2MF in 2023, to attract designers and buyers. In 2023, Indonesia held IN2MF both in the international and domestic stages. Six countries across the globe hosted International IN2MF, while seven domestic events involved 433 MSMEs and dozens of designers (Bank Indonesia, 2024).

Indonesia's challenges in the modest fashion market are in the halal value chains and unique selling points. Indonesia's modest fashion is currently working on establishing a halal value chain ecosystem, emphasising the importance of maintaining stable and affordable prices for raw materials from local sources (Bank Indonesia, 2024). To win the market, modest fashion relies on the uniqueness of the design. For example, the UAE, the market leader in 2017–2021, draws its design inspiration from the West without copying Western styles and fabrics, while Türkiye, ranking second, prioritises the quality of its design and fabrics (Yuniastuti and Pratama, 2023). Therefore, to gain market dominance, Indonesia must identify its unique modest fashion style as its primary marketing strategy. Indonesian traditional cultures, which include textiles, fabrics, and clothing designs, can provide uniqueness. Through the implementation of nation branding that highlights multiculturalism and halal lifestyles, Indonesia can identify its distinctive selling points in the modest fashion industry.

Cosmetic

The cosmetic industry is an unexplored halal market sector in comparison to other sectors. Out of USD 2.29 trillion of consumer spending by 2 billion Muslims across six real-economy sectors—food, fashion, tourism, media, and pharma—in 2023, halal cosmetics reached only 8.9% of the total consumer spending (DinarStandard, 2023). Religiosity influences Muslims' purchasing behaviours toward halal cosmetics (Divianjella et al., 2020). However, halal cosmetics attract both Muslim and non-Muslim consumers due to their preference for safety and quality (Septiarini et al., 2023) and the perception of halal cosmetics as a safe product with ethically sourced and natural ingredients (Future Market Insights, 2024), both Muslim and non-Muslim consumers find halal cosmetics appealing, and it creates the growing global demand for halal cosmetics. Clearly, the potency of halal cosmetic markets is vast.

Indian consumers lead the halal cosmetics market, followed by Indonesia, Turkey, Russia, and Egypt. Worldwide, Muslim consumer spending reached USD 65 billion in 2020, up by 6.8% to USD 74 billion in 2021, further up by 14.3% to USD 84 billion in 2022, and is forecasted to reach USD 129 billion by 2027 at a compound annual growth rate of 8.9% (DinarStandard, 2023, 2022). On the global halal cosmetics supply chain, Southeast Asian and European countries are still dominating the ecosystem. Singapore reigns, followed by Belgium, Malaysia, France, and Indonesia (DinarStandard, 2023, p. 208). South Korea and Japan, the global cosmetics market leaders, are preparing to enter the halal industry by obtaining certification (Rizki and Aminah, 2023). The two countries are targeting the OIC markets, currently dominated by five top exporters: France, Ireland, China, Germany, and the US (DinarStandard, 2022).

Indonesian halal cosmetic brands are strong players in the national market. As such is Wardah that bring halal and natural as the main philosophy and is one of the top ten market shares in 2024 in all cosmetic categories (Top Brand Award, 2024). The non-Muslim domestic market base for halal cosmetics presents an opportunity to further develop the image of halal cosmetics as safe and

inclusive products for all users. Further exploration is to traditional cosmetic that strongly based on cultures and have been efficacy proven (Ambarwati et al., 2023). Indonesia's opportunity on halal cosmetic market lies on the halal certification, naturalness, and the vast domestic-consumer as the marketing proof-point.

Tourism

In the halal diplomacy context, halal tourism can serve as a tool for nation branding by leveraging historical background, culture, cuisine, and lifestyle. Tourism enhances nation branding by generating positive experiences. Countries attract Muslim travelers by providing Muslim-friendly services. Halal tourism is distinct from conventional and religious tourism as it addresses the specific requirements of Muslim travelers that are halal products and services while still incorporating entertainment aspects. The enjoyable experiences, along with the availability of halal facilities and services significantly affect Muslim tourists' decisions to return, thereby enhancing the country's image (Jeaheng et al., 2019; Marlinda et al., 2021; Sthapit et al., 2022; Wibawa et al., 2021). The primary objective of halal tourism is to create unforgettable experiences for tourists that positively impact the country's image.

Countries with non-Muslim communities see halal tourism as an economic opportunity. The Japanese government develops halal food in line with the globalization and internalization situations of Muslim travelers, which change Japan's society and foster Japan's economic growth (Yusof and Shutto, 2014). Thailand develops halal tourism by implementing a Muslim-friendly concept that provides privacy, services, and halal F&B. Economic benefit is not the only reason for South Korea to develop halal tourism. The South Korea's increasing Muslim population and geopolitical changes on South Korea-China relations led the government to pursue halal tourism (Marlinda et al., 2021).

Halal tourism becomes Indonesia's strategy to achieve the ambition of being the global halal hub and enhances the Indonesian economy. Since 2018, Indonesian Halal Destinations priorities have included East Java, West Nusa Tenggara, South Sulawesi, West Sumatra, Riau, Riau Island, Jakarta, West Java, Central Java, and Yogyakarta provinces (Antara News, 2019). In 2023, the Global Muslim Travel Index report ranked Indonesia as the top halal tourism destination in the world out of 140 countries (Crescent, 2023).

Diplomacy Efforts

Halal diplomacy relies on the government as the main actor in strategizing the diplomatic route by defining the nation branding and developing the industry ecosystem, then facilitates the public's participation in the diplomatic efforts.

Government Orchestration

Indonesia's halal diplomacy still relies heavily on government agencies both in G2G and G2P with industry support, and limited support from individuals as it can be seen from how the Indonesian government is the primary actors behind halal promotion abroad and halal collaboration (Kemlu RI, 2022a, 2023a; Sekretariat Wapres RI, 2021b, 2023a). The P2P diplomacy concept focuses on the people's contributions without disregarding the government. Even though the public's roles as subject and object are indispensable, it is the government that conducts the orchestra. The government sets the goal, strategy, and assumes the roles of initiator, provider, regulator, protector, and facilitator for the halal industry, with the public carrying out the remaining activities. Non-state actors roles

including as producers, market players, and nation branding enhancer due to their strength in information circulation, campaigning, and public opinion construction both directly or through the internet and social media. Indonesian halal diplomacy, however, have still limitedly involving the publics.

Leadership plays an important role in diplomacy's success. Indonesia's leaders actively promote halal diplomacy. From November 2019 to August 2023, to promote the halal industry, Vice President Ma'ruf Amin met with around 29 foreign countries' representatives both in his state visits and courtesy calls in Indonesia. In November 2022, during Indonesia's G20 presidency in Bali, Indonesia formed the Halal 20 Forum (H20), attracting 279 participants from 44 countries (Kemenag RI, 2022a). The H20-Halal World 2023 was attended by 500 representatives from 118 halal institutions across 41 countries (BPJPH, 2023). In the third H20-Halal World in 2024, the forum released the Communiqué on Strengthening the Global Halal Ecosystem, and the Indonesian agency for the halal industry (BPJH) secured 52 deals with foreign halal institutions from 24 countries (BPJPH, 2024). H20 is a significant milestone in the development of the global halal ecosystem and industry, as well as Indonesia's contribution to global partnerships. In addition, Indonesia does not exclusively target countries with Muslim populations to offer halal industries for economic partnership since Indonesia also builds cooperation with Japan, South Korea, and Singapore (Putri, 2022; Sekretariat Wapres RI, 2023b, 2022a). Indonesia also successfully formed bilateral cooperation with Malaysia, the United Arab Emirates, Qatar, OIC countries, Jordan, Azerbaijan, Iran, Uzbekistan, and Saudi Arabia (Bank Indonesia and DinarStandard, 2022).

International conferences and expos are the venues for halal diplomacy, intersects with other streams of public diplomacy such as gastrodiploacy or cultural diplomacy. Indonesia annually participates in the biggest halal expos organized by the Organization of Islamic Cooperation (OIC). In July 2022, Indonesia hosted the 18th ASEAN Working Group on Halal Food (AWGHF), which aimed to develop regional guidelines for halal food (Kemenag RI, 2022b). Indonesian Muslim fashion designers joined the Kazan Modest Fashion Show 2022 in Russia and received positive reactions from the public and government officials (Kemlu RI, 2022b). In the ASEAN Youth Dialogue 2023 in Jakarta, Indonesia's delegation presented the country's cultures and Halal food through the ASEAN Halal Food Festival and ASEAN Youth Cultural Performance (Kemlu RI, 2023b). In 2023, Indonesia also participated in the 8th Philippine Halal Trade and Tourism Expo. 20 Indonesian halal companies dominated the Halal Expo 2023 in Almaty, Kazakhstan (Embassy of the Republic of Indonesia in Astana, Kazakhstan, 2023). Joining an international expo is critical in diplomacy because it is more than just an opportunity to display objects; it is also a vehicle to promote nation branding (Wang, 2020). Indonesia's participation global events will strengthen the nation branding, in addition to the exploration for market expansion.

Collaboration on halal certification to develop global halal standardization is part of the diplomatic steps to penetrate the global market. In 2019, Bahrain received guidance from Indonesia's Halal certification agency to establish a halal certification body, enabling their exporters to penetrate Saudi Arabia's market (KNEKS, 2019). Cooperation in halal certification is also part of the Indonesia and South Africa agreement in January 2021 (Kemlu RI, 2020). In June 2023, Indonesia and Iran signed a memorandum of understanding on Halal Product Quality Assurance Cooperation (Kemenag RI, 2023a) to ensure halal product guarantees. Iran is the sixth country to sign a MoU on Halal Product Guarantee with Indonesia; five other countries, Chile, Argentina, Hungary, Belarus, and Türkiye, have signed similar MoUs with Indonesia. On July 20, 2023, during his state visit to Malaysia, Indonesia's President Joko Widodo and Malaysia's Prime Minister Anwar Ibrahim signed a Memorandum of Cooperation regarding the recognition of halal certification for domestic products

(Kemenag RI, 2023b). On September 20, 2023, Indonesia and South Korea signed an MoU on Halal Product Assurance in Jakarta. On October 20, 2023, Indonesia signed a similar MoU with Saudi Arabia in Riyadh City during President Joko Widodo's state visit. With this cooperation, Indonesia is cementing the status as the world's number one halal producer by setting the standard for product certification.

Japan is one of Indonesia's closest partners in the halal industry. The Japanese government has introduced programs to attract Muslim visitors by establishing halal and Muslim-friendly markets (Pratama, 2022). In addition to assisting the Japanese government, Indonesia cooperates with Japanese public sectors such as a Japanese company, Otsuka Food, and an education institution, Kyoto University (Sekretariat Wapres RI, 2023c, 2023d). Furthermore, the Indonesian government also seeks support from Indonesians living in Japan to promote Indonesian halal products in response to the Japanese government's effort to attract Muslim visitors (Sekretariat Wapres RI, 2022b).

Public Participation

Large companies and MNCs still dominate public participation in the global market. MSMEs, which drive the domestic halal industry, have not yet entered the global market. The 2021 Halal Market Report still heavily advocates for industry associations, large and medium corporations, and investors (Bank Indonesia and DinarStandard, 2022). Reaching a global consumer and audience remains a challenge, as non-halal-based industries still dominate most global industries, leading to a lack of public awareness. The problem lies in the concept of halal, which is still unfamiliar to the public on a global level, outside of the Muslim community.

Nevertheless, on the image-building front, public communication toward the merit of the halal industry is lacking due to the absence of public participation as messengers. For example, the government acknowledges non-state actors' support for the halal domestic industry with the annual Indonesia Halal Industry Award (IHYA). However, the event often goes unnoticed by the public, as evidenced by the limited media coverage it receives. From 2021 to 2023, the national media covered the IHYA award with only 44 articles in 2021, 131 articles in 2022, and 120 articles in 2023. Additionally, media news, government, and corporate official press releases published 120 articles through the website. A stronger promotion of the IHYA award to raise its prestige in the public eye will attract more people to join the industry or popularize it. The ISEF, at the forefront of the Sharia economy campaign in Indonesia, faced a similar situation. Therefore, strategic communication toward the public is critical for image building's enhancement of the halal and Sharia economies.

Similarly, the Islamic finance industry's contribution to global society is far from the public's attention. For example, the Sharia Financial Institution, the foundation for halal ecosystem expansion, has not yet gained the public's attention (Rachman, 2019). The United Nations Development Bank and country partners launched the Green Sukuk Initiative, an Islamic finance product that aligns with the Sustainable Development Goals, but has yet to attract public participation (Rehman, 2020). Unfortunately, these positive deeds are unknown to global audiences and eventually hinder the development of Indonesia's positive image in front of the global public.

As the F&B industry is still the biggest sector of the halal industry, attracting public participation through culinary heritage that is close to the hearts of the people could be a strategy. The Indonesian culinary industry can be a potential resource for the halal food industry, especially in traditional cuisine. At the same time, the internalization of Indonesian halal traditional cuisine will activate Indonesian gastrodiploacy, along with halal diplomacy. In executing Indonesian

gastrodiplomacy, identification of Indonesian culinary identity is crucial (Trihartono et al., 2023). There is an opportunity for cross-cutting issues with halal diplomacy as most Indonesian traditional culinary are halal, following the Islamic values held by the communities. Also, promoting Indonesian traditional halal cuisine is compatible with global norms on food consumption, such as the value of healthy, safe, and sustainable food (Trihartono et al., 2023, p. 165), which is in line with halal values. Public participation to promote gastrodiplomacy can also be useful for halal diplomacy.

CONCLUSION

Indonesian halal diplomacy not only yields economic benefits, but it also cements the Indonesian image as a country with positive economic growth where the population adheres to an Islamic lifestyle. Indonesia's ambition to be number one in the global halal industry is a rational choice based on the nation's modalities, which are the halal lifestyles of the people supported by the industry ecosystem. Furthermore, Indonesia's nation branding heavily relies on the halal lifestyle in a multicultural society, drawing its relevance from the identity, culture, and values of the majority of its population. Nation branding will be an effective instrument for Indonesia's halal diplomacy. The government has made notable efforts in halal diplomacy, actively striving to foster the development of the halal ecosystem through regulatory facilitation and industry stakeholder engagement. However, to intensify halal diplomacy, Indonesia needs to develop more robust strategies to encourage people's involvement across multiple channels and layers, and integrate halal diplomacy with other forms of public diplomacy, starting from the nation's branding.

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