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Comparative Analysis of Halal Consumer Behavior in Indonesia, Malaysia, and Nigeria: A Theory of Planned Behavior Perspective

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Abstract

The halal industry continues to expand across Muslim-majority nations, yet comparative investigations into how social, cultural, and structural factors shape consumer behavior remain scarce. This study aims to analyze how infrastructure readiness, social inequality, economic factors, and cultural values influence halal consumer behavior in Indonesia, Malaysia, and Nigeria using the Theory of Planned Behavior (TPB) framework. A qualitative comparative literature review was conducted through structured searches in Scopus, Web of Science, and Google Scholar for publications between 2015 and 2024, following a three-stage screening process that yielded 54 sources for thematic analysis. The findings reveal that Malaysia demonstrates the most balanced halal ecosystem across all three TPB constructs, attitude, subjective norms, and perceived behavioral control. Indonesia shows robust attitudinal and normative drivers but faces structural constraints in perceived behavioral control, particularly in rural areas. Nigeria, despite strong community-based subjective norms, struggles with the lowest perceived behavioral control due to weak infrastructure, regulatory fragmentation, and economic inequality. This study provides a comparative framework for policymakers, recommending that Nigeria prioritize establishing a national halal certification body, Indonesia bridge urban-rural access gaps, and Malaysia maintain certification standards while expanding halal literacy programs.

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Introduction

The halal industry has experienced rapid growth across various parts of the world, particularly in countries with large Muslim populations such as Indonesia, Malaysia, and Nigeria (Adiba & Amir, 2023; Randeree, 2020; Yahya & Ariffin, 2021). This development has been driven by increasing awareness of the importance of halal products from religious, health, and ethical perspectives (Uula, 2024). Although these three countries have significant Muslim populations, notable differences exist in consumption patterns, preferences, and

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acceptance of halal products. In Indonesia and Malaysia, the halal industry has developed substantially with strong regulatory support and well-established infrastructure(Ahmad et al., 2023; Hudaefi & Jaswir, 2019). In contrast, despite its considerable halal market potential, Nigeria continues to face major challenges related to infrastructure and halal certification systems (Department of Meat Technology, Poznań University of Life Sciences, Poland et al., 2023; Olaniyi, 2023). Furthermore, public understanding of the halal concept extends beyond food products to include cosmetics, pharmaceuticals, and Islamic finance (Shah et al., 2023). Nevertheless, the readiness of society to adopt halal principles across various aspects of life remains uneven, depending on cultural, economic, and regulatory factors in each country (Amelia et al., 2024; Ismail & Melia Mareta, 2026; Loyer et al., 2020).

Existing studies have predominantly focused on the global growth of the halal industry or on single-country case studies, with limited attention given to comparing how social and cultural factors shape consumer behavior across different national contexts (Amelia et al., 2024; Fauzi et al., 2024). Three major trends can be identified in previous research. First, many studies discuss the halal industry in terms of its contribution to economic development and its potential in the global marketplace (Hasan, 2021; Jailani & Adinugraha, 2022). Second, existing research often examines halal consumption patterns from a macro perspective without adequately considering the cultural factors that influence consumer behavior (M. R. Arifin et al., 2023; Z. Arifin & Hatoli, 2021; Fuseini et al., 2017). Third, research has largely concentrated on halal certification standards and the influence of government regulations on the halal industry, while paying less attention to societal perceptions of halal itself (Ab Talib et al., 2016; Adinugroho et al., 2024; Admin et al., 2023). These trends reveal a significant research gap regarding how the social and cultural characteristics of communities in Indonesia, Malaysia, and Nigeria influence halal consumption behavior.

This study seeks to address this gap by analyzing how the social and cultural characteristics of a society shape consumer behavior toward halal products. To achieve this objective, three key research questions are proposed: How prepared are the infrastructures in Indonesia, Malaysia, and Nigeria to support consumer adoption of halal products? How do social inequalities and economic factors in each country affect access to and preferences for halal products? And how do cultural differences among these three countries influence public perceptions and acceptance of the halal industry? Answers to these questions will provide deeper insights for policymakers and industry stakeholders in designing more effective halal industry policies and marketing strategies tailored to the specific needs of each country.

This study is grounded in the argument that halal consumption behavior is influenced not only by economic and regulatory factors but also by the social and cultural characteristics of society (Lia Febriati et al., 2024; Rusydiana, 2024). Fundamental differences exist in the ways communities in Indonesia, Malaysia, and Nigeria understand and adopt the concept of halal in their daily lives. In Indonesia, halal has increasingly become part of a broader lifestyle, supported by government policies and the expansion of the halal industry across sectors such as food, cosmetics, and Islamic finance (Jailani & Adinugraha, 2022). In Malaysia, the halal industry has developed in a more systematic manner through rigorous certification processes and strong governmental support, positioning the country as a global hub for the halal industry (Ahmad et al., 2023). In Nigeria, despite strong demand for halal products, challenges related to infrastructure, the absence of uniform regulations, and diverse cultural dynamics continue to affect halal adoption within society(Yahya & Ariffin, 2021). The success of the halal industry in these three countries depends greatly on infrastructure readiness, equitable access, and the ability to align cultural values with the adoption of halal principles. Therefore, this study emphasizes the importance of social engineering and adaptive halal industry strategies to ensure broader and more effective acceptance among communities in each country.

Research Methodology

This study employs a qualitative comparative literature review to analyze halal consumer behavior in Indonesia, Malaysia, and Nigeria. This approach enables systematic cross-national synthesis of existing empirical findings across diverse socio-cultural and regulatory contexts (Snyder, 2019).A structured literature searc h was conducted in Scopus, Web of Science, and Google Scholar for publications between January 2015 and June 2024. The search string combined keywords related to halal consumer behavior (“halal consumer behavior,” “halal consumption,” “halal purchase intention”) with geographic terms (“Indonesia,” “Malaysia,” “Nigeria”) and relevant constructs (“certification,” “perception,” “attitude”). Inclusion criteria were peer-reviewed articles, book chapters, and government reports in English or Bahasa Indonesia focusing on halal consumer behavior. Conference proceedings and theses were excluded.

The screening process followed three stages: identification (387 records, 89 duplicates removed), screening (298 records, 156 excluded by title/abstract), and eligibility (142 full-text assessed, 88 excluded). The final corpus comprised 54 sources. Data were analyzed using thematic analysis (Braun & Clarke, 2006) organized around five thematic dimensions: infrastructure readiness, attitude toward halal, subjective norms, perceived behavioral control, and socio-cultural values. The Theory of Planned Behavior (Ajzen, 1991) served as the primary

analytical framework.Trustworthiness was enhanced through source triangulation, peer debriefing among the three authors, and an audit trail documenting all search decisions. This study has several limitations, including reliance on secondary data, exclusion of non-English sources particularly relevant for Nigeria, and limited literature on Nigeria's halal industry which may bias comparative findings.

Infrastructure Readiness in Supporting the Adoption of Halal Products in Indonesia, Malaysia, and Nigeria

The adoption of halal products in Indonesia, Malaysia, and Nigeria faces both challenges and opportunities that are highly dependent on infrastructure readiness and government policy support. The global halal industry has experienced rapid growth, with Indonesia, Malaysia, and Nigeria emerging as countries with significant potential to expand their halal markets. However, realizing this potential requires attention to several critical factors, including infrastructure development, supportive government policies, and the adoption of technologies capable of enhancing efficiency and transparency throughout the halal supply chain.

In Indonesia, achieving the ambition of becoming a major global producer of halal products requires substantial improvements in the infrastructure supporting the halal industry. This includes the development of halal industrial zones, distribution centers, and research facilities that can facilitate innovation and product development. According to Uula (2024), strengthening such infrastructure is essential for accelerating the growth of Indonesia's halal industry. Adequate infrastructure can streamline production and distribution processes while ensuring that halal products consistently meet required quality standards. Furthermore, infrastructure investment is particularly important for supporting Micro, Small, and Medium Enterprises (MSMEs), which constitute a major driving force of the Indonesian economy. Izzuddin and Adinugraha (2022) argue that targeted assistance and capacity-building programs for MSMEs can accelerate Indonesia's transition from being primarily a consumer of halal products to becoming a global halal producer. Such a transformation requires comprehensive planning, including training programs, financing mechanisms, and improved access to international markets.

Malaysia has demonstrated the critical role of government intervention in developing the halal industry, particularly through institutions such as the Department of Islamic Development Malaysia (JAKIM), which administers internationally recognized halal certification. Daud et al. (2023) highlight that appropriate policy support can significantly enhance awareness and acceptance of halal products among Micro, Small, and Medium Enterprises (MSMEs). In this

regard, the Malaysian government has not only focused on strengthening domestic halal production but has also actively facilitated the international expansion of Malaysian halal products. The halal certification system established by the government has contributed significantly to strengthening the country's halal supply chain. Bahrudin et al. (2024) demonstrate that challenges faced by SMEs during the halal certification process can be mitigated through supportive policies and adequate training programs. These measures are essential for building consumer trust and ensuring that products circulating in the market comply with established halal standards.

Moreover, Hasan et al. (2020) note that competition within the global halal market has become increasingly intense. Countries seeking to compete effectively must establish robust and credible certification systems. In this context, government policies that support halal industry development become crucial in enabling local products to compete internationally. In Nigeria, although the halal industry remains at an early stage of development, significant opportunities exist due to the country's large Muslim population. Hermawan (2020) observes that Nigeria possesses a substantial potential market for halal products; however, existing infrastructure remains limited. Consequently, Nigeria may benefit from adopting strategies similar to those implemented in Indonesia and Malaysia, including the establishment of halal production and distribution centers to ensure the effectiveness and reliability of the halal supply chain.

Strengthening logistics and distribution networks in Nigeria is particularly important to ensure that halal products reach consumers efficiently and in optimal condition. Ali et al. (2016) argue that the development of efficient logistics infrastructure is essential for establishing an effective halal supply chain. Improved logistics systems can reduce distribution costs, increase consumer satisfaction, and ultimately accelerate halal market penetration throughout the country. In addition, Hermawan (2020) emphasizes the importance of expanding public education regarding halal certification and consumer rights. Better-informed consumers are more likely to purchase halal products because they possess a clearer understanding of halal standards and their implications for health, safety, and well-being.

One of the most important emerging dimensions in halal industry development is the adoption of technologies capable of enhancing efficiency and transparency throughout the halal supply chain. Among the most promising innovations is the Internet of Things (IoT), which enables end-to-end traceability of halal products across the supply chain. Tarmizi et al. (2020) explain that IoT technologies can be utilized to monitor compliance with halal standards throughout production, transportation, and distribution processes. Such

technologies can reduce consumer concerns regarding product authenticity and the risk of cross-contamination. Rashid and Bojei (2019) further argue that IoT adoption can significantly improve transparency and accountability within the halal industry. For example, consumers can verify the origins of raw materials used in halal products and ensure that all stages of production comply with halal requirements. This capability can strengthen consumer confidence while addressing concerns related to halal authenticity, which remains a major issue in international markets.

By strengthening infrastructure and integrating advanced technologies, Indonesia, Malaysia, and Nigeria can enhance their competitiveness within the increasingly dynamic global halal market. Digital technologies and supply chain automation can improve operational efficiency, reduce costs, and enhance the quality of halal products offered to consumers. Despite the substantial opportunities presented by the global halal market, these countries must also address a number of challenges as they seek to expand their market presence. Sulaiman et al. (2023) note that one of the key challenges faced by countries such as Brunei Darussalam is the limited understanding and awareness of halal standards in international markets. Consequently, countries aspiring to strengthen their halal sectors must intensify efforts to promote their certification systems and ensure global recognition of their halal products.

At the same time, significant opportunities arise from expanding global demand for halal products across sectors such as food, cosmetics, tourism, and pharmaceuticals. Through appropriate strategies, these countries can strengthen their positions within the global halal economy and capture substantial economic benefits. Overall, the successful adoption of halal products in Indonesia, Malaysia, and Nigeria requires a comprehensive approach that integrates infrastructure development, supportive government policies, consumer education, and technological innovation to ensure efficiency and transparency throughout the halal supply chain. Strong infrastructure, effective policy frameworks, and active stakeholder engagement will be essential in accelerating the growth of the halal industry in these countries. Furthermore, the adoption of technologies such as IoT can enhance operational efficiency and transparency, both of which are critical for building consumer trust in halal products. With appropriate strategic initiatives, these countries can capitalize on the immense opportunities available within the global halal market while ensuring the long-term sustainability and continued growth of their halal industries.

The Impact of Social and Economic Factors on Halal Consumer Behavior

The decision to consume halal products in Indonesia, Malaysia, and Nigeria is influenced by a combination of social, economic, and cultural factors that interact with one another. Among these factors, income level, education, and social inequality play particularly important roles in shaping halal consumption patterns. Although these three countries differ in their socioeconomic contexts, these variables remain closely interconnected in influencing consumer decisions regarding halal products. In Indonesia, the rapid growth of the middle class has contributed significantly to increasing demand for halal products. Studies by Kurniawati and Savitri (2019) and Arsil et al. (2018) indicate that higher income levels provide consumers with greater purchasing power, enabling them to prioritize not only halal certification but also other product attributes such as quality, health benefits, and taste. As economic conditions improve, Indonesian consumers become increasingly willing to spend on premium halal products, particularly in the halal food and fashion sectors. This trend is reflected in the expansion of increasingly competitive halal food and fashion industries that cater to middle- and upper-income market segments (Yuniastuti & Pratama, 2023; Mubarok & Imam, 2020).

Rising income levels in Indonesia have also fostered greater consumer awareness regarding product quality and authenticity. Consumers increasingly seek products that not only comply with halal requirements but also offer additional value in terms of safety, quality, and ethical production. Consequently, halal products in Indonesia have evolved beyond their religious function and have become part of a broader lifestyle choice embraced by a wider segment of society. Similarly, income plays a significant role in influencing halal consumption in Malaysia. As a country with a substantial Muslim population, Malaysia exhibits a strong preference for premium halal products among higher-income consumers. Moreover, the close relationship between national identity and Islam has reinforced halal consumption as a lifestyle choice among many Malaysians (Mutmainah, 2018; Diana et al., 2023). As income levels increase, consumers become more inclined to purchase higher-quality halal products despite their higher prices, partly because they have better access to information regarding halal certification, which positively influences their perceptions of product quality (Yahya & Ariffin, 2020). In Nigeria, however, the relationship between income and halal consumption is more complex. Although awareness of the benefits of halal products continues to grow, economic inequality significantly affects consumer access to halal goods. Lower-income consumers often prioritize affordability over halal certification. Nevertheless, the expansion of the Nigerian middle class has generated a growing tendency to favor halal products as awareness of halal quality and standards increases (Putri et al., 2023).

As the purchasing power of the middle class continues to improve, demand for premium halal products is expected to expand accordingly.

Education constitutes another critical factor influencing consumer understanding and appreciation of halal products. In Indonesia, studies have shown that higher educational attainment is strongly associated with greater awareness of halal standards and certification systems. Educated consumers are generally more likely to support businesses that comply with halal principles and ethical norms (Sadiyah & Erawati, 2024; Dewi et al., 2023). Higher education enhances understanding of the values embedded within halal products, including authenticity, quality assurance, and certification processes. Consequently, highly educated consumers tend to be more selective in choosing halal products and place greater emphasis on additional quality-related attributes and benefits. A similar pattern can be observed in Malaysia, where educational programs and government initiatives have played a substantial role in improving public understanding of halal products. Through institutions such as the Department of Islamic Development Malaysia (JAKIM), the Malaysian government has actively promoted halal literacy among consumers, particularly among those with higher educational backgrounds. As a result, educated consumers have become more critical in evaluating whether products comply with halal standards and more supportive of businesses that prioritize halal certification (Diana et al., 2023; Utami & Nurkhasanah, 2021).

In contrast, disparities in halal literacy are more evident in Nigeria. While educated consumers demonstrate strong preferences for halal products, overall halal literacy remains relatively limited, particularly in rural areas. Unequal access to education and halal-related knowledge significantly affects consumption behavior. Although efforts have been made to increase halal awareness, educational programs concerning halal certification and consumer rights have not yet reached all segments of society, especially those living in less developed regions (Putri et al., 2023). Social inequality represents another important determinant of halal consumption patterns across the three countries. In Indonesia, disparities between urban and rural areas significantly influence access to halal products. Urban consumers generally enjoy better access to halal products and services than their rural counterparts, resulting in differences in consumption patterns. Consumers in urban areas often have access to a wider range of halal products tailored to diverse preferences, whereas rural consumers may be limited to more common and affordable halal options (Nalawati et al., 2023; Hasan, 2019). These disparities highlight the need for policies aimed at reducing inequalities and ensuring equitable access to halal products throughout the country (Kurniawati & Savitri, 2019; Burhanuddin & Riyanto, 2022).

In Malaysia, social stratification also shapes halal consumption behavior. Consumers with greater financial resources are more likely to purchase premium halal products, suggesting that halal consumption can function as a status symbol for certain segments of society. At the same time, social inequality means that lower-income households often prioritize affordability over comprehensive consideration of halal attributes. Consequently, ensuring that affordable halal products also meet high-quality standards remains a significant challenge (Mutmainah, 2018; Burhanuddin & Riyanto, 2022).A comparable situation exists in Nigeria, where social inequality is reflected in halal consumption patterns. Urban elites, who tend to possess higher levels of education and income, are more likely to purchase premium halal products perceived as offering superior quality. In contrast, lower-income groups frequently opt for cheaper alternatives that may lack formal halal certification due to financial constraints. As a result, social disparities influence access to high-quality halal products and shape consumer perceptions regarding the authenticity and reliability of halal goods (Putri et al., 2023).

Overall, the interaction between income, education, and social inequality plays a crucial role in shaping halal consumption patterns in Indonesia, Malaysia, and Nigeria. In Indonesia, demand for halal products continues to rise alongside the expansion of the middle class and growing awareness of product quality. In Malaysia, the strong connection between Islamic identity and national culture, combined with higher income levels, has positioned halal consumption as an important lifestyle choice. In Nigeria, despite increasing awareness of the benefits of halal products, economic and educational inequalities continue to influence consumer access to halal goods. Social inequality further affects consumer preferences and purchasing behavior across all three countries. Consequently, these factors significantly shape consumer decisions regarding halal products, as well as their access to information related to halal certification, authenticity, and product quality.

The Role of Culture and Religious Values in Shaping Halal Consumption Patterns in Indonesia, Malaysia, and Nigeria

The role of culture and religious values in shaping halal consumption patterns is evident across the diverse contexts of Indonesia, Malaysia, and Nigeria. Each of these countries reflects a unique interaction between religious commitment, cultural influences, and socioeconomic conditions, all of which collectively shape consumer behavior toward halal products. Halal consumption patterns are influenced not solely by religious considerations but also by cultural and social

factors that guide purchasing decisions. Consequently, each country presents a distinct context characterized by its own social, cultural, and religious dynamics. As the country with the largest Muslim population in the world, Indonesia exhibits halal consumption patterns that are strongly influenced by Islamic values.

The consumption of halal products is closely associated with levels of religiosity and societal perceptions of Islamic teachings regarding food, beverages, and personal care products. Studies have shown that higher levels of religious commitment are positively associated with stronger intentions to purchase halal products. Islamic teachings emphasizing the importance of consuming halal products in everyday life serve as a primary motivation for Indonesian consumers to select products that are certified as halal (Aisyah, 2016). Furthermore, Islamic educational institutions play a significant role in shaping halal consumption behavior among younger generations. This contributes to the development of a collective ethos that prioritizes halal practices in daily life (Sholihin et al., 2022). One of the most influential institutions in maintaining and promoting halal standards in Indonesia is the Indonesian Ulema Council (MUI). Beyond its function as a halal certification authority, MUI plays a crucial role in educating the public about the importance of halal products and their moral and spiritual significance within Islam (Vanany et al., 2019).

Malaysia demonstrates similar dynamics while also exhibiting distinctive characteristics in halal consumption behavior. The country not only has a substantial Muslim population but also a significant non-Muslim community. The Malaysian government actively promotes halal certification and halal product marketing as part of a national strategy to facilitate the distribution and acceptance of halal products across different segments of society. This policy is supported by social and cultural factors, as Muslim consumers generally regard halal as an integral component of their religious identity.

Research indicates a strong relationship between consumer trust in halal products and psychological factors such as confidence, familiarity, and cultural affinity. These trust-related factors significantly influence purchasing decisions among both Muslim and non-Muslim consumers. Although non-Muslim consumers are not religiously obligated to consume halal products, many display positive attitudes toward halal-certified goods because they perceive them as safer, cleaner, and more environmentally responsible (Haque et al., 2015). This phenomenon reflects a gradual process of acculturation, whereby favorable perceptions of halal products have expanded among diverse demographic groups regardless of religious affiliation (Lim et al., 2020). Halal consumption in Malaysia is also deeply rooted in cultural traditions. Malaysian society places considerable value on long-standing customs and practices that associate halal

products with both cultural and religious identity. As a result, purchasing decisions are influenced not only by religious obligations but also by powerful cultural norms and expectations (Mutmainah, 2018). Furthermore, the Malaysian government has undertaken systematic efforts to improve public understanding of halal certification through educational initiatives aimed at enhancing halal literacy among consumers (Diana et al., 2023).

In Nigeria, halal consumption patterns are more complex due to the country's religious and cultural diversity. Although Muslim consumers generally prioritize halal products, their purchasing decisions are shaped by the interaction between Islamic teachings and local cultural traditions. Nigerian Muslims place strong emphasis on religious values, yet they often integrate local cultural norms into their understanding and practice of halal consumption. Studies suggest that while Nigerian Muslims remain committed to Islamic principles, they frequently negotiate their religious identities within broader sociocultural contexts where ethnic traditions and community practices continue to play important roles in shaping perceptions of halal products (Wingett & Turnbull, 2017).

Moreover, despite growing awareness of the importance of halal products among Nigerian consumers, economic considerations continue to influence purchasing behavior. Many consumers, although conscious of halal requirements, prioritize affordability over formal halal certification. This suggests that while religious values remain important, economic realities significantly shape halal consumption patterns. Lower-income consumers often face difficulties accessing certified halal products and may therefore choose less expensive alternatives, even when halal authenticity cannot be fully guaranteed (Wingett & Turnbull, 2017).

Beyond religious, cultural, and economic factors, the influence of family, peers, and social norms also plays a significant role in shaping consumer attitudes toward halal products. In Indonesia, Malaysia, and Nigeria, social influences such as family guidance and community expectations strongly affect the purchasing decisions of younger consumers. Research indicates that young consumers' attitudes toward halal products are often shaped by family teachings and peer influence (Hassan & Pandey, 2019; Mutmainah, 2018). Families frequently serve as the primary source of information regarding the importance of halal consumption, transmitting these values across generations. Among younger consumers in all three countries, awareness of halal consumption has increasingly evolved beyond simple compliance with religious requirements. Many young consumers now perceive the selection of halal products as an expression of ethical values, social responsibility, and conscious consumption. Consequently, halal consumption is increasingly understood through a broader

lens that incorporates ethical and social considerations alongside religious obligations. This development highlights the significant role of social and cultural influences in fostering a more holistic understanding of halal consumption.

Overall, the interaction between cultural values and religious beliefs plays a decisive role in shaping halal consumption patterns in Indonesia, Malaysia, and Nigeria. Across these countries, religion serves as the primary driver of halal consumption, while cultural and social factors significantly influence consumer behavior. In Indonesia, religiosity remains the dominant motivating factor, reinforced by religious institutions such as the Indonesian Ulema Council (MUI). In Malaysia, the interaction between religion, culture, and consumer trust influences purchasing decisions among both Muslim and non-Muslim consumers. In Nigeria, although halal consumption is strongly grounded in Islamic teachings, social and economic factors substantially affect consumer choices. These findings demonstrate that halal consumption cannot be understood solely through a religious perspective; rather, it must be examined within broader cultural, social, and economic contexts. Such complexity underscores the need for a more comprehensive understanding of how consumers across different societies perceive and consume halal products, as well as the factors that shape their attitudes and behaviors toward halal consumption.

Key Factors Determining the Competitiveness of the Halal Industry in Indonesia, Malaysia, and Nigeria

The halal industry in Indonesia, Malaysia, and Nigeria continues to experience significant growth, driven by increasing consumer awareness of halal products and stronger government support. Each country exhibits distinct dynamics in developing its halal sector, influenced by factors such as regulatory frameworks, market awareness, consumer behavior, and the development of related sectors such as halal tourism. The competitiveness of the halal industry in these three countries is largely shaped by the synergy between regulatory support, market awareness, and the growth of complementary industries.

Government intervention plays a critical role in enhancing the competitiveness of the halal industry. In Malaysia, the government has adopted a proactive approach to promoting halal certification. One of its most significant initiatives is the establishment of the Department of Islamic Development Malaysia (JAKIM), which functions as the primary authority responsible for overseeing halal compliance and certification standards. JAKIM ensures that certified products comply with Islamic requirements and internationally

recognized halal standards (Hasan & Latif, 2024). These government initiatives have significantly strengthened consumer awareness and trust in halal products, thereby stimulating the growth of the domestic halal industry. Furthermore, the Malaysian government provides incentives to businesses obtaining halal certification and facilitates the international expansion of Malaysian halal products. This commitment is reflected in aggressive marketing strategies aimed at positioning Malaysia as a global halal hub and a leading halal tourism destination. Growing awareness of the health, ethical, and religious benefits associated with halal products has further stimulated demand in both domestic and international markets (Fathoni, 2020).

In Indonesia, the establishment of the Halal Product Assurance Organizing Agency (BPJPH) in 2017 demonstrates the government's commitment to creating a transparent and efficient halal certification system. BPJPH is responsible for verifying halal compliance and issuing halal certificates, thereby providing consumers with assurance regarding the integrity of halal products (Hasan & Latif, 2024). Through this institution, the Indonesian government seeks to address challenges associated with managing halal certification systematically while enhancing the competitiveness of domestic halal products in global markets. Nevertheless, despite the existence of supportive regulations, several challenges remain. The transition from a certification system previously centered on the Indonesian Ulema Council (MUI) toward a more flexible self-declaration mechanism has generated concerns regarding monitoring effectiveness and standardization consistency across regions (Muhammad et al., 2020). In addition, inadequate infrastructure supporting halal tourism and halal production facilities continues to constrain Indonesia's competitiveness.

Nigeria, by contrast, remains at an earlier stage of developing its halal certification mechanisms. Although the country possesses substantial potential to participate more actively in the global halal economy, it faces considerable challenges in establishing a structured and credible halal certification system. In the absence of clear regulations and accessible certification procedures, many Nigerian halal products struggle to compete effectively with products from countries such as Indonesia and Malaysia, where halal certification systems are more developed and internationally recognized (Supriyadi et al., 2024). Consequently, Nigeria must strengthen its regulatory framework and establish institutions capable of effectively supervising halal certification processes to enhance its competitiveness in global halal markets.

Consumer awareness constitutes another critical determinant of halal industry competitiveness. In Indonesia and Malaysia, high levels of awareness regarding the importance of halal products have contributed significantly to market expansion among both Muslim and non-Muslim consumers. Indonesian

Muslim consumers, for example, place considerable importance on halal attributes when purchasing food, cosmetics, and personal care products. Halal certification provides assurance that products comply with Islamic principles and meet ethical standards, thereby influencing purchasing decisions among consumers seeking to avoid products that conflict with their religious beliefs (Aisyah, 2016). Similarly, Malaysia has witnessed growing awareness among non-Muslim consumers, who increasingly perceive halal products not only as religiously compliant but also as healthier, safer, and more sustainable alternatives. Studies suggest that halal products are often associated with superior quality assurance and environmental responsibility, making them attractive to consumers who prioritize sustainability and ethical consumption (Haque et al., 2015). This trend has broadened the appeal of halal products beyond Muslim communities, creating new opportunities for industry expansion.

In Nigeria, however, awareness of halal products remains relatively limited. This presents a significant challenge for local producers seeking to establish a strong consumer base. Limited knowledge and understanding of halal concepts, particularly among non-Muslim populations, constrain market expansion and reduce demand for halal-certified products (Triantoro et al., 2020). Therefore, increasing public education and awareness regarding the benefits and significance of halal products is essential for building a broader and more sustainable consumer market. The halal tourism sector also plays a strategic role in strengthening the competitiveness of the halal industry, particularly in Indonesia and Malaysia. Halal tourism possesses substantial potential to attract international Muslim travelers, thereby increasing demand for halal food, cosmetics, hospitality services, and related products. Through initiatives such as the "Wonderful Indonesia" campaign, Indonesia has successfully positioned itself as an attractive halal tourism destination for global Muslim travelers (Musthofa et al., 2023; Akim et al., 2023). This development has created strong synergies between halal tourism and other halal-related industries, contributing to the formation of a comprehensive halal ecosystem.

Malaysia has achieved similar success in developing halal tourism. Through the provision of Muslim-friendly accommodations, halal-certified restaurants, and accessible religious facilities, Malaysia has become one of the preferred destinations for Muslim travelers worldwide. The expansion of halal tourism has also stimulated growth in the halal food industry, reinforcing Malaysia's competitive position within the global halal market (Fathoni, 2020). In contrast, Nigeria's halal tourism sector remains in its infancy. Although considerable opportunities exist, the limited development of halal tourism has restricted the growth of related halal industries, including food production and

hospitality services (Farizkhan et al., 2023). Consequently, the development of halal tourism should form an integral component of Nigeria's broader halal industry strategy.

Despite the substantial opportunities available, significant challenges remain across all three countries. In Indonesia, lengthy and bureaucratic certification procedures continue to present obstacles, while the transition toward self-declaration mechanisms has raised concerns regarding standardization and regulatory oversight (Muhammad et al., 2020). Infrastructure limitations also continue to hinder the development of halal tourism and related industries. In Malaysia, maintaining consistency in halal certification standards and sustaining consumer confidence remain ongoing priorities. Meanwhile, Nigeria faces the pressing challenge of establishing a more efficient and credible halal certification system capable of supporting international competitiveness. Overall, the halal industries of Indonesia, Malaysia, and Nigeria possess considerable growth potential but also face significant structural challenges. Strong government support, increased consumer awareness, and effective integration between halal-related sectors, particularly halal tourism, are essential for strengthening competitiveness within the global halal economy. Enhancing regulatory frameworks, expanding consumer education, and optimizing the development of halal tourism will be critical factors in ensuring the sustainable advancement of the halal industry in the years ahead.

Halal Consumer Behavior Through the Lens of TPB: A Three-Country Comparison

This section applies the Theory of Planned Behavior (TPB) to explain variations in halal consumption across Indonesia, Malaysia, and Nigeria. Developed by Ajzen (1991), TPB posits that behavior is determined by three interrelated constructs: attitude toward the behavior, subjective norms, and perceived behavioral control. This framework is particularly suitable for comparative halal studies as it accommodates psychological, social, and structural determinants, from religious values and community pressures to infrastructure readiness and economic accessibility (Ajzen, 1991). The TPB framework has been extensively validated in halal consumption research. Studies consistently demonstrate that the three TPB constructs significantly predict purchase intention toward halal products, with attitude, subjective norm, and perceived behavioral control showing strong correlations with consumer decisions (Alfiani & Priantina, 2024; Abu-Hussin et al., 2017). Furthermore, research applying TPB in Muslim-majority contexts reveals that these constructs operate within culturally specific

dynamics, where religiosity interacts with product attributes, certification, and reference group influence (Bhutto et al., 2023).

Attitude toward Halal Consumption represents the consumer's positive or negative evaluation of halal products. In Indonesia, religiosity and lifestyle integration create strong positive attitudes, with halal consumption transcending religious obligation to become an expression of ethical values and quality consciousness (Aisyah, 2016). Malaysian consumers similarly demonstrate robust attitudes, where halal certification signals quality assurance and national identity (Arsil et al., 2018). However, Nigerian consumers, while religiously committed, exhibit more moderate attitudes as economic constraints often force prioritization of affordability over formal certification (Wingett & Turnbull, 2017). Subjective Norms capture perceived social pressure from family, community, and religious institutions. In Indonesia, influential bodies like the Indonesian Ulema Council (MUI) and pesantren networks reinforce halal consumption as collective obligation (Vanany et al., 2019). Malaysia demonstrates very strong subjective norms through the Department of Islamic Development Malaysia (JAKIM) and government campaigns positioning halal as national strategic priority (Daud et al., 2023). Nigerian subjective norms remain strong at community level but lack national institutional integration due to regulatory fragmentation (Supriyadi et al., 2024).

Perceived Behavioral Control reflects consumers' perception of ease or difficulty in accessing halal products. Malaysia exhibits the highest control through integrated certification systems, robust infrastructure, and widespread halal literacy (Hasan & Latif, 2024). Indonesia shows moderate control with notable urban-rural disparity, urban consumers enjoy broader access while rural populations face infrastructure limitations (Nalawati et al., 2023). Nigeria confronts the lowest control due to weak infrastructure, absence of unified regulation, and economic inequality limiting certified product access for lower-income groups (Putri et al., 2023). The TPB analysis reveals that Malaysia demonstrates the most balanced halal ecosystem where all three constructs operate optimally. Indonesia shows strong attitudinal and normative drivers but faces structural constraints in perceived control.

Nigeria, despite strong subjective norms rooted in religious commitment, struggles with limited perceived behavioral control due to infrastructural and regulatory deficits. These findings suggest policy interventions should be tailored to strengthen the weakest TPB construct in each country, expanding infrastructure in Nigeria, bridging urban-rural access gaps in Indonesia, and maintaining certification standards and halal literacy programs in Malaysia (Sari et al., 2024; Izzuddin & Adinugraha, 2022). To systematically compare how the three TPB constructs manifest across Indonesia, Malaysia, and Nigeria, Table 1

presents a detailed assessment of each construct's relative strength in each country. This comparison draws upon the empirical findings from the reviewed literature and synthesizes the key patterns observed in consumer attitudes, social pressures, and perceived accessibility to halal products across the three nations.

Table 1.

Comparison of TPB Construct Strength in Indonesia, Malaysia, and Nigeria

TPB Construct	Definition	Indonesia	Malaysia	Nigeria
Attitude toward Behavior	Positive or negative evaluation of halal products	**High.** Religiosity and lifestyle integration create strong positive attitudes. Halal transcends religious obligation to become an expression of ethical values and quality consciousness (Aisyah, 2016; Vanany et al., 2019).	**Very High.** Halal certification signals quality assurance and national identity. Malaysian consumers perceive halal as an internationally recognized standard (Arsil et al., 2018; Mutmainah, 2018).	**Moderate.** Nigerian Muslim consumers have strong religious commitment, but economic constraints often force prioritization of affordability over formal certification (Wingett & Turnbull, 2017; Yahya & Ariffin, 2020).
Subjective Norms	Perceived social pressure from family, community, and religious institutions	**High.** MUI and pesantren networks reinforce halal consumption as collective obligation. Social pressure from community and religious leaders is highly influential (Vanany et al., 2019; Sholihin et al., 2022).	**Very High.** JAKIM and government campaigns position halal as a national strategic priority. Social norms are integrated with state policy (Daud et al., 2023; Hasan & Latif, 2024).	**High.** Community-based and ethnic-tied subjective norms are strong, but lack national institutional integration due to regulatory fragmentation and informal institutions (Supriyadi et al., 2024; Wingett & Turnbull, 2017).
Perceived Behavioral Control	Consumer's perception of ease or difficulty in accessing halal products	**Moderate.** BPJPH certification system is adequate, but urban-rural disparities are notable. Urban consumers enjoy broad access, while rural populations face infrastructure limitations (Nalawati et al., 2023; Kurniawati & Savitri, 2019).	**Very High.** Integrated certification systems, robust halal logistics infrastructure, and widespread halal literacy across all societal levels (Hasan & Latif, 2024; Bahrudin et al., 2024).	**Low.** Weak infrastructure, absence of a unified national certification body, and economic inequality limit access to certified products, especially for low-income groups (Putri et al., 2023; Supriyadi et al., 2024).

Authors' synthesis based on the reviewed literature, 2026.

Table 1 reveals several important patterns. First, both Indonesia and Malaysia demonstrate strong positive attitudes toward halal consumption, though the drivers differ somewhat. In Indonesia, religiosity and lifestyle integration serve as primary motivators (Aisyah, 2016; Vanany et al., 2019), while in Malaysia,

halal certification functions as both a quality signal and a marker of national identity (Arsil et al., 2018; Mutmainah, 2018). Nigeria, by contrast, exhibits more moderate attitudes, as economic constraints often compel consumers to prioritize affordability over formal certification (Wingett & Turnbull, 2017; Yahya & Ariffin, 2020).Second, subjective norms are consistently strong across all three countries, but their institutionalization varies considerably. In Indonesia and Malaysia, religious authorities (MUI and JAKIM) and government institutions provide formal structures that reinforce halal consumption as a collective social obligation (Vanany et al., 2019; Daud et al., 2023). In Nigeria, subjective norms remain robust at the community and ethnic levels, but lack national integration due to regulatory fragmentation and the absence of a unified certification framework (Supriyadi et al., 2024; Wingett & Turnbull, 2017).

Third, and most critically, perceived behavioral control exhibits the widest variation among the three constructs. Malaysia achieves the highest level of control through its integrated certification system, advanced logistics infrastructure, and widespread halal literacy (Hasan & Latif, 2024; Bahrudin et al., 2024). Indonesia shows moderate control, with notable urban-rural disparities that limit access for rural populations (Nalawati et al., 2023; Kurniawati & Savitri, 2019). Nigeria demonstrates the lowest level of perceived behavioral control, constrained by weak infrastructure, the absence of a unified regulatory framework, and significant economic inequality that restricts access to certified products (Putri et al., 2023; Supriyadi et al., 2024). Building upon the construct-level comparison presented in Table 1, Table 2 synthesizes how the three TPB constructs interact and operate collectively within each national context. This synthesis provides a more holistic understanding of each country's halal ecosystem and identifies the distinctive configurations that characterize consumer behavior in Indonesia, Malaysia, and Nigeria.

Table 2.

Comparative Synthesis: Interaction of the Three TPB Constructs

Analysis Dimension	Indonesia	Malaysia	Nigeria
Relative Construct Strength	Attitude: ✅✅✅ Subjective Norms: ✅✅✅ Perceived Control: ✅✅	Attitude: ✅✅✅ Subjective Norms: ✅✅✅ Perceived Control: ✅✅✅	Attitude: ✅✅ Subjective Norms: ✅✅✅ Perceived Control: ✅
Consumer Behavior Characteristics	Halal consumption driven by religious awareness and lifestyle, but access remains geographically uneven.	Most mature halal behavior with systemic support from all dimensions; halal consumption becomes part of national identity.	Strong religious commitment, but access limited by infrastructure and economy; significant potential if regulation improves.
Policy Intervention Priorities	Expand halal literacy and infrastructure in rural areas; maintain certification standards.	Maintain certification standards; expand halal literacy programs to non-food sectors.	Establish national halal certification body; build logistics and distribution infrastructure.

Primary Reference Sources	Aisyah (2016); Vanany et al. (2019); Nalawati et al. (2023); Kurniawati & Savitri (2019)	Arsil et al. (2018); Daud et al. (2023); Hasan & Latif (2024); Bahrudin et al. (2024)	Wingett & Turnbull (2017); Putri et al. (2023); Supriyadi et al. (2024); Yahya & Ariffin (2020)

Authors' synthesis based on the reviewed literature, 2026

The synthesis presented in Table 2 reveals three distinct halal ecosystem configurations. Malaysia emerges as the most mature and balanced ecosystem, where all three TPB constructs operate at optimal levels. This configuration enables halal consumption to function as both a religious practice and an integral component of national identity, supported by coherent policy frameworks and robust institutional infrastructure (Daud et al., 2023; Hasan & Latif, 2024).

Indonesia presents a configuration characterized by strong attitudinal and normative drivers, yet constrained by moderate perceived behavioral control. This pattern suggests that while Indonesian consumers are highly motivated by religious and social factors, structural barriers, particularly the urban-rural infrastructure gap, continue to limit equitable access to halal products (Nalawati et al., 2023; Kurniawati & Savitri, 2019). Consequently, policy interventions should prioritize bridging this access gap rather than further strengthening attitudes or norms, which are already robust. Nigeria exhibits the most challenging configuration, with strong subjective norms juxtaposed against weak perceived behavioral control. Despite high community-level religious commitment and social pressure to consume halal products, structural deficits, including inadequate infrastructure, fragmented regulation, and economic inequality, severely constrain consumers' ability to access certified halal goods (Supriyadi et al., 2024; Putri et al., 2023). This configuration suggests that Nigeria's policy priority should be establishing foundational infrastructure and regulatory frameworks before attempting to shift consumer attitudes or norms. The synthesis also highlights that perceived behavioral control serves as the critical bottleneck in both Indonesia and Nigeria. While Malaysia has successfully addressed this dimension through systemic investment and institutional coordination, Indonesia and Nigeria must prioritize infrastructure development, regulatory harmonization, and equitable access to unlock their full halal market potential.

The distinctive configurations identified in Tables 1 and 2 necessitate differentiated policy responses. Table 3 translates the TPB-based diagnostic findings into concrete, actionable policy recommendations tailored to each country's specific circumstances. These recommendations are designed to address the weakest TPB construct in each national context, thereby maximizing the effectiveness of policy interventions and resource allocation.

Table 3.
TPB-Based Policy Recommendations by Country

Country	Weakest TPB Construct	Policy Recommendations	Supporting References
Indonesia	**Perceived Behavioral Control** *(urban-rural access gap)*	1. Build halal distribution centers in remote areas. 2. Expand halal literacy programs through pesantren and schools. 3. Simplify certification procedures for rural MSMEs.	Nalawati et al. (2023); Izzuddin & Adinugraha (2022); Sari et al. (2024)
Malaysia	*All constructs strong → Focus on maintenance*	1. Maintain JAKIM certification standards. 2. Expand halal literacy to cosmetics, pharmaceuticals, and tourism sectors. 3. Strengthen halal supply chain monitoring.	Hasan & Latif (2024); Daud et al. (2023); Bahrudin et al. (2024)
Nigeria	**Perceived Behavioral Control** *(very low)*	1. Establish a credible national halal certification body. 2. Build logistics infrastructure and halal production centers. 3. Collaborate with Indonesia/Malaysia for knowledge transfer. 4. Educate the public on halal benefits and standards.	Supriyadi et al. (2024); Putri et al. (2023); Hermawan (2020); Yahya & Ariffin (2020)

Authors' synthesis based on the reviewed literature, 2026.

Table 3 demonstrates that effective halal industry policy must be context-sensitive and theoretically grounded. For Indonesia, the priority is strengthening perceived behavioral control through infrastructure development and simplified certification procedures, particularly in rural areas. This approach does not ignore the importance of maintaining strong attitudes and norms, but recognizes that the binding constraint on halal consumption is structural rather than psychological or social (Nalawati et al., 2023; Izzuddin & Adinugraha, 2022). Initiatives such as establishing halal distribution centers in remote regions, expanding literacy programs through pesantren, and streamlining MSME certification would directly address this constraint (Sari et al., 2024).

For Malaysia, where all three TPB constructs are already strong, the policy focus shifts from structural reform to quality maintenance and sectoral expansion. Maintaining JAKIM's certification standards, expanding halal literacy to non-food sectors (cosmetics, pharmaceuticals, tourism), and strengthening supply chain monitoring will sustain Malaysia's competitive advantage in the global halal market (Hasan & Latif, 2024; Daud et al., 2023; Bahrudin et al., 2024). For Nigeria, the policy imperatives are foundational and urgent. Establishing a credible national halal certification body, building logistics infrastructure and production centers, collaborating with Indonesia and Malaysia for knowledge transfer, and educating the public on halal standards and benefits represent the

core priorities (Supriyadi et al., 2024; Putri et al., 2023; Hermawan, 2020; Yahya & Ariffin, 2020). Without addressing these foundational deficits, efforts to shift consumer attitudes or norms, however well-intentioned, will remain ineffective due to the structural barriers that limit perceived behavioral control.

Collectively, the TPB analysis reveals that halal consumer behavior cannot be understood solely through economic or religious lenses; rather, it emerges from the complex interaction between psychological dispositions, social pressures, and structural enablers. The configurations identified in this study demonstrate that countries at different stages of halal industry development require fundamentally different policy strategies. For Indonesia, the challenge is to maintain strong consumer motivation while expanding structural access. For Malaysia, the challenge is to sustain excellence and expand to new sectors. For Nigeria, the challenge is to build the foundational infrastructure and regulatory framework that will enable future growth. By addressing the weakest TPB construct in each country, policymakers can achieve the greatest impact with limited resources, ensuring that halal consumption becomes not only a religious practice but also an accessible and equitable dimension of everyday life.

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No potential conflict of interest was reported by the author(s).

Ethical Approval

This study is a systematic literature review based exclusively on secondary data from published academic journals, official reports, and policy documents. It does not involve primary data collection from human subjects, animals, or any form of direct intervention. Therefore, ethical approval was not required for this research.

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