

# HALAL LOGISTICS IMPLEMENTATION IN THE CONTEXT OF ASEAN LIBERALISATION: A LITERATURE REVIEW

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## Introduction

Within the last two decades, an obvious trend of development and consistent evolution can be observed in logistics (Gundlach et al., 2006). It is being considered as an industry with strategic role, and not as a supportive industry (Sum et al, 2001). This importance of logistics industry has been increasing because of globalisation of many countries and expansion of international trade etc. As per recent statistics and forecasts, there is a huge chance of growth in Asia Pacific region (Sun et al., 2001). The dramatic expansion in the trade with countries in this region i.e., Indonesia, Thailand, Malaysia and Singapore has resulted in an increased demand for better, effective and efficient logistics. The Halal market is the biggest market in the world but is largely overlooked. The Ministry of International Trade and Industry Malaysia (MITI) categorized the Halal market into three categories, namely food, non-food (pharmaceuticals, toiletries, medical products, medical devices, and cosmetics) and services (logistics, packaging, branding, marketing, media coverage and tourism), thus valuing the Halal market at a staggering US\$2.3 trillion. This is contributed by the dominance of Muslim population (Adams, 2011), the gaining acceptance among non-Muslim consumers (Golnaz et al., 2010; Aziz and Chok, 2013), increased awareness on Halal products and services (Bonne et al., 2007; Bonne and Verbeke, 2008) and Halal is becoming a lifestyle (Lada et al., 2009).

As mentioned earlier, one of the Halal markets is logistics, commonly termed „Halal logistics“, and it is an emerging trend (Kamaruddin et al., 2012). Besides, there are many logistics service providers (LSP) in Malaysia are adopting Halal in their operations (Jaafar et al., 2011; Talib et al., 2013) and the Malaysia government, in its Third Industrial Master Plan (IMP3) 2006-2020, listed Halal logistics as one of the potential business to stamp Malaysia’s mark as the preferred Halal hub in the world.

The objective of this study is to examine the relevant literature and discuss the issues related to Halal logistics industry in Malaysia, after the ASEAN liberation. The Halal logistics industry in Malaysia will be evaluated from the politic, economy, social and technology factors.

## Background of Logistics and Supply Chain in Malaysia

There is a limited research on management of logistics and supply chain management in the context of Malaysia. It seems like companies in the past were unaware of the advantages of having an effective and efficient distribution system and therefore, no efforts were made to develop effective distribution strategies. However, the transformation of economy from agriculture-based to a trade-driven based as well as the development of international trade within the last decade has stimulated awareness that transport and logistics sector plays a critical role in facilitating the country’s economy (MIMA, 2004).

A recent report highlighted that Malaysia has the opportunity to create an additional value of about RM9-11 billion over the next decade, which contributes approximately 12.1% to the GDP, if the supply-chain competitiveness is improved through more efficient transport and logistics services. The report also emphasised that by reducing the supply chain cost will ultimately stimulate further national growth as the World Bank has estimated that a 10% reduction in transportation costs can increase trade by 20% (Ali et al., 2008). Similarly, McKinsey Global Institute who studied productivity improvements in various industry sectors around the world, indicated that such efficiency improvements are likely to translate into a GDP growth effect of at least the same order. Consequently, this creates a virtuous and perpetuates effect on the economy.

Various incentives have also been introduced by the government. One of the incentives is Integrated Logistics Services (ILS) incentives. The purpose is to encourage logistics service providers to consolidate or integrate their activities to include other services as well as encouraging them to venture into business abroad (MITI, 2008). As at December 2013 a total of 33 companies have been granted the Integrated Logistics Services (ILS) incentives, which amounted to RM880.5 million (MITI, 2014). As a result of an active development of the industry, at the end of year 2013, the industry, which comprises of transport, storage and communication services contributed more than 5.0% to the country’s GDP.

### *Third Industrial Master Plan (2006-2020) (IMP3)*

Recognising the significance of the halal logistics sector towards the enhancement of Malaysia's progress in industrialisation and international trade, the role and importance of the halal logistics industry has been officially mentioned and highlighted in the Third Industrial Master Plan (2006-2020) (IMP3, 2005). The targets underlined by the government includes the achievement of overall growth of 8.6% by the year 2020, which is equivalent to approximately 12.1% contribution to the GDP; to increase the total marine cargo by more than three-fold, air cargo trade by more than two-fold and railway freight by more than four-fold in the year 2020.

### *Liberalisation of Logistics Sector under Association of Southeast Asian Nations (ASEAN)*

Under the Association of Southeast Asian Nations (ASEAN) a liberalization program of the logistics service sector has been agreed among the member countries. This program creates an ASEAN single market by 2015; strengthening ASEAN economic integration through liberalisation and facilitation measures in the area of logistics services and supporting the establishment and enhancing the competitiveness of an ASEAN production base through the creation of an integrated ASEAN logistics environment (EUMCCI, 2011). Specific measures and timelines for integration, liberalisation and facilitation of the logistics sector have been outlined in the ASEAN Roadmap for Integration of Logistics Sector, which includes:

- The coverage of logistics services for liberalisation;
- Issues related to trade and customs facilitation;
- Expanding the capability of ASEAN logistics service providers;
- Human resources development; and enhancing multimodal transport infrastructure investment.

The liberalization requires Malaysia to strengthen its logistics industry, the capabilities of the logistics players and the multi-modal transport infrastructure in order to attract FDI in logistics and trade to Malaysia in future. Due to its excellent location, transportation infrastructure and availability of land, Malaysia would be the preferred location for an Asia Regional Distribution Centre allowing for value added logistics (VAL). As one of ASEAN's leading logistics hubs, Malaysia is expected to lead green logistics initiatives in ASEAN. The Ministry of International Trade and Industry (MITI) are taking responsibility to meet the liberalisation targets under ASEAN (MITI, 2007; 2008).

### **Halal Logistics in Malaysia**

According to Mentzer *et al.* (2001), logistics is part of supply chain process that plans, implements, and controls the efficient flow and storage of goods, services, and related information from the point of origin to the point of consumption in order to meet customers' requirements. Lambert *et al.* (1998) state that the objective of logistics management is to achieve customer satisfaction by ensuring that product or services are made available at the right time, in the right quantity, with the right description and in good condition. Since there are concerns on the status and integrity of Halal products and services, the customers are demanding for logistics services that can ensure the Halal status remains intact even during distribution activities. Hence, Smith (2007) explains that Halal products and services depend on the Halal logistics functions such as transportation, warehousing and packaging. Smith continues that the success of Halal logistics will contribute to the overall growth of Halal industry.

The acceptance of Halal logistics is highly welcomed in Malaysia as not only it is a Muslim country, but the strong government support also contribute to the large acceptance. Omar and Jaafar (2011) and Kamaruddin *et al.* (2012a) stated that Halal logistics is a lucrative business. Furthermore, logistics service providers LSP are also adopting Halal into their operation, by dedicating assets, facilities, procedures and manpower. Jaafar *et al.* (2012) reported that LSP are innovative in combining Halal and logistics operations such as *samak* (ritual cleansing) services for containers, dedicated cold-storage, dedicated warehouse, Halal-specialized carriers and Halal-only tools and equipment. These various services are indications that LSP and Halal LSP are dedicated towards establishing a total Halal logistics services here in Malaysia (Talib *et al.*, 2013).

Although Halal logistics is gaining grounds among LSP and consumers, there are issues encountered (Kamaruddin *et al.*, 2012a; Talib *et al.*, 2013). For instance, the Halal logistics faces challenges in the form of lacking enforcement and monitoring, inadequate Halal standards, low credibility and low level

of centralization (Kamaruddin *et al.*, 2012a). Besides, Talib *et al.* (2013) discover that the LSP perceived Halal logistics associates with higher cost as it requires different sets of equipment, facilities and assets. However, there are many academic and professional research performed in the Halal logistics related fields such as, training in Halal logistics (Pahim *et al.*, 2012a and 2012b), Halal transportation (Tan *et al.*, 2012), willingness to pay for Halal logistics (Kamaruddin *et al.*, 2012a), Halal packaging (Talib and Johan, 2012), and food supply chain (Halaseh and Sundarakani, 2012; Manzouri *et al.*, 2013).

### **External Environment and Factors effecting Halal Logistics**

An external environment is the general environment, or sometimes is referred to as macro-environment (Mohamed *et al.*, 2010), that directly or indirectly influence firms in an industry. Additionally, external environment evaluation is also referred to as PEST Analysis (Ward and Rivani, 2005). A PEST Analysis is a shortening for political, economic, socio-cultural and technological analysis. Like PEST Analysis, assessing the environment from politic, economic, social, and technology perspective, an external environmental evaluation gives a „satellite view“ of an industry and also a tool used to monitor trends, opportunities or threats (Pulaj and Kume, 2013). Following are a few issues related to Halal Logistics Industry considering political, economic, socio-cultural and technological factors.

#### *Political Factors*

The role of government is apparent in logistics industry as political interventions, such as developing key logistics infrastructure, will accelerate the growth and development of logistics industry (Goh and Pinaikul, 1998). In Malaysia Halal logistics industry, the political or governmental factors can be seen from various efforts such as tax incentives, financial supports, certification and guidelines (Ramli, 2006; Muhammad *et al.*, 2009; Tan *et al.*, 2012; Talib, 2014). Apart from that, examples of government role in Halal logistics include planning, developing, implementing, regulating, promoting and educating Halal (Samsi *et al.*, 2011). In the IMP3 2006-2020, the Malaysia government encourage LSP to adopt Halal into their operation by offering tax exemption, tax drawbacks and double deduction (MITI, 2006). Tan *et al.* (2012) described this initiative as encouragement for new investment, as well as in increasing the use of information communication technology (ICT) in Halal logistics. Furthermore, government supports come in the form of introducing and applying Malaysia Standards for Halal logistics, the MS2400:2010, and other Malaysia Halal Certifications. According to Talib (2014), government support also comes in the form of policies, procedures and guidelines. The government efforts have managed to position Malaysia Halal Certification as the most reliable standards, and Malaysia is known for its Halal certification (Muhammad *et al.*, 2009). Moreover, the development of Halal logistics infrastructure by the government is an indication of political factor, thus consistent with the work done by Goh and Pinaikul (1998). For instance, the Malaysia government established Halal Park and Halal Distripark to cater for Halal product and services, including Halal Logistics. However, the political factor from the government can also be a threat. For example, fake Halal certification and lack of standardization are problems in Halal logistics as it will lead to confusion and doubt among consumers (Shafie and Othman, 2006; Ibrahimi *et al.*, 2012). Besides, the process of applying new or renewing Halal certification are inefficient, tedious, time consuming and very costly (Abdul *et al.*, 2009; Noordin *et al.*, 2009). Although many efforts have been put into action to curb these issues, they are still pertinent and a threat in the Halal industry.

#### *Economic Factors*

Malaysia is blessed with strategic location, good external trade, and strong government support, and this leads to strong logistics industry forecast by Frost & Sullivan that predict Malaysia's logistics industry growth was US\$45.1 billion in 2013. A strong economic and industry growth is one of the aspects in economic factors (Mohamed *et al.*, 2010). Furthermore, the total Halal market, comprises of food and non-food market, is valued at US\$2.3 trillion (MITI, 2013). This is a very good indication for LSP to adopt Halal in their operations and it is also a good avenue for Halal logistics in Malaysia to become a global Halal hub. Furthermore, Talib (2014) suggests that Halal LSP should target the ASEAN Free Trade Area (AFTA) for transporting or distributing Halal goods. This is because ASEAN market is very promising as between the year 2010 and 2013, the Intra-ASEAN trade among the participating countries recorded growth and was valued at US\$598 billion, and Malaysia holds one of the largest total trade values of US\$108 billion. (MITI, 2013).

#### *Social Factors*

The acceptance of Halal products and services among Muslims and non-Muslims is because of the perception that Halal is a symbol of a healthier lifestyle and clean preparation (Ambali and Bakar, 2013; Aziz and Chok, 2013). This consumer inclination towards Halal is an indication that Halal logistics trend is on the rise and more business customers and consumers are willing to pay for Halal-compliant logistics services (Kamaruddin *et al.*, 2012a). The response from the public has led Halal LSP to invest in Halal-dedicated assets such as Halal warehousing, Halal seaport, Halal transportation and carrier, Halal-only equipment, Halal audit teams, Halal tracking, and steam/*samak* services (Jaafar *et al.*, 2011; Kamaruddin *et al.*, 2012b; Talib *et al.*, 2013). Furthermore, a threat worth mentioning is the lack of talent and knowledge of Halal logistics. Talib *et al.* (2013) states the scarcity of talent and knowledge about Halal and logistics combined is an issue need to be addressed. Knowledge of both Halal and logistics must be hand-in-hand in order to achieve incomparable Halal logistics services, but as mentioned earlier, there is lack of professionals in logistics industry.

#### *Technology Factors*

Information technology (IT) in logistics helps to improve productivity of LSP, enhance the effectiveness and efficiency level, and even help to position a country to become a logistics hub (Piplani *et al.*, 2004; Hazen and Byrd, 2012). This is an indication that use of IT is also vital in Halal logistics, and Halal LSP must grab this opportunity as it is gaining interest and a lucrative business (Mazlan, 2005; Zailani *et al.*, 2010). According to Bahrudin *et al.* (2011) and Tan *et al.* (2012), the tracking and tracing activities in Halal logistics is part of IT and it enhances the service integrity. Therefore, the applications of IT in Halal logistics benefit both the service providers and consumers. Moreover, Transportation Management System (TMS), Warehouse Management System (WMS), Electronic Data Interchange (EDI) and Global Positioning System (GPS) and Radio Frequency Identification (RFID) are examples of IT application used in Halal logistics (Bahrudin *et al.*, 2011; Nasir *et al.*, 2011; Tan *et al.*, 2012). For instance, the use of RFID in Halal logistics can help strengthen Malaysia status as the world Halal hub (Norman *et al.*, 2009). However, issues such as resistant to change and false perception on Halal logistics adds in more costs can be threats to the Halal logistics success. Tan *et al.* (2012) expressed that organizations are resistant to adopt IT in Halal logistics activities while some are used to the traditional way of short message services (SMS) for real-time tracking (Anir *et al.*, 2008). Besides, the issue of IT compatibility exists among LSP and this cause service inconsistency (Tan *et al.*, 2012).

From the literature discussed above, Figure 1 showcases the external factors of Malaysia Halal logistics industry. There are six factors for politic and social factors, and only four factors for economic and technology factors. It must be noted that the factors shown are not fixed and may change as the external environment is constantly changing.

#### **Conclusion**

The objective of this study is to examine the relevant literature and discuss the issues and opportunities related to Halal logistics industry in Malaysia. This study reviewed the related literature and examined the factors that are related to Halal logistics in Malaysia considering the main four external environment dimensions including political, socio-cultural, economic and technological. This study discovered seventeen (17) factors that externally impacting the Halal logistics industry in Malaysia and divided them based on four (4) external environment dimensions. Hence, this study appraises the knowledge of environmental analysis and contributes to the Halal logistics body of knowledge. Despite of the remarkable expansion of the industry, there has been very little published research in the area of logistics and supply chain particularly in Malaysia – a Muslim majority country observing Halal way of life (Ali *et al.*, 2008). Halal is a Muslim way of life, and it is not only limited to Muslims' dietary but includes speech, behaviour, dress code and social manner (Al Jallad, 2008). This study is significant for researchers and professionals in order to have more knowledge on the environment and surroundings. This study is hopeful that it will be a reference and a platform for more research in the future.

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