



Sistem Logistik Halal



Togar M. Simatupang
Sekolah Bisnis dan Manajemen
Institut Teknologi Bandung
12 Januari 2016

Kilasan

1. Pendahuluan
2. Ekonomi Halal Global
3. Industri Halal Malaysia
4. Logistik Halal
5. Logistik Halal di Indonesia
6. Tantangan

Pendahuluan

- Indonesia adalah negara dengan jumlah penduduk muslim terbesar di dunia.
- Seiring dengan pertumbuhan pelanggan muslim, kesadaran akan produk halal semakin meningkat.
- Industri halal Indonesia masih berkutat pada sertifikasi halal produk atau merek belum memperhatikan pergerakan barang sampai ke tangan pelanggan.
- Tingginya permintaan domestik akan produk halal dan terbukanya pasar Asean dan internasional mendorong industri halal nasional perlu memperhatikan bukan hanya sisi merek tetapi juga bagaimana produk sampai ke tangan konsumen.
- Paparan ini menyajikan perkembangan terakhir tentang logistik halal baik pada tataran global maupun nasional.

Ekonomi Halal Global

Halalan - Thoyyiban

Halal = diijinkan

- Religius
- Iman
- spiritual

Thoyyiban = baik

- Mutu
- Keamanan
- Higinis
- Bersih (sanitasi)
- Bergizi
- Otentik

International Halal Integrity Alliance (IHI)



Pendorong Ekonomi Halal

Demografi Muslim: 1,8 miliar

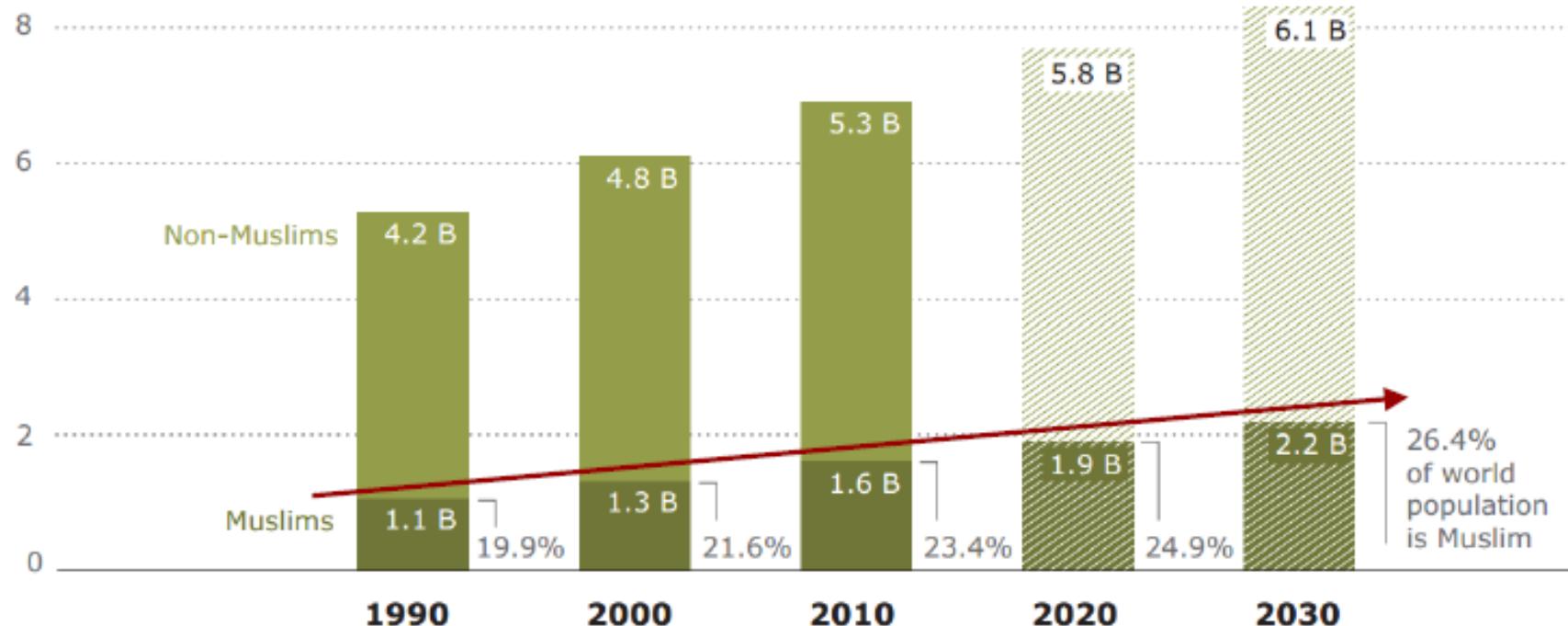
Pasar Halal

Belanja Muslim

Komunikasi: media sosial, internet, e-komersial

Demografi Muslim

10 billion

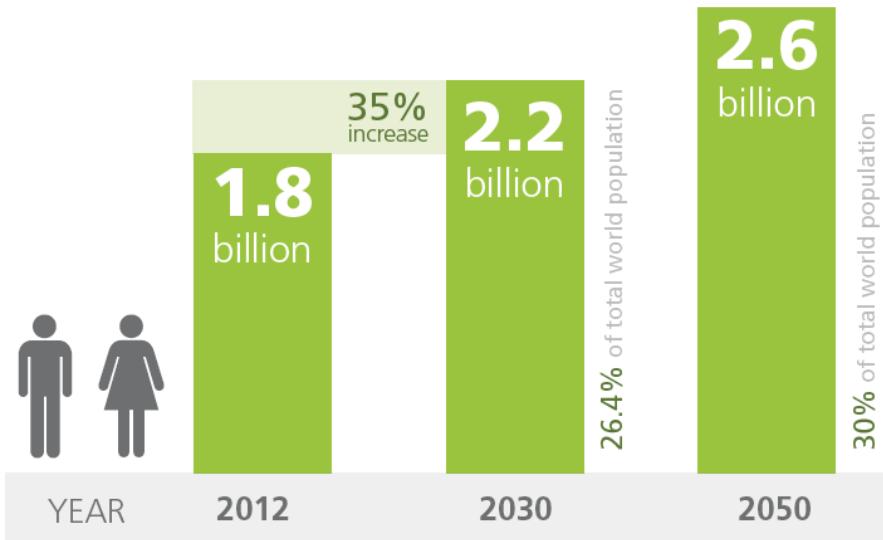


Percentages are calculated from unrounded numbers. Cross hatching denotes projected figures.

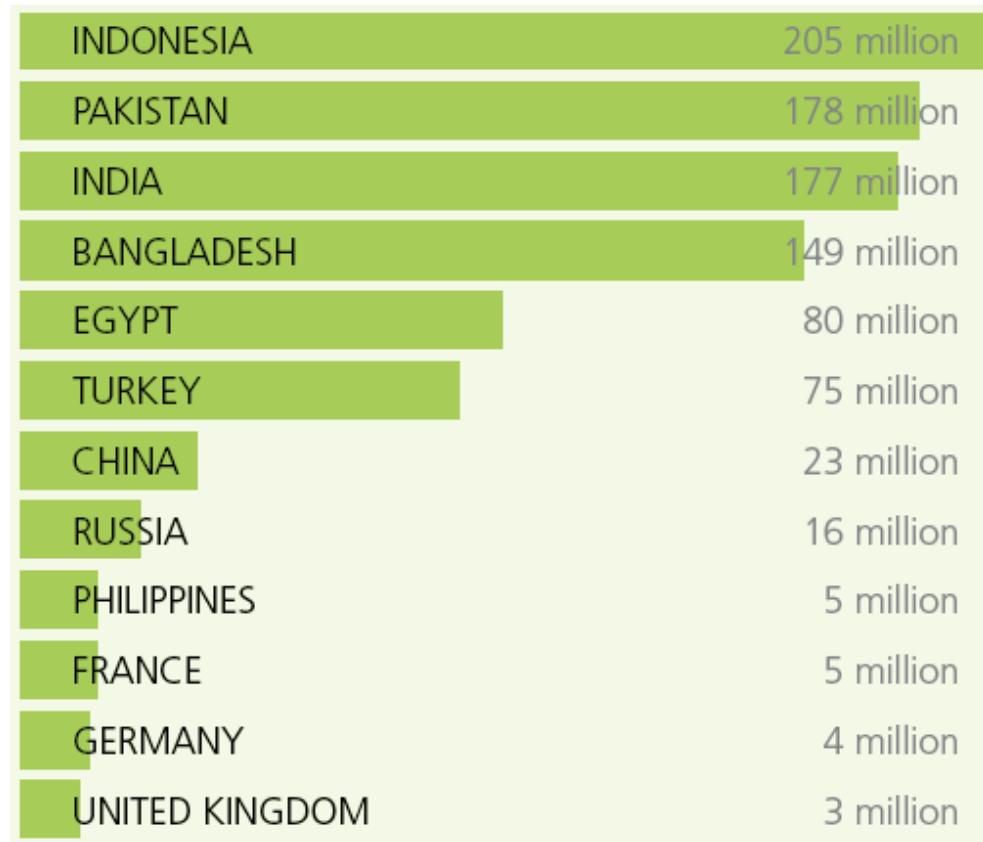
Pew Research Center's Forum on Religion & Public Life • *The Future of the Global Muslim Population*, January 2011

Komposisi Penduduk Muslim

Penduduk Muslim Dunia



Penduduk Muslim Berbagai Negara



Sumber: Fleishman-Hillard Majlis, "The next billion: The market opportunity of the Muslim world, July 2012.

Pasar Halal

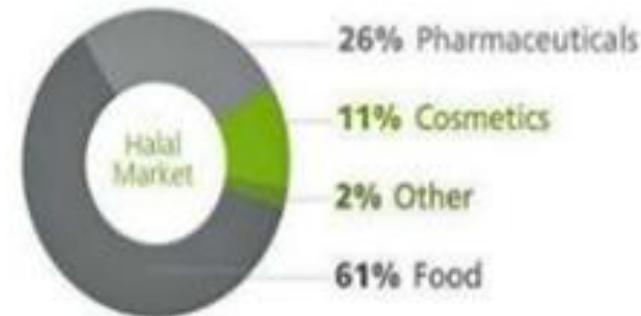
The Halal Economy

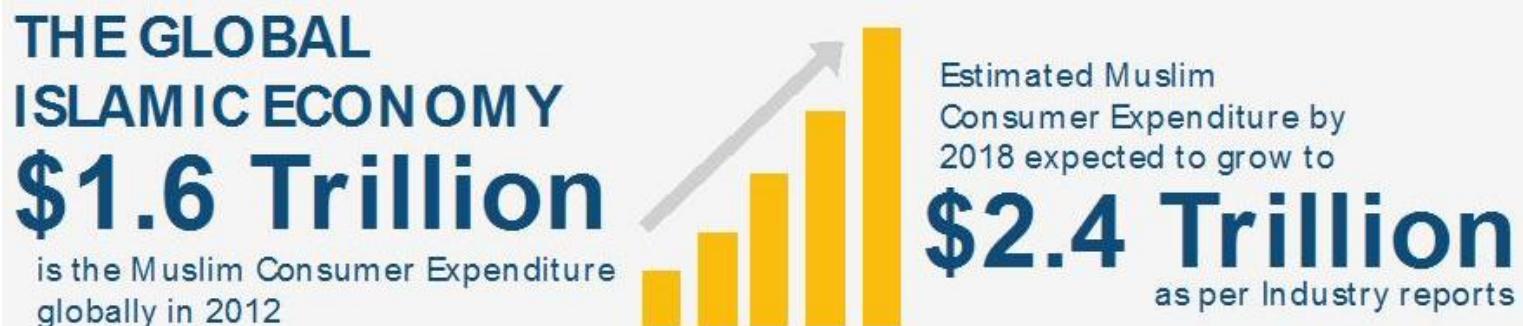


Global Halal Market Value

US\$ 2,300,000,000,000

annually





8 Major Verticals of the Muslim Lifestyle Market



FOOD
\$1,088 Billion
2012 Expenditure



FINANCE
\$1,354 Billion
2012 Assets



CLOTHING
\$224 Billion
2012 Expenditure



TRAVEL
\$137 Billion
2012 Expenditure



MEDIA &
RECREATION
\$151 Billion
2012 Expenditure



PHARMACEUTICALS
\$70 Billion
2012 Expenditure



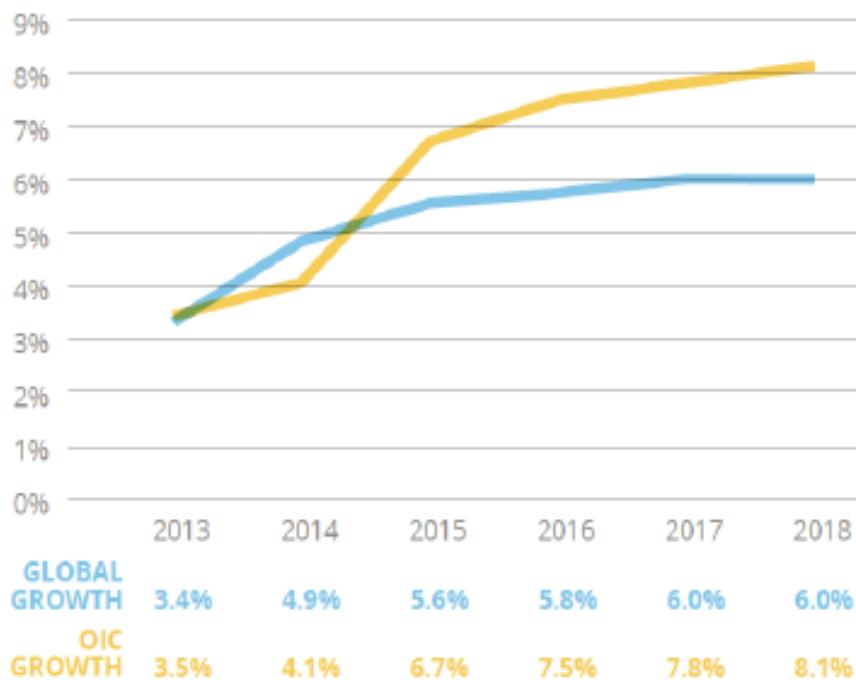
COSMETICS
\$26 Billion
2012 Expenditure



LOGISTICS
\$15 Billion
2012 Expenditure

Belanja Halal

OIC VS GLOBAL GDP GROWTH



TOP 10 OIC COUNTRIES BY GDP

COUNTRY	GDP, CURRENT PRICES (NATIONAL CURRENCY) (US BILL, 2012)
Indonesia	\$878
Turkey	\$794
Saudi Arabia	\$727
Iran, Islamic Rep.	\$549
United Arab Emirates	\$359
Malaysia	\$304
Nigeria	\$269
Egypt	\$257
Iraq	\$213
Kazakhstan	\$196
TOTAL	\$4,546

Source: IMF World Bank 2012 database

Quelle: State of the Global Islamic Economy
2013, Thomson Reuters and Dinar Standard

Konsumsi Halal

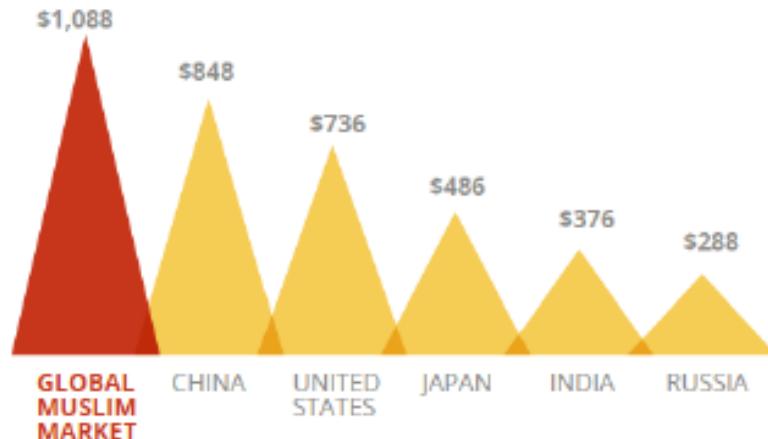
Global consumption in 2012 (US\$ billion)²

Islamic
Rest of world

Food	Clothing	Travel*	Cosmetic
1088	224	137	26
5466	1899	959	430

\$ MUSLIMS GLOBALLY SPENT
\$1,088 BILLION
ON FOOD & BEVERAGE IN 2012
(16.6% OF GLOBAL F&B EXPENDITURE)

\$ EXPECTED TO REACH
\$1,626 BILLION
IN 2018
(17.4% OF GLOBAL EXPENDITURE)



Quelle: 10th World Islamic Economic Forum (WIEF), Delegate's brief and discussion agenda, PWC, 2014

Pasar Makanan Halal

Halal Food Markt



TOP MUSLIM FOOD CONSUMPTION MARKETS
US BILLION, 2012

1. INDONESIA	\$197
2. TURKEY	\$100
3. PAKISTAN	\$95
4. EGYPT	\$88
5. IRAN	\$77



TOP EXPORT COUNTRIES TO OIC COUNTRIES
MEAT & LIVE ANIMALS
US BILLION, 2012

1. USA	\$17.3
2. BRAZIL	\$14.4
3. NETHERLANDS	\$12.3
4. GERMANY	\$11.8
5. AUSTRALIA	\$8.5



TOP OIC IMPORT COUNTRIES
MEAT & LIVE ANIMALS
US BILLION, 2012

1. SAUDI ARABIA	\$2.28
2. EGYPT	\$1.47
3. UAE	\$1.41
4. TURKEY	\$0.95
5. MALAYSIA	\$0.80

Source: State of the Global Islamic Economy Report 2013. Expenditure data base into from 2008 International Comparison Program - National Statistics Agencies - DinarStandard Analysis; IMF Outlook 2012 Database for projections; Muslim market estimates and Value-chain from DinarStandard; Organic data — FBI; 3. IFCAI (2013). Trade data from UN Comtrade Database 2012. OIC = Organization of Islamic Cooperation (57 member countries).

Estimated annual market size for halal food

Continent / Country	Total Population (million)	Muslim Population (million)	Food Expenditure (US\$ per capita)	Market size (US\$ million)
Total	6,475.4	1,565.3	n.a.	547,409
Asia	3,921.0	1,043.7	350	365,299
West Asia	213.9	195.3	572	111,712
Indonesia	221.9	195.3	347	67,769
China	1,311.1	39.2	156	6,115
Malaysia	26.1	15.4	381	5,867
Thailand	65.0	5.9	371	2,189
Pakistan	162.4	157.5	n.a.	n.a.
India	1,103.6	154.5	n.a.	n.a.
Bangladesh	144.2	127.3	n.a.	n.a.
Others	672.8	153.3	n.a.	n.a.
Africa	906.0	461.8	200	92,360
Europe	727.4	51.2	1,500	76,800
North America	329.0	6.6	1,750	11,550
South America	559.0	1.6	500	800
Oceania	33.0	0.4	1,500	600

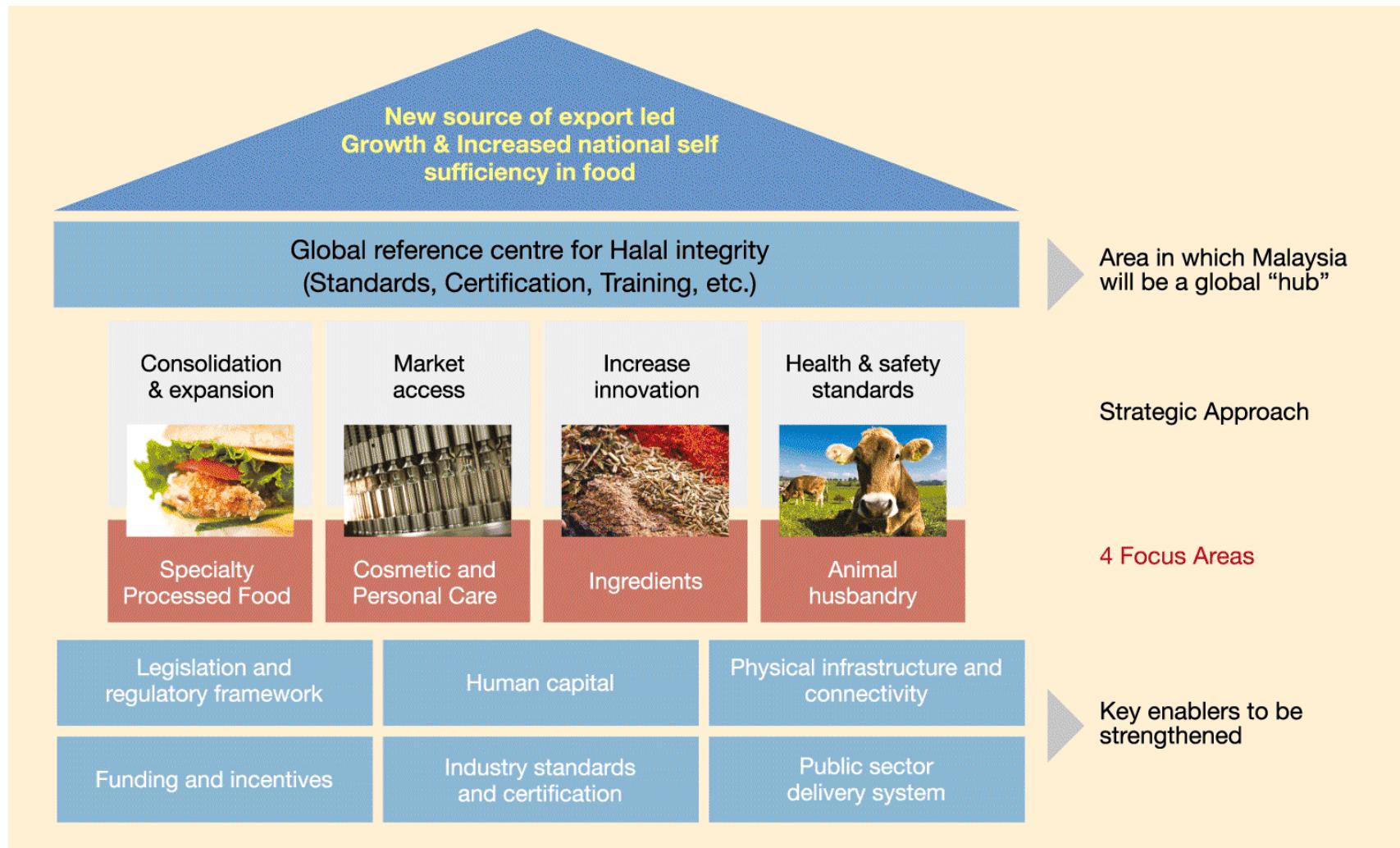
Sumber: The Third Industrial Master Plan (2006-2020), HDC at <http://majeca.org/2014/12/>

Teknologi Komunikasi dan Informasi



Industri Halal Malaysia

Malaysia Halal Industry Masterplan



Malaysia Halal Industry Masterplan

The implementation phases described in Halal Industry Master Plan

Phase 1 (2008-2010)

Establish Malaysia as a global leader in Halal Integrity

Halal Reference

- Improved certification process
- Global Halal support Centre
- Global knowledge base
- Global brand recognition
- R&D and Innovation

Phase 2 (2010-2015)

Establish Malaysia as a preferred locations for halal-related business

Wealth Creation

- Anchor companies
- Reduce fragmentation
- Flagship halal zone
- Key Investment
- High value Halal clusters

Phase 3 (2015-2020)

Broaden geographic footprint of home- grow companies

- Industry capabilities and capacity
- Homegrown global suppliers
- Outward Investment

Halal Industry Development Corporation (HDC)

Halal Industry

- Halal Agencies in Malaysia
- Halal Standards
- Halal Certification
- Industry Training and Services
- Market Information
- Policies & Regulations
- Discover Halal Malaysia
- Halal Logo
- Halalan Toyyiban
- Fatwa
- Halal Glossary

Initiatives

- 11th Malaysia Plan: Halal Industry
- SME Mentoring Programme
- Program GO! HALAL
- Halal World TV Series
- Global Halal Support Centre
- Halal Parks
- HDC Incentives
- Halal Data Warehouse
- Halal Training
- Comprehensive Halal Directory
- World Halal Week Conference

GLOBAL HALAL SUPPORT CENTRE

Strategic Impact



Halal Industry
Development Corporation

Contributes to :



Strategic Impact in Halal Master Plan



FOR CONSUMER :
MAKING HALAL AS A LIFESTYLE



FOR BUSINESS : MAKING MALAYSIA AS A
PREFERRED BUSINESS LOCATION AND
BROADEN FOOT-PRINT OF HOME GROWN CO.

FOR GOVERNMENT : MAKING MALAYSIA
AS A GLOBAL HALAL REFERENCE CENTRE

PROPAGATING NEW TALENTS FOR HALAL
INDUSTRY

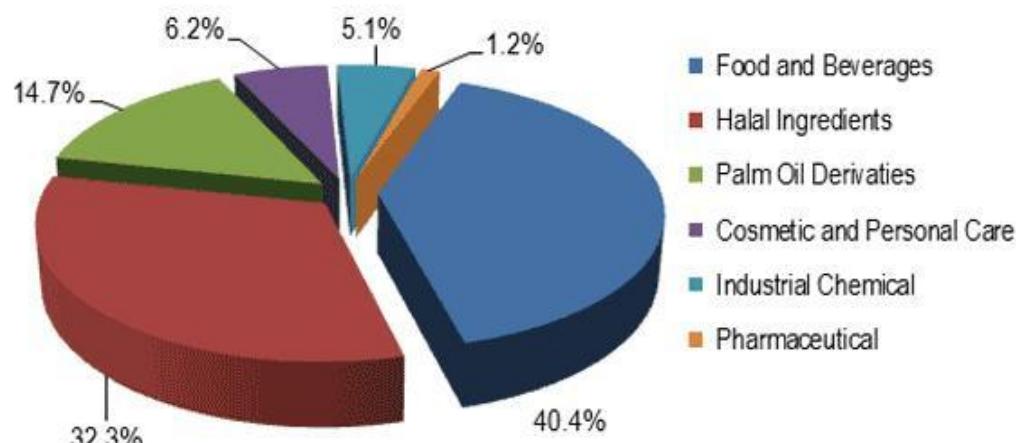
The Achievements

KPI (2020)	Achievement in 2014
Halal Export Revenue RM19billion	RM37.7billion
Employment in Halal 300,000 jobs	206,000 jobs
Number of exporters (SMEs) 1,6000 companies	700 companies
-	5415 Halal certified companies in Malaysia

Source: MITI 2015

Total Halal Export 2013 RM32.8 BILLION

Major Halal Exported Products	RM (million)
Ingredient	10,621.45
Food & Beverage	13,272.18
Palm Oil Derivatives	4,828.29
Industrial Chemical	1,686.99
Cosmetic & Personal Care	2,025.95
Pharmaceutical	407.15

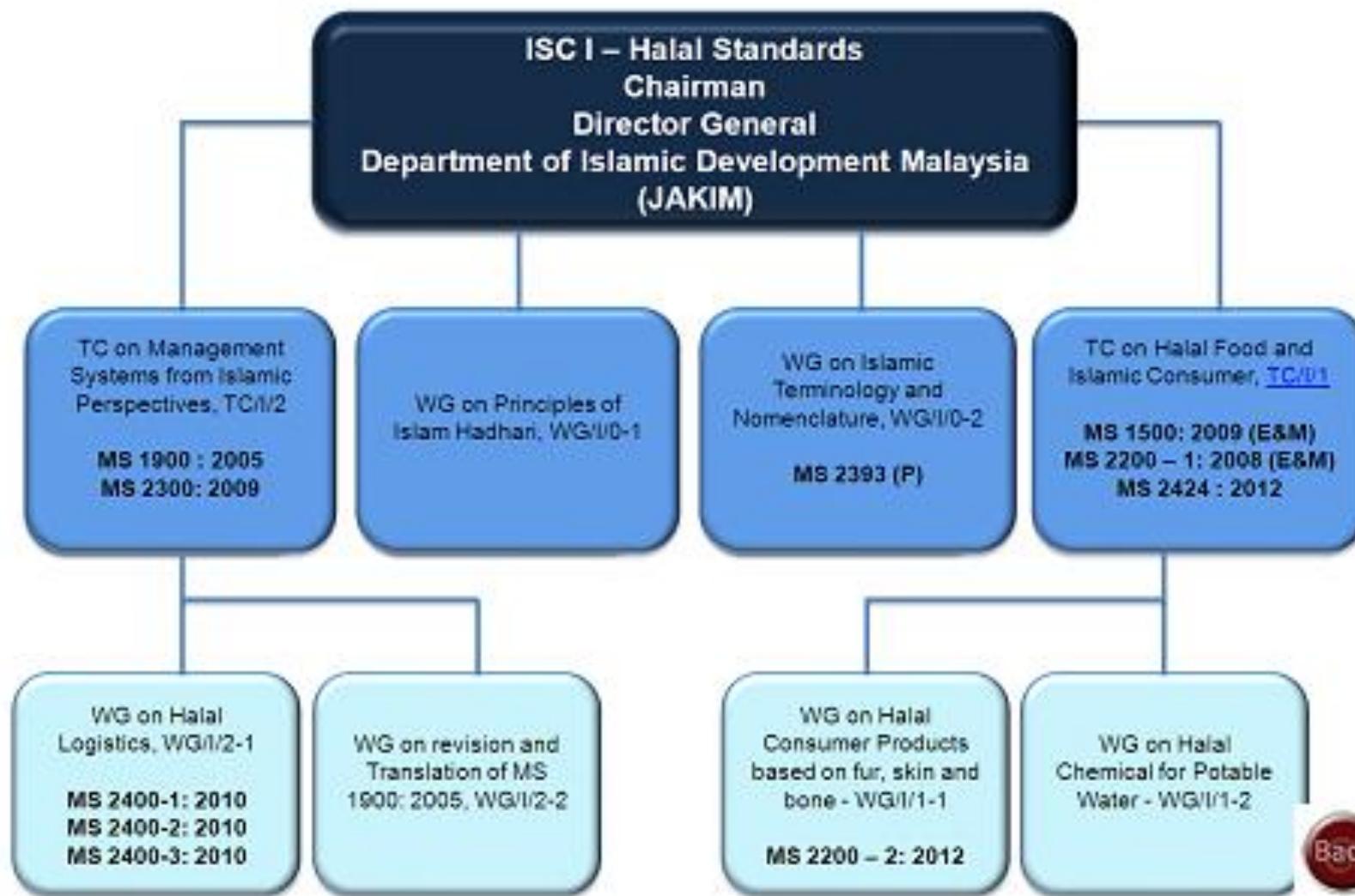


Halal Exports



Source: MITI 2015

Struktur Standar Halal

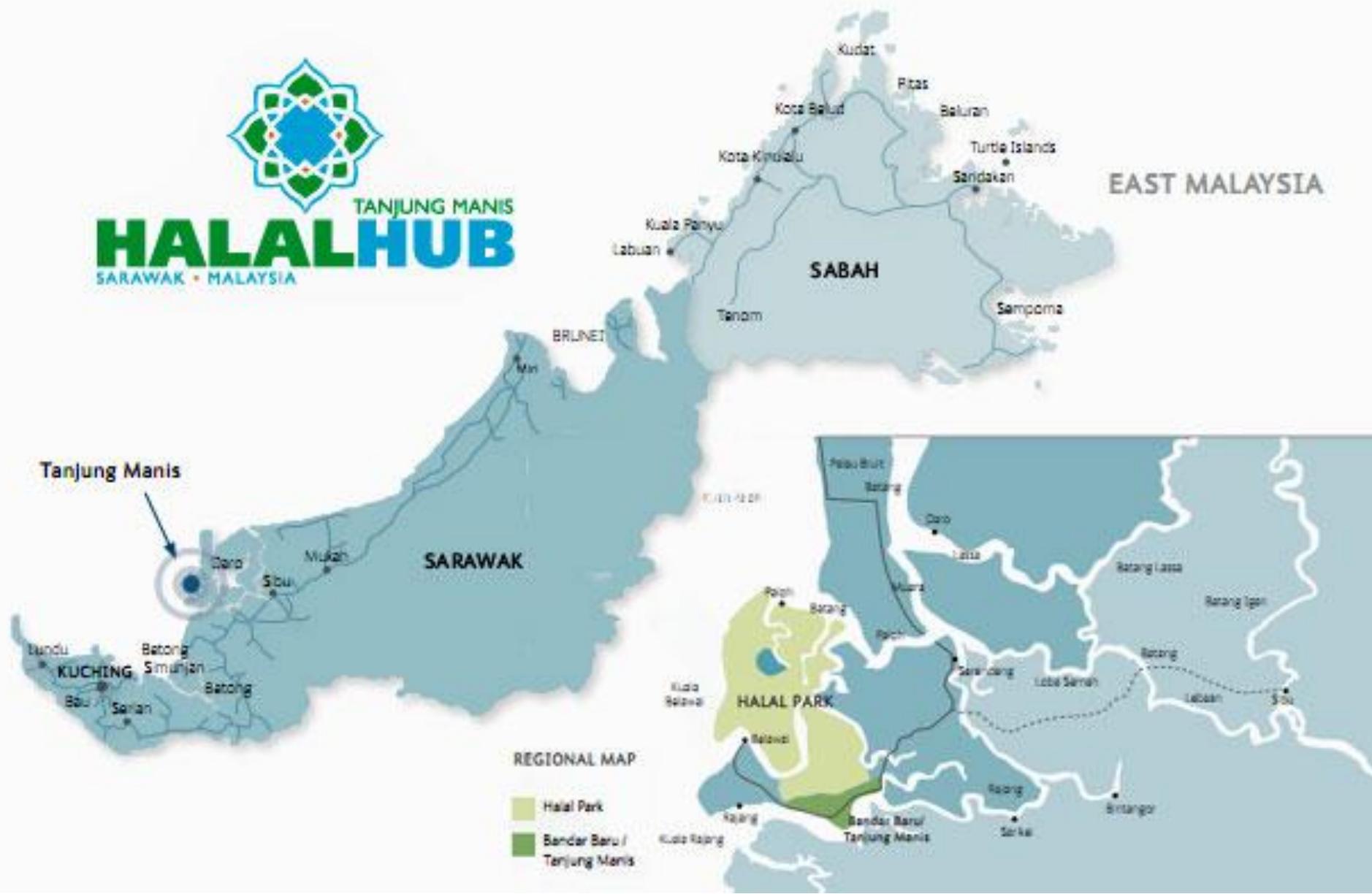


Back

JAKIM/Malaysian Recognised Certification Bodies

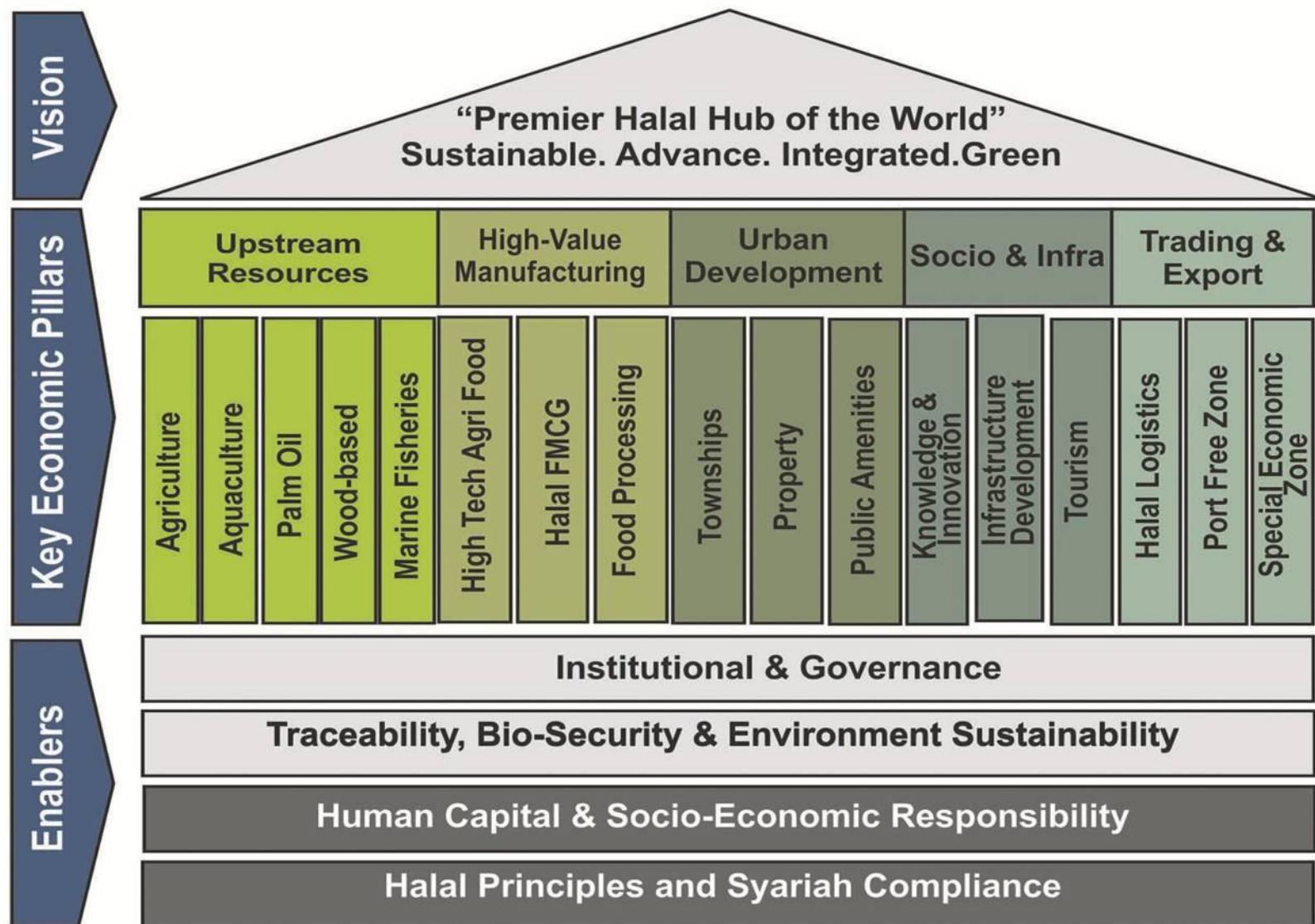


Source: MITI 2015



TANJUNG MANIS HALAL HUB

Potential Industries within the Tanjung Manis Halal Hub



Tanjung Manis Master Plan Components

The main proposed development components :

Agriculture	Agriculture Plantation - Agriculture Farming - Agriculture CEA
Aquaculture	
Industry	Heavy Industry - Light and Medium Industry Future Industry
Residential	High Density Residential Low and Medium Density Residential
Forest and Mangrove Reserve (Environmental Sensitive Area)	
Park and Recreational	
Tourism	
Commercial / Mixed Development	
Government Reserve	
Airport, Port and Road	
Public Amenities and Utilities	

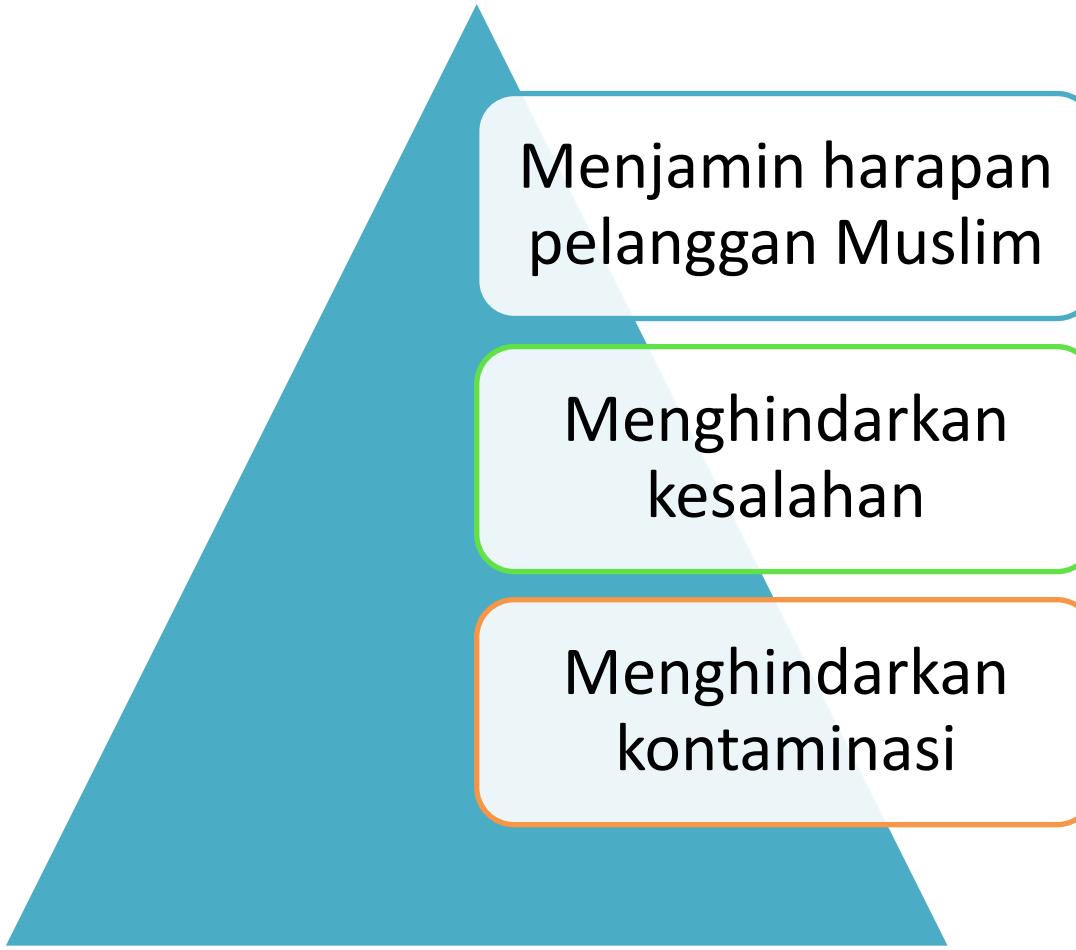


Logistik Halal

Logistik Halal

Proses mengelola pengadaan, pergerakan, penyimpanan, dan penanganan material, ternak, dan persediaan barang setengah jadi baik makanan dan bukan makanan bersama dengan informasi terkait dan aliran dokumentasi melalui organisasi perusahaan dan rantai pasok yang patuh terhadap prinsip-prinsip umum syariah.

Prinsip Logistik Halal

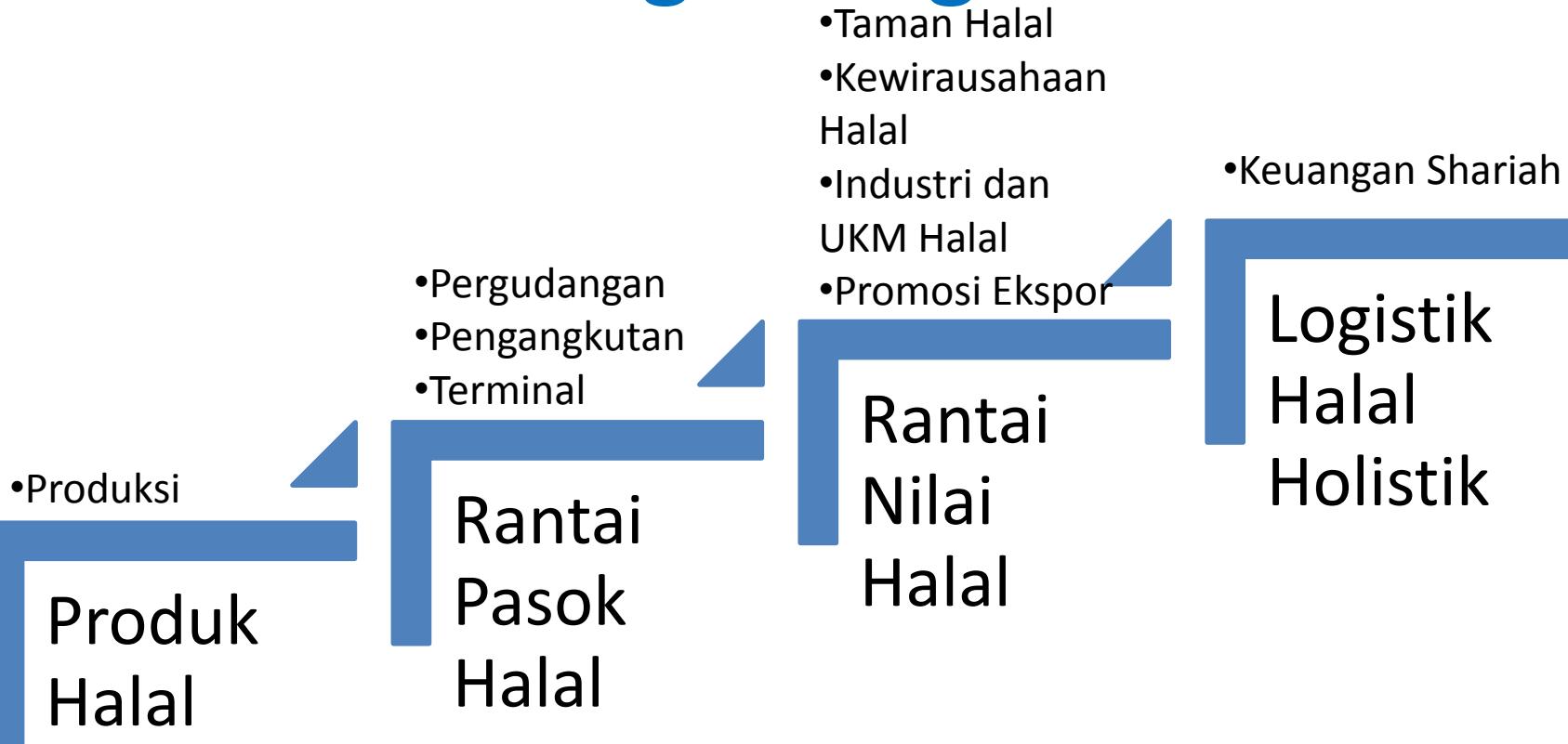


Menjamin harapan
pelanggan Muslim

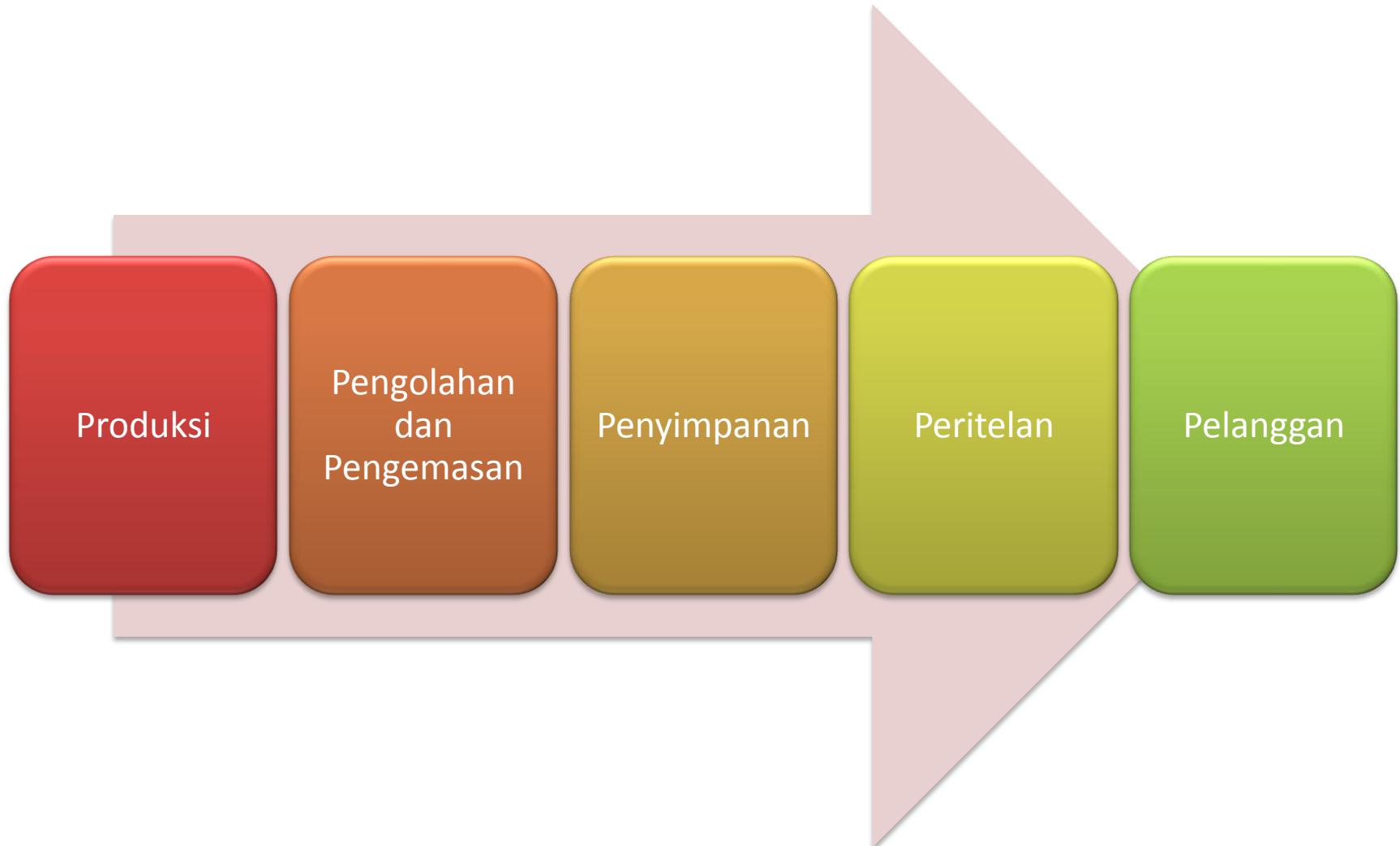
Menghindarkan
kesalahan

Menghindarkan
kontaminasi

Perkembangan Logistik Halal



Rantai Pasok Halal



HALAL SUPPLY CHAIN



Halal Industry
Development Corporation

Extremely diverse, cuts across multiples sectors

Islamic Financing	Halal Logistics	Livestock and Agricultural Produce	Halal Parks	Halal Entrepreneurs	SME Development	Export Promotion
Agency Involved	Agency Involved	Agency Involved	Agency Involved	Agency Involved	Agency Involved	Agency Involved
<ul style="list-style-type: none"> BNM and MOF Malaysia's Leadership in Islamic Banking provide an excellent Syariah compliant financial instruments and services for the Halal Industry 	<ul style="list-style-type: none"> MOT Halal Logistics involves providing halal certified cold storage facilities, refrigerated transportation, and non-contaminated shipping services. Creation of Halal Distribution Centres 	<ul style="list-style-type: none"> MOA, DVS, KKLBW Livestock and Agricultural Produce involves rearing, grazing, feedlot, syariah compliant slaughtering and planting of commercial grade agri products. GlobalGAP and SALM and SALT compliance. 	<ul style="list-style-type: none"> MITI, EPU, UPEN & State SEDC, KKLBW Halal Parks provide location requirements for SMEs and Foreign Investment Focus on Flagship Halal Zone, PKFZ, Gambang Halal AgriFood Park, Padang Besar Halal Park and Tanjung Manis 	<ul style="list-style-type: none"> MITI, PNS, MARA & PUNB, KKLBW Halal Entrepreneurs is an essential part of the value chain particularly the creation of successful entrepreneurs under the BCIC programme Halal Industry include food, non food products & services 	<ul style="list-style-type: none"> SMDEC, MECD, Domestic Trade, Development of Halal SMEs to be export ready and gradually becoming global players. Develop product differentiation and branding. Access to Hypermarkets such as Tesco, Carrefour, Jusco and Giant. 	<ul style="list-style-type: none"> MITI, MATRADE Export Promotion and Access to Global markets through Matrade. Participation in Halal Expos and promotional visits in strategic markets for Halal Industry players.

HDC'S Role is to ensure an integrated and comprehensive development of the National Halal Industry throughout the entire Halal Value Chain

Rumah Logistik Halal

Integritas Logistik Halal

Kebijakan
Logistik Halal

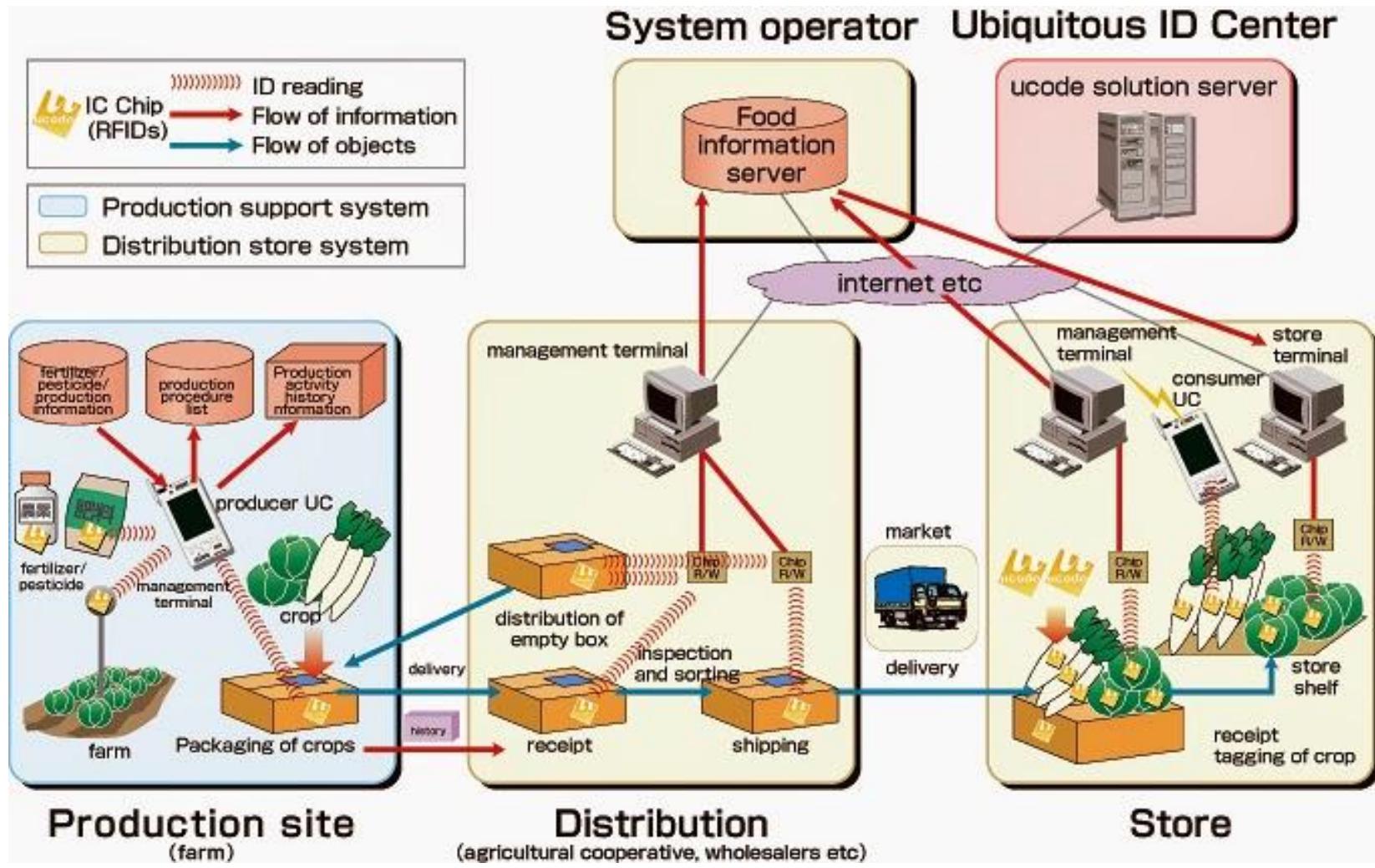
Fasilitas dan
Infrastruktur

Produk Halal

Kelembagaan
Logistik

Kompetensi
Logistik

Solusi Teknologi Informasi



Logistik Halal Indonesia

Mengapa Logistik Halal?

Pelanggan

Perlindungan
Konsumen

Jaminan Halal

Pasar

Domestik

Ekspor

Kelembagaan

Berkeadilan

Pemberdayaan

Lingkungan

Berkelanjutan

Terbarukan

Inovasi

Mutu Produk

Nilai Tambah
Logistik

Cetak Biru Logistik Halal Nasional

Koordinasi
Kelembagaan?

Kebijakan dan
Regulasi?

Pengembangan
Industri?

Edukasi
Masyarakat?

Integritas Halal?

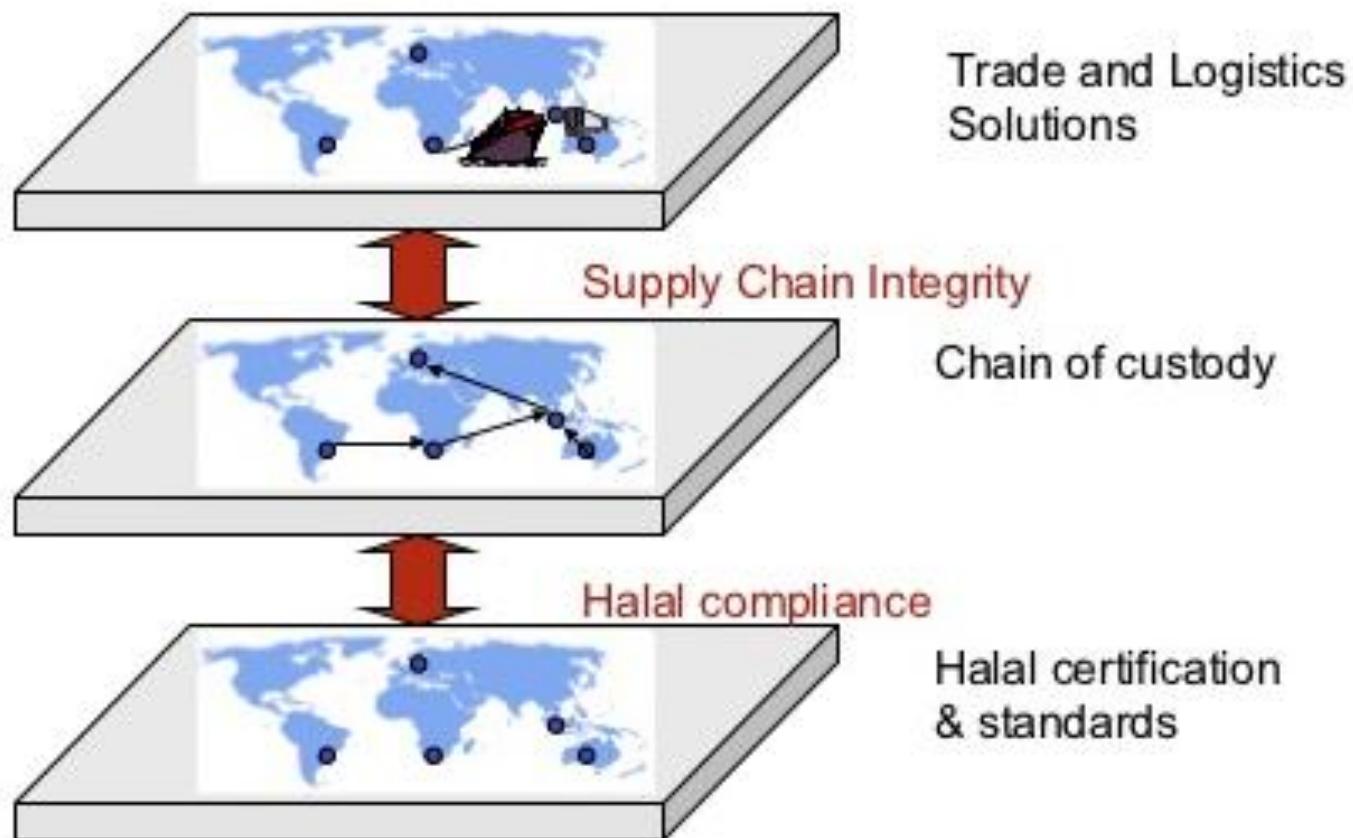
Sektor Prioritas?

Teknologi?

Kompetensi
SDM?

Penelitian dan
Pengembangan?

Jalan Raya Halal



The Halal SuperHighway = Brick & Mortar (A hybrid model)

Jasa Halal



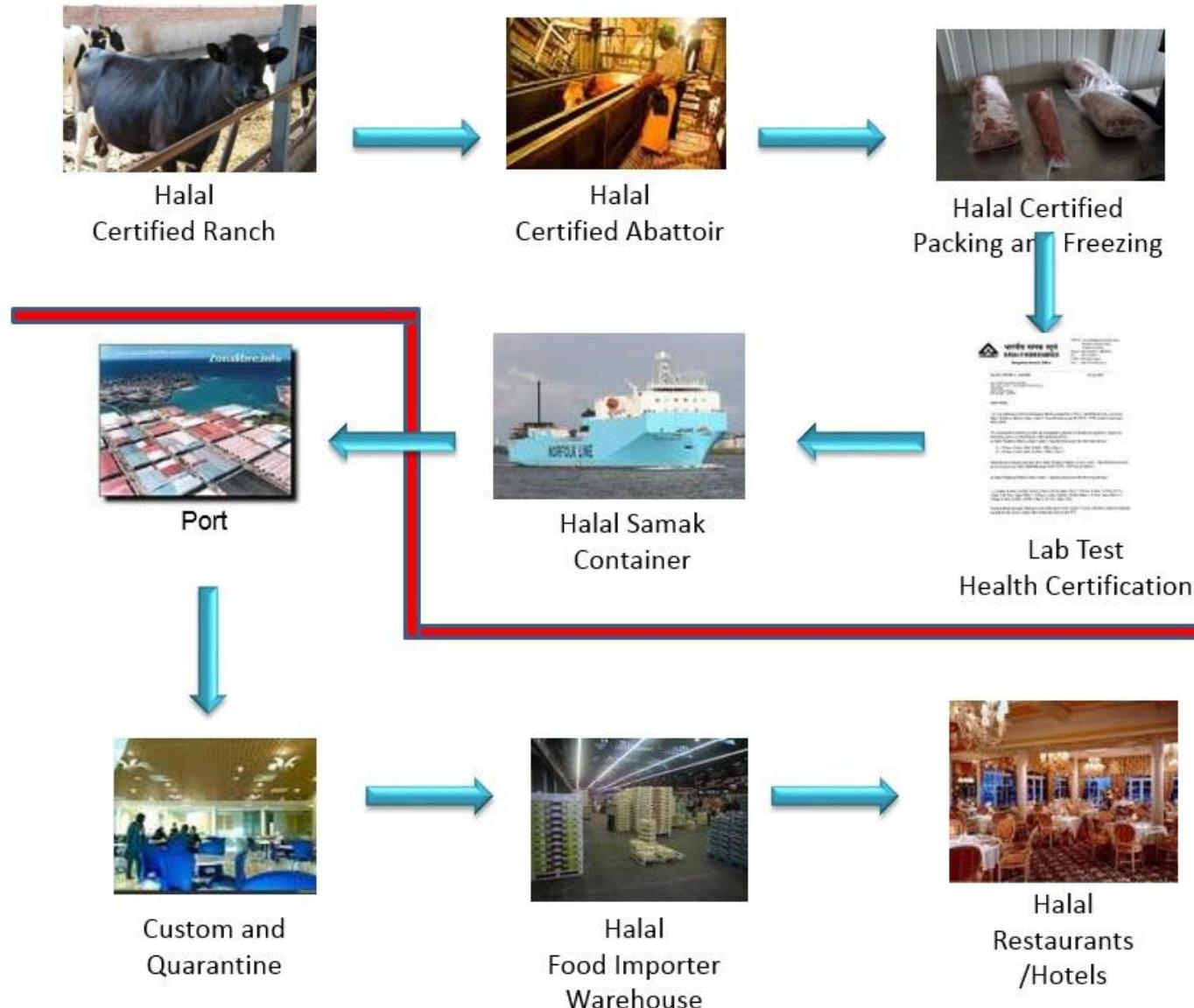
Sistem Halal Logistik

Kemampuan telusur (*traceability*) melalui Prosedur Standar dan Teknologi



Layanan Pengangkutan, Pergudangan, Terminal, dan Taman

Logistik Halal Daging Sapi



Jasa Logistik

Jasa 3PL

Jasa 4PL

Solusi Teknologi
Informasi

Jasa Taman, Pabrik,
Gudang

Pengembangan
dan Pemeliharaan
Aset

Jasa Konsultan
Rantai Pasok

Perancangan dan
Pengadaan
Penanganan Bahan
dan Sistem Rak

Pelatihan dan
Sertifikasi
Kompetensi

Jasa Pembersihan
dan Pemeliharaan
Fasilitas Logistik

Peluang Pasar Halal

- Populasi muslim
- Barang konsumer (67% produk halal)
- Pasar domestik:
 - Klien Ceruk (makanan, kosmetik, bahan kulit, turisme)
- IMT-GT
 - Malaysia: standar, pelatihan, sertifikasi, logistik
 - Thailand: setengah jadi, pengolahan dan pengemasan
 - Indonesia: bahan baku, sertifikasi, dan distribusi

Tantangan Logistik Halal Indonesia

- Pengembangan industri halal:
 - Operator taman halal
 - Produsen Halal
 - Pergudangan
 - Teknologi
- Pengembangan Bisnis Jasa Logistik Halal
- Hambatan tarif dan non-tarif
- Pengembangan Ceruk Pasar
- Kemauan membayar dari Pelanggan
- Pendidikan Pelanggan

Terima Kasih