Halal Across Borders: Brunei-Thailand Halal Industry Cooperation and Development Futures

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The global demand for halal products has surged in recent years, driven by heightened consumer awareness of halal-compliant hygiene, safety, and quality standards. In response, Brunei has prioritized halal industry development as part of its Wawasan 2035 economic diversification strategy. Despite introducing halal certification standards and seeking to extend its reach, Brunei has yet to achieve broader international recognition. Thailand, meanwhile, has announced its ambition to become an ASEAN halal hub by 2028. Although existing scholarship on the region has focused largely on Indonesia, Malaysia, and Singapore, comparatively limited attention has been paid to emerging Brunei-Thailand halal industry cooperation. This article draws on ten in-depth, semi-structured interviews with halal monitoring and enforcement authorities, diplomatic officials and industry actors from Brunei and Thailand. Interview data were thematically analysed and triangulated with policy documents and trade reports. The findings suggest that while Brunei's halal certification regime functions as an important source of regulatory credibility, the absence of wider accreditation recognition continues to constrain market access and export scalability. Realizing the sector's potential role in Wawasan 2035 depends not only on maintaining certification integrity, but also on strengthening international recognition, regulatory adaptability, and strategic branding. In doing so, the article contributes to debates on halal governance, regulatory authority, and the diversification strategies of small states in Southeast Asia.

Keywords: Brunei Darussalam; Economic Diversification; Halal Governance; Halal Certification and Accreditation; Thailand

INTRODUCTION

The global consumption of halal-products has surged markedly in recent years, driven primarily by expanding Muslim populations and heightened consumer awareness (Nor Surilawana Sulaiman et al., 2023). Beyond religious observance, halal consumption also appeals to consumer trust in standards and hygiene (Halal World Institute, 2024). With the global Muslim population projected to grow from 2 to 2.2 billion by 2030, halal products represent a stable and significant sector of the world economy (Siti Majidah Rahim & Nor Surilawana Sulaiman, 2023). This demand has encouraged several Southeast Asian states, such as Malaysia, Indonesia, and Singapore to prioritize halal industry development as a key pillar of economic diversification and regional competitiveness (Norazla Wahab et al., 2016).

In this context, Brunei is analytically significant as it seeks to position halal development not only as a cultural sector but as a state-led means of economic diversification in a largely resource-dependent economy. Its *Wawasan 2035* vision emphasizes the strategic importance of halal industry development in fostering a more diversified and sustainable economy.[1] Brunei distinguishes between a halal permit (label) and halal certification, each with different regulatory and trade functions. These distinctions are outlined in Table 1. Although the country has developed its own halal certification standards and sought to heighten the international recognition of its halal-labeled products, wider global market penetration remains elusive (Izni Azalie & Samad, 2022; Khalid et al., 2024). Interestingly, Thailand is also seeking to compete with established names such as Malaysia, Indonesia, and Singapore and become an ASEAN halal hub by 2028 (Salama, 2024; Thongnoi, 2024; Yang Wangli, 2024). While not the most prominent halal actor in the region and a non-Muslim majority state, Thailand does present a strategically complementary partner for Brunei as it has advanced logistics, Conformity Assessment Body (CAB) status, and global market access (Lubis et al., 2022; Mohd Nawawi et al., 2019).[2] This makes the closer pairing of the two an appealing test case for asymmetric yet potentially synergistic cooperation that leverages regulatory credibility with production scalability of halal supply chains and distribution networks.

Despite growing policy interest, limited empirical research has examined how such asymmetric halal partnerships actually function in practice or what regulatory barriers constrain their effectiveness. As such, this article provides a qualitative investigation based on primary interview data of Brunei-Thailand halal industry cooperation. By providing fresh insights on the challenges of certification and regulatory alignment, trade facilitation and regional integration, it contributes to understanding of how a small state negotiates and exerts influence within the global political economy of halal governance.

HALAL INDUSTRY DEVELOPMENT IN SOUTHEAST ASIA

Scholarship on halal industry dynamics has expanded considerably over the past decade and a half, reflecting its significance in both religious and economic spheres. Much of the earlier work focused on the globalization of halal standards and the institutionalization of certification regimes (Abdul-Talib & Abd-Razak, 2013; Adams, 2011; Ahmed, 2008; Fischer, 2011). Subsequent studies extended this to examine halal governance as a form of moral-economic regulation shaped by state authority, market interests, and transnational Islamic norms (Ab Talib et al., 2016; Elasrag, 2016; Wilson, 2014).

Given the rapid expansion of the worldwide halal market, Southeast Asia is now an active participant, with countries such as Malaysia, Indonesia, and Singapore all having their own halal certification criteria (Man & Pauzi, 2017; Norfadzilah Kifli, 2023). Research highlights how these countries have leveraged halal certification not only as a means of assuring consumer confidence but as a way to project soft power and attract investments (Fischer, 2015; Tieman & van Nistelrooy 2014).

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[1] See *Wawasan Brunei 2035*, www.wawasanbrunei.gov.bn

[2] CAB accreditation is based on international standards, including OIC/SMII 2 (General Requirements for Bodies Providing Halal Certification) and GSO 2055-2 to ensure impartial, consistent, and reliable Halal certification.

This has propelled the region into significant player status in the global halal market and a promoter of halal certification regimes. For instance, Malaysia's JAKIM (Department of Islamic Development Malaysia) is highly regarded in the region with a strong reputation for its halal certification credibility in international markets (Man & Pauzi, 2017). While Indonesia's halal certification under the auspices of the Indonesian Ulama Council (MUI) caters for its large Muslim population and helps shape regional standards for halal products (Fischer & Nisa, 2025). Singapore's halal regulations under the auspices MUIS (*Majlis Ugama Islam Singapura*) also leverage the state's widely recognized food safety standards to facilitate Singaporean firms in becoming accredited centers for halal goods (Norazla Wahab et al., 2016). These countries have effectively utilized halal certification to promote halal export trade, especially within the food, cosmetics, and pharmaceutical sectors. Outside the major players, countries such as the Philippines, Cambodia, and Laos remain marginal to the global halal economy, with limited certification capacity and low export integration (Halal World Institute, 2024).

Brunei and Thailand in comparative perspective

Less visible in the field of regional halal industry dynamics are Brunei Darussalam and Thailand. The main scholarship on halal governance in Southeast Asia has privileged producer and export hubs such as Malaysia, Indonesia and Singapore with a tendency to focus on the technical aspects of the certification process (Fischer, 2015; Siti Norfadzilah Kifli, 2023; Tieman & van Nistelrooy, 2014). However, this obscures how smaller Muslim-majority states negotiate regulatory authority, credibility, and market access within transnational halal regimes. Brunei occupies this under-examined position in Southeast Asia; it has strong religious legitimacy but limited global recognition. By examining Brunei's engagement with Thailand's export-oriented halal governance system, this study highlights how regulatory asymmetries and institutional hierarchies structure participation in regional halal markets. It responds to the comparatively limited attention given to smaller players by analyzing how they position themselves within a competitive regional halal-scape.

Brunei has credible regulatory standards but a small domestic market with limited international recognition and scalability capacity (Ab Talib 2021; Elasrag, 2016; Noryati Haji Ibrahim, 2022). The Brunei government launched the Bruneihalalfoods program in 2009 to serve as a platform for promoting local halal products internationally and to counter surplus imports. The government-owned company entered into an agreement with Hamitan Marketing, a prominent distributor in the country, to distribute Brunei Halal Foods products across 500 national retail outlets (Siti Majidah Rahim & Nor Surilawana Sulaiman, 2023).

The *Majlis Ugama Islam Brunei* (MUIB) under the Ministry of Religious Affairs (MoRA) acts as the halal certification authority and principal halal advisor, but is not CAB accredited. It issues halal certifications, licenses, and labels for enterprises and goods. The *Bahagian Kawalan Makanan Halal* (BKMH - Halal Food Control Division) functions as the monitoring and enforcement body with assistance from the Department of Agriculture & Agrifood, the Customs and Excise Department, and the Ministry of Health's Scientific Services (Noryati Haji Ibrahim, 2022).

Factor	*Brunei Halal Permit*	*Brunei Halal Certificate*
Definition	Official label indicating that a product or service complies with halal criteria established by the Brunei Government.	Formal legal authorization issued to individual products or food-related businesses.
Primary Purpose	Branding and signals compliance to consumers.	Regulatory compliance with Islamic dietary laws and food safety standards.
Regulatory Function	Credibility and trust marker.	Compliance and enforcement mechanism.
Role In Trade	Brand recognition and consumer confidence.	Domestic operation and international market access.

Table 1. Summary of Brunei Halal Permit and Halal Certificate Distinctions. (source: Paul J. Carnegie).

On the other hand, Thailand, despite being a Buddhist majority country, possesses advanced logistical and industrial capacity, CAB accreditation status, and access to global markets. Reports indicated a five percent growth in its halal export sector in 2021, and the country has set ambitious halal sector growth targets of 4 percent per year (Arunmas, 2024; Lubis et al., 2022).

The development of the Thai halal industry has been supported by a set of specialized institutional bodies that distinguish its regulatory ecosystem. The Central Islamic Council of Thailand (CICOT) plays a pivotal role in defining halal standards, coordinating certification, and representing Islamic affairs at the national level. CICOT brings together religious authorities, academic experts, and government representatives to enable alignment with international halal norms. The work of CICOT is supported by the Halal Science Center (HSC) at Chulalongkorn University, which provides science-based assistance for halal certification, including testing, risk assessment, and audits. These bodies underpin Thailand's CAB accredited export-oriented halal strategy and have helped it integrate into global halal governance frameworks recognized by the Organization of Islamic Cooperation (OIC). Its halal certification is accepted in 57 countries under OIC agreements. This enables Thailand to export halal products more readily. As a competitive halal exporter, it currently ranks 15th globally (Thongnoi, 2024).

Both countries hold significant potential for expanding their halal industries internationally. In fact, the signing of the agriculture pact at Istana Nurul Iman in 2015 highlighted the shared ambitions of Brunei and Thailand (Salama, 2015). The Memorandum of Understanding (MoU) emphasized collaborative projects in halal food production, which were further supported by visits by leaders of both nations. Further diplomatic engagements included official visits in 2023 and 2024 that focused on strengthening halal industry cooperation, with Thailand seeking to export halal-certified goods such as chicken meat and jasmine rice to Brunei (Bangkok Post, 2023).

However, compared to Thailand's halal eco-system, Brunei's regulatory architecture and halal governance is dispersed across several agencies and lacks a dedicated scientific support center. It has struggled to achieve similar levels of international acceptance and export integration (Izni Azalie & Samad, 2022; Nor Surilawana Sulaiman et al., 2023). As Kamariah Ismail et al. (2024) note, Brunei's limited international recognition restricts the country's ability to participate within the Organisation of Islamic Cooperation (OIC) halal markets. Such institutional differences help explain why Thailand has been more successful at aligning certification with export growth and recognition in global halal markets. Having said that, the credibility of Thailand's halal certification process still faces issues over consistency and quality assurance (The Nation, 2024). Conversely, Brunei's certification standards are stringent with quality assurance credibility, but the absence of bodies comparable to CICOT and the HSC contributes to limited recognition of the Brunei halal label and certificate abroad and slower export growth. The challenge is to better standardize halal logistics infrastructure to meet growing demand and improve the reach of its international recognition.

These asymmetries and the political-economic and strategic dimensions of their bilateral halal development cooperation make Brunei and Thailand a compelling comparison. Given that smaller states often use regulatory credibility and religious legitimacy as forms of economic diplomacy, it is an interesting test case of the potential benefits and challenges of pairing regulatory credibility and production scalability. How Brunei and Thailand navigate the production complexities of the global halal market can bring fresh insight into the challenges of trade facilitation, certification, and regulatory alignment, and regional integration. By examining the bilateral halal development cooperation between Brunei and Thailand in the regional context, there is an opportunity to study the efficacy of Brunei's diversification strategy within broader debates on regional integration and small-state agency in Southeast Asia.

METHODOLOGY

Primary data collection consisted of semi-structured interviews with key stakeholders. Their views and experiences provided qualitative insight on halal governance, certification processes, trade, and cooperation. When triangulated with relevant policy and halal certification documents, news reports, and statistical information on halal matters between the two countries, it ensured an empirically grounded and thematic analysis of the factors and interests influencing halal industry cooperation between Brunei and Thailand than previously available.

Sampling and Data Collection

Data was collected from a set of 10 purposively sampled in-depth, semi-structured interviews in accordance with approved ethical standards. Participants were selected based on their direct involvement in halal governance, certification, trade facilitation and diplomatic engagement between Brunei and Thailand. They were representatives from the Halal Food Control Division (*Bahagian Kawalan Makanan Halal* - BKMH), Thai embassy, Thai Business and Bruneian Distributor stakeholders. The study draws on 10 in-depth interviews with regulatory, diplomatic and industry elites, sufficient to achieve thematic saturation in a specialized field, no substantively new categories emerged beyond the eighth interview. All participants provided informed consent. Identities were anonymized using coded identifiers. No sensitive personal data were collected, and the study complied with institutional ethics approval and standards. Interviews were conducted in-person for a duration of between 45-90 minutes in a mix of Malay and English. They were then translated and transcribed by the first author into English. Observations of non-verbal cues, contextual factors, participant interactions and voice recordings were further utilized to capture detailed data. Interview data were anonymized and coded as follows: Halal Food Control Division, BO1, BO2, etc. Thai Embassy, TD1 and TD2, Thai business, TB1 and Brunei Distributor, BD1 (see Table 2). To ensure data reliability, recorded data was transcribed with the assistance of Turboscribe and cross-verified with Evernote, then underwent manual review to reduce misinterpretation and loss of nuance. This multi-level verification process ensured the fidelity of the transcribed data remained as close as possible to the verbatim original interview dialogue. In line with Lincoln and Guba's (1985) evaluative criteria, the trustworthiness of the views expressed was further enhanced through triangulation with policy documents and iterative comparison across interviews.

Sector	*Role*	*Code*
Halal Food Control Division (BKMH)	Officer under Unit Halal	BO1
	Officer under Halal Meat Management	BO2
	Officer under Halal Policy and International Unit	BO3
	Officer under Unit Halal	BO4
	Religious Officer	BO5
	Officer under Halal Inspection	BO6
Thai Diplomat	Minister Counsellor	TD1
	Counsellor	TD2
Thai Business	Manager	TB1
Bruneian Distributor	Distributor	BD1

Table 2. Interview Demographics and Codes. (source: Jannah Nurul Kosor).

DATA ANALYSIS

Following Braun and Clarke (2006), an inductive thematic approach was employed in the interpretive analysis of the coded data from the interviews. Transcripts were read iteratively, generating initial inductive analytical categories from informant accounts, which were then clustered into five higher-order themes as follows: market access, certification processes, trade barriers, regulatory challenges, and the mutual recognition of halal standards. The thematic clustering enabled the systematic identification of structural patterns, motivations, and behavior, facilitating a more textured and analytically grounded examination of Brunei-Thailand halal industry cooperation.

Certification and Market Access

The growing demand in the global halal market has led to countries adopting halal certification processes to tap into lucrative market access. The type of halal certification plays a critical role in regulating halal trade and influencing market access.

Brunei and Thailand both have established halal certification systems, but there are differences in process, regulatory structures, and global recognition. This section presents primary qualitative interview data to substantiate the differences between Brunei's certification process and Thailand's approach to give fine-grained insight into the challenges of trade facilitation and market access. Interview data indicate that while Brunei's halal certification (see Table 3) is stringent and credible, it is complicated by its multi-agency approval system and a lack of formal CAB recognition. This can create trade barriers and make it difficult for Brunei to expand its halal exports more widely. Meanwhile, Thailand's certification process - managed by the Central Islamic Council of Thailand (CICOT) - has CAB recognition (see Table 4) and is structured to facilitate exports, but it does face ongoing credibility and consistency concerns.

Stage	*Actor*	*Activity*	*Outcome*
1	Business/Manufacturer	Preparation of application documents and appointment of certified Halal Supervisors	Application dossier completed
2	Applicant → BKMH	Submission of halal certification application to Halal Food Control Division (MoRA)	Application registered
3	BKMH	Preliminary screening of documents and ingredient lists	Application accepted for audit
4	BKMH	Halal Supervisor test and competency interview	Supervisors approved
5	BKMH	On-site audit and inspection of premises, processes, storage, and hygiene	Compliance status determined
6	BKMH	If non-compliant: corrective actions required and re-inspection	Compliance achieved
7	BKMH	Preparation of audit report and formal recommendation	File endorsed
8	BKMH → MUIB	Submission of full file to Brunei Islamic Religious Council	Case tabled for decision
9	MUIB	Committee review and religious adjudication	Approval or rejection
10	Applicant	Payment of certification or permit fees	Certificate authorized
11	MUIB	Issuance of Halal Certificate / Halal Permit	Legal halal status granted
12	BKMH	Post-certification surveillance and routine inspections	Ongoing compliance enforced

Table 3. Steps in the Brunei Certification Process. (source: adapted from Nor Surilawana Sulaiman et al., 2023 and Siti Norfadzilah Kifli, 2023).

As TD1 emphasized, while the credibility of Brunei's Halal certification is not in question, it is generally viewed as an arduous and complicated process for potential halal industry partners.

> We think that, of course, Brunei is a Muslim country who is very strict, adhere very strictly to the Sharia law and halal system. So, what we perceive is that the branding, the certification of Brunei halal food is strong and well-recognized in Muslim world. I think that's the strong points from Brunei's side.

Stage	*Action*	*Outcome*
1	Business/Manufacturer submit documents to the Central Islamic Council of Thailand	Halal affairs officer verifies the documents
2	Halal Training	First-time applicants must complete Halal training with the Halal Standard Institute of Thailand under CICOT. They must provide training records to auditors during inspections.
3	Halal Audit Committee	After training, CICOT forms an audit committee with experts in food science, manufacturing, and livestock (for slaughterhouses).
4	Lab analysis	The audit team collects product and raw material samples for testing at the Halal Standard Institute of Thailand, with results sent to the Halal Committee.
5	On-site audits	The team inspects the entire production process, including warehouses and raw materials.
6	Approval	CICOT grants final approval and issues the Halal certificate along with a contract.

Table 4. Steps in the Thai Certification process. (source: adapted from Medina, 2002).

Having said that, when dealing with the process of importing goods into Brunei, some products are more easily navigated than others. Both TD2 and BD1 agreed that dry products with a halal logo certified by the Thai government are not particularly difficult to import. As TD2 noted.

> When the exporter export Thai food to Brunei, there is this Halal Thai, Thailand Halal certificate. And everything would have to be applied through food authority of Brunei. I believe the procedure is not that complicated.

BD1 echoed that.

> It's quite easy because we import the dry food, I mean the dry products. It is easy to get the certificate from the Ministry of Food. They will give each product, if you want to import the product, you must get certificate from the company.

In contrast, as TB1 explained, other products face significant challenges in gaining market entry, particularly for certain ingredients and products that require extensive approvals.

> Businesses must ensure all ingredients and processes meet the standards, which can be costly and time-consuming.

TD2, TB1, BD1, and BO2 highlighted that products involving wet foods, such as chicken and meat, are difficult and costly to obtain approval from the Brunei government. It involves several different agencies and costly on-site inspections. According to TD2.

> Anything from the slaughterhouse in Thailand, the slaughtering procedure is very strict. But then for the fresh food, fresh products, I think there are more procedure because the inspection team from Brunei would have to fly to Thailand to inspect the factory.

TB1 further pointed out that some suppliers struggle to fully understand Brunei's strict halal requirements, leading to delays in compliance.

> Some suppliers didn't fully understand Brunei's strict halal standards, and it took time to find compliant products. The paperwork and inspections also required a lot of effort.

BD1 acknowledged how demanding it was to import halal meat between the two countries.

> If we want to import halal raw meat from Thailand, we have to pay the Bruneian officer from MUIB to go there to inspect their slaughtering house. Hence, it's very complicated and expensive procedure.

BO2 underscored the demands.

> In order to be accredited by Brunei, the importer must first submit an application. The application is then reviewed by LMPH (Halal Permit Committee), which determines whether all requirements are met. If approved, two Jawatan kuasa or officers from BKMH will be sent to conduct an inspection.

BKMH confirmed the multi-agency procedure of checks and approvals when importing livestock from other countries to Brunei, especially meat (see Table 5). The procedure protocols in Table 5 show the multi-agency process. This is most likely attributable to Brunei's commitment to importing only high-quality meat and trying to ensure full compliance with Islamic practices. As BO2 noted, the procedure cannot be bypassed, as it is legally mandated by the country's legislative framework.

> It is already stated in our legislation. The procedures are outlined there, and they follow the legal framework. Nothing can supersede these requirements, as they are mandated by law.

Similarly, BO1 reaffirmed that.

> Even if you want to appeal, you still have to follow the requirements set by the government. These requirements are established by Majlis Ugama Islam (MUIB) and are mandated by law. At the moment, they cannot be abolished or superseded by any other laws.

Steps / Activities	*Actors & Agencies*	*Phase*	*Sub-Activities*
Halal Certificate – Country & Abattoir	MUIB, BKMH Inspection Team	Pre-Border	• Apply for halal accreditation for abattoir • Conduct desk audit for exporting country and abattoir • Visit abattoir for halal audit
Import Permit – Raw Materials	Applicant, BDNSW*, DOA, MUIB, BKHM	Pre-Border	• Apply for import permit • Approve or review import permit application
Inspection	Applicant, DOA**, MUIB, Customs & Excise Department	Border	• Present import permit and documentation • Verify import permit • Perform physical inspection and confirm declaration on container
Testing	Applicant, DOA, MUIB	Post-Border	• Conduct random meat sampling • Perform laboratory test (e.g., E. coli)

Table 5. Summary of Halal Meat Procurement Procedure. (Source: Adapted from Khalid et al., 2018). * Brunei Darussalam National Single Window. ** Department of Agriculture and Agrifood)

While the complexity of the process may pose difficulties for importers, it does ensure that halal standards are upheld at the highest level, reinforcing consumer confidence in Brunei's halal-certified products. Nonetheless, BD1 agreed that Brunei's halal certification would benefit from wider international recognition, as it would simplify trade for exporters and importers.

> Brunei could recognize more international halal certifications, provide clearer guidelines, and simplify the application process to help foreign businesses comply more easily.

TD2 echoed the point.

> If they have the right information and if Thai investor, they know the procedure, they know the right direction to go to, it might be easier and it might, you know, make them reconsider coming to Brunei.

As BO1 highlighted, the Brunei government is aware of these issues. It has taken several initiatives to enhance the global recognition of its halal certification, including conducting meetings with foreign halal authorities, paying accreditation fees, and establishing Memorandums of Understanding (MOUs) with other countries.

> What we're doing right now, which is meetings with different countries, or ongoing communication with other countries to get our logo accredited internationally. In discussion, MOU, meeting with other countries about just to get this logo to be recognized.

However, BO3 emphasized that achieving comprehensive recognition requires ongoing collaboration with global halal authorities, enhanced trade relationships, and conformity with international halal standards.

> We're not recognized as a CAB... This is the main challenge for Brunei's halal industry to become more recognized.

As the data show, Brunei's halal certification is credible, but its limited international recognition constrains commercial prospects. On the other hand, Thailand has significant worldwide recognition but still struggles with an equivalent level of religious legitimacy and credibility issues over standards. Greater alignment of certification requirements and adopting Mutual Recognition Agreements (MRAs) is a possible path to developing their respective halal sectors.

Trade Barriers

The presence of logistical and economic trade barriers makes it difficult for businesses, particularly Thai exporters, to penetrate the Brunei halal market. Logistical and regulatory challenges constrain Brunei-Thailand halal trade. The main trade barriers identified include high transportation costs, bulk order requirements and regulatory compliance issues.

High transportation costs, country-specific regulations, and trade policies affect the importation of halal-certified products into Brunei. As BD1 noted, the most common trade barrier faced by distributors is high transportation costs and limits on product quantities.

> Bringing the product to Brunei is quite costly. Because we have to pay the auction price, which is quite expensive, they will give a minimum order quantity. That means you cannot order one box.

Consequently, distributors face financial strain due to high upfront costs and minimum order requirements, making it difficult for small businesses to compete in the market. It places limits on product variety and reduces market accessibility, as only well-funded distributors can afford to import goods in bulk. BO2 further noted the difficulties when trying to enter the international market, due to the cost and abiding by different policies when importing goods.

> It's like that. If we export to other countries, for example, we need to abide by their relations, requirements, things like that.

These barriers increase compliance costs and delays, making it harder for Brunei's halal products to compete in global markets.

Regulatory Issues

As alluded to earlier, one of the key regulatory challenges facing Brunei is its certification body's lack of recognition as a CAB. Under ISO/IEC 17065, only recognized CABs can enter Mutual Recognition Agreements (MRAs), as it acts as a gatekeeper on mutual recognition. As BO3 explained, without CAB status, Brunei's certification authority cannot be formally embedded with global accreditation regimes.

> First off, BKMH, how we deal with the Halal certification processes, we're not even a conformity assessment body. So, we're not recognized that way professionally in that field. Other bodies around the world, if they're a Halal certification body, which is a CAB, a conformity assessment body, they would be recognized or qualified under that.

> They'd be accredited. But we don't have that currently. So, we still have our own technical regulations that we just stick to, but we're not recognized as a CAB. So, that's the main challenge, I think. This is my opinion. For the Brunei Halal industry to become more recognized, that's the barrier right there.

The absence of CAB accreditation positions Brunei within a regulatory hierarchy that privileges export-oriented certification regimes and limits its ability to facilitate trade and gain wider international recognition in global markets. A lack of international recognition within assessment standards regimes diminishes competitiveness in the global halal market, since countries prefer to acquire halal-certified products from recognized CABs. Many halal goods from Brunei require additional certification protocols when exporting to other nations, resulting in increased prices and obstacles for firms.

Mutual Recognition Agreements

Halal certification authorities that enter into MRAs eliminate several redundant inspections or approval procedures by acknowledging and accepting each other's criteria and standards. Without the partnerships that MRAs confer, Brunei remains relatively isolated, resulting in increased costs and complexities for exports.

Opportunities for Bilateral Halal Cooperation

Despite the above challenges, the distinct positions Brunei and Thailand occupy in the halal business offer opportunities for complementary partnerships. There is potential for greater cooperation between Brunei and Thailand in the halal industry. Brunei and Thailand acknowledge the potential for collaboration in the halal business, specifically Thailand's processing and logistics proficiency alongside Brunei's certification credibility and raw materials. Interview data indicate increased knowledge transfer, investment, and collaborative manufacturing alliances, alongside the prospect of establishing Muara Port as a halal trading hub, as potential avenues for greater cooperation.

As TD1 emphasized, Thailand's developed halal processing industry and strong export networks present an opportunity for Brunei to tap into global halal markets while strengthening its own halal certification credibility.

> Brunei should not see itself as just a small market of 400,000 people. Instead, it should position itself as a center for the region. If Brunei works with Thailand, it can utilize Thailand's expertise, technology, and market access to expand its halal industry.

By leveraging Thailand's processing capabilities and Brunei's certification credibility, both countries could establish a more conducive halal trade framework, allowing Brunei to expand its halal exports into Thailand and other ASEAN markets. As TD1 noted, Brunei has the potential to expand its reach beyond its domestic market.

> Brunei should not see itself as just a small market of 400,000 people. Instead, it should position itself as a center for the region. If Brunei works with Thailand, it can utilize Thailand's expertise, technology, and market access to expand its halal industry. Brunei needs to explore its own potential - what it has to offer to the market, particularly in food, such as fisheries…pharmaceuticals are also interesting. There is potential for co-investment or joint initiatives in that area.

Knowledge Transfer
BO6 highlighted past efforts regarding knowledge transfer initiatives.

> In 2018, BKMH attended the Thailand Halal Assembly, where discussions on halal certification and production standards took place. These kinds of exchanges are valuable for strengthening halal industry cooperation.

Despite these knowledge-sharing activities, a formal mutual recognition agreement (MRA) has yet to be implemented. Ongoing negotiations for a Memorandum of Understanding (MOU) do, however, indicate both governments' commitment to enhancing halal collaboration. As TD1 remarked, formalizing this collaboration via trade agreements would certainly improve trade efficiency, diminish regulatory obstacles, and broaden halal market access throughout ASEAN.

> Well one thing I can tell you that we're working on the MOU on halal cooperation between Thailand and Brunei and once that's finished that's finalized. I hope that based on that cooperation we can establish more let's say investment from Thailand and in Brunei using our expertise to utilize Brunei's potential for export market, perhaps like I mentioned the BIMP-EAGA region and also vice versa.

Investment and Collaborative Manufacturing Alliances
Another critical area is investment and joint manufacturing. As TD2 pointed out, Brunei has high-quality raw halal resources, especially in the seafood and agricultural sector, but lacks extensive food processing facilities.

> Brunei has a lot of potential, especially raw materials. The fish is very abundant. And Thailand has technology and innovation. While Brunei has the raw material. So, if they collaborate, for example we invest in terms of investment, I know that there are some manufacturers, who is very interested in investing in Brunei, using the raw material in Brunei. And then those investors will bring in all the technology, even building a factory here in Brunei.

BO1 cast a note of doubt on investment inflow despite Thailand's developed halal food manufacturing and processing infrastructure and extensive export networks.

> It involves several agencies for the investment to take place, and it's not only BKMH role to decide and we are not the correct channel for that, probably the fisheries department has a say in that.

While collaboration is possible and holds significant potential, it involves multiple agencies and departments. This makes cross-country cooperation, whether in the halal industry or other sectors, more complex. Further investment in collaboration would require substantial effort, time, and coordination among various stakeholders.

Muara Port as Halal Trade Hub?
TD1 outlined additional opportunities for Brunei and Thailand to collaborate, including the potential of Muara port to act as a strategic halal trade hub connecting ASEAN halal markets.[3]

[3] Under the auspices of the Muara Port Company and commenced in September 2024, Brunei's Muara Port Expansion Project is set to add 250m container berth and 88m service berth which upgrades the existing 250m berth quay to 500m – it will enable vessels of up to 50,000 deadweight tonnage – alongside the reclamation of land to support new terminal buildings and facilities. First phase completion is scheduled for Q3, 2027. There was also the

> As Brunei is trying to establish itself as a hub to connect the PMAK region, both as a trading hub and by expanding Muara Port to be a center, this area—including the southern Philippines and Borneo—is a major market for halal food. If Brunei can promote itself not just as a market of 400,000 people but as a center to this region, it would be more attractive for larger manufacturers and investors who want to access a market of 300 million, including Indonesia.

This indicates that Brunei's small domestic market should not be considered a limitation but an opportunity to serve as a gateway to a much larger halal consumer base, including Indonesia, wider Borneo, and the southern Philippines. TD1 underscored the significance of this regional connectivity.

> Trying to expand the Muara port to be a center, to be a hub to reach out to this area-we have technology, we have food, we have everything. If Brunei want to attract, want to gain expertise from Thailand in this part about Halal food, one way is to promote that.

However, Muara Port has yet to fully realize its potential as a regional halal trade hub. Enhancing Brunei's capacity to facilitate halal exports from Thailand and other ASEAN countries would increase trade flow into Indonesia, Malaysia, and the Philippines. Given that Brunei's Wawasan 2035 vision encourages economic diversification, positioning the development and expansion of Muara Port could bring significant benefits. TDI noted that this would draw foreign investment in halal manufacturing, prompting companies to establish production facilities in Brunei to capitalize on its halal certification and logistical connectivity.

> If an investor wants to explore this market, they could set up production in Brunei, utilize this connection and this port, and expand from Brunei to reach out to the broader ASEAN halal market. That's also another possibility.

In sum, challenges hinder successful cooperation, including regulatory and bureaucratic trade impediments that affect the effectiveness of trade flows, certification procedures, and investment prospects between the two nations. However, data indicate that Brunei's halal certification and regulatory framework could instill significant legitimacy and trust in Thailand's worldwide halal market and food processing sector, while the latter's manufacturing scale, logistics networks, and export orientation could help drive Brunei's growth and diversification ambitions. There is potential to enhance cooperation, particularly around certification alignment and credibility, knowledge transfer, investment, and commerce (see Table 6).

Theme	*Opportunities*	*Constraints*
Certification	Brunei legitimacy	No CAB
Logistics	Muara Port	High shipping costs
Knowledge	MOU talks	No formal mechanisms

Table 6. Summary of Opportunities for Bilateral Halal Cooperation. (source: authors)

launch in March 20025 of a new Brunei based container shipping company *Warisan Shipping Line* (WSL) intended to provide intra-ASEAN maritime logistics and reliable short-sea connections between Maura, Singapore, Sabah (Lahad Datu) and Sarawak (Samalaju).

As summarized in Table 7, overcoming constraints could significantly enhance Brunei's economic diversification, global market access, and job creation objectives, repositioning it more effectively within the regional and global halal economy.

Factors	*Current Contributions*	*Potential Contributions*
Economic Diversification	Moderate (Limited to food exports)	High (expansion into pharmaceuticals, cosmetics)
Global Halal Market Access	Low (No CAB/MRAs)	High (CAB accreditation and MRAs)
Infrastructure (Muara Port)	Low (Underdeveloped)	High (regional logistics hub)
Job Creation	Low	Moderate (SME growth in halal sectors)

Table 7. Summary of Contributions to *Wawasan 2035*. (source: authors)

DISCUSSION OF FINDINGS

The findings demonstrate that halal governance operates as a form of regulatory power within the global halal economy. In Brunei's case, strong religious legitimacy and strict certification standards confer moral authority, yet it does not automatically translate into market access. Instead, international accreditation regimes, in particular Conformity Assessment Body (CAB) status, function as gatekeeping mechanisms that structure entry into global halal markets.

From Thailand's perspective, Brunei is viewed as a credible halal partner due to its Islamic governance framework, strategic location and resource base. However, the data indicate that Brunei has yet to fully capitalize on these perceived advantages and convert credibility into commercial scale. Limited industrial capacity and sectoral diversification constrain its ability to move beyond quality niche food exports into higher value production. This highlights a gap between regulatory legitimacy and operational readiness.

The redevelopment and expansion of Muara Port emerged as a key site where this gap could be partially addressed. Thai stakeholders expressed interest in contributing logistical expertise, underscoring Thailand's broader strategy of embedding itself within regional halal supply chains rather than merely expanding certification influence. Positioning Muara Port as regional halal logistics hub would support Brunei's ambition to strengthen connectivity and trade infrastructure. However, on its own this is unlikely sufficient without parallel regulatory alignment and accreditation recognition.

This regulatory asymmetry is most evident in Brunei's lack of CAB accreditation. Without it, Brunei-certified products face restricted international acceptance and ability to conclude Mutual Recognition Agreements. This limits export scalability. By contrast, Thailand's CAB recognized system enables its exporters to integrate more easily into global halal value chains. This illustrates how regulatory recognition rather than certification stringency alone, shapes competitive advantage.

The findings suggest that Brunei's halal industry has strategic potential in support of *Wawasan 2035*, but realizing this depends on overcoming interlinked regulatory, infrastructural and institutional barriers. Securing CAB status, streamlining certification, strengthening SME capacity and leveraging Muara Port as a logistics hub represent not discrete policy options but mutually reinforcing conditions for small-state repositioning within the regional and global halal economy.

CONCLUSION

This study contributes to emerging debates on halal governance and small state-political-economy by showing how Brunei's diversification efforts and integration into the global halal market remain underexamined within both regional economic policy discussions and mainstream halal industry research. It demonstrates how a smaller Southeast Asian state seeks to align religious credibility, regulatory authority, and trade ambitions within an increasingly competitive global halal economy. The findings highlight how halal certification functions not only as a religious marker, but as a form of regulatory power and economic diplomacy for small states seeking position in global markets.

While Brunei's halal certification standards are respected for their rigor and role in safeguarding halal integrity, the absence of CAB status and associated MRAs constrain commercial scalability, regional trade harmonization, and international market access. These regulatory limitations underscore how global accreditation regimes operate as gatekeepers in halal governance, shaping which actors can effectively participate in cross-border halal trade.

The findings suggest that Brunei's halal industry sector holds tangible strategic potential. However, this potential remains unevenly realized due to certain bureaucratic rigidities, infrastructural constraints, and partial international recognition. While leveraging Brunei's governance credibility, digitalization across the certification system[4], and strengthened public-private partnerships are all options, from a policy perspective the findings point to specific actionable priorities. First, tackling the lack of Conformity Assessment Body (CAB) accreditation. This is not straightforward, but through adopting a phased approach, Brunei could begin to partner with established bodies in Thailand or Malaysia to assist in aligning procedures with OIC/SMII 2 and GSO 2055-2 standards. This would facilitate mutual recognition arrangements and reduce potential duplication in certification for exporters. Second, the strategic redevelopment and expansion at Muara Port should not be underestimated. If that is coupled effectively with regulatory reforms, it could bring lasting benefits for Brunei's halal industry sector. This would most likely involve the establishment of a dedicated halal logistics and certification facilitation unit at the port. The closer integration of customs, inspections, and certification processes would certainly streamline import-export procedures and reduce compliance costs for firms. Such measures could translate Brunei's regulatory credibility into greater market access in support of its *Wawasan 2035* diversification objectives.

While this study is not without limitations, most notably a relatively small sample and its primary focus on institutional perspectives within Brunei, it nevertheless benefits from access to key stakeholders. The primary interview data provide a more textured and nuanced understanding of Brunei-Thailand halal industry cooperation. This improves insight into both the opportunities and constraints shaping Brunei's economic diversification efforts.

Future research could build on this study in several ways, especially how CAB accreditation affects export performance across ASEAN. There is certainly scope for greater comparative

[4] Malaysia's online *Halal Malaysia Portal* may well serve as a suitable model for enabling companies to fulfil criteria standards more swiftly https://myehalal.halal.gov.my/portal-halal/v1/.

analysis of how Conformity Assessment Body (CAB) accreditation shapes market access. Examining in further depth the relationship between accreditation status, mutual recognition arrangements and export performance would help clarify how regulatory recognition can translate into commercial advantage. Additional work at the firm level would help reveal how certification requirements affect business strategies and practice, especially around compliance costs, multi-agency procedures and inspections. Future studies could also consider the role of consumer trust and brand recognition in mediating the relationship between certification stringency and market acceptance. This type of work would deepen our understanding of halal governance as a form of regulatory power within global value chains.

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