How U.S. & Canada Food Companies Can Enter the $302B Global Halal Food Market

Practical market-entry lessons across Indonesia, Saudi Arabia, Türkiye, UAE, and Malaysia

July 1st 2026

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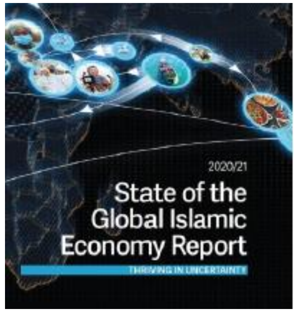
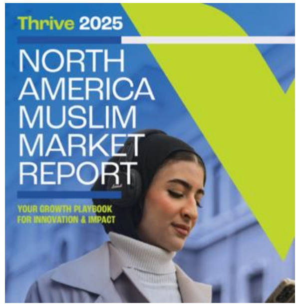
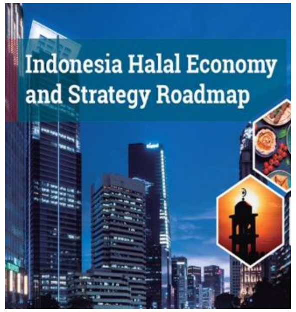
DinarStandard is a growth strategy research and advisory firm specializing in the global halal economy.

Producing proprietary global halal economy intelligence







…driving export growth, investments and awareness building.

HALAL DEVCO. | Public Investment Fund | ifanca | SAFFRON ROAD

Forbes | CNN | BUSINESS INSIDER | The Economist

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DinarStandard Support

Rafi-uddin Shikoh

CEO & Managing Partner (GCC / NA / ASEAN)

Email:
rafiuddin.shikoh@dinarstandard.com

Reem El Shafaki

Partner

Email:
reem.elshafaki@dinarstandard.com

Delmar Zakaria

Research Analyst

Email:
delmar.zakaria@dinarstandard.com

Ebrahim Vahed

Consulting Manager

Email:
ebrahim.vahed@dinarstandard.com

What You'll Walk Away With

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Where the Opportunity Lives

Size and prioritize the $302B halal food market: the fastest-growing categories, and the five OIC markets — Indonesia, Saudi Arabia, Türkiye, UAE, Malaysia — where US/Canada exporters already have entry pathways.

How Halal Certification Works

The four-layer compliance ecosystem, the two pathways to get certified, and how recognized certifiers and requirements differ — and keep changing — across target markets.

A Repeatable Go-to-Market Playbook

A 3-step framework — confirm export eligibility, read the local opportunity, meet compliance requirements — to plan entry into any OIC market.

1

Global Halal Food Market Overview

Why this market, why now; Where the opportunity lives

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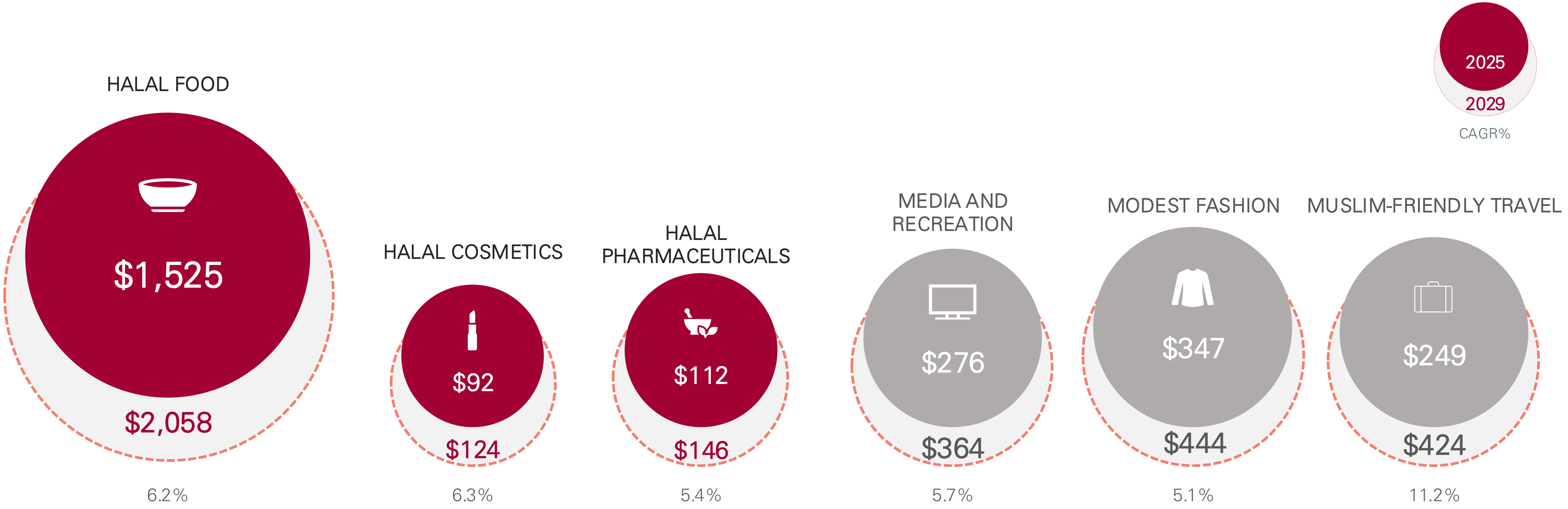
The Global Halal Market is a $2.6 Trillion Consumer Opportunity

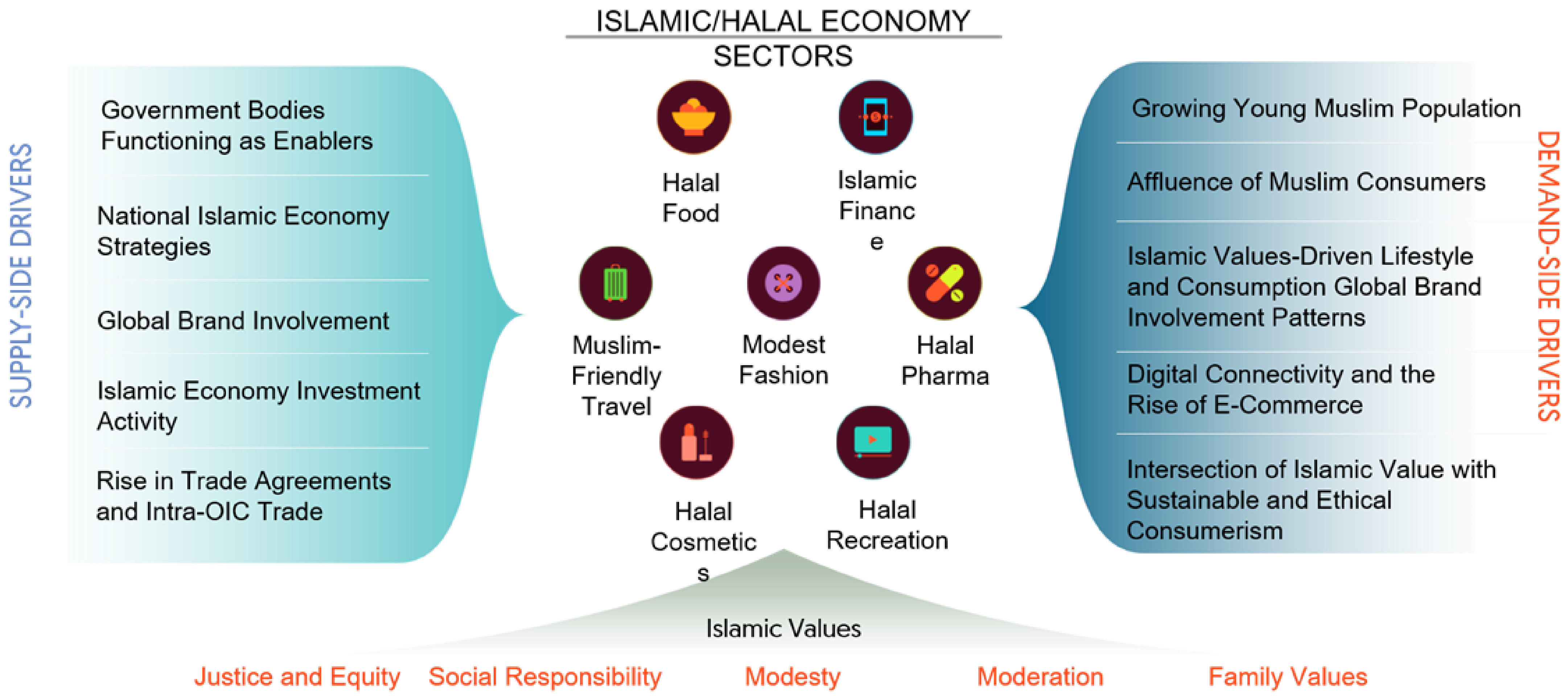
CONSUMER POWER

Represented by $2.6 trillion of consumer spending by 2 billion Muslims across six real-economy sectors (2024). YOY growth 2023-24 of 7%, reaching $3.56 trillion by 2029 (6.5% CAGR).



The Drivers of the Global Halal Economy

There are several factors driving growth in the global Halal market, which will likely lead to sustained growth.



The US is the 4th largest exporter to the OIC at ~5%

TOP 5 EXPORTERS TO OIC

1. Brazil 33.3
2. China 32.6
3. India 28.7
4. US 21
5. Türkiye 18.7

32%

Share of exports to OIC by the top 5 global exporters

TOP 5 OIC IMPORTERS

$421.5 billion

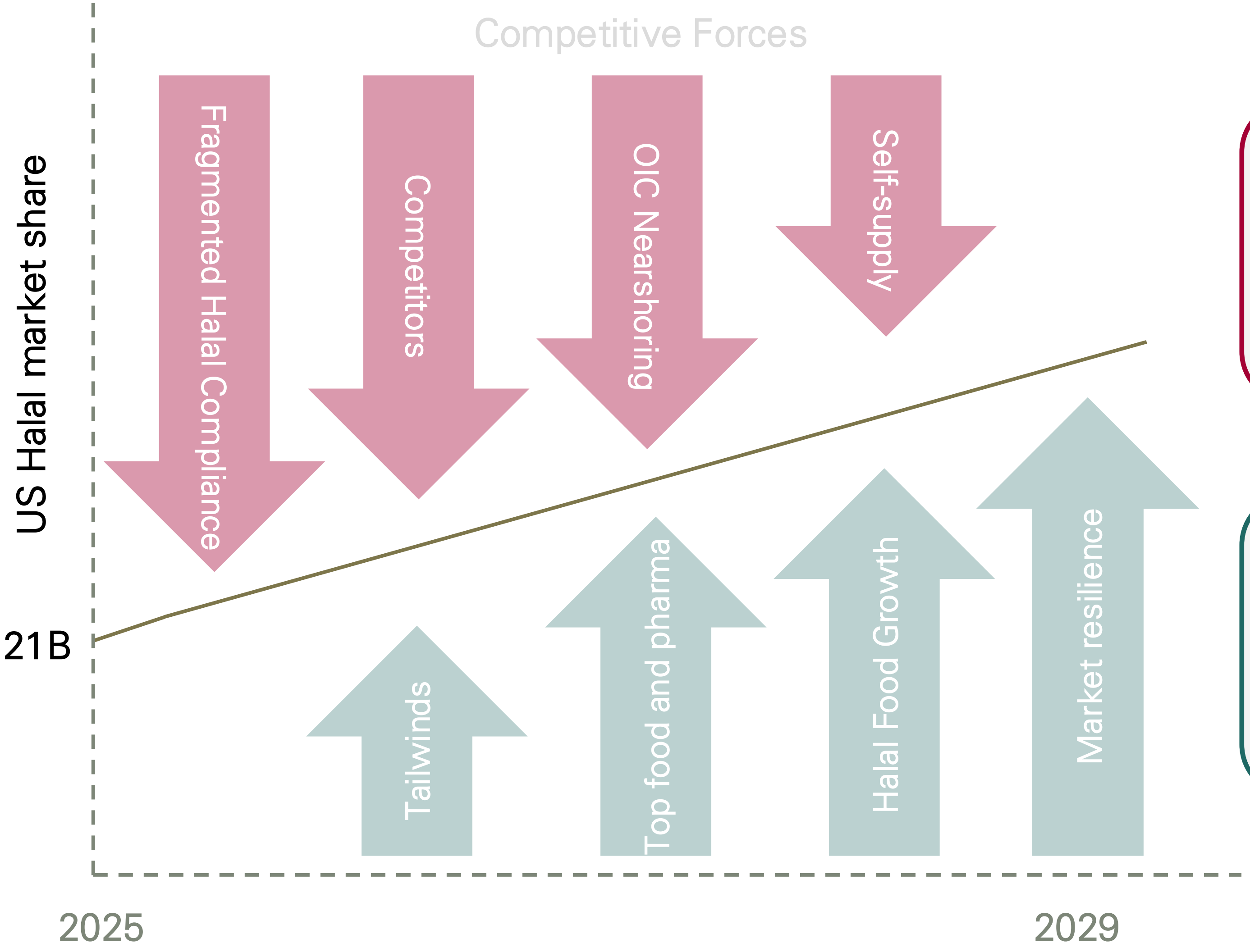
OIC imports in halal-related sectors

$302 billion

OIC imports in halal food

1. Saudi Arabia 46.9
2. UAE 43.7
3. Türkiye 32.9
4. Indonesia 31.5
5. Malaysia 30.6

Whilst the US can benefit from current headwinds, the strong growth of this market will bring strong competition



▼ Headwinds — what slows the climb

- Costly, fragmented halal compliance and certification
- Importers nearshoring to regional supply chains
- OIC push for domestic self-sufficiency

▲ Tailwinds — what accelerates it

- US is the world's 4th-largest food exporter
- Home to top global food & pharma players
- Halal demand outpacing overall food-trade growth
- Resilient even through SE & South Asia shocks

US & Canadian agri-food exporters already supply the OIC's largest halal markets – the pathways exist

Major export products of US & Canadian companies

- Soyabeans
- Nuts
- Wheat and meslin
- Dried leguminous vegetables

Major export markets

- Indonesia
- UAE
- Saudi Arabia
- Türkiye
- Malaysia
- Bangladesh
- Algeria

Growth, not size, signals the food opportunity

The fastest-growing OIC food imports — fats & oils, sugars, beverages, and vinegar — are not the largest by value

HS	SIMPLIFIED NAME	OIC Growth Imports 2018-2023, CAGR %	OIC Total Trade Value (2023) US$ 000
'15	Animal or vegetable fats and oils	8.17%	29,229,446
'17	Sugars and sugar confectionery	8.51%	19,867,704
'22	Beverages and vinegar	6.15%	3,353,457
'19	Cereal, pasta & bakery products	4.28%	12,817,902
'21	Soups, sauces & other processed foods	4.18%	12,875,052
'18	Cocoa and cocoa preparations	4.96%	8,191,315
'20	Preparations of vegetables, fruit, nuts	3.97%	7,515,371
'09	Coffee, tea, maté and spices	3.54%	10,032,017
'02	Meat and edible meat offal	2.46%	15,789,671
'03	Fish and other aquatic invertebrates	1.43%	8,612,173
'11	Products of the milling industry	1.45%	5,053,130
'16	Preparations of meat, fish or other aquatic invertebrates	1.39%	3,234,162
'13	Vegetable saps and extracts	0.35%	736,265
'04	Dairy products	-1.76%	15,563,044
'05	Other products of animal origin	-3.80%	215,447
‘01	Live animals	-5.62%	4,742,998

Top 3 categories — and who buys them

Fats & oils ('15), sugars & confectionery ('17) and beverages & vinegar ('22) — typical products and their leading OIC import markets

'15 Animal or vegetable fats and oils

Typical Products

Top 10 OIC Importers

1. Pakistan	6. Bangladesh
2. Türkiye	7. Saudi Arabia
3. Iran	8. Morocco
4. Malaysia	9. Djibouti
5. Egypt	10. Algeria

'17 Sugars and sugar confectionery

Typical Products

Top 10 OIC Importers

1. Indonesia	6. Morocco
2. Malaysia	7. Nigeria
3. Saudi Arabia	8. Algeria
4. Bangladesh	9. Iraq
5. UAE	10. Sudan

'22 Beverages and vinegar

Typical Products

Top 10 OIC Importers

1. UAE	6. Kuwait
2. Türkiye	7. Morocco
3. Malaysia	8. Saudi Arabia
4. Kazakhstan	9. Nigeria
5. Iraq	10. Jordan

Demand clusters in a familiar set of markets. *Türkiye, Malaysia, Saudi Arabia, UAE and Indonesia recur across all three categories — a concentrated set of entry targets for U.S. & Canada exporters.*

2

Navigating Regulatory Maze

Halal compliance is not a single stamp but a layered ecosystem with each play a distinct role

Regulatory Body
A government authority that enforces halal laws and oversees national halal policy and compliance.

Standard Body
A national or international institution that develops halal standards and technical guidelines for products, services, and processes

Accreditation Body
An organization, often government-linked, that authorizes and monitors halal certification bodies to ensure they meet recognized standards

Halal Certification Body (HCB)
An organization (public or private) that audits, certifies, and issues halal certificates to companies based on compliance with halal standards

How the layers connect

- Regulators establish the legal framework
- Standards define what halal translated into technical language in each jurisdiction
- Accreditors authorize license of the certification to certifiers
- Certifiers audit and issue the certificate.
- *Roles may overlap: the four layers are functions, not always separate organizations. In some jurisdictions one body serves with several functions*

Source: DinarStandard Analysis

Halal compliance is enabled by an interconnected governance ecosystem

Regulatory Body
Establish legal framework

Standard Body
Define what halal translated into technical language

Accreditation Body
Authorize license of the certification to certifiers

Halal Certification Body (HCB)
Conduct audit and issue the halal certificate

Halal Certified Company
Manufacturers of halal certified products

Source: DinarStandard Analysis

National competent authorities and their roles shape each country's halal ecosystem

Indonesia
HCB: Certifiers appointed/recognized by BPJPH; final halal cert. issued by BPJPH

UAE
HCB: Certifiers accredited by MoIAT

Saudi Arabia
HCB: Saudi Food and Drug Authority (SFDA) – Saudi Halal Center

Türkiye
HCB: Certifiers accredited by HAK

Malaysia
HCB: Department of Islamic Development Malaysia (JAKIM)

Each country publishes its own list of approved foreign certifiers (HCBs)

Every target market maintains an official online register of the foreign halal certification bodies (incl. US & Canada-based HCBs) it recognizes. Always confirm the certifier — and its product scope — on the destination's own portal before certifying.

Sources: DinarStandard Analysis, BPJPH, Saudi Halal Center, JAKIM, MoIAT UAE, HAK Türkiye

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Two pathways for US/Canada companies to achieve halal compliance in target markets

Pathway 1
Certify locally via a recognized US/Canada HCB

Use a US or Canadian halal certifier that already appears on the destination's approved/recognized list

- Audit & certificate issued at home, by a body the destination authority recognizes

Pathway 1 — Watch out:

- Recognition is often scope-specific
- Some countries add further steps to meet national requirements (e.g. Indonesia's registration scheme).

Pathway 2
Certify directly under the national halal scheme

Apply directly to the destination's own national halal authority / scheme

- Application via the national system (e.g. SIHALAL / ptsp.halal.go.id; SFDA Halal Center; MOIAT portal)

Pathway 2 — Watch out:

- Longer lead time when complying across multiple jurisdictions
- May trigger repeat audits, adding cost

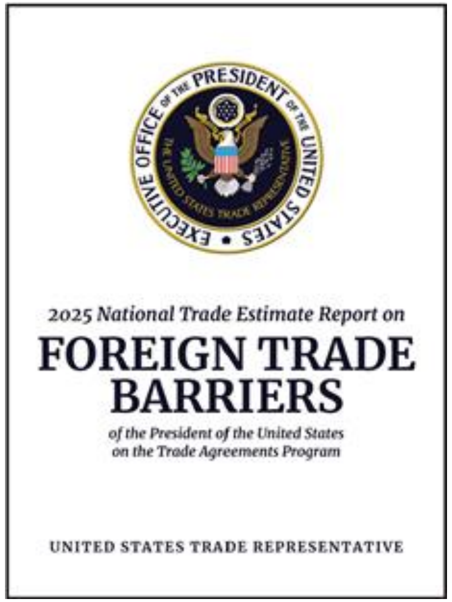
Source: DinarStandard Analysis

The US–Indonesia trade agreement addresses halal but remains unratified as of June 2026

US–Indonesia Reciprocal Trade Agreement

- **Halal related articles:** Indonesia to accept US slaughter practices compliant with Islamic law or any SMIIC member-state standard.
- **Certifier efficiency:** MRA with US halal bodies; halal stays mandatory for food & beverage.
- Latest Update on US-Indonesia Trade Agreement (June 2026): The agreement has not yet been ratified. Public authorities continue to state that the agreement does not exempt U.S. goods from applicable halal requirements

The wider trade picture of US with Muslim Markets



EXECUTIVE OFFICE OF THE PRESIDENT OF THE UNITED STATES

2025 National Trade Estimate Report on

FOREIGN TRADE BARRIERS

of the President of the United States on the Trade Agreements Program

UNITED STATES TRADE REPRESENTATIVE

Halal requirements have been listed as a top concern in the U.S. Trade Representative's (USTR) reports on Technical Barriers to Trade (TBT) for several Muslim Markets, including Saudi Arabia, UAE, Indonesia, and Malaysia.

Scan here to download 2025 National Trade Estimate Report on Foreign Trade Barriers

Sources: DinarStandard Analysis, US Trade

Regulation, recognized certifiers, MRAs, and import requirements are dynamic and constantly changing

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Indonesia
2026: Mandatory halal for imported F&B

Saudi Arabia
SFDA Halal Center tightening

Malaysia
Digitalizing & enforcing JAKIM

UAE
Consolidating under MOIAT/EIAC

Türkiye
SMIIC compliance for halal claims

What keeps changing

- Regulation and Standards
- Accreditation and Mutual Recognition Agreement
- Product Scope and Coverage
- Deadlines and Enforcement

The ongoing cycle

The halal regulatory landscape is constantly evolving. Standards, recognized certifier lists, MRAs, and import requirements change over time, making halal compliance a continuous process rather than a one-time achievement.

Sources: DinarStandard Analysis, BPJPH, Saudi Halal Center, JAKIM, MoIAT UAE, HAK Türkiye

3

Go-to market considerations

Go-to-market: three steps to enter an OIC market

Entering an OIC market runs in three steps — can you enter, what sells, and how to comply.

1. CONFIRM YOU CAN EXPORT

Eligibility first. Some goods are banned outright (pork, alcohol; US poultry/meat in Türkiye).

Tariffs swing widely — **0% to 40%+**; rivals often enter cheaper via trade blocs.

Import permits, licences and conformity certificates are needed before any sale.

2. UNDERSTAND THE LOCAL OPPORTUNITY CONTEXT

Read each market on its own terms. Size, demographics and what actually sells differ sharply.

Win on the right **format, flavour and language** for the local consumer.

Match the channel — **retail, HoReCa or quick-commerce** — to each market.

3. MEET AND OPTIMIZE COMPLIANCE REQUIREMENTS

Understand certificate validity. Each market recognises its own certifiers and standards.

Optimize certification. Given the constantly changing landscape of MRA – consolidate and optimize certification across all regions.

Meet **labelling and traceability** rules in the local language.

Step 1: Confirm you can export

First confirm your product can even enter — some goods are banned outright, and tariffs swing from 0% to well over 40%.

INDONESIA & MALAYSIA

- Indonesia: dairy duty ~5–10%; needs licence + BPOM registration
- Malaysia: frozen chicken up to 40% for non-ASEAN — a cost gap vs Thailand/Brazil

GCC (UAE-LED)

- 5% external tariff + 5% VAT; GCC-origin moves duty-free
- Processed goods cost more: poultry ~20%, sauces 10–25%

TÜRKIYE

- US poultry banned (avian flu); US meat currently ineligible
- High farm protection: agri tariff ~42% vs ~13% non-agri
- VAT ~20%; EU rivals enter tariff-free; licences + SPS add friction

Source: USDA FAS & FSIS; Market Access Map; GCC Customs Union

Step 2: Understand the local opportunity context

Once you know you can enter, read each market on its own terms — size, what sells, and the right format, flavour and language for the local consumer.

INDONESIA & MALAYSIA

- **280M+ Muslim consumers** — halal trust drives brand choice.
- **Sachets & shelf-stable win online** (Shopee, Lazada); local flavours like durian, pandan.
- **Malaysia: poultry >50 kg/person,** bone-in; label in Bahasa Malay.

GCC (UAE-LED)

- **Wealthy & import-reliant** — premium and origin branding sell.
- **Chilled chicken leads retail**; demand peaks at Ramadan.
- **One spec fits all six states**; Arabic labelling expected.

TÜRKIYE

- **86M, young middle class** — imports higher-value food & inputs.
- **Best fits: ingredients, nuts, confectionery, beverages.**
- **Halal assumed, not a selling point**; compete with duty-free EU; label Turkish.

Source: State of the Global Islamic Economy 2023/24; USDA Foreign Agricultural Service.

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Step 3: Meet the compliance requirements

A home halal logo isn't enough — each market recognises its own certifiers, standards and labelling.

INDONESIA & MALAYSIA

- Indonesia: halal mandatory from 17 Oct 2026 (BPJPH); needs an MRA — a JAKIM/GCC mark won't transfer.
- **Covers storage & transport**; add BPOM registration.
- **Malaysia: only JAKIM-recognised certifiers**; MS 1500:2019; pork-free facilities.

GCC (UAE-LED)

- **Halal mandatory for meat & poultry** on GSO standards (incl. GSO 993 slaughter).
- Strict controls for antibiotics, hormones & banned additives.
- **Halal cert + UAE ESMA approval + vet certificate**.

TÜRKIYE

- **Halal cert voluntary** but must meet OIC/SMIIC from a HAK-accredited body.
- **Food safety via Min. of Agriculture**; plants need facility approval.
- **Rules track the EU** (pesticide & residue limits).

Source: BPJPH; JAKIM (MS 1500:2019); GCC Standardization Org (GSO); Türkiye HAK / Law 7408; USDA FAS

4

DS Support and Advisory

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How DinarStandard can help drive your halal exports

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1. Advisory:

DinarStandard - Halal Market Export Advisory

Expand into halal markets with greater confidence through **DinarStandard's proprietary 5-step export enablement process. 4–6 weeks from start to delivery.**

- Qualified halal markets prioritized for your products
- Clear assessment of market potential and practical market entry steps
- Qualified partners identified and introduced in selected target market(s)

MENA Region Partner

HALAL DEVCO

شركة تطوير منتجات الحلال

SE Asia Region Partner

Indonesia Halal Lifestyle Center

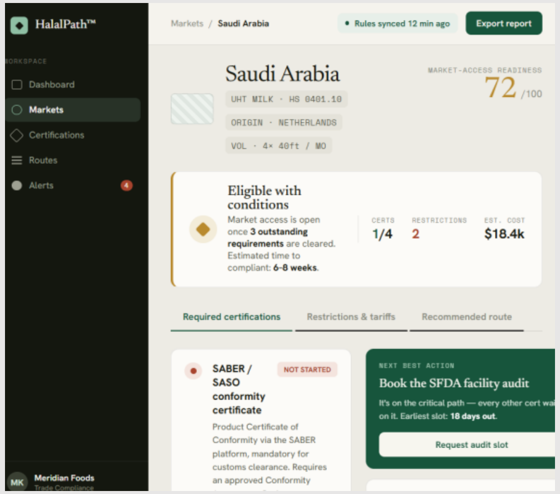
2. Mapping Platform

HalalPath™ — Navigate halal. Export more.

HalalPath™ is a real-time intelligence platform that tells halal product exporters exactly which certifications they need — and which trade restrictions apply — to access any market, at the lowest cost and fastest route.

300+ certification bodies. 70+ countries. One clear answer.

- Certification mapper
- MRA (mutual Recognition Agreements) pathway finder
- Trade restriction pre-filter
- Real-time alerts



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