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Original Article

Islamic Finance Integration in the Halal Wagyu Global Value Chain: Sharia-Compliant Instruments, Governance, and Policy Implications

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Abstract

The global halal food market has evolved from a niche religious segment into a mainstream component of international agrifood trade, driven by demographic growth, rising middle-class incomes, and greater awareness of halal standards. Within this context, Japan occupies a distinctive position as a non-Muslim, high-income country with an advanced agrifood sector and strong branding around safety, quality, and traceability. Wagyu beef has become a flagship export, and the emergence of halal-certified wagyu has opened a high-value but still niche channel linking Japanese producers to Muslim markets in Southeast Asia and the Middle East, while facing governance and financing challenges such as fragmented certification, midstream bottlenecks, and limited Islamic finance integration. This article examines how halal-certified Japanese wagyu participates in global halal agrifood trade and how Islamic finance can support its development. Using qualitative document analysis of academic, policy, industry, and media sources, it maps the halal wagyu global value chain from upstream breeding and fattening in Japan to midstream slaughtering and processing, and downstream logistics, export, and retail in Muslim-majority markets. The findings show that halal governance relies on layered assurance across slaughter, processing, packaging, logistics, and food service, anchored in Japan's beef traceability system and private halal certification and logistics standards. The study demonstrates that halal wagyu occupies a high-margin niche driven by affluent Muslim consumers but constrained by limited certified processing capacity, high compliance and logistics costs, and fragmented recognition of certifiers and regulations.

Keywords: Halal Supply Chain Governance, Halal Wagyu Value Chain, Islamic Finance Integration, Policy Implications in Agribusiness, Sharia-Compliant Instruments.

1. Introduction

The global halal food market has evolved from a niche religious segment into a mainstream component of international agrifood trade (Fischer, 2011), driven by demographic growth in Muslim-majority countries, rising middle-class incomes, and increasing awareness of halal standards among both Muslim and non-Muslim consumers (Bonne et al., 2007; Golnaz et al., 2010; Idris & Rozaidah, 2024). Within this broader landscape, Japan occupies a distinctive position as a non-Muslim, high-income country with an advanced agrifood sector and strong branding around safety, quality, and technological sophistication. Among Japan's agricultural exports, wagyu beef stands out as a flagship product, renowned for its intense marbling, consistent grading, and strict production

protocols that differentiate it from generic beef (Japan Ministry of Agriculture, Forestry and Fisheries [MAFF], 2024).

In recent years, rising numbers of Muslim tourists from Southeast Asia and the Middle East, coupled with the opening of new export markets, have created a specific niche for halal-certified Japanese wagyu. Relaxed visa requirements and the expansion of low-cost carriers have contributed to a boom in Muslim visitors from Indonesia, Malaysia, and Brunei, which has strengthened demand for halal dining options that include premium meats such as wagyu. At the same time, regulatory changes such as Malaysia's lifting of a long-standing ban on Japanese beef and the gradual recognition of Japanese halal certifiers by authorities in Muslim-majority countries have enabled exports of halal wagyu to markets in Southeast Asia and the GCC. These developments suggest that halal wagyu could become an important, though still niche, component of Japan's agri-export strategy towards Muslim markets (IMARC, 2025; MAFF, 2024).

Despite these opportunities, the development of a robust halal wagyu industry faces several structural and governance challenges. First, halal certification in Japan is organized through non-state bodies rather than a single national halal authority, resulting in a fragmented ecosystem of certifiers whose recognition varies across importing countries. Institutions such as Japan Islamic Trust (JIT) have gained international recognition and certify slaughterhouses and processing plants for wagyu exports to destinations such as Malaysia, Indonesia, Qatar, and Saudi Arabia, yet the number of facilities that meet their standards remains limited. This creates a bottleneck in the midstream segment of the value chain, where insufficient halal-certified slaughtering and processing capacity constrains the scale of wagyu exports despite growing demand.

In addition to export-oriented halal certifiers, Japan's halal governance landscape has also been shaped by community-based institutional initiatives. Recent research on the Halal International Trust Organization (HITO) in Japan shows that halal certification can emerge through community-led organizational arrangements aimed at building trust, legitimacy, and practical halal assurance in a non-Muslim environment (Gandhi, Hidayat, et al., 2025). This perspective is important for understanding the halal wagyu global value chain because the credibility of halal governance in Japan depends not only on formal compliance at the slaughtering and processing stages, but also on the institutional capacity and social legitimacy of certifying bodies operating within fragmented governance settings.

Second, the halal wagyu supply chain requires high levels of coordination and integrity along multiple nodes on-farm production, slaughtering, processing, cold-chain logistics, and retail each of which presents potential critical halal points where non-compliance or cross-contamination could undermine halal status (Ali et al., 2016; Tan et al., 2017). Supply chain integration, encompassing both forward physical flows of deliveries and backward coordination of information from customers to suppliers (Frohlich & Westbrook, 2001), is essential to maintaining halal integrity from farm to fork (Ali et al., 2016). For example, halal logistics providers such as Nippon Express must ensure that Japanese beef certified as halal is transported from processing plants to airports and onward to restaurants in Malaysia or Indonesia without exposure to non-halal products, relying on dedicated cold-chain facilities and documented cleaning protocols. Research has shown that internal integration and strategic cooperation with suppliers positively influence halal food supply chain integrity (Tan et al., 2017), yet achieving this level of integration in the context of premium wagyu exports remains challenging.

Third, while there is growing media and industry attention to "halal wagyu," academic research has largely focused on Japan's halal tourism and inbound perspectives (Kitayama et

al., 2018), general halal food supply chains in comparative contexts (Saidon et al., 2015), or consumer perceptions and awareness of halal principles (Bonne et al., 2007; Golnaz et al., 2010), with relatively little work that systematically examines wagyu as a specific halal global value chain linking Japanese producers and Muslim markets. Previous studies have emphasized the importance of supply chain integration for halal food integrity in Japan (Kitayama et al., 2018) and the need to go beyond certification alone to ensure true food integrity (Ali et al., 2017), yet the specific dynamics of premium meat products like wagyu, with their unique production systems, quality grading, and branding requirements remain underexplored.

Fourth, and relatedly, the financial architecture underpinning the halal wagyu GVC remains underexplored. High-quality wagyu production and export require substantial capital investment in farms, slaughterhouses, processing plants, and logistics infrastructure, yet the role of Islamic finance instruments in supporting these investments, especially in cross-border settings has not been closely examined in the existing literature. This gap is notable given the growing body of research on Islamic agricultural and rural finance, which has so far concentrated more on staple crops and smallholder-oriented interventions than on premium agribusiness segments such as wagyu.

Against this backdrop, this study investigates the structure, governance, and financing of the halal wagyu global value chain linking Japan to Muslim markets in Southeast Asia and the Middle East. The analysis is guided by the following research questions: (1) How is the halal wagyu global value chain structured from upstream production in Japan to downstream distribution in Muslim-majority markets? (2) How is halal integrity governed along this value chain, particularly in terms of certification, traceability, and logistics? (3) What are the main opportunities and constraints facing agribusiness actors engaged in the halal wagyu segment? (4) How can Islamic finance instruments be mapped onto different stages of the halal wagyu value chain to support its development and resilience?

The study has four objectives. First, it maps the halal wagyu GVC by identifying key actors, nodes, and flows from on-farm production to export and retail. Second, it analyzes the governance mechanisms that sustain halal integrity, including the roles of certifiers, logistics providers, and regulatory authorities in both Japan and importing countries. Third, it assesses agribusiness opportunities and constraints in this niche segment, paying particular attention to capacity bottlenecks, cost structures, and market dynamics. Fourth, it proposes a conceptual mapping of Islamic finance instruments along the wagyu halal GVC, exploring how contracts such as *musharakah*, *murabahah*, *salam*, and *sukuk* can be used to finance key investments and working capital needs.

2. Literature Review

2.1. Japan's Halal Food Market and the Wagyu Segment

The emergence of halal food in Japan has been closely tied to the rapid growth of inbound Muslim tourism and Japan's broader strategy to promote agrifood exports to Southeast Asia and the Middle East (Fischer, 2011; IMARC, 2025). Studies on Japan's halal food landscape emphasize that, while the domestic Muslim population remains relatively small, the combined effect of inbound tourism and export ambitions has turned halal from a marginal concern into a strategic issue for selected sectors, particularly food service and high-value food products (Kitayama et al., 2018; Hasnan & Kohda, 2023; Idris & Rozaidah, 2024). Within this evolving market, wagyu has attracted particular attention because it combines strong "Japan brand" attributes such as food safety, quality, and regional terroir with growing

demand among affluent Muslim consumers for premium meat products (Fischer, 2011; Golnaz et al., 2010; Bonne et al., 2007).

Industry reports and media coverage document the expansion of halal-certified wagyu offerings in Japan, from specialized restaurants in Tokyo and Osaka to export-oriented producers and consortia in prefectures such as Miyazaki and Kumamoto (IMARC, 2025). Companies like SE Meat Miyazaki and Arita Wagyu have positioned themselves as pioneers in exporting halal-certified Japanese beef to markets such as Malaysia, Indonesia, the United Arab Emirates, and Saudi Arabia, often in partnership with recognized halal certifiers (MAFF, 2024). These initiatives have been complemented by halal-focused logistics solutions—for example, Nippon Express' halal logistics services for shipping Japanese beef to Malaysia, highlighting the need to manage halal integrity beyond the factory gate (MAFF, 2024).

However, existing academic work on Japan's halal market tends to focus on broader themes such as halal tourism, restaurant adaptation, and general halal food availability, rather than on wagyu as a specific export-oriented halal value chain (Kitayama et al., 2018; Hasnan & Kohda, 2023; Idris, 2024). As a result, the structure, governance, and cross-border dynamics of the halal wagyu segment remain underexplored in the scholarly literature, even as industry practice moves ahead with certification and export initiatives. This gap justifies a more focused value chain perspective on wagyu, integrating insights from halal supply chain research and agribusiness studies (Ali et al., 2016; Tan et al., 2017).

2.2. Halal Supply Chain, Traceability, and Agribusiness

The concept of halal supply chain extends conventional supply chain management by requiring that all activities from sourcing and production to storage, transport, and retail which conform not only to quality and safety standards but also to Islamic dietary rules (Ali et al., 2017). Halal supply chain research has developed around ideas such as halal integrity, halal logistics, and the identification of critical halal points (CHPs) where non-compliance or cross-contamination could jeopardize halal status (Ali et al., 2017; Tan et al., 2017). Studies in the Malaysian and Indonesian contexts show that internal integration (coordination within firms) and external integration (with suppliers and logistics providers) both have significant positive effects on halal food supply chain integrity, particularly in processed food and beverage industries (Tan et al., 2017; Ali et al., 2016; Saidon et al., 2015; Frohlich & Westbrook, 2001).

In the Japanese context, Kitayama et al (2018) work on the halal food supply chain from an inbound perspective highlights the importance of supply chain integration for firms handling halal products, noting that companies tend to adopt either a "peripheral-oriented" strategy with limited integration or more advanced strategies that integrate information and physical flows with halal-certified partners (Kitayama et al., 2018). Follow-up analyses underline Japan-specific distinctions between "halal certified" and "Muslim-friendly" approaches, where some firms obtain formal halal certification while others implement partial adaptations (e.g., avoiding pork, providing prayer space) without full certification (Hasnan & Kohda, 2023; Idris % Rozaidah, 2024). These studies underscore both the progress and the limitations of halal supply chain integration in a non-Muslim environment.

Traceability is another core theme in halal supply chain literature, referring to the ability to trace a product's history, application, or location through recorded information (Wahyuni & Arfidhila, 2019). In meat and livestock chains, traceability typically covers animal identification, farm-of-origin records, feed and veterinary treatments, slaughtering and processing data, and logistics documentation (Wahyuni & Arfidhila, 2019). Japan's beef industry already operates under stringent traceability regulations: each animal is assigned a unique identification number, and consumers or restaurants can verify origin information through official databases (MAFF, 2024). Premium wagyu brands market "full traceability

from farm to export" as a key selling point, combining legal traceability systems with additional documentation on halal certification, multilingual labeling, and custom-cut specifications for overseas clients.

For agribusiness, the integration of halal supply chain and traceability concepts implies that firms must treat halal as a system-level property, not merely a product attribute at the point of sale (Ali et al., 2017; Tan et al., 2017). This is especially demanding in high-value meat chains such as wagyu, where long production cycles, complex processing, and cross-border logistics increase the number of potential failure points (Ali et al., 2017). Yet the literature has paid relatively little attention to how these concepts play out in premium livestock chains in non-Muslim countries, leaving a gap that the present study seeks to address (Hasnan & Kohda, 2023).

2.3. Islamic Finance in Agricultural and Livestock Value Chains

Islamic finance in agriculture and rural development has gained traction as scholars and practitioners seek sharia-compliant alternatives to conventional credit and risk-management instruments in food and livestock sectors. Key contracts discussed in this literature include partnership-based modes such as *musharakah* and *mudharabah*, trade-based instruments such as *murabahah* and *salam*, lease-based contracts such as ijarah, and capital market instruments such as sukuk (Mughal, 2016). Mughal's early work on Islamic agricultural and rural finance outlines how these contracts can be tailored to support input financing, on-farm investments, and marketing activities, emphasizing risk-sharing and asset-backing as core principles (Mughal, 2016). More recent studies highlight the potential of Islamic contracts to enhance food security, promote equitable value distribution, and empower smallholders in Muslim-majority countries (Kroessin, 2025).

In livestock specifically, several conceptual and empirical contributions propose waqf-based and partnership-based models for financing cattle breeding, fattening, and marketing (Mughal, 2016; Kroessin, 2025). For example, waqf-based livestock projects in Indonesia and elsewhere use idle waqf land and community-based institutions to establish sharia-compliant livestock partnerships that combine commercial and social objectives. Islamic Relief's "Qurbani Plus" program similarly conceptualizes a livestock partnership *(sharaka bil mawashi)* that brings poor households into the livestock value chain through risk-sharing arrangements and capacity building (Kroessin, 2025). These models demonstrate that Islamic finance can be applied not only to conventional banking products but also to innovative, community-based arrangements along livestock value chains (Mughal, 2016; Kroessin, 2025).

However, existing Islamic agricultural finance literature has tended to focus on staple foods (e.g. rice, wheat) and low- to medium-value livestock segments, with limited attention to premium agribusiness chains such as branded beef or high-end dairy. Moreover, most case studies are situated in Muslim-majority contexts, where sharia-compliant institutions and regulations are relatively established (Mughal, 2016; Kroessin, 2025). There is a paucity of research on how Islamic finance instruments might be applied to agribusiness projects in non-Muslim countries, particularly in cross-border value chains where production takes place in a non-Muslim environment while consumption and financing are concentrated in Muslim markets (Kroessin, 2025). The halal wagyu GVC provides a fertile ground to explore these questions, as it links Japanese producers and logistics providers with Muslim consumers, regulators, and financial institutions across multiple jurisdictions.

2.4. Research Gaps and Conceptual Framework

Several research gaps emerge from this review. First, while Japan's halal market and halal supply chain integration have received growing attention, wagyu has rarely been treated

as a distinct halal global value chain with its own production, governance, and market dynamics (Kitayama et al., 2018; Hasnan & Kohda, 2023). Existing studies offer valuable insights into halal food availability, restaurant adaptation, and tourist-oriented services, but they do not systematically map the actors, flows, and governance mechanisms that structure the halal wagyu chain from farm to fork (Kitayama et al., 2018; Idris & Rozaidah, 2024). Second, the literature on halal supply chain and traceability has developed robust conceptual tools such as halal integrity, CHPs, and halal logistics, but empirical applications to premium meat chains in non-Muslim countries remain limited (Ali et al., 2016; Ali et al., 2017; Tan et al., 2017; Wahyuni & Arfidhila, 2019).

Third, although Islamic agricultural and livestock finance has produced a rich body of work on how sharia-compliant contracts can support smallholders and food security, there is little analysis of how these instruments might be tailored to high-value, export-oriented agribusiness chains like wagyu (Mughal, 2016; Kroessin, 2025). In particular, the potential to combine commercial Islamic finance (e.g. *musharakah*, *murabahah*, *sukuk*) with social finance instruments *(zakat, waqf)* and *takaful* in a cross-border halal livestock chain has not been systematically explored (Kroessin, 2025). Finally, the intersection of these three domains—Japan's halal wagyu segment, halal supply chain governance, and Islamic agribusiness finance has not yet been theorized or empirically investigated as a coherent research agenda.

To address these gaps, this study adopts a conceptual framework that links three analytical dimensions. The first dimension is value chain structure, which maps the halal wagyu GVC into upstream (breeding and fattening), midstream (slaughtering, processing, and packaging), and downstream (logistics, export, and retail) segments, identifying key actors and flows at each stage. The second dimension is halal governance, encompassing certification regimes, traceability systems, halal logistics practices, and the management of critical halal points along the chain. The third dimension is Islamic finance integration, which examines how specific Islamic contracts can be mapped onto the investment and working-capital needs of different segments of the wagyu GVC and how risk-sharing and social finance instruments can enhance the chain's resilience and inclusivity. This tripartite framework grounds the empirical analysis in the following sections.

3. Methods

3.1. Research Design and Approach

This study uses a qualitative, exploratory design based on document analysis to examine the structure, governance, and financing of the halal wagyu global value chain linking Japan to Muslim markets. Qualitative document analysis is suitable because key insights on halal wagyu are dispersed across heterogeneous textual sources—academic studies, policy reports, industry documents, and company communications—that are not easily captured through large-N quantitative approaches. Following Bowen's guidelines, documents were systematically read, compared, and interpreted with attention to credibility, representativeness, and triangulation, in line with recent qualitative work on halal certification and supply chains in Japan (until 2026).

3.2. Data Sources and Selection

The study draws on three main types of documents. First, academic publications (journal articles, conference papers, and working papers) on halal food supply chains in Japan, halal certification, and Islamic agricultural and livestock finance, including studies on inbound

halal food chains, supply chain integration, and Islamic finance applications. Second, industry and policy documents, such as reports and press releases from Japanese ministries and export promotion bodies, halal logistics providers, wagyu producer consortia, and halal certification organizations, which provide information on export destinations, certification and logistics arrangements, and the institutional context of wagyu exports. Third, media articles and company communications that offer qualitative detail on business models, certification practices, and cross-border linkages in the halal wagyu value chain.

Documents were identified through keyword searches (e.g. “halal wagyu Japan,” “Japanese beef export Muslim markets,” “halal logistics Japan–Malaysia,” “Islamic finance livestock value chain”) and backward–forward snowballing from key references. Inclusion criteria required that documents contain substantive information on at least one of the following: Japanese wagyu production and export, halal certification and supply chains in Japan, or Islamic finance in agricultural and livestock contexts, and be published or updated within roughly the last 10–15 years.

3.3. Analytical Framework and Coding Strategy

The analysis follows the tripartite framework outlined in Section 2, focusing on three dimensions: value chain structure, halal governance, and Islamic finance integration. All documents were manually coded using a thematic scheme aligned with these dimensions. For value chain structure, codes captured segments (upstream, midstream, downstream), key nodes (farms, slaughterhouses, processors, logistics hubs, importers, retailers/restaurants), and material and information flows. For halal governance, codes targeted certification bodies, standards and requirements, traceability practices, halal logistics protocols, and critical halal points along the chain. For Islamic finance integration, coding focused on financing needs, existing or proposed arrangements, and explicit mentions of Islamic contracts relevant to agricultural and livestock value chains.

Where direct references to Islamic finance in the wagyu context were absent, potential applications were inferred by matching documented investment and working-capital needs in the wagyu chain with contract characteristics described in the Islamic finance literature. Coding followed an iterative, abductive logic, allowing new sub-codes to emerge as patterns related to logistics arrangements, branding strategies, or regulatory bottlenecks became apparent.

3.4. Ensuring Rigor and Limitations

Rigor was enhanced by clearly specifying document types, inclusion criteria, and the analytical framework, and by applying triangulation across sources and dimensions. Information on specific slaughterhouses, export routes, or financing models was cross-checked using combinations of academic, policy, industry, and media documents to reduce reliance on single sources. The study nonetheless faces several limitations. It relies exclusively on secondary data, without primary interviews with farmers, slaughterhouse operators, logistics providers, importers, or Islamic financial institutions, which limits insights into actor-level practices and informal arrangements. Company and media documents may contain promotional bias, and quantitative information on volumes, costs, and financial structures in the halal wagyu segment remains scarce. As a result, the findings should be interpreted as a structured, empirically grounded exploration rather than a definitive quantitative assessment, and they point to the value of future mixed-methods research combining primary data collection and more detailed economic analysis.

4. Results and Discussion

4.1. Structure and Governance of the Halal Wagyu Supply Chain

The halal wagyu global value chain connecting Japan to Muslim markets can be divided into three segments: upstream breeding and fattening, midstream slaughtering and processing, and downstream logistics, export, and retail (Kitayama et al., 2018; Hasnan & Kohda, 2023). Upstream, wagyu cattle are raised in key producing regions such as Miyazaki, Kumamoto, and other Kyushu prefectures under strict quality management regimes that emphasize feed composition, animal health, and marbling standards (MAFF, 2024). Midstream, a limited number of slaughterhouses and processing plants—most notably SE Meat Miyazaki in Saito City and facilities associated with companies like Sugimoto-Honten, Nishiawa Beef, and H.M Ryochi—have obtained halal certification from bodies such as Japan Islamic Trust, enabling them to process wagyu for halal export (MAFF, 2024).

Downstream, halal-certified wagyu moves through specialized cold-chain logistics systems from processing plants to international airports, is shipped by air to destinations such as Malaysia, Indonesia, and GCC countries, and is then distributed to high-end restaurants, hotels, and premium retailers (IMARC, 2025). Logistics providers such as Nippon Express have developed halal logistics solutions that cover collect-from-plant, international freight, and last-mile delivery to halal restaurants like "WAGYU KOKORO," supported by halal warehouse certifications in Japan and Malaysia (IMARC, 2025). At the consumer end, halal wagyu is typically offered as a premium menu item in specialized yakiniku and steak restaurants or sold by specialty butchers, with origin and halal certification visible in marketing (IMARC, 2025).

From a governance perspective, the halal wagyu GVC is shaped by firm-level initiatives, private certification regimes, and cross-border regulatory oversight (Kitayama et al., 2018; Hasnan & Kohda, 2023). Lead firms coordinate closely with halal certifiers and logistics providers to meet importing-country requirements set by authorities such as JAKIM (Malaysia) and MUI (Indonesia) (Idris & Rozaidah, 2024). Japanese government agencies, including MAFF, support these efforts through export promotion schemes and export platforms but do not directly regulate halal certification (MAFF, 2024). Governance is thus polycentric, with multiple nodes of authority and strong reliance on private standards and mutual recognition along the chain (Ali et al., 2017).

4.1.1. Upstream Segment: Wagyu Farms and On-Farm Practices

The upstream segment comprises wagyu breeding and fattening farms, many clustered in Kyushu and other wagyu-producing regions such as Miyazaki and Kumamoto (MAFF, 2024). Miyazaki is widely recognized as a top wagyu-producing region, with farmers specializing in high-marbling beef that commands premium prices (IMARC, 2025). Farms operate under Japan's beef traceability system, whereby each animal receives a unique ID, and its origin, age, and movement history are recorded in centralized databases accessible to buyers and consumers (MAFF, 2024). This traceability infrastructure underpins origin and quality assurances for wagyu destined for halal markets (Wahyuni & Arfidhila, 2019).

While halal requirements are most critical at slaughter and processing, upstream practices also affect halal integrity and market acceptance (Ali et al., 2017). Reports on halal wagyu emphasize that feed composition and animal health are carefully monitored to avoid substances that might raise concerns among halal-conscious buyers, although typical feeds are generally permissible (IMARC Group, 2025). Farmers supplying halal wagyu to SE Meat Miyazaki, for instance, reportedly maintain high-quality feed regimes while ensuring compliance with halal expectations (MAFF 2024). Upstream farms often coordinate with

slaughterhouses and export integrators to synchronize production with limited halal processing capacity and export orders, given long fattening cycles (Kitayama et al., 2018).

The upstream segment is capital-intensive and characterized by long production cycles and a strong emphasis on quality differentiation rather than volume. These features create opportunities—via price premiums in Muslim markets—but also expose farmers to market and disease risks and to potential disruptions downstream (IMARC, 2025). Integration into coordinated halal supply chains through contracts or partnerships with slaughterhouses and exporters is thus vital for aligning incentives and sharing risks (Ali et al., 2016; Frohlich & Westbrook, 2001).

4.1.2. Midstream Segment: Slaughterhouses, Processing, and Halal Certification

The midstream segment—slaughterhouses and processing plants—is widely recognized as the critical bottleneck in Japan's halal wagyu supply chain. Only a limited number of facilities are currently certified to process wagyu according to halal standards accepted by key importing countries, and obtaining such certification requires substantial investment in infrastructure, staff training, and process redesign. SE Meat Miyazaki in Saito City is a prominent example: established with investment from Arita Livestock Industry and partners, it obtained halal certification and began operating as a dedicated halal beef plant, with capacity of around 1,000 cattle per month and an annual target of up to 12,000 halal wagyu cattle. The facility is certified by Japan Islamic Trust and approved to export halal wagyu to multiple Muslim-majority markets, including Malaysia, Indonesia, and various Gulf states.

Reports on Miyazaki's halal wagyu highlight stringent requirements at slaughter: animals must be healthy and alive, a trained Muslim slaughterman must perform the cut while reciting the prayer, and equipment and workspaces for halal wagyu must be separated from non-halal operations. At SE Meat Miyazaki, Muslim workers handle slaughter and certain processing steps, and machinery and tools are dedicated to halal lines, reflecting both religious requirements and importing-country expectations. Similar arrangements exist at other halal wagyu facilities in Kumamoto and elsewhere, such as those linked to Sugimoto-Honten and H.M Ryochi, which supply halal wagyu to Middle Eastern and Southeast Asian markets.

Halal certification involves comprehensive audits of sourcing, processing, cleaning, packaging, labeling, and documentation. Certifiers like Japan Islamic Trust coordinate with overseas halal authorities (e.g., JAKIM, Saudi Food and Drug Authority) to ensure that standards and inspections are recognized. Thus, facilities must meet internal protocols, pass audits by Japanese certifiers, and undergo periodic verification tied to foreign market requirements. These multi-layered requirements increase compliance costs but also create a reputation premium, enabling certified plants to secure long-term contracts with importers and restaurants in Muslim markets.

The limited number of certified facilities constrains overall supply. Even with expansion plans—such as SE Meat Miyazaki's growth targets—capacity is likely to remain tight relative to potential demand in Indonesia, Malaysia, and the GCC. This capacity constraint underscores the central role of midstream actors in the governance of the halal wagyu GVC: their investment and certification decisions largely determine how far and how fast Japan can expand halal wagyu exports.

4.1.3. Downstream Segment: Logistics, Export Channels, and Muslim Markets

The downstream segment is dominated by specialized cold-chain logistics, air-freight export channels, and premium distribution networks in Muslim-majority markets. Japanese logistics providers, especially Nippon Express, have developed halal logistics solutions that

link halal-certified plants in Japan with halal restaurants and retailers overseas, extending halal governance into transport, warehousing, and last-mile delivery. Nippon Express and subsidiaries have obtained halal certifications from bodies such as JAKIM and LPPOM-MUI for facilities including the Fukuoka Chuo Logistics Center, enabling end-to-end halal logistics covering warehousing, air and sea freight, and domestic distribution.

A typical export route involves collection of frozen or chilled wagyu from a halal-certified plant like SE Meat Miyazaki, transport in refrigerated trucks to an international airport, air shipment to Malaysia or Indonesia, and storage in halal-certified warehouses before delivery to restaurants or retailers. Case reports on deliveries to "WAGYU KOKORO" in Malaysia describe how Nippon Express Malaysia manages container cleanliness, temperature, and documentation to preserve halal status and quality. Similar chains support exports to GCC markets, where halal wagyu is distributed to high-end steakhouses and hotels, often via exclusive importers specializing in Japanese food products.

Market coverage is focused on upper-income urban consumers, reflecting wagyu's luxury positioning. In Malaysia and Indonesia, halal wagyu is sold mainly through fine-dining restaurants, upscale yakiniku outlets, and specialty meat retailers. In GCC countries, wagyu competes with halal beef from Australia and other suppliers, but Japanese origin and halal certification serve as differentiating factors. Reliable halal logistics and capable importers are thus critical for maintaining both wagyu's quality and halal integrity at the consumer end.

4.2. Halal Integrity, Traceability, and Critical Control Points

Maintaining halal integrity along the wagyu supply chain requires coordinated management of multiple critical halal points from farm to fork, building on both Japan's beef traceability system and halal-specific controls. Since 2004, Japan has mandated a national beef traceability system assigning each animal a 10-digit ID, enabling tracing back to the farm of origin. Information on birth, farm movements, slaughterhouse, and processing is recorded; in some retail settings, consumers can view producer details by entering the code. For wagyu, brands extend this with additional documentation on quality and sometimes halal certification.

Halal-specific critical points center on slaughtering, processing, packaging, logistics, and food service. At slaughterhouses, key controls include health checks, use of trained Muslim slaughtermen, prayer recitation, and separation of halal and non-halal processing lines, equipment, and storage. Audits at facilities like SE Meat Miyazaki examine slaughter procedures, cleaning protocols, equipment management, and batch documentation for halal exports. Packaging and labeling stages apply halal logos, certifier marks, and batch codes, linking to both the national ID system and certifiers' records.

In logistics, critical points relate to container cleanliness, avoidance of co-loading with non-halal products, and temperature and handling conditions. Nippon Express' halal logistics requires documented cleaning and inspection of refrigerated trucks and storage, segregation of halal cargo, and traceable handovers under halal warehouse oversight. At retail and restaurant levels, controls include separate storage and preparation areas for halal meat, dedicated utensils and grills, and careful sourcing of complementary ingredients. Restaurants marketing "authentic halal wagyu" often display both traceability documents and halal certificates.

The interaction between Japan's traceability regulations and private halal certification creates layered assurance but also coordination challenges. Gaps in documentation, inconsistent implementation of cleaning and segregation, or misalignment between Japanese certifiers and foreign authorities can undermine confidence in wagyu's halal status. These vulnerabilities underscore the need for continued improvements in information systems,

training, and recognition mechanisms, and they point to the potential of technologies like blockchain-based traceability for future research. These governance challenges also point to the importance of digital ecosystem development in strengthening halal assurance. Gandhi et al. (2025)'s study of applications and institutions in Japan between 2010 and 2025 suggests that digital halal tools can support information access, institutional visibility, and ecosystem coordination in a Muslim-minority context (Gandhi et al., 2025). For halal wagyu, this implies that digital traceability and verification systems could serve not only as technical instruments for tracking product flows, but also as governance mechanisms that enhance transparency, trust, and cross-border confidence in halal claims.

The halal wagyu segment offers significant agribusiness opportunities at the intersection of premium Japanese beef, rising Muslim demand, and halal market globalization. Reports highlight that halal-certified wagyu from Miyazaki, Kumamoto, and Tokushima is attracting growing interest from buyers in Southeast Asia and the Middle East, where Muslim consumers seek status-signaling, high-quality halal products. Promotional events in Gulf cities have showcased halal Miyazaki wagyu to chefs and hotel buyers, with producers aiming to export substantial volumes annually as relationships mature. In Southeast Asia, the lifting of bans on Japanese beef and the expanding presence of Japanese restaurants and hotels in Kuala Lumpur and Jakarta have created a niche but expanding market for halal wagyu dishes.

Analyses suggest that demand for halal beef in Malaysia and Indonesia is relatively inelastic among higher-income consumers, who are willing to pay premiums for quality and trusted halal credentials. This willingness, combined with the scarcity of Japanese suppliers recognized by foreign halal authorities, creates a supply premium: only a limited number of plants in Japan can export halal beef to markets like Malaysia, where all imported beef must be halal-certified. As a result, certified producers can command higher prices and secure long-term contracts with fine-dining restaurants, luxury hotels, and specialty retailers.

Beyond immediate price premiums, halal wagyu offers branding opportunities that can enhance Japan's broader agrifood export strategy. By combining existing "Japan quality" narratives with credible halal certification and logistics, producers and policymakers can position wagyu as a flagship product in Japan's engagement with the global halal economy. Success stories like Kurohana wagyu and Arita Wagyu demonstrate that, with the right mix of certification, storytelling, and partnerships, halal wagyu can serve as a model for other Japanese halal agrifood exports. For Islamic finance actors, this segment represents a relatively underexplored agribusiness niche that combines tangible assets, clear cash flows, and growing demand in core Muslim markets.

4.3. Opportunities, Constraints, and Islamic Finance

4.3.1. Mapping Agribusiness Opportunities in the Halal Wagyu Segment

The halal wagyu segment represents a niche but high-value agribusiness opportunity at the intersection of premium Japanese beef and expanding Muslim consumer markets. Demand is growing in Southeast Asia and the Middle East, where halal-certified wagyu from regions such as Miyazaki and Kumamoto is increasingly positioned as a status-oriented, high-quality product. Market expansion is supported by rising incomes, the proliferation of Japanese restaurants and hotels in cities such as Kuala Lumpur and Jakarta, and renewed market access following the lifting of import restrictions on Japanese beef.

This demand is relatively price inelastic among upper-income consumers, allowing certified producers to capture price premiums. Supply remains constrained, however, as only a limited number of Japanese facilities are recognized by foreign halal authorities. This

scarcity reinforces premium pricing and enables long-term contracts with high-end buyers, including fine-dining restaurants and luxury hotels.

Beyond direct commercial gains, halal wagyu contributes to Japan's broader agrifood export strategy by combining established "Japan quality" branding with credible halal certification. Emerging cases such as Kurohana and Arita Wagyu illustrate how certification, branding, and international partnerships can position halal wagyu as a flagship product within the global halal economy. For investors, including those in Islamic finance, the segment offers a relatively underdeveloped opportunity characterized by strong demand fundamentals and asset-backed value creation.

4.3.2. Structural Constraints in the Halal Wagyu Supply Chain

Despite strong market potential, the halal wagyu segment faces several structural constraints. A key limitation is the restricted capacity of halal-certified slaughtering and processing facilities recognized by importing countries. Certification entails substantial upfront and recurring costs—including facility modifications, dedicated equipment, trained personnel, and audits—which can deter smaller firms and slow capacity expansion.

High production and certification costs also undermine price competitiveness. Compared with lower-cost halal beef suppliers such as Australia, Japanese wagyu remains confined to premium market segments. This narrow positioning increases vulnerability to demand shocks in luxury food service and tourism-dependent markets.

Institutional and regulatory complexities further constrain growth. Fragmentation among Japanese halal certifiers and inconsistent recognition across importing countries create uncertainty for exporters. Additional compliance requirements related to food safety, animal health, and labeling increase transaction costs. Downstream, limited numbers of specialized importers and logistics providers can create bottlenecks and uneven bargaining power.

Together, these constraints suggest that without targeted investment in certification capacity, midstream infrastructure, and halal logistics, the segment will remain a high-margin niche. Addressing these gaps, potentially through risk-sharing and asset-based financing mechanisms will be critical to scaling halal wagyu within Japan's export portfolio.

4.3.3. Mapping Islamic Finance Instruments along the Halal Wagyu GVC

This subsection maps Islamic finance instruments along the halal wagyu GVC, linking financing needs at each stage with specific sharia-compliant contracts.

Table 1. Mapping Islamic Finance Instruments along the Halal Wagyu GVC

GVC stage	Key activities / financing needs	Suitable Islamic finance instruments	Illustrative application in halal wagyu context
Upstream (breeding & fattening)	Capital expenditure for farm facilities, purchase of calves, feed, veterinary services, on-farm infrastructure	*Musharakah*, *Mudharabah*, *Murabahah*	An Islamic bank and a wagyu farm enter into a *musharakah* to finance herd expansion, sharing profits from future halal wagyu sales; feed and equipment are financed via murabahah with deferred payment terms.

GVC stage	Key activities / financing needs	Suitable Islamic finance instruments	Illustrative application in halal wagyu context
Upstream (working capital)	Operating expenses during long fattening cycle, including labor and feed costs	*Murabahah*, *Tawarruq* (if allowed), *Qard Hasan* (limited)	The bank purchases feed and inputs and sells them to the farm on a *murabahah* basis; *qard hasan* may supplement seasonal cash-flow gaps for small/medium wagyu farmers.
Midstream (slaughterhouse & processing facilities)	Investment in halal-compliant abattoir, processing equipment, cold storage, certification and audit costs	*Ijarah*, *Istisna*, Asset-backed *Sukuk*	Abattoir assets are financed through *ijarah*, with the bank owning equipment and leasing it to the operator; a special-purpose vehicle issues sukuk to fund construction of a halal wagyu slaughterhouse and processing plant.
Midstream (certification & compliance)	Costs of halal certification, audits, staff training, process redesign for halal	*Murabahah*, *Waqf*-linked financing	Certification packages (audit, consulting, training) are financed via murabahah; a waqf fund co-finances certification support for smaller operators as capacity-building in the halal wagyu ecosystem.
Downstream (export & cross-border logistics)	Working capital for export orders, inventory financing, shipping and insurance	*Murabahah* (trade finance), *Salam*, Parallel *Salam*	The bank purchases halal wagyu from the producer and sells it to overseas distributors on *murabahah* basis; in a parallel *salam* structure, the bank prepays the producer for specified wagyu cuts and sells the future output to importers.
Risk management & resilience layer	Buffer against price volatility, animal disease, market shocks; inclusivity for smaller actors	*Zakat*, *Waqf*-based funds, *Takaful*	*Zakat* and *waqf*-based investment funds provide first-loss capital or concessional financing for small wagyu producers; *takaful* schemes cover livestock mortality and export-related risks.

Source : Authors Compilation (2026)

This Table 1 mapping shows that the halal wagyu GVC can be a practical context in which commercial Islamic finance, social finance, and risk-sharing instruments are combined to support a high-value agribusiness chain spanning non-Muslim production and Muslim consumption.

4.3.4. Implications for Agribusiness Strategy and Policy

For wagyu producers, the mapping suggests moving beyond self-financed expansion toward structured partnership-based financing models aligned with long production cycles. *Musharakah* or *mudharabah* arrangements with Islamic financial institutions, potentially via cross-border vehicles—would allow farms to share profits and risks of herd expansion aimed at halal markets, while *murabahah* facilities can standardize input financing. Strategically, this can enable farms that already meet Japan's quality and traceability standards to scale production earmarked for halal slaughterhouses, improving capacity utilization and supply reliability.

At the midstream level, Islamic finance can help address capacity bottlenecks. Investments in new or upgraded halal-certified slaughterhouses and processing plants require substantial upfront capital that may be difficult to mobilize solely through domestic loans. Asset-based instruments such as *ijarah* and *istisna*, backed by long-term off-take agreements, could provide financing structures suited to these facilities, while sukuk issuances targeting investors in GCC and Southeast Asia could diversify funding. Policymakers could facilitate such investments through export promotion programs, co-guarantees, or dedicated halal infrastructure funds.

Downstream, Islamic trade finance and partnership-based investments can strengthen logistics and market development. *Murabahah* and *salam*-based export finance can ease working capital constraints and manage price risk for exporters, while Islamic banks in importing countries can co-invest in cold chains, specialty stores, and restaurant chains featuring halal wagyu. Such arrangements can deepen wagyu's integration into local halal agrifood ecosystems and create shared incentives for marketing and consumer education.

For regulators, fostering dialogue between halal authorities, export agencies, and Islamic finance regulators can help align certification frameworks with cross-border sukuk and syndicated Islamic financing for halal infrastructure, and encourage joint ventures between Japanese agribusiness firms and Islamic financial institutions.

4.3.5. Research and Policy Implications for Islamic Financial Institutions

For Islamic financial institutions (IFIs), the halal wagyu GVC offers a concrete case to expand agricultural portfolios beyond traditional smallholder and staple commodity projects. Wagyu's branded, asset-intensive nature which combined with strong traceability and defined export channels makes it suitable for structured Islamic finance products requiring clear underlying assets and cash flows. By engaging with the wagyu halal chain, IFIs can develop and test project finance structures (e.g., *sukuk* for halal processing hubs, cross-border *musharakah* for logistics platforms) that might be replicated in other premium agrifood segments.

At the same time, the wagyu case highlights challenges: IFIs need due-diligence frameworks tailored to non-Muslim production environments; alignment between halal certification and sharia-compliant financing structures; and mechanisms to manage country, currency, and commodity risks in long-distance livestock trade. Drawing from waqf-based livestock projects and models such as *sharakah bil mawashi*, IFIs could explore hybrid arrangements combining commercial returns with developmental goals, such as integrating smaller wagyu farmers into halal supply chains or supporting capacity building for halal logistics providers.

For regulators in Muslim-majority countries, the wagyu case underscores the importance of coherent policies at the intersection of halal certification, food import regulation, and Islamic finance. Clear recognition of Japanese halal certifiers, guidelines for halal logistics, and enabling frameworks for cross-border Islamic investment in agrifood

infrastructure can lower barriers to entry for projects like halal wagyu. Conversely, fragmented standards or ad hoc changes can deter investment. Ultimately, integrating Islamic finance into the halal wagyu GVC requires designing financing structures congruent with value-chain realities, halal governance, and *maqasid*-oriented objectives.

5. Conclusion

This paper analyzed the halal wagyu global value chain linking Japan to Muslim markets, focusing on value chain structure, halal governance, and the potential integration of Islamic finance instruments. In relation to the first research question on value chain structure, the study showed that through qualitative document analysis—how wagyu has begun to enter the global halal economy via certified slaughterhouses, specialized halal logistics, and high-end distribution channels in Southeast Asia and the Middle East. It found that the halal wagyu GVC consists of upstream breeding and fattening, midstream slaughtering and processing, and downstream logistics and retail, underpinned by Japan's beef traceability system and private halal certification and logistics standards. With respect to the second research question on halal governance and integrity, the analysis demonstrated that halal governance relies on layered assurance across critical halal points in slaughter, processing, packaging, logistics, and food service, but that expansion remains constrained by limited certified capacity, high costs, and regulatory complexity. Addressing the third and fourth research questions on opportunities, constraints, and Islamic finance, the study proposed a detailed mapping of Islamic finance instruments along the wagyu GVC, highlighting opportunities for partnership-based, asset-based, and trade-based contracts, alongside social finance and takaful, to support investment, working capital, and risk management in this premium agribusiness segment.

The study contributes to halal supply chain research by providing a detailed case of a premium livestock GVC in a non-Muslim country, illustrating how halal integrity is operationalized in a complex, high-value chain. It enriches Islamic agricultural and livestock finance literature by applying Islamic finance concepts to a high-value, export-oriented agribusiness chain and by proposing a contract mapping tailored to specific stages and asset structures. It also adds to global value chain and agribusiness scholarship by showing how a non-Muslim country can position a flagship product within the halal economy via private standards, logistics innovation, and targeted market development.

For wagyu producers and agribusiness firms, the findings underscore the importance of integrating into coordinated halal supply chains and of exploring risk-sharing financing models to support expansion. For Japanese policymakers, they point to the need to support halal infrastructure—slaughterhouses, processing plants, and logistics hubs—and to strengthen coordination with foreign halal authorities and Islamic finance regulators. For regulators in importing countries, the results highlight the importance of transparent recognition frameworks for Japanese halal certifiers and alignment between halal requirements and broader import regulations to reduce uncertainty and transaction costs. For Islamic financial institutions, the wagyu case offers concrete opportunities to design and test *sharia*-compliant financing structures such as *musharakah*-based farm investment, *sukuk* for processing infrastructure, *salam*-based export finance, and takaful for livestock and logistics risks—in a sophisticated, cross-border agribusiness context.

This study is limited by its reliance on secondary documents and the absence of primary data from value-chain actors, the potential promotional bias of company and media sources, the scarcity of quantitative data on volumes and costs, and the illustrative nature of its Islamic finance mapping. These constraints call for cautious interpretation and indicate the need for

complementary empirically grounded research. Future work should include multi-stakeholder case studies combining interviews and fieldwork, mixed-methods analyses integrating qualitative and quantitative data, and comparative studies across countries and products to assess how different institutional contexts shape halal meat value chains. There is also scope for detailed case studies of implemented Islamic finance structures for halal agribusiness and technology-focused research on digital traceability systems. Overall, the halal wagyu case provides a rich terrain for exploring how non-Muslim agrifood exporters can engage with the global halal economy in ways that align value-chain structure, halal governance, and Islamic finance.

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5.2. Conflict of Interest

The authors declare no conflict of interest

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