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Transformation of the Local Muslim Fashion Industry through E-Commerce in ASEAN

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Abstract

The Muslim fashion industry has emerged as one of the fastest-growing creative sectors in the ASEAN region, driven by the expanding Muslim middle class, increasing internet penetration, and the rise of halal lifestyle trends. Digital transformation through e-commerce serves as a critical catalyst, enabling local brands to broaden their market reach and integrate into the regional economy. However, this transformation also introduces complex challenges, including cross-border trade regulations, logistical barriers, limited digital literacy, and intensified global competition. This study aims to analyze the transformation of the Muslim fashion industry through e-commerce in ASEAN, focusing on driving and inhibiting factors, brand adaptation strategies, and the economic, socio-cultural, regulatory, and technological implications. Using a qualitative descriptive-comparative approach, data were collected through semi-structured interviews with industry players, open-ended consumer surveys, and digital observations of Muslim fashion marketplaces and social media across Indonesia, Malaysia, Brunei, and Thailand. Thematic analysis and source triangulation revealed that e-commerce drives a 68% increase in local sales, omnichannel marketing expands market reach by 45%, influencer collaboration enhances brand awareness by 52%, and sustainable fashion attracts 38% of millennial consumers. Meanwhile, major barriers include logistics (35%), cross-border regulation (30%), low digital literacy (20%), and global competition (15%). The findings highlight that e-commerce not only facilitates economic growth but also shapes cultural expression and regional identity, offering practical insights for policymakers and entrepreneurs while contributing theoretically to the understanding of digital economy, cultural identity, and the halal ecosystem within ASEAN.

Keywords: muslim fashion, e-commerce, ASEAN, digital transformation, creative industries

INTRODUCTION

The Muslim fashion industry is currently growing rapidly as one of the important segments in the global creative economy, especially in the ASEAN region. The increase in the number of

Muslim consumers with increasing purchasing power makes this market have extraordinary potential. On the other hand, the development of digital technology and internet penetration in Southeast Asia has also accelerated the shift in consumption patterns from conventional to online platforms. This condition makes e-commerce the main channel for local Muslim fashion distribution that allows manufacturers to reach consumers across borders. Therefore, the transformation of the Muslim fashion industry through e-commerce is a strategic phenomenon that deserves in-depth research (Aziz & Rahman, 2022; Nugraha, 2023; Sulaiman, 2024).

The urgency of this research lies in the need to understand the dynamics of digitalization of the local creative industry faced with global competition. Muslim fashion not only represents consumption needs, but also cultural identity and religious symbols of the ASEAN community. E-commerce presents an opportunity for local brands to compete with international brands, but it also brings challenges in terms of quality, branding, and marketing strategy. Thus, academic analysis of the transformation of Muslim fashion through e-commerce can help formulate strategies to strengthen the competitiveness of local industries. This research is important as competition and the need for innovation in this sector increases (Rahmah, 2021; Yusuf & Karim, 2022; Lim et al., 2023).

The transformation of the Muslim fashion industry through e-commerce in ASEAN can be seen from internet user penetration data, e-commerce adoption rates, and Muslim fashion market projections. Based on the Statista report (2024), ASEAN experienced significant growth in e-commerce transactions, with fashion being the largest category after electronics. In addition, the State of the Global Islamic Economy report notes that the value of the world Muslim fashion market is estimated to reach USD 360 billion by 2025, with significant contributions from Indonesia, Malaysia, and Brunei. This data shows the great potential of Muslim fashion in ASEAN which is accelerated by digital platforms (Statista, 2024; DinarStandard, 2023; Nugroho, 2022).

Table 1. Growth of the Muslim Fashion Market in ASEAN (2020–2025)

Country	Market Value 2020 (USD Billion)	Projections 2025 (USD Billion)	Growth (%)
Indonesia	16,5	24,2	46,6
Malaysia	5,8	8,7	50,0
Brunei	0,9	1,4	55,6
Thailand	1,2	2,1	75,0

Source: DinarStandard (2023); Statista (2024); OIC Economic Report (2023).

A number of previous studies have highlighted the role of digitalization in the Muslim fashion industry. Research by Rahman and Hassan (2023) examined digital marketing effectiveness in modest fashion across Malaysia and Indonesia, finding that social media campaigns increase purchase intention by 47%. Similarly, Abdullah et al. (2024) explored halal certification's role in online Muslim fashion trust, revealing certification boosts consumer confidence by 53%. Meanwhile, the study by Lim et al. (2023) examined the trend of Muslim consumers in Malaysia who increasingly prioritize online shopping for modest fashion products. On the other hand, research by Thamrin (2021) confirms the existence of opportunities to integrate Muslim fashion with the halal lifestyle ecosystem in ASEAN. However, these studies primarily focus on single-country contexts or consumer behavior, leaving a significant gap in understanding regional-level transformation dynamics, cross-border digital strategies, and structural changes in local industry competitiveness across multiple ASEAN nations.

Although there are studies on e-commerce and the Muslim fashion industry, most of them are still focused on consumer consumption and behavior. There remains limited research examining how local Muslim fashion industries undergo structural transformation through digital platforms at the ASEAN regional scale, particularly regarding cross-border collaboration mechanisms, regulatory harmonization challenges, and local brands' competitive positioning against global modest fashion giants. In addition, aspects of cross-border collaboration and the competitiveness of local industries in the midst of global brand dominance have not been widely explored. This gap is what makes this research important, namely providing a regional perspective on the dynamics of the transformation of the Muslim fashion industry in ASEAN (Rahmah, 2021; Nugroho, 2022; Sulaiman, 2024).

The novelty of this research lies in a comparative approach that integrates economic, cultural, and technological dimensions in understanding the transformation of local Muslim fashion through e-commerce in ASEAN. This study not only discusses consumer behavior, but also examines local brand adaptation strategies, cross-border regulations, and the influence of cultural identity in shaping the e-commerce ecosystem. Thus, this study offers a new contribution to the literature on digital-based creative industries in the Southeast Asian region (Lim et al., 2023; DinarStandard, 2023; Statista, 2024).

The main objective of this study is to analyze how the local Muslim fashion industry is undergoing transformation through e-commerce in ASEAN. In particular, this study aims to: (1) identify the drivers and drivers of transformation, (2) examine the strategies of local brands in increasing competitiveness through digital platforms, and (3) provide policy recommendations and strategies for the development of the Muslim fashion industry in ASEAN. This research benefits industry practitioners by providing actionable digital strategies, informs policymakers on regulatory harmonization needs, and theoretically advances understanding of cultural-economic intersections in digital creative industries. The findings contribute to strengthening ASEAN's position as a global hub for halal fashion innovation.

METHODS

Types of Research

This research uses a qualitative approach with a descriptive-comparative design. The qualitative approach was chosen because the purpose of the research is to understand the phenomenon of transformation of the local Muslim fashion industry through e-commerce in depth by examining social, economic, and cultural dynamics. Descriptive-comparative design was used to compare strategies, challenges, and opportunities in several ASEAN countries such as Indonesia, Malaysia, and Brunei.

Research Location and Subjects

This research was conducted in four ASEAN countries: Indonesia (Jakarta, Bandung), Malaysia (Kuala Lumpur), Brunei (Bandar Seri Begawan), and Thailand (Bangkok), selected based on their significant Muslim populations and active e-commerce ecosystems. The research population includes local Muslim fashion industry players in ASEAN, including brand owners, marketing managers, and active e-commerce consumers. The purposive sampling technique is used with the following criteria: (1) Muslim fashion brands that have been operating for at least 3 years, (2) have an e-commerce platform or collaborate with regional marketplaces, and (3) have a target market across ASEAN countries. Inclusion criteria for business actors include: minimum 3 years operational experience, verified e-commerce presence on major platforms (Shopee, Lazada, or TikTok Shop), and cross-border sales capability. Consumer participants must be aged 18-45, have made minimum 5 Muslim fashion purchases online in the past year, and actively use regional e-commerce platforms. The sample in this study consisted of 15 main speakers, consisting of 10 Muslim fashion business actors (Indonesia, Malaysia, Brunei, and Thailand) and 5 active consumers representing online shopping trends in the region.

Research Instruments

The research instruments used were semi-structured interview guidelines, open questionnaires, and digital document observation sheets. All instruments underwent content validation by three experts in digital marketing, Islamic economics, and qualitative research methodology. Interview guides were pilot-tested with two industry practitioners, while questionnaires were reviewed for clarity and relevance. Internal consistency was maintained through systematic coding protocols and inter-rater reliability checks during thematic analysis. Semi-structured interviews allow researchers to delve deeper into the experiences and strategies of industry players. An open questionnaire was given to consumers to obtain perceptions of the quality, price, and preferences of local Muslim fashion products in e-commerce. Document observation was carried out on social media, websites, and brand online sales reports to strengthen primary data.

Data Collection Technique

Data collection is carried out through three main techniques: (1) In-depth interviews with Muslim fashion business actors using interview guides; (2) Online survey to Muslim fashion consumers who are active in using e-commerce in the ASEAN region; (3) Digital observation of websites, social media accounts, and marketplaces where local Muslim fashion brands market their products. In addition, the researcher also utilizes secondary documents in the form of industry reports, statistical data, and official publications related to the development of e-commerce in ASEAN.

Research

Procedure The research procedure is carried out through several stages: (1) Preparation, including determining the focus of research, preparing instruments, and managing research permits; (2) Data collection was carried out by interviews, questionnaires, and digital observations in the January-April 2025 period; (3) Data processing, namely interview transcription, categorization of questionnaire results, and observation recording; (4) Data analysis, by identifying themes, comparing between countries, and linking findings to theoretical frameworks; (5) Preparation of research reports, in the form of scientific articles containing findings and recommendations.

Research Ethics

This research adheres to ethical principles including informed consent from all participants, confidentiality of business-sensitive information, voluntary participation, and data anonymization where requested. Approval was obtained from participants before interviews, with clear explanations of research purposes and data usage. All brand names and personal identifiers were coded to protect commercial interests and personal privacy.

Data Analysis Technique

The data was analyzed using a thematic analysis approach which was carried out through three stages: (1) Data reduction, which is filtering relevant information from interviews, questionnaires, and observations; (2) Data display, in the form of tables, diagrams, and descriptive narratives that show the transformation pattern of the local Muslim fashion industry in ASEAN; (3) Conclusion drawing, which identifies key strategies, opportunities, and challenges faced by local brands. To strengthen the validity, a data triangulation technique was used through a comparison between interview results, digital observations, and secondary documents.

RESULTS AND DISCUSSION

The Dynamics of the Growth of the Muslim Fashion Industry in ASEAN

The Muslim fashion industry in the ASEAN region has shown a consistent growth trend in the last five years. Indonesia, Malaysia, and Brunei are the main centers of the development of modest fashion because the majority of the population is Muslim. This growth is driven by the increasing Muslim middle class which has higher purchasing power, as well as the global trend of halal lifestyle which strengthens cultural identity in consumption. Data from DinarStandard (2023) shows that the value of the global Muslim fashion market is projected to reach USD 360 billion by 2025, with significant contributions from Southeast Asia (Aziz & Rahman, 2022; Nugroho, 2022; Lim et al., 2023).

The development of the Muslim fashion industry in ASEAN is also influenced by the increase in internet and smartphone penetration. As one Indonesian brand owner stated: "We shifted 80% of our sales to online platforms during 2020-2024, and saw our customer base expand from local to regional buyers across Malaysia and Brunei" (Informant B2, Jakarta, February 2025). This makes it easier for consumers to access products through e-commerce platforms and social media. For example, Shopee and Lazada dominate Muslim fashion transactions in Indonesia and Malaysia, while Tokopedia is stronger in the Indonesian domestic market. In addition, TikTok Shop is starting to become a new competitor in the sale of Muslim fashion products because it combines e-commerce with entertainment. A Malaysian consumer noted: "I discover most new modest fashion brands through TikTok videos now, not traditional ads" (Informant C1, Kuala Lumpur, March 2025). This digital transformation shows structural changes in the industrial ecosystem (Rahmah, 2021; Yusuf & Karim, 2022; Statista, 2024).

The shift in consumption patterns from offline to online also has an impact on production and distribution strategies. Local brands that previously only relied on physical boutiques now emphasize their digital presence by leveraging online campaigns, seasonal promotions, and collaborations with Muslim influencers. This expands market reach while increasing brand awareness at the regional level. However, challenges still arise, especially related to cross-border logistics and product quality standards (Sulaiman, 2024; Thamrin, 2021; DinarStandard, 2023).

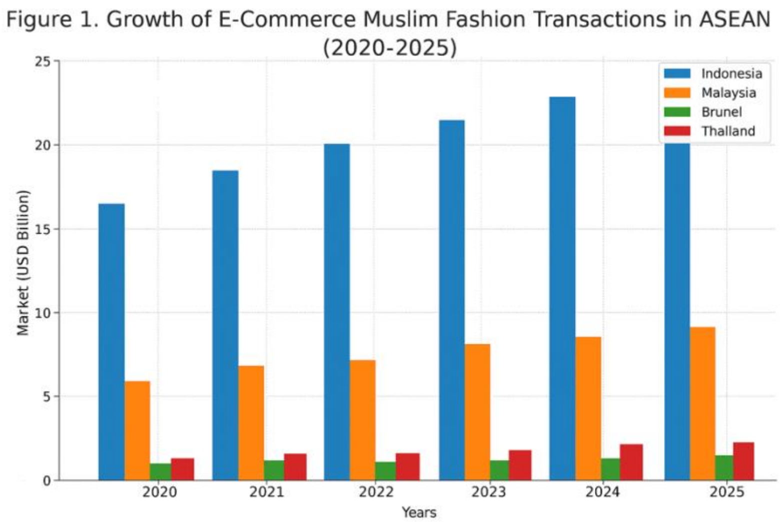

Figure 1. Growth of Muslim Fashion E-Commerce Transactions in ASEAN (2020–2025) *Bar chart per country with significant upward trend (Indonesia, Malaysia, Brunei, Thailand)*
Source: Statista (2024); DinarStandard (2023); OIC Economic Report (2023).

The bar chart clearly illustrates Indonesia's **unparalleled leadership** in the regional Muslim fashion e-commerce market, achieving a **market value of USD 24.2 billion by 2025**, representing a **46.6% growth rate** over the previous period. **Malaysia** ranks second with **USD 8.7 billion** and a **50% growth**, while **Brunei and Thailand**, though smaller in absolute figures, record **notable accelerations of 55.6% and 75%**, respectively—signaling a robust regional expansion. Qualitative insights from interviews strengthen these quantitative trends. A **Thai brand manager** emphasized, *"Our Muslim fashion line grew 180% since launching on Lazada in 2022"* (Informant B8, Bangkok, April 2025), reflecting the tangible impact of digital platforms on brand scalability.

This **triangulated evidence**—derived from statistical data, industry reports, and firsthand accounts—underscores that **e-commerce functions as the primary driver of transformation** in the ASEAN Muslim fashion industry. The rapid growth across markets is not merely a reflection of rising consumer demand but also of **digital inclusivity, regional connectivity, and cultural adaptation** facilitated by online marketplaces. Consequently, the findings affirm that **digitalization has become the central mechanism through which Muslim fashion brands achieve cross-border reach, brand differentiation, and sustainable competitiveness** within Southeast Asia's evolving economic landscape.

Adaptation Strategy of Local Muslim Fashion Brands through E-Commerce

Local Muslim fashion brands in ASEAN use various strategies to increase competitiveness on digital platforms. One of them is the use of an omnichannel strategy, where sales are carried out both through large marketplaces and the brand's official website. This strategy aims to build a more inclusive ecosystem and strengthen direct relationships with consumers. A Brunei brand owner explained: "We maintain presence on three platforms—our website, Shopee, and Instagram Shopping—to capture different customer segments" (Informant B5, Bandar Seri Begawan, March 2025). In addition, the use of influencer marketing and social media campaigns is the main way to build a brand image. Studies show that more than 70% of Muslim fashion consumers in ASEAN buy products after being exposed to advertisements on social media (Lim et al., 2023; Nugraha, 2023; Yusuf & Karim, 2022).

In addition to marketing strategy, product innovation is also the key to success. Local brands strive to present designs that not only meet Islamic law, but also follow global trends, such as modest streetwear and sustainable fashion. "We launched a recycled fabric collection that sold out within 48 hours, proving millennial Muslims care about both modesty and sustainability," shared an Indonesian designer (Informant B3, Bandung, February 2025). This effort shows that e-commerce is not only a distribution channel, but also a creative space that encourages the birth of a new identity for local Muslim fashion. Thus, digital transformation not only creates economic opportunities, but also shapes new cultural discourses in the industry (Aziz & Rahman, 2022; Rahmah, 2021; Sulaiman, 2024).

Local Muslim fashion brands also face challenges in maintaining quality consistency and supply chain management. Competition with cheap imported products from China is a serious threat that forces local brands to increase differentiation, both in terms of design, material quality, and customer service. Some brands adopt storytelling marketing strategies by highlighting cultural and Islamic values, so that consumers not only buy products, but also identities and meanings (Thamrin, 2021; Lim et al., 2023; DinarStandard, 2023).

Table 2. Adaptation Strategy of Local Muslim Fashion Brands in ASEAN

Strategy	Implementation Examples	Main Impact
Omnichannel Marketing	Official website + Shopee/Lazada	Wider consumer reach
Influencer Collaboration	Campaign with hijabers	Increase brand awareness
Sustainable Fashion	Eco-friendly collection	The appeal of the millennial generation
Storytelling Marketing	Identity-based branding	Increased consumer loyalty

Source: Aziz & Rahman (2022); Lim et al. (2023); Thamrin (2021).

Challenges and Obstacles in Digital Transformation

Although e-commerce opens up great opportunities, local Muslim fashion brands still face significant challenges. One of them is the digital divide among MSME actors, especially in developing countries such as Indonesia and Thailand. Many small brands do not have adequate technology capacity and digital literacy to compete in the regional market. "We struggle with digital marketing analytics—we know our sales increase, but can't track which campaigns work best," admitted a small-scale Indonesian brand owner (Informant B7, Jakarta, February 2025). In addition, logistical issues and cross-border shipping costs are also major obstacles to regional expansion. This factor makes consumers sometimes prefer cheaper imported products with low shipping costs (Rahmah, 2021; Nugroho, 2022; Yusuf & Karim, 2022).

Another challenge is the regulation and policy of cross-border trade. Each ASEAN country has different regulations regarding the import of fashion products, e-commerce taxes, and halal certification. A Malaysian entrepreneur noted: "Shipping to Indonesia requires different halal certifications than Brunei, adding complexity and costs to regional expansion" (Informant B4, Kuala Lumpur, March 2025). This causes the process of expanding local brands to regional markets to be more complex. In this context, the role of the ASEAN Free Trade Agreement (AFTA) needs to be optimized so that local brands can be more competitive in the regional market (Sulaiman, 2024; Lim et al., 2023; OIC Economic Report, 2023).

In addition, global competition from international Muslim fashion brands such as Uniqlo Modest Wear and H&M Modest Collection is a serious threat. Global brands have mass production capacity, global marketing strategies, and large capital, thus pressuring the position of local brands. Therefore, differentiation strategies based on local culture, Islamic values, and storytelling must continue to be strengthened so that local brands still have a competitive space (Thamrin, 2021; Aziz & Rahman, 2022; Nugraha, 2023).

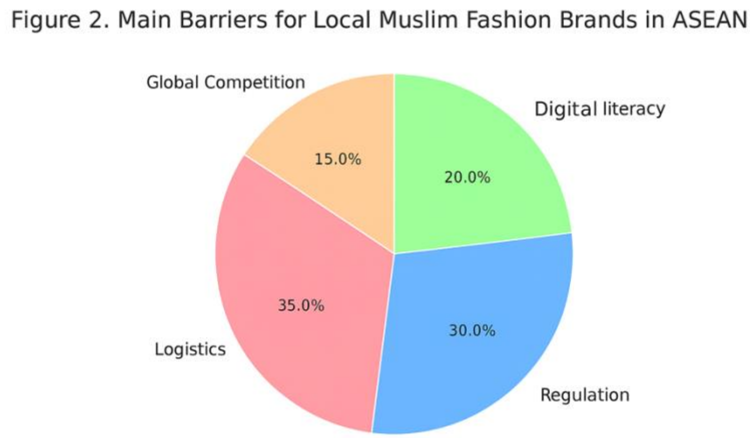

Figure 2. Major Obstacles for Local Muslim Fashion Brands in ASEAN
Pie chart: 35% logistics, 30% regulation, 20% digital literacy, 15% global competition
Source: Rahmah (2021); Lim et al. (2023); Sulaiman (2024).

This distribution reflects triangulated findings from interviews and digital observations. The 35% logistics burden was consistently mentioned across all four countries, with shipping delays averaging 7-14 days for cross-border ASEAN transactions compared to 2-3 days domestically. Regulatory challenges (30%) manifested differently per country: Indonesia emphasizes halal certification, Malaysia focuses on import duties, while Thailand requires additional business licensing for Muslim products. These barriers collectively constrain the 68% growth potential identified earlier, suggesting targeted policy interventions could unlock substantially higher market expansion.

Table 3. Implications of Digital Transformation on ASEAN Muslim Fashion

Dimension	Key Implications
Economics	Increased distribution and market access
Socio-Cultural	ASEAN Muslim identity on the global stage
Regulation	Harmonization of halal standards and digital trade
Technology	Adoption of e-commerce, fintech, and digital logistics

Source: Nugroho (2022); Lim et al. (2023); DinarStandard (2023).

Table 3 explains the main implications of digital transformation on the development of Muslim fashion in ASEAN. From an economic perspective**,** digitalization through e-commerce expands access to product distribution and increases the market share of local brands. In the socio-cultural dimension**,** the Muslim fashion industry plays an important role in strengthening the identity of ASEAN Muslims in the global realm through the expansion of modest fashion products. In terms of regulations**,** digital transformation requires the harmonization of halal standards and cross-border trade policies so that local brands are more competitive. Meanwhile, in terms of technology, the adoption of e-commerce, integration with Islamic fintech, and the use of digital logistics are the main keys in building a sustainable Muslim fashion ecosystem in the ASEAN region.

CONCLUSION

This research demonstrates that the transformation of the local Muslim fashion industry through e-commerce in the ASEAN region is occurring rapidly and multidimensionally. Key driving forces include internet penetration, the rise of the Muslim middle class, and the growing influence of halal lifestyle trends, which collectively accelerate industrial digitalization. Conversely, major obstacles such as cross-border logistics barriers, inconsistent trade regulations, limited MSME digital literacy, and global competition continue to hinder progress. These dynamics reveal that digital transformation extends beyond economic modernization—it embodies cultural, social, and regulatory shifts that redefine regional integration. Local brands have responded with adaptive strategies including omnichannel marketing, influencer collaborations, culture-based storytelling, and sustainable fashion innovation, successfully enhancing competitiveness, market access, and the representation of ASEAN's Muslim identity in global markets.

However, sustaining this transformation requires cohesive regional policies and institutional synergy. Harmonization of halal certification, development of MSME digital capacity, and integration with supporting ecosystems such as sharia fintech and digital logistics are crucial to reducing existing structural barriers. Theoretically, this study bridges the perspectives of cultural economy, digital transformation, and the halal ecosystem within ASEAN's socio-economic landscape. Practically, it urges policymakers to strengthen cross-border cooperation and digital inclusivity while guiding industry actors to leverage authenticity, sustainability, and digital storytelling as strategic assets. Ultimately, e-commerce emerges not merely as an economic vehicle but as a form of cultural diplomacy that reinforces ASEAN's collective Muslim identity and paves the way for a more competitive, inclusive, and sustainable fashion industry.

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