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Niche market making in the UK sheep sector; performing the halal market in uncertain times

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ABSTRACT

Focussing on the UK sheep sector, this paper explores the relational formation of niche halal meat markets, examining how performation struggles shape and relocate market controversies amid post-Brexit uncertainty and economic crisis. While the prevailing political and media-led controversy over the non-stun religious slaughter of animals has waned considerably, it has not disappeared altogether; rather, it has been relocated through processes of b/ordering and the reframing value attribution. Drawing on the geographies of marketisation literature, we examine how dual markets for stunned and non-stunned halal meat persist as interdependent trajectories, and how both remain central to the resilience of rural farming communities. Through a mixed-method approach, including livestock market observations and interviews with supply chain actors, we demonstrate how the halal market is recursively shaped by spatial, moral, and calculative logics. These ongoing performation struggles reveal that market order is achieved through ongoing and contested negotiations across economic, ethical, and religious dimensions.

1. Introduction

While halal production and consumption practices are believed to be guided by religious principles, in recent decades religion has been conditioned *by* and invigorated *within* global markets, as evidenced by interdisciplinary scholarship across the social sciences (Fischer, 2011; Lever and Miele, 2012; Bergeaud-Blackler et al., 2015; Rudnyckyj and Osella, 2017; Lever and Fischer, 2018; Yakin and Christians, 2021; Lever et al., 2023). In this paper, we interrogate ongoing developments in the halal market in line with Berndt and Boeckler's (2023) claim that the dynamics of global markets have become increasingly unpopular in their orthodox economic cloth. As Berndt and Boeckler note:

> We are increasingly retreating behind borders and walls, as nations (e.g., Brexit) and individually (family, social media bubbles). Although the globalist ghosts have certainly not disappeared, after a succession of economic crises, pandemics, and wars the years of unfettered market neoliberalism appear to be over (2023, 1).

We argue that an intimation of this can be seen in the UK halal market, where long standing media-driven controversy about animal welfare during non-stun religious slaughter (Miele, 2016; Fraser, 2018; Lever, 2019) has waned considerably in line with the rise of new calculating market challenges (c.f. Callon, 1998a,b) during a period of ongoing economic crisis. This does not mean that the controversy has disappeared altogether, more that the emergence of new markets for lamb and sheep meat have relocated the struggles evident in halal marketisation socially, geographically and spatially.

As the global halal market expanded in the early twenty first century, the visibility of halal meat in supermarkets, fast food restaurants and other eating establishments across the UK became increasingly controversial in line with the concomitant growth of anti-Muslim sentiment across rural and urban areas (Grumett, 2015; Mamonova and Franquesa, 2020; Lever, 2019). To a large extent, anti-halal sentiment was driven by media led reports that overestimated the volume and availability of non-stunned religiously slaughtered halal meat *vis-à-vis* stunned halal meat for political purposes (Lever, 2019; Lever, 2020). In recent years, the controversy over stunning has not attracted the same level of media attention because of the breakdown (of old) and the establishment of (new) b/orders *within* the market (c.f. Rainer et al., 2023). Neverthless, we argue that halal's growing economic importance to the UK economy

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and rural farming communities still fuels concerns and ambivalence for the animal welfare risks associated with non-stun slaughter. This concern and ambivalence, expressed by sheep farmers and grounded on an ethics of care (de La Bellacasa, 2011) for their farmed animals, revolves around the competing logics and rationalities of slaughter in actually existing market arrangements (c.f. Berndt and Boeckler, 2023). Contributing to debates about market making in the *geographies of marketisation* literature (Berndt and Boeckler, 2011, 2020; Berndt et al., 2020; Rainer et al., 2023), this paper explores the development of the UK halal market in what Berndt and Boeckler (2023) refer to as 'post-neoliberal times.'

2. The development of UK halal market(s)

Given the prominence of animal sacrifice in near Eastern culture, it has been widely accepted since Moses that to be fit for human consumption meat must come from slaughtered animals and that slaughtering practices should minimise animal suffering (Fischler, 2011). The practice of stunning animals before slaughter emerged in the 19th century in line with concerns about the safety of workers in industrial meat plants and growing campaigns for humane slaughter legislation (Fitzgerald, 2010; Fraser, 2018; Lever, 2019). Stunning practices at the time of slaughter were mostly accepted by Muslims in Europe until the 1970s but, as the halal market began to expand globally in the early 21st century, slaughtering *without* stunning animals became popular among a significant minority of Muslims for religious, political and commercial reasons (Armanios and Ergene, 2018).[1] These developments challenged established meat industry practice and created media-enhanced concerns about animal welfare in several European countries, including the UK (Lever and Miele, 2012, Miele, 2016, Miele et al., 2023)

Until relatively recently, all meat produced in the UK was considered 'halal' because it was produced by *The People of the Book* (i.e., by Christians and Jews as well as Muslims) (Lever and Miele, 2012; Lever and Fuseini, 2022). Things began to change in the early 1990s when a series of local political controversies facilitated national debate about halal meat, which encouraged the emergence of the UK's first halal certification body to protect Muslim interests (Lever, 2019). The Halal Food Authority (HFA) operated unchallenged for a decade until the more orthodox Halal Monitoring Committee (HMC) emerged in 2003 during a period of rapid market expansion (Lever and Fischer, 2018) and concurrent global tensions over Islam (Toğuşlu, 2015; Miele, 2016). Promoting non-stunned *'traditionally'* (or religiously) slaughtered meat as being '*authentic halal'* (Lever and Miele, 2012), this new certification body went to great lengths to educate Muslim consumers about why they should only be eating meat from non-stunned animals rather than the HFA endorsed stunned meat aligned with the meat industry's animal welfare requirements. While several countries prohibited the production of non-stunned halal meat at this time (Miele, 2016; Armanios and Ergene, 2018), as competition for consumers with specific religious preferences intensified in global markets (Fischer, 2008; 2011; Lever and Fischer, 2018; Yakin and Christians, 2021) a controversial *'dual market'* for halal meat from both pre- and non-stunned animals (see Fig. 1) became firmly embedded in the UK (Lever and Miele, 2012).

In the run-up to the UK leaving the European Union (EU) in January 2020, there were widespread discursive protestations that slaughter without stunning was likely to be (finally) prohibited in the post-Brexit period (e.g., JTA, 2016; Swinford, 2018). Things turned out very differently. As trade with EU states became more complicated, niche halal markets (particularly for sheep meat) have become increasingly important for the UK economy and for the resilience of rural farming communities. In this new context, the longstanding media driven controversy over the non-stun religious slaughter of animals (Fraser, 2018; Lever, 2019) appeared to lesson considerably. We argue that this does not mean that the controversy disappeared altogether, more that religious slaughter no longer constituted a 'hot' market topic in the manner identified by Callon (1998a,b). Indeed, as halal meat has become increasingly important for the UK economy and 'the relational and contested character of marketisation' has slipped from view (c.f. Berndt and Boeckler (2023, 9), our analysis demonstrates that struggles over non-stun religious slaughter has continued to play an important if ambivalent role in ethical and economic decision making *within* the UK halal market. We align these developments with ongoing debates in the *geographies of marketisation* literature (Rainer et al., 2023) that have emerged from the social studies of economization literature (Caliskan and Callon, 2009, 2010).

3. From social studies of economization to geographies of marketisation

Scholars working in *geographies of marketisation* (e.g. Berndt and Boeckler, 2011, 2020; Rainer et al., 2023) have recently added a spatial dimension to the insights provided in social studies of economization (Caliskan and Callon, 2009, 2010). To move beyond orthodox understandings of 'the market' as a perfect 'self-contained' entity, Berndt and Boeckler (2011, 2020) focus on the spatial figurations embedded in *market agencements*. However, rather than focussing solely on the role of *agencements* as a way of describing 'the market' as a hybrid collective that shapes distributed (calculative) agency through the use of *'market devices'* (Muniesa et al., 2007), they emphasise the 'heterogeneous networks that appear to be stable and permanent but always remain incomplete and open to contestation' as markets-in-the-making (Berndt and Boeckler, 2020, 70).

Taking up Callon's (2005, 2007) proposal to speak of *performation* as a way of stressing the recursive and material aspects of knowledge generation, Berndt and Boeckler argue that 'economists are not powerful because they make people believe their statements to be true. Rather, they are powerful because their (and other's) manifold material interventions are successful in constituting the object that economics is accounting for.' (2020, 2). The market (economy), they contend, is not simply performed with statements in an Austinian sense (Austin, 1962), it is created by material interventions such as marketing and supply chain management, and by socio-technological procedures such as pricing formulas and auctions. Marketisation is thus theorised in line with the spatial arenas where *'performation struggles'* take place, and where diverse and competing logics and rationalities converge (Berndt and Boeckler, 2012; 2020). Performation is double-sided in this sense. Not only must various elements and agents be assembled and entangled to make calculative market behaviour possible; they must also be separated from diverse contexts to enable anonymous exchange (Berndt and Boeckler, 2020). Assembling heterogeneous agents requires cutting unwanted connections and bracketing out distracting considerations; consumers, for example, must forget why they went into a shop, while farmers, as we observe in more detail below, must overlook who buys their livestock in actually existing halal markets.

To address criticisms that his work was apolitical, Callon (2010) introduced the notion of *'overflows.'* This allowed him to argue that the *'framing'* of markets (that is, the ordering processes between competing logics and rationalities) is never complete, and that market enactments can have negative as well as positive consequences, which in turn allowed him to counter those who argued that by prioritising process (marketisation) over form (the market) his work unintentionally overlooked the ideology of 'the market' (Fine, 2003; Miller, 2002). However, for Berndt and Boeckler (2012; 2020), overflows are only minor irritations that tend to be dealt with quite easily, and it thus follows, they argue, that markets can only work effectively when overflows are perceived as exceptions to the rule, when the appearance of order veils contradiction, and when boundaries between the market and the world outside it are established as a desired state of being. As Berndt et al.

[1] Similar debates were evident in relation to kosher meat in and around regional Jewish communities in the 19th century (Fraser, 2018; Lever, 2019).

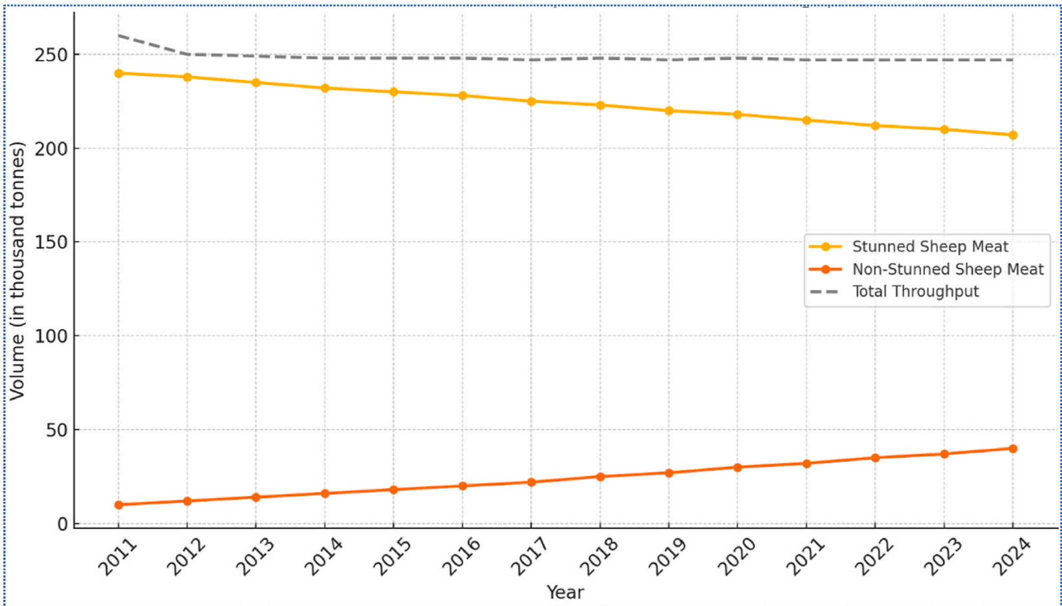

Fig. 1. Volumes of stunned & non-stunned sheep meat, & total throughput (2011–2024).
(Data from FSA, 2010, 2019, 2024)

(2020) explain:

> This fuzzy terrain between markets and their respective outsides can be read as a site of performation struggles around competing framings and overflows – inherently political struggles that are both necessary for markets to work as well as a constant source of friction (Berndt et al., 2020, 21).

As new market challenges emerged in the post Brexit period, following Rainer et al. (2023, 3) we argue that b/ordering processes '*within*' the halal meat market became central to 'the contested attribution of value to commodities.' While the prevailing public controversy over non-stun religious slaughter has been invisibilised by the breakdown (of existing) and the establishment of (new) market b/orders, we draw attention to the continuing dependency of UK sheep farming and rural communities on the contested economic and moral values *within* the market. Localising and materializing the abstract processes that studies of economization theorise is particularly useful in our case, not least because it helps us to understand not just how the halal market is constructed, but where, how, and with what consequences change occurs socially, spatially and geographically.

The paper proceeds as follows. In the next section we outline the research context and methods employed in our research. We then explore the centrality of sheep farming to UK farming and rural communities and its growing dependency on the halal sector. After examining the market assemblage emerging around halal in the last two decades, we next turn our attention to a number of new market niches that have invisibilised the halal meat controversy through processes of market b/ordering during a period of ongoing economic crisis. We then explore how these developments play out at livestock markets, where the contested attribution of value is manifest. We conclude with some reflections on the ongoing controversy over niche (halal) market making.

4. Research context and methods

This paper draws on a study of the value of the halal sector to the UK economy, focussing specifically on sheep meat. University ethical procedures were followed at all times, and the research adopted a mixed method approach with quantitative (statistical) and qualitative elements. Our quantitative work drew on data from the Slaughter Sector Survey conducted by the UK Food Standards Agency (FSA, 2019, 2022, 2024) and publicly available data from Statista[2] on fresh meat[3] trends in the United Kingdom.[4]

In our qualitative work, we initially conducted formal interviews (both online and face-to-face) with the key supply chain actors listed below.

- 1 farmer
- 2 abattoir/slaughterhouse owners
- 2 meat processing operatives
- 2 national supermarket employees
- 1 market intermediary/supplier
- 4 National Farmers Union (NFU) representatives (1 National, 3 Regional)
- 1 livestock association officer
- 2 livestock auctioneers

Participants were identified using personal and professional contacts via a snowball sampling strategy to enable purposive recruitment. We also visited livestock markets in the Midlands and North of England, where regional contacts in the NFU facilitated access. Here, we conducted observations and informal interviews with numerous farmers, NFU representatives and auctioneers, collecting fieldnotes as we worked. All interviews (formal and informal) were recorded (where possible) and transcribed verbatim and subjected to a rigorous process of analysis, as were field notes. Initially, this involved reading and rereading all interview transcripts to identify rich passages of text, which were complemented with similar analysis of informal interviews and fieldnotes. Coding and analysis were undertaken following an abductive approach, which involved moving back-and-forth between

[2] See https://www.statista.com/outlook/cmo/food/meat/fresh-meat/united-kingdom?currency=GBP.

[3] Defined by Statista as meat which has not been cooked, heated or processed.

[4] There are some disparities to be aware of across these data sets. While the FSA (2022) categorises and reports animal slaughter data using individual categories for cattle, calves, sheep, goats, meat chicken and spent hens, Statista report overall figures for beef and veal, mutton and goat, and poultry.

empirical data and theory (Dubois and Gadde, 2002).

5. Developing the UK (halal) sheep supply chain

Sheep farming has a long history in the UK, stretching back to Roman times. Today, there is a complex interlinked production system with different breeds of sheep grazing hill, upland and lowland grasslands, which involves particular breeds occupying and being adapted for particular regions (Mishra et al., 2014). The National Sheep Association (NSA) estimates that there are around 30 million sheep and lambs across the UK, and more than 60 different breeds. In 2020, they estimated the financial value of sheep production at around £1.3 billion, with 150,000 jobs creating another £290 million annually for the UK economy.[5]

As in other European countries, sheep meat is particularly significant for the halal market. Our analysis of Food Standards Agency data (FSA, 2022) data indicated that in 2022 50 % of all sheep meat went into the stunned halal meat market, while 22 % went into the non-stunned halal market. At this time, our analysis estimated the financial value of halal sheep meat at slaughter at approximately £810 million out of an overall sector value of £1.12 billion (i.e., 72 % of overall sector value). The volume of sheep meat (both lamb and mutton) consumed weekly by Muslim consumers of halal is indicative of this trend. While lamb consumption has been declining for years among the general population, it is eaten at least weekly by more than 60 % of halal consumers (AHDB, 2020). Mutton too is rarely consumed by the general population, but it is highly valued in some Muslim communities, where it is sold by independent halal retailers and in Bangladeshi owned Indian restaurants (where it is also consumed by non-Muslims) (Lever, 2024). The significance of these trends was noted by an interviewee from a National Meat Association during our field work, who stated that: 'Domestic demand, if it wasn't for our Muslim consumers, would have reduced far, far more than it has done' (as evidenced in Fig. 1).

For several years, the Halal Steering Group at the English Beef and Lamb Executive (EBLEX), which was run by volunteers, played a key role in overseeing the challenges facing the halal sector with a view to finding solutions to emergent problems. EBLEX came into being after a significant downturn in the English red meat industry in the wake of mad cow disease in the late-1990s and an outbreak of foot-and-mouth disease in the early 2000s (Palmer et al., 2006). In 2013, as halal certification bodies intensified their attempts to push the market in new directions through the use of competing stun and non-stun methods to create products with specific halal qualities (Lever and Miele, 2012), EBLEX brought together a number of key market actors to establish a new Halal Forum, which replaced the steering group. At a time when tensions over the 'religious slaughter' of animal's were growing (Miele, 2016), many of the actors involved were concerned that EBLEX, who were collecting levy fees from them annually, would never endorse or certify abattoirs involved in the statutory defined, but hugely controversial method of non-stun religious slaughter (Halal Focus, 2013). This was the start of an ongoing period of contestation characterised by *preformation struggles* between groups pursuing antagonistic strategies, rationalities and values in actually existing (halal) markets (c.f. Berndt and Boeckler, 2023).

As non-stunned halal meat became increasingly politicised (Lever and Miele, 2012), there was a danger that strong feelings and emotions (c.f. Callon, 1998a,b) linked to perceived threats to animal welfare and British values (with which animal welfare has long been associated) (Lever, 2019) would 'overflow' to destabilise the UK halal market at a time of growing attention to the sustainability of animal production (Miele and Lever, 2014; Cole et al., 2009). As the controversy intensified, to avoid reputational damage from association with non-stunned meat and the world *outside* the market (c.f. Berndt and Boeckler, 2012; 2020), several corporate retailers and their supply chain partners made it difficult to identify the method of slaughter on halal (particularly own-label) supermarket products by removing certification logos and related information (Lever and Fischer, 2018; Lever, 2020). The religious slaughter controversy, we could say, and market overflows, were veiled to maintain market order (Berndt and Boeckler, 2012; 2020).

By the end of 2013, EBLEX had announced plans to launch a new assurance scheme for halal meat in the hope of enhancing market transparency. Initially rolled out for lamb, the plan covered meat produced using stun *and* non-stun methods of slaughter (Glotz, 2013). Around 2015, EBLEX was rebranded with a broader remit as the Agriculture and Horticulture Development Board (AHDB). With the halal market becoming increasingly important for UK farming and the UK economy (Lever and Miele, 2012), in 2017 the AHDB recruited their first halal sector manager with a remit to work closely with levy payers. Through work with key market actors, they subsequently began attributing more diverse halal qualities (Callon et al., 2002) to meat to improve the stability of halal products for sale in UK and overseas markets. Although the cultural requirements for specific cuts of meat had always been evident among diverse Muslim populations (Lever and Fischer, 2018), from this point onwards such qualities became increasingly important in processes of product qualification (Callon et al., 2002).

There has also been a movement towards yield management (Henry, 2017; see also Callon, 2021). This has involved the AHDB introducing new valuation devices that allow farmers, abattoirs and butchers to develop new pricing strategies for lamb to reveal and calculate the hidden qualities of a carcass via more marketable cuts. A key concern here has been a movement towards less fat, which is a desired quality in Middle East markets where Muslim consumers have high levels of disposable income.[6] Alongside the development of new cuts, labelling has thus also become more important, not only for legal reasons (Busch, 2020), but for ongoing processes of market *framing* and ensuing the *circulation* of commodities (Çalışkan and Callon, 2010; Rainer et al., 2023)

6. Post Brexit export markets

Global markets have been impacted dramatically in recent years by an ongoing period of economic crisis (Berndt and Boeckler, 2023). As some overseas markets have become less accessible during this period, it is our contention that strategies emerged to *fit* the UK farming system to halal to accommodate uncertainty (c.f. Enticott and Little, 2022). Indeed, Brexit led to a severe refocusing of export markets and the AHDB have stated on numerous occasions that they are looking to develop, create and enact new markets.

While in general, meat exports to Europe became more difficult in this period (Jivraj, 2024), a particularly strong market has been the export of wholesale (stunned) sheep meat to halal markets (FSA, 2019, 2022). These markets have been growing in the post Brexit period and in 2022 whole carcasses accounted for 81% of *all* exported sheep meat (both lamb and mutton) (AHDB, 2023). An exporter of halal certified sheep meat (from both stunned and non-stunned animals) confirmed the significance of this trend for UK producers, stating that this was: '*probably where the majority of our trade is, particularly to Europe … 70 % would be whole carcass.*' (Abattoir Owner). Carcasses, we contend, in this context, should not simply be aligned with sheep's bodies. They are one of the key abstractions in the creation of lamb and mutton as economic objects, which comes about through a physical and ontological transformation during the act of slaughter (Henry, 2017).

[5] https://www.nationalsheep.org.uk/for-the-public/.

[6] In a lamb cutting guide for the halal market, the AHDB (https://issuu.com/ahdb1/docs/lamb_cutting_guide_for_the_halal_market?e=0) used the EUROP system of carcass classification which ranks carcasses on conformation and fat on a scale of 1 (extremely lean) to 5 (high fat).

Carcasses also provide a strategy for developing our understanding of the qualities, valuations, and pricing strategies for sheep meat, and of the ways in which, as some markets have contracted and others have emerged, the fragility of markets has been exposed. For example, as New Zealand started to export specific cuts of lamb into Asian markets, new opportunities emerged for UK farmers to switch away from the export of whole carcases to produce cuts with better yields for export to other markets (AHDB, 2021). An interviewee confirmed the implications of this situation concisely, stressing both the fragilities and the benefits entailed for UK farmers:

> The one thing that's helped us is that because there's a shortage of lamb generally, because Australia and New Zealand are sending more products to China than they are to UK and Europe … that's helped to underpin demand. (NFU National).

It was no coincidence that in the midst of post-Brexit uncertainty, the AHDB launched a meat education training programme for lamb (and beef). Halal was again key to their thinking, and they have since been using a range of technologies and devices to prepare for *and* develop niche markets in the Middle East to hedge the UK's bets in global markets.

A key issue in these markets, as noted, is labelling and certification, which helps to frame halal commodities and establish market b/orders (Rainer et al., 2023). There are currently around twenty halal certification bodies in the UK, but only a handful have agreements in place to export into Middle East markets (AHDB, 2018). As an interviewee noted:

> We're trying to work with governments to improve our access to … the Gulf states, the GCC countries, which is massively important … if we get our certification right, the story right, then we can access that market. (NFU National)

The AHDB have recently produced market reports for Saudi Arabia, Jordan, Kuwait, Bahrain, UAE and Qatar, which were complemented by the appointment of a Middle East agent. Data from HMCR highlights the impact of these new market devices and interventions in the UK sheep sector. Between 2018 and 2019, there was a near 700 % increase in the volume of sheep meat exported to the UAE, and between January and August 2022 the UK exported more than 500 tonnes of fresh sheep meat (i.e. over half of all exports of fresh sheep meat outside the EU) to Kuwait (AHDB 2022). Significantly, stunned halal meat is becoming more widely accepted in these markets.

These trends were reflected in the UK. During a period of ongoing economic crisis, our analysis of FSA data (2022) found that between 2018 and 2022 the volume of non-stunned sheep meat (as a percentage of all sheep and lambs slaughtered in the UK) entering the halal market dropped from 25 % to 22 %, while the volume of stunned sheep and lambs rose from 46 % to 50 %. As these processes unfolded, the media driven political controversy over non-stun slaughter that had dominated debate about halal meat for two decades lessened considerably. It is only recently, as the volume of non-stunned sheep meat has started to increase again (FSA, 2024), that concerns over non-stun slaughter have started to reappear (see Duncan, 2024) – although (as yet) at nowhere near the levels that they once were. Overall, while the total volume of sheep and lambs slaughtered in the UK has declined since 2011 (see Fig. 1), the combined share of stun and non-stun halal slaughter has grown as a percentage of all sheep and lambs slaughtered, reflecting the growing importance of the halal market.

Another market niche where the increasing economic value of halal is evident is in what is now referred to as the Qurbani market (Fuseini, 2023). And it is here that we can start to see more clearly how the *preformation struggles* revolving around stunned and non-stunned halal meat have been invisibilised in line with the breakdown of old and establishment of new b/orders *within* the market (Rainer et al., 2023).

7. The qurbani market

Over a decade ago during a European research project (Lever and Anil, 2016),[7] we witnessed the performance in Turkey of what has since become an emerging feature of growing markets for halal meat globally: *The Feast of Sacrifice* (or Eid al-Adha in Arabic). This Islamic festival, celebrated around the world in Muslim minority and majority contexts, commemorates Ibrahim's (the Prophet Abraham) willingness to sacrifice his son Ismail (Isaac) in God's honour by encouraging Muslims to slaughter a permitted species of animal with friends and family (Delaney, 2014; Fuseini, 2023). In Turkey at this time, the slaughter of animals for the festival often took place in public spaces (Lever and Anil, 2016), which was controversial given the market *agencements* emerging around animal welfare in the European Union (Miele and Lever, 2014) – for which Turkey was (and still is) a candidate country.

Such practice is highly significant for sacrificial meat. During the festival there is a finite period during which slaughter can take place, and slaughter outside this time frame invalidates the sacrifice. The slaughter period generally occurs over three days, although a minority of Muslims perform it over four. Aligned with the Islamic lunar calendar, Qurbani slaughter must commence after Eid prayers on the 10th day of the final (and sacred) month of the year (Dhul Hijjah)[8] and end at sunset three (or in some cases four) days later. Abattoirs that process Qurbani meat before Eid prayers on the 10th day of Dhul Hijjah or after sunset on the 12th day are in violation of Qurbani requirements. Although such meat can still be consumed as regular halal, it cannot be classified as sacrificial meat (Fuseini, 2023).[9]

Anecdotally, we know that the first and second generations of Muslims in the UK are likely to fulfil the requirement of the festival in their countries of origin, while their children and grandchildren (third generation) will perform the sacrifice in the countries where they reside. The AHDB (2021) suggests the market for halal products during Qurbani is growing and that between 50,000–70,000 animals are currently slaughtered for the festival annually in the UK. However, while it is commercial by nature (Torlak et al., 2019), for religiously observant Muslims it is the spiritual aspect of the festival that is most important. Sacrificial meat is usually divided into three portions: the donor keeps one portion, a third is distributed to family and friends, and the remainder is donated to the needy; participation is not obligatory and is only required of Muslims with the economic means to take part (Fuseini, 2023). Historically, Muslims in the UK have donated money to international charities for the sacrifice to be conducted on their behalf overseas, but in recent years charities have started to promote Qurbani in the UK, which has led to more animals being procured and slaughtered. On the Islamic Relief website in 2022 it was stated that they 'distributed over 9,000 kg in Qurbani meat to over 30,000 individuals and families across the UK' during the festival.[10]

The AHDB first became interested Qurbani around 2010 and in recent years they have used a range of technologies, devices and interventions to safeguard the supply of appropriate carcasses for the UK market. One such device is the Qurbani protocol, which was agreed by several key market actors in 2021, including the UKs two major certification bodies for stunned (HFA) and non-stunned meat (HMC) to ensure compliance by abattoirs and butchers supplying Qurbani animals. As stated in a AHDB document employed to enable better financial returns from Qurbani: 'It is vital for processors to understand consumer

[7] https://www.dialrel.net/dialrel/welcome.html.

[8] Dhu al-Hijja is also the time at which the pilgrimage known as the Ḥajj takes place to Mecca in Saudi Arabia (Delaney, 2014).

[9] For an animal to be acceptable for the sacrifice, it must also be a Musinnah (i.e., possess an adult tooth) and be healthy and subjected to minimal invasive procedures (castration, tail docking, ear-tagging etc.) (Fuseini, 2023).

[10] https://www.islamic-relief.org.uk/giving/islamic-giving/qurbani/uk-qurbani-donations/.

preferences as lack of the relevant quality traits leads to Qurbani being performed outside the UK, to the detriment of the local trade' (AHDB, 2021, 8).

There are different market and product framings at play here (Rainer et al., 2023). On one level, these developments can be linked to the work of charities and to the changing demands of younger Muslim consumers, who (anecdotally at least) prefer to conduct Qurbani in the UK and distribute sacrificial meat to poor people locally. On another level, in line with ongoing economic crises, where significantly higher livestock prices have led to difficulties supplying enough lamb for Qurbani (see EQL, 2022), these developments can be aligned with new ways of physically and ontologically transforming economic objects for sale in the Qurbani market.

As the Qurbani market has grown, the AHDB (2021) has also identified instances where supply practices that do not meet religious criteria or legal requirements can be classed as fraud through misrepresentation.[11] An abattoir owner explained the complexities involved:

> Because the lambs have to be a certain age for qurbani and because of seasonality, there's not very many of those lambs available, and what is available, you have to take the farmers word for it. (Abattoir Owner)

In line with concerns about fraud and supplying enough carcasses for Qurbani, a debate has emerged about changing the lambing season. Views about this were mixed among our research participants, with a livestock market auctioneer outlining his concerns in the following way:

> Yes, there's a ridiculous suggestion that we could alter the lambing season just to suit the halal element … You're not going to start having your lambs in October, if indeed you could achieve it, so that there's a qualifying age when the halal man wanted to buy them the following spring. (Livestock Market Auctioneer)

Others were more positive and an interviewee from the NFU suggested conversely that: 'If the demand was there, people would adapt'. The interviewee suggested further that the first time you hear talk about changing the lambing season it sounds unworkable, but that when you think about it more carefully there is in fact 'a period of the year where we get crossover, so we get old season lambs on the market and new season lambs on the market. And that transition over is an interesting one' (NFU National). Such a transition could also be implemented, others argued, by using breeds of sheep that lamb later in the season *or* twice a year.

By attempting to establish and break down market b/orders in this way – by dis/entangling the work of charities and the demands of young Muslim consumers with/from the difficulty of supplying enough lamb for Qurbani market – key market actors are attempting to create new forms of symbolic and economic value (c.f. Rainer et al., 2023). In this changing context, debate about the ontological specificity of products for sale in the Qurbani market has arguably become, for some market actors, more important than debate about the merits of stun and non-stunned products. The *performation struggles* involved in these fuzzy realms, we could say, spur the composition of hybrid entities, crossing the lines of market and social reproduction, reflecting the fact that it is no longer possible to appropriate the halal market as if it does not matter (c.f. Berndt and Boeckler, 2023). Indeed, as we observed during visits to the livestock markets in the Midlands and North of England, actually existing markets for stunned and non-stunned sheep meat are central both to the UK halal market and to the resilience of rural farming communities.

[11] There are other types of fraud in the halal market, most notably instances of what can be classified as livestock rustling and/or organised crime (McElwee et al.,. 2017; Fuseini, 2023).

8. Dis/entangling livestock encounters

In the UK, sheep and lambs are sold either by deadweight or by live weight. In one UK region in the Midlands close to urban conurbations with large Muslim populations, an interviewee estimated that 45 % of all lambs are sold as deadweight and the remaining 55 % as liveweight. Lambs sold as deadweight go directly from farmers to the big abattoirs and large meat processing plants serving the major retail chains where, such is the demand for halal products *vis-à-vis* non halal products, all such meat is processed as stunned halal. Selling sheep meat in this way takes place at a distance from farmers, and it appears that farmers are not concerned about the halal market in this context.

Things can be very different at livestock markets, where farmers, auctioneers and other supply chain actors are dis/entangled in innumerable ways, and where sheep and lambs are often bought by unknown buyers for unknown markets. Here, the likelihood that sheep and lambs will be sold into the non-stun halal market creates a great deal of uncertainty and anxiety for farmers. Although it varies by region, 22 % of *all* sheep and lambs in the UK went to the non-stunned halal market in 2022, and most of these animals are processed through regional livestock markets. During informal interviews on livestock market visits, we were frequently informed that Muslim buyers regularly purchase large quantities of sheep to service the restaurant trade in and around Birmingham and other cities the UK Midlands. In this context, interestingly, Fagin (2022) has argued that halal mutton is helping to re-localise the sheep sector in ways that benefit regional economies *and* help the UK to feed itself.

Unsurprisingly, care for animals and good farming practice (Blokhuis et al., 2013) were reoccurring themes during discussions at livestock markets. As an interviewee noted: 'Most [farmers] have the view that good welfare, good health, is critical because that means the animal was really productive' (NFU Regional 1). However, in the case of halal, it soon became clear that livestock market encounters present significant challenges for farmers. Indeed, several interviewees emphasised that many farmers don't like to talk about welfare in relation to halal, and that while in principle they 'don't mind halal … they would prefer their animals to be stunned' (NFU National). Slaughter practice and halal certification can thus be seen, we contend, in this context, as both a 'matter of concern' (Latour, 2004) and a 'matter of care', where 'interests and other affectively animated forces … are intimately entangled' (de La Bellacasa, 2011, 87). Enticott and Little's (2022) argument that livestock markets are borderlands where imperfect exchange reflects the loosely connected aspects of farming and market systems is also relevant at this juncture, for it is at these actually existing markets (Berndt and Boeckler, 2023) that the contested attribution of value to halal products and commodities takes place, and where the continuing importance of non-stunned meat production to rural farming communities *and* the UK economy is manifest in ongoing *performation struggles* (Berndt and Boeckler, 2012; 2020).

As farming systems evolve in new ways, great care is needed to maintain systems and protect farmers from disruption and market 'overflows' (Enticott and Little, 2022; Rainer et al., 2023). Recently, the AHDB has therefore gone to great lengths to promote and market the halal sector to UK farmers and rural communities. There was a clear recognition of the value of the sector during our visits to livestock markets, yet this was often accompanied by feelings of uncertainty and unease about the presence of non-stunned halal as a market option. When approached informally at auctions, farmers would adopt one of two strategies. Some would openly talk about the value of the halal market for farming and rural communities, but request further private meetings to seek assurances. Others would be more discreet, looking for a quiet space to talk, before expressing their moral concerns about halal, particularly the non-stunned sector, in very clear terms.

The concerns were often expressed in a concealed way in order to maintain the farming system and prevent blockages that may hinder new calculations of value. However, even if they claim otherwise, as an interviewee stated: 'Everybody knows that where they're selling their animals, lambs, or cull ewes into the live market that the vast majority of those will be going to the halal supply chain' (NFU Regional 2). The implications of this situation were captured in a field note made during a visit to a livestock market:

> Very interesting today to hear the concerns of farmers, men, women and couples, who talked about the dominance of the halal market, their appreciation of it, which is often contrasted with the view that for most farmers, even if they don't want to admit it, economics often trumps morals.

These issues were also reflected in the rhetorical performances of auctioneers when discussing the socio-technological procedures through which value is attributed to livestock. On the one hand, auctioneers would sometimes talk up the value of halal by stating how grateful they were for the emergence of the halal market:

> Definitely … more lambs are going to the people who we believe are the halal consumers … and I mean that's something for which we should be eternally grateful, sheep farmers and auctioneers alike. (Livestock Auctioneer 2)

On the other hand, auctioneers would sometimes use anecdotes to express their disdain for halal, which usually meant the non-stun market. After a short digression expressing the experiences of a wealthy landowner who was surprised at the potential implications of selling her beloved horses at auction, one auctioneer commented:

> That is a humorous way of saying that I have come across people who have come to me in the market and said, "I wouldn't bring my sheep here for you to sell because I couldn't control who was going to buy them, what they were going to do with them and how they were going to be slaughtered. (Livestock Auctioneer 1)

Similar performances are evident in the auction box (see Enticott and Little, 2022), where auctioneers often talk up the animal welfare merits of individual farmers when they probably have more insight than most about which markets the animals being auctioned are destined for. The material interventions and socio-technological procedures entangling diverse groups of actors are thus key elements of marketisation that emphasise the current location of *performation struggles* in the sheep supply chain (Berndt and Boeckler, 2012; 2020). While the controversies engendered have become less visible nationally than they once were, they are still highly relevant in performative market making in particular geographical and spatial contexts.

To make sense of their own practice and the material realities of these entanglements, farmers must navigate livestock market encounters with great skill. As an interviewee noted:

> They're [farmers] running commercial businesses; they've got to make money. They know … that you've got to put your animal in the market where it's going to make the most money, whether that's dead weight selling or live weight selling. (NFU Regional 1).

Several interviewees also emphasised the benefits of having a range of different markets for selling sheep meat, and it is here that we can start to see the economic significance of a UK halal market with stun and non-stun elements serving a range of niche markets. Liveweight selling plays a key role attributing value throughout the sheep supply chain in this sense, as it is here that existing market value is negotiated and articulated. An interviewee from the NFU explained this situation concisely:

> A really important point for the sheep sector is … for farmers to have a range of different markets, either dead weight or live weight selling … because the halal sector is really important for driving the sheep trade. And generally, you find the dead weight price tries to mirror the liveweight prices. There may be a week or two lag either way, but some would say that the live weight price based on halal … drives the domestic market in dead weight sales (NFU National).

While b/orders between stun and non-stun halal have been invisibilised in some instances to drive the attribution of value, it is our contention that the production of non-stunned halal meat has continued to play a key role enabling the attribution of diverse and often contentious halal qualities throughout the sheep supply chain.

In challenging postneoliberal times (Berndt and Boeckler, 2023), prohibiting or banning non-stun slaughter would undoubtedly have wide-ranging economic impacts on sheep farming and rural communities. During a period of ongoing economic crisis, veiling the controversies involved, as farmers and auctioneers clearly recognise, has thus been key to maintaining market stability. While media-driven controversy about halal (and the anti-Muslim sentiment entailed) has declined significantly in recent times, our research suggests that this sentiment is still evident – if largely invisible – in rural farming communities. To be clear, the boundaries around the halal market are sites of permanent struggle, and there is constant negotiation about what should be inside the market and what should remain outside. These debates are not just economic, they are moral and spatial, reflecting discussions about what types of society people want to live in.

9. Concluding discussion

In this paper, we have argued that the *performation struggles* at the heart of the UK halal sheep meat market reflect a broader shift in how value is constituted, negotiated, and obscured within postneoliberal market contexts. The anticipated post-Brexit prohibition of non-stun religious slaughter failed to materialise—not because the controversy was resolved, but because the terrain of contestation changed. As niche halal markets have grown in economic importance, especially in relation to rural resilience and global export strategies, the boundaries of market legitimacy have been reconfigured through processes of b/ordering and dis/entanglement.

The non-stun halal market, once highly visible in public controversy, now occupies an ambiguous position, central to the sheep supply chain yet often hidden in regulatory and ethical discourse. Our findings demonstrate that farmers, auctioneers, and other supply chain actors must navigate complex moral terrains while adapting to shifting calculations of value. The market is not simply shaped by economic logics, but by ongoing performative acts—labelling, timing, slaughter practices, and infrastructural interventions—that both stabilise and challenge the market. Ultimately, it is through these uneven and contested *performation struggles* that niche halal markets are made, sustained and remade. Far from representing a resolved or static formation, the UK halal sheep meat market continues to evolve in ways that reflect the tensions of a fractured political economy. While much of the controversy remains out of sight, the issues involved are far from settled. It remains to be seen whether media led controversy reappears in public discourse in the UK, or whether the economic importance of emerging niche markets in the making continues to trump moral concerns over animal welfare.

CRediT authorship contribution statement

John Lever: Writing – original draft, Methodology, Funding acquisition, Formal analysis, Conceptualization. **Mara Miele:** Writing – review & editing, Formal analysis. **Shabbir Dastgir:** Writing – review & editing, Methodology, Formal analysis. **Awal Fusein:** Writing – review & editing, Project administration, Funding acquisition.

Declaration of generative AI and AI-assisted technologies in the writing process

During the preparation of this work the author(s) used ChatGPT to produce Fig. 1. After using this tool, the author(s) reviewed the content as needed and take(s) full responsibility for the content of the publication.

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