



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - December 21, 2009

### Weekly Federal Bison Slaughter

	07-Nov	14-Nov	21-Nov	28-Nov	Nov Total	2009 YTD	09 vs 08 % Change
<b>Total Canada</b>	<b>455</b>	<b>471</b>	<b>443</b>	<b>484</b>	<b>1,853</b>	<b>18,004</b>	<b>-5%</b>
<i>previous year</i>	690	249	624	505	2,068	18,985	

### Provincially Inspected Slaughter

	June	July	Aug	Sept	Oct	Oct-08	2009 YTD	2008 YTD	% Change
<b>Alberta</b>	158	223	150	169	220	198	1976	2455	-20%
<b>Saskatchewan</b>	24	20	15	26	25	34	293	N/A	
<b>Manitoba/BC</b>	91	71	74	73	96	68	752	751	0%
<b>Ontario/Quebec</b>	56	49	59	62	49	33	522	565	-8%
<b>Total</b>	<b>329</b>	<b>363</b>	<b>298</b>	<b>330</b>	<b>390</b>	<b>333</b>	<b>3543</b>	<b>3771</b>	<b>-6%</b>

\*\* Ontario/Quebec Provincial slaughter numbers are estimated due to a delay in reporting

\*Source AAFC Red Meat Section : Due to varying provincial reporting schedules, total Fed. and Prov. has a one month delay in Prov. Data

	2009	2008	% Change
<b>Total Canadian Federal and Provincial Slaughter</b>	<b>21,547</b>	<b>22,756</b>	<b>-5%</b>

### US Federal Slaughter\*

for week ending:	07-Nov	14-Nov	21-Nov	28-Nov	Nov Total	2009 YTD	2008 YTD	% Change
	<b>1202</b>	<b>1196</b>	<b>1265</b>	<b>676</b>	<b>4,339</b>	<b>48,282</b>	<b>49,751</b>	<b>-3%</b>
<i>previous year</i>	937	1031	951	1264	4,183			

\*actual slaughter numbers in federally inspected plants, not necessarily inspected, source USDA

### Canada Live Bison Exports to US

	Aug-09	Sept-09	Oct-09	Nov-10	2009 YTD	2008 YTD	% Change
Slaughter Male	766	488	763	324	6,849	7,626	-10%
Slaughter Female	796	968	798	502	8,292	7,882	5%
Feeder Male	89	423	988	603	4,159	4,814	-14%
Feeder Female	77	205	899	661	3,565	3,614	-1%
<b>Total</b>	<b>1,728</b>	<b>2,084</b>	<b>3,448</b>	<b>2,090</b>	<b>22,865</b>	<b>23,936</b>	<b>-4%</b>

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

<b>Boneless</b>		June	July	August	September	October	YTD 2009	YTD 2008	% Change
<b>USA</b>	Kg	34,615	25,090	26,877	27,609	26,608	323,052	250,854	29%
	Value (\$Cdn)	277,004	216,082	216,995	232,014	231,321	2,694,329	1,710,209	58%
<b>France</b>	Kg	27,432	21,192	35,613	36,111	17,777	301,449	447,548	-33%
	Value (\$Cdn)	474,091	316,051	468,654	490,282	238,221	4,143,364	4,668,126	-11%
<b>Germany</b>	Kg	3,634	2,883	4,298	2,179	4,446	24,955	49,078	-49%
	Value (\$Cdn)	57,063	45,989	57,497	25,750	42,771	324,824	686,389	-53%
<b>Switzerland</b>	Kg	2,536	5,218	4,242	3,116	1,907	37,708	91,905	-59%
	Value (\$Cdn)	81,030	193,941	157,339	112,673	58,625	1,379,287	1,303,574	6%
<b>Mexico</b>	Kg	-	-	-	-	-	423	-	N/A
	Value (\$Cdn)	-	-	-	-	-	16,165	-	N/A
<b>China P.Rep.</b>	Kg	-	-	186	-	-	186	-	N/A
	Value (\$Cdn)	-	-	1,030	-	-	1,030	-	N/A
<b>Saudi Arabia</b>	Kg	10,073	-	-	-	-	10,073	-	N/A
	Value (\$Cdn)	209,682	-	-	-	-	209,682	-	N/A
<b>Belgium</b>	Kg	-	-	-	-	-	-	1,414	-100%
	Value (\$Cdn)	-	-	-	-	-	-	15,876	-100%
<b>United Arab Emirates</b>	Kg	-	-	13	185	-	864	47	1738%
	Value (\$Cdn)	-	-	361	5,285	-	24,678	756	3164%
<b>Japan</b>	Kg	-	-	-	-	401	401	10,305	-96%
	Value (\$Cdn)	-	-	-	-	1,603	1,603	74,727	-98%
<b>Moldova</b>	Kg	-	-	-	1,008	-	1,008	-	N/A
	Value (\$Cdn)	-	-	-	15,760	-	15,760	-	N/A
<b>Italy</b>	Kg	-	-	-	-	-	1,008	431	134%
	Value (\$Cdn)	-	-	-	-	-	15,760	6,899	128%
<b>French S. Terr.</b>	Kg	195	-	-	-	-	195	-	N/A
	Value (\$Cdn)	2,971	-	-	-	-	2,971	-	N/A
<b>Total</b>	<b>Kg</b>	<b>78,485</b>	<b>54,383</b>	<b>71,229</b>	<b>70,208</b>	<b>51,139</b>	<b>700,314</b>	<b>851,582</b>	<b>-18%</b>
	<b>Value (\$Cdn)</b>	<b>1,101,841</b>	<b>772,063</b>	<b>901,876</b>	<b>881,764</b>	<b>572,541</b>	<b>8,813,693</b>	<b>8,466,556</b>	<b>4%</b>

### Bone-in

	June	July	August	September	October	YTD 2009	YTD 2008	% Change	
<b>Total</b>	<b>Kg</b>	-	315	54	16,465	789	26,471	65,530	-60%
	<b>Value (\$Cdn)</b>	-	4,354	563	171,118	10,147	225,771	252,172	-10%

### Total Exports, Boneless and Bone-in

	June	July	August	September	October	YTD 2009	YTD 2008	% Change
<b>Kg</b>	78,485	54,698	71,283	86,673	51,928	726,785	917,112	-21%
<b>Value (\$Cdn)</b>	1,101,841	776,417	902,439	1,052,882	582,688	9,039,464	8,718,728	4%

\*source Statistics Canada

**US Bison Carcasses - Grain Fed (Hot Carcass Wt \$US/cwt) FOB Plant Basis**

wghtd avg

	Bulls (UTM)	Heifers (UTM)	Bulls (OTM)	Cows (OTM)
Dec 2008	241.11	226.38	150.7	143.66
Jan 2009	238.4	224.73	161.32	142.95
Feb 2009	238.08	221.62	149.43	142.82
Mar 2009	237.3	220.08	146.71	145.8
Apr 2009	238.71	220.44	150	151.9
May 2009	239.33	221.12	159.5	154.78
June 2009	238.55	207.04	141.67	152.02
July 2009	239.39	219.85	154.38	149
Aug 2009	234.98	220.24	118	135.18
Sep 2009	235.11	218.8	159.88	147.3
Oct 2009	237.4	222.18	162.14	148.5
Nov 2009	239.53	221.9	160.61	159.98

\*source USDA

**Canadian Bison Carcasses - Grain Fed (Hot Carcass Wt Cdn\$/cwt) FOB Plant Basis**

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Dec 2008	245-280	235-255	100-135	115-130
Jan 2009	235-280	220-260	100-130	100-130
Feb 2009	240-275	230-260	110-125	110-125
Mar 2009	240-270	230-260	115-145	110-145
Apr 2009	240-250	240-240	130-150	130-150
May 2009	240-270	240-265	120-170	120-170
June 2009	240-265	240-250	130-170	130-165
July 2009	255-280	235-265	125-165	130-165
Aug 2009	235-275	225-260	130-150	130-140
Sep 2009	235-275	225-250	130-140	130-150
Oct 2009	235-275	225-250	130-140	130-150
Nov 2009	245-260	225-245	140-165	140-165
Dec 2009	225-260	215-245	140-150	140-150

\*source CBA survey of marketers

**USDA Key Cuts - Grain Fed Wholesale (\$US/cwt)**

	September		October		November		Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	800-1225	949.75	750-1225	960.49	700-1225	951	0%	-1%
Chuckroll/Clod Fresh	315-425	336.5	320-425	338	335-390	340.32	1%	1%
Striploin Fresh	750-1050	868.15	700-1050	925.22	700-915	897.64	3%	-3%
Tenderloin Fresh	1100-1650	1249.65	900-1650	1218.56	900-1650	1267.1	1%	4%
Ground 90% Bulk, Fresh	300-375	328	355-414	359.66	333-390	371.65	13%	3%
Ground 85% Bulk, Frozen	300-440	385.34	300-445	374.17	332-445	384.06	0%	3%
Ground 85% Patties, Frozen	305-440	356.63	305-375	361.1	325-440	362.59	2%	0%

\*source USDA

**Canadian Bison Cuts - Grain Fed Wholesale (\$Cdn/kilogram)**

	Mid-September Pricing	Mid-October Pricing	Mid-November Pricing	Mid-December Pricing
Tenderloin - Fresh	\$29.00 - \$37.50	\$31.95 - \$40.00	\$39.95 - \$40.00	\$38.00 - \$48.00
Strip Loin Boneless - Fresh	\$18.00 - \$24.00	\$18.95 - \$24.00	\$23.40 - \$26.01	\$21.95 - \$27.50
Inside Round - Fresh	\$7.25 - \$11.00	\$8.45 - \$15.00	\$8.49 - \$12.75	\$8.45 - \$12.00
Ground 90% Bulk Fresh	\$7.25 - \$9.40	\$7.25 - \$9.45	\$7.25 - \$9.45	\$7.45 - \$9.35
Fresh Bison Trim	\$6.45 - \$7.35	\$6.75 - \$7.35	\$7.25 - \$7.49	\$6.45 - \$7.30

\*source CBA survey of marketers

**Live Auction Reports \*most recent reported, may not reflect current market**

Sekura Auctions (AB) (December 5, 2009)			Kramer Auctions (SK) (December 2, 2009)			Willowview Auctions (AB) (November 14, 2009)			
Birth Year, Sex	lbs	Average (\$/cwt)	Birth Year, Sex	lbs	# Head	Average (\$/cwt)	Birth Year, Sex	lbs	Average (\$/cwt)
2009 Males	0-300	78.65	2006 + Bulls	1400-1600	4	49	Bull Calves	300 +	95-105
	300-400	113.01						350-400	108-115
	400-500	129.30	450-500	118-127					
2008 Males	500-600	110.00	2006/2007 Bulls	850-1000	7	87	Heifer Calves	300 +	95-100
	600-700	123.00						350-399	100-108
	900-1000	105.39	400-450	105-114					
2007 Males	700-800	80.00	2008 Bulls	600-700	20	134	Yearling Bulls	600-700	118-124
2009 Females	0-300	97.32	2008 Heifers	701-800	32	141		750-850	126-137
	300-400	133.59		801-900	33	142		Yearling Heifers	500-549
2008 Females	400-500	129.98	900 +	4	118	124	550-599		105-108
	300-400	66.99	2008 Heifers	575-650	11	113	600-700	115-118	
	400-500	72.00	2008 Heifers	650-750	10	124	Mature Bulls		68-75
500-600	89.51	2009 Bulls	350-400	12	150	Cows			700-850 / head
2007 Females	700-800	81.21	401-500	36	161				
Feeder Cows		73.28	2009 Heifers	300-400	28	126			
			400-450	15	138				

**Commentary**

By Terry Kremeriuk, Executive Director, CBA

This report can only be improved with your feedback. Please send any comments that you have to either [cba2@sasktel.net](mailto:cba2@sasktel.net) or [diane.kelly@agr.gc.ca](mailto:diane.kelly@agr.gc.ca)

Bison prices for grade "A" grain-fed youthful bulls, although they have softened, have remained steady. Heifer prices have experienced further downward pressure because of inventories and lower returns on heifer carcasses. The strength of the Canadian dollar is also placing downward pressure on prices. Certain marketers are quoting prices of about 15 cents lower for bulls and heifers over thirty months old because marketing options are reduced. Prices for mature bulls and cows remain strong as the trim market for bison also remains very strong. Most marketers have little or no bison trim in inventory. Middle cuts inventory is still high but some cuts have been moving with demand being very unpredictable. The Christmas demand, although it has been steady has not met the expectations of certain marketers.

Nationally federal slaughter for the first 47 weeks was down 5.2%. (18,004 in 2009 compared to 18,985 for the same period in 2008). Exports of live animals to October 31, 2009 were down by 14.0% (21,199 in 2009 compared to 24,656 in 2008). The decline in live exports is attributed to the short supply of animals combined with the stronger Canadian dollar.

Total boneless bison meat exports to October 31, 2009 were at 700,314 Kg. compared to 851,704 Kg. for the same period in 2008. Exports of meat have increased to the U.S., while exports to Europe have declined as significant amounts of Canadian bison continue to be shipped to the EU from the U.S.

Chart 1

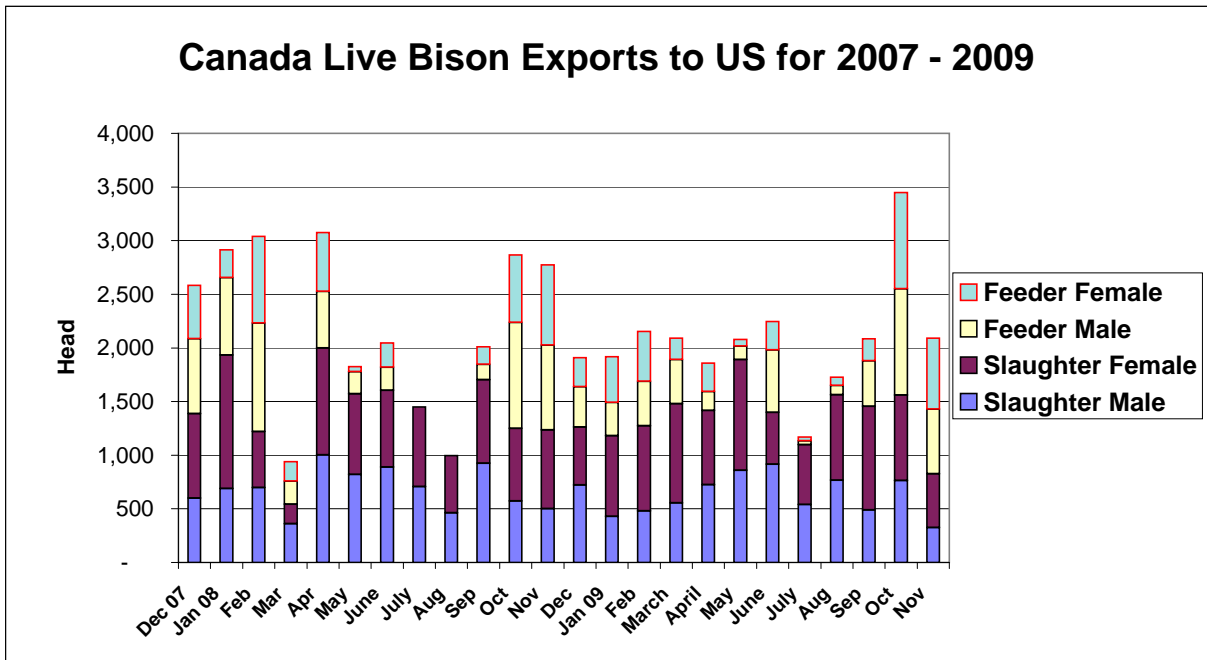


Chart 2

