



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - January 19, 2010

### Weekly Federal Bison Slaughter

|                      | 05-Dec     | 12-Dec     | 19-Dec     | 26-Dec     | 02-Jan    | Dec Total    | 2009 YTD      | 09 vs 08 % Change |
|----------------------|------------|------------|------------|------------|-----------|--------------|---------------|-------------------|
| <b>Total Canada</b>  | <b>516</b> | <b>570</b> | <b>394</b> | <b>230</b> | <b>11</b> | <b>1,721</b> | <b>19,725</b> | <b>-6%</b>        |
| <i>previous year</i> | 661        | 576        | 431        | 268        | 28        | 1,964        | 20,949        |                   |

### Provincially Inspected Slaughter

|                       | July       | Aug        | Sept       | Oct        | Nov        | Nov-08     | 2009 YTD    | 2008 YTD    | % Change   |
|-----------------------|------------|------------|------------|------------|------------|------------|-------------|-------------|------------|
| <b>Alberta</b>        | 223        | 150        | 169        | 220        | 169        | 197        | 2145        | 2652        | -19%       |
| <b>Saskatchewan</b>   | 20         | 15         | 26         | 25         | 34         | 17         | 327         | N/A         |            |
| <b>Manitoba/BC</b>    | 71         | 74         | 73         | 96         | 63         | 77         | 815         | 828         | -2%        |
| <b>Ontario/Quebec</b> | 49         | 59         | 62         | 49         | 51         | 56         | 573         | 621         | -8%        |
| <b>Total</b>          | <b>363</b> | <b>298</b> | <b>330</b> | <b>390</b> | <b>317</b> | <b>347</b> | <b>3860</b> | <b>4101</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>23,585</b> | <b>25,050</b> | <b>-6%</b> |

### US Federal Slaughter\*

| for week ending:     | 05-Dec      | 12-Dec      | 19-Dec     | 26-Dec     | 02-Jan     | Dec Total    | 2009 YTD      | 2008 YTD      | % Change   |
|----------------------|-------------|-------------|------------|------------|------------|--------------|---------------|---------------|------------|
|                      | <b>1572</b> | <b>1227</b> | <b>958</b> | <b>673</b> | <b>618</b> | <b>5,048</b> | <b>53,330</b> | <b>54,357</b> | <b>-2%</b> |
| <i>previous year</i> | 766         | 1309        | 1027       | 949        | 555        | 4,606        |               |               |            |

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

### Canada Live Bison Exports to US

|                  | Sept-09      | Oct-09       | Nov-09       | Dec-09       | 2009 YTD      | 2008 YTD      | % Change   |
|------------------|--------------|--------------|--------------|--------------|---------------|---------------|------------|
| Slaughter Male   | 488          | 763          | 324          | 916          | 7,765         | 8,348         | -7%        |
| Slaughter Female | 968          | 798          | 502          | 968          | 9,260         | 8,423         | 10%        |
| Feeder Male      | 423          | 988          | 603          | 180          | 4,339         | 5,190         | -16%       |
| Feeder Female    | 205          | 899          | 661          | 189          | 3,754         | 3,883         | -3%        |
| <b>Total</b>     | <b>2,084</b> | <b>3,448</b> | <b>2,090</b> | <b>2,253</b> | <b>25,118</b> | <b>25,844</b> | <b>-3%</b> |

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

| <b>Boneless</b>             | July                  | August  | September | October | November | YTD 2009  | YTD 2008  | % Change |
|-----------------------------|-----------------------|---------|-----------|---------|----------|-----------|-----------|----------|
| <b>USA</b>                  | Kg 25,090             | 26,877  | 27,609    | 26,608  | 48,093   | 371,145   | 304,952   | 22%      |
|                             | Value (\$Cdn) 216,082 | 216,995 | 232,014   | 231,321 | 373,907  | 3,068,236 | 2,111,455 | 45%      |
| <b>France</b>               | Kg 21,192             | 35,613  | 36,111    | 17,777  | 9,382    | 310,831   | 491,925   | -37%     |
|                             | Value (\$Cdn) 316,051 | 468,654 | 490,282   | 238,221 | 115,935  | 4,259,299 | 5,259,250 | -19%     |
| <b>Germany</b>              | Kg 2,883              | 4,298   | 2,179     | 4,446   | 2,305    | 27,260    | 53,694    | -49%     |
|                             | Value (\$Cdn) 45,989  | 57,497  | 25,750    | 42,771  | 44,571   | 369,395   | 746,611   | -51%     |
| <b>Switzerland</b>          | Kg 5,218              | 4,242   | 3,116     | 1,907   | 3,801    | 41,509    | 97,407    | -57%     |
|                             | Value (\$Cdn) 193,941 | 157,339 | 112,673   | 58,625  | 130,189  | 1,509,476 | 1,502,467 | 0%       |
| <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    | -         | N/A      |
|                             | Value (\$Cdn) -       | -       | -         | -       | -        | 209,682   | -         | N/A      |
| <b>Belgium</b>              | Kg -                  | -       | -         | -       | -        | -         | 1,902     | N/A      |
|                             | Value (\$Cdn) -       | -       | -         | -       | -        | -         | 29,786    | N/A      |
| <b>United Arab Emirates</b> | Kg -                  | 13      | 185       | -       | 485      | 1,349     | 47        | 2770%    |
|                             | Value (\$Cdn) -       | 361     | 5,285     | -       | 4,626    | 29,304    | 756       | 3776%    |
| <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       | -         | N/A      |
|                             | Value (\$Cdn) -       | -       | -         | -       | -        | 2,971     | -         | N/A      |
| <b>Total</b>                | Kg 54,383             | 71,229  | 70,208    | 51,139  | 64,066   | 764,380   | 960,663   | -20%     |
|                             | Value (\$Cdn) 772,063 | 901,876 | 881,764   | 572,541 | 669,228  | 9,482,921 | 9,731,951 | -3%      |

### Bone-in

|              | July                | August | September | October | November | YTD 2009 | YTD 2008 | % Change |
|--------------|---------------------|--------|-----------|---------|----------|----------|----------|----------|
| <b>Total</b> | Kg 315              | 54     | 16,465    | 789     | -        | 26,471   | 66,805   | -60%     |
|              | Value (\$Cdn) 4,354 | 563    | 171,118   | 10,147  | -        | 225,771  | 264,457  | -15%     |

### Total Exports, Boneless and Bone-in

|                      | July                  | August  | September | October | November | YTD 2009  | YTD 2008  | % Change |
|----------------------|-----------------------|---------|-----------|---------|----------|-----------|-----------|----------|
| <b>Total Exports</b> | Kg 54,698             | 71,283  | 86,673    | 51,928  | 64,066   | 790,851   | 1,027,468 | -23%     |
|                      | Value (\$Cdn) 776,417 | 902,439 | 1,052,882 | 582,688 | 669,228  | 9,708,692 | 9,996,408 | -3%      |

\*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) |
|-----------|-------------|---------------|-------------|------------|
| 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     |
| Dec 2009  | 242.27      | 223.67        | 163.29      | 164.8      |

\*source USDA

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

wghtd avg

|           | Bulls   | Heifers | Mature Bulls | Mature Cows |
|-----------|---------|---------|--------------|-------------|
| 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     |
| Jan 2010  | 220-255 | 210-240 | 140-155      | 140-150     |

\*source CBA survey of marketers

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

|                            | October             |          | November |          | December |          | Change Current Month vs. |               |
|----------------------------|---------------------|----------|----------|----------|----------|----------|--------------------------|---------------|
|                            | Range               | Wt. Avg  | Range    | Wt. Avg  | Range    | Wt. Avg  | 2 months prior           | 1 month prior |
|                            | Ribeye Lip-On Fresh | 750-1225 | 960.49   | 700-1225 | 951      | 700-1225 | 939.05                   | -2%           |
| Chuckroll/Clod Fresh       | 320-425             | 338      | 335-390  | 340.32   | 240-440  | 341.2    | 1%                       | 0%            |
| Striploin Fresh            | 700-1050            | 925.22   | 700-915  | 897.64   | 700-1050 | 871.61   | -6%                      | -3%           |
| Tenderloin Fresh           | 900-1650            | 1218.56  | 900-1650 | 1267.1   | 950-1650 | 1325.21  | 9%                       | 5%            |
|                            |                     |          |          |          |          |          |                          |               |
| Ground 90% Bulk, Fresh     | 355-414             | 359.66   | 333-390  | 371.65   | 341-354  | 351.48   | -2%                      | -5%           |
| Ground 85% Bulk, Frozen    | 300-445             | 374.17   | 332-445  | 384.06   | 300-445  | 370.94   | -1%                      | -3%           |
| Ground 85% Patties, Frozen | 305-375             | 361.1    | 325-440  | 362.59   | 325-440  | 362.67   | 0%                       | 0%            |

\*source USDA

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

|                             | Mid-October Pricing | Mid-November Pricing | Mid-December Pricing | Mid-January Pricing |
|-----------------------------|---------------------|----------------------|----------------------|---------------------|
| Tenderloin - Fresh          | \$31.95 - \$40.00   | \$39.95 - \$40.00    | \$38.00 - \$48.00    | \$29.95 - \$43.00   |
| Strip Loin Boneless - Fresh | \$18.95 - \$24.00   | \$23.40 - \$26.01    | \$21.95 - \$27.50    | \$19.95 - \$27.00   |
| Inside Round - Fresh        | \$8.45 - \$15.00    | \$8.49 - \$12.75     | \$8.45 - \$12.00     | \$8.45 - \$12.00    |
| Ground 90% Bulk Fresh       | \$7.25 - \$9.45     | \$7.25 - \$9.45      | \$7.45 - \$9.35      | \$7.50 - \$7.58     |
| Fresh Bison Trim            | \$6.75 - \$7.35     | \$7.25 - \$7.49      | \$6.45 - \$7.30      | \$7.25 - \$7.58     |

\*source CBA survey of marketers

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

| Sekura Auctions (AB) (January 9, 2010) |         |                  | Sekura Auctions (AB) (December 5, 2009) |              |                  | Kramer Auctions (SK) (December 2, 2009) |                 |              |                  |     |
|--|---------|------------------|---|--------------|------------------|---|-----------------|--------------|------------------|-----|
| Birth Year, Sex                        | lbs     | Average (\$/cwt) | Birth Year, Sex                         | lbs          | Average (\$/cwt) | Birth Year, Sex                         | lbs             | # Head       | Average (\$/cwt) |     |
| 2009 Males                             | 300-400 | 124.39           | 2009 Males                              | 0-300        | 78.65            | 2006 + Bulls                            | 1400-1600       | 4            | 49               |     |
|  | 400-500 | 148.91           |   | 300-400      | 113.01           |   | 2006/2007 Bulls | 850-1000     | 7                | 87  |
| 2008 Males                             | 500-600 | 127.34           | 2008 Males                              | 500-600      | 110.00           | 2008 Bulls                              |                 | 1001-1300    | 3                | 75  |
|  | 700-800 | 128.00           |   | 600-700      | 123.00           |   | 600-700         | 20           | 134              |     |
| 2009 Females                           | 0-300   | 85.00            | 2007 Males                              | 700-800      | 80.00            | 2008 Heifers                            | 701-800         | 32           | 141              |     |
|  | 300-400 | 112.00           |   | 2009 Females | 0-300            |   | 97.32           | 801-900      | 33               | 142 |
|  | 400-500 | 136.08           |   |              | 300-400          |   | 133.59          | 900 +        | 4                | 118 |
| 2008 Females                           | 500-600 | 103.30           | 2008 Females                            | 400-500      | 129.98           | 2009 Bulls                              | 350-400         | 12           | 150              |     |
|  |         | 114.00           |   | 300-400      | 66.99            |   | 401-500         | 36           | 161              |     |
|  |         | 600-700          |   | 114.00       | 400-500          |   | 72.00           | 2009 Heifers | 300-400          | 28  |
| Feeder Cows                            | 68.66   | 2007 Females     | 500-600                                 | 89.51        | 400-450          | 15                                      | 138             |              |                  |     |
|  |         |                  | 700-800                                 | 81.21        | Feeder Cows      | 73.28                                   |                 |              |                  |     |

**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)

Prices for grade "A" bison grain-fed youthful bulls and heifers have softened with heifers with excessive conditioning being discounted further. The strength of the Canadian dollar is continuing to place 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. Buyers are also discounting over-conditioned heifers about 15-20 cent per pound. 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 with trim moving domestically, into the US and Europe. Middle cuts inventory is still high but some cuts have been moving with demand being very unpredictable. The post Christmas demand for red meats tends to be softer with this year being no different.

Nationally federal slaughter for the year was down 6.0% (19,725 in 2009 compared to 20,949 for the same period in 2008). Exports of live animals to November 30, 2009 were down by 14.1% (23,576 in 2009 compared to 27,436 in 2008). The decline in live exports is attributed to the short supply of animals combined with the strong Canadian dollar.

Total boneless bison meat exports up to November 2009 were at 764,380 Kg compared to 960,663 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

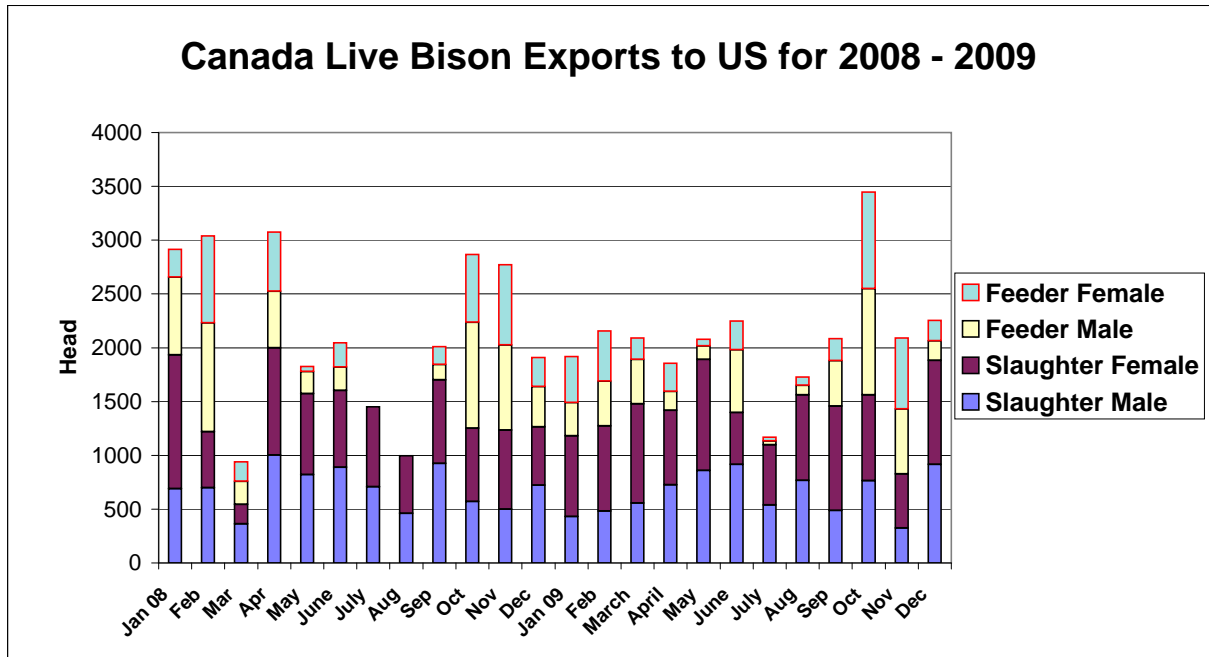


Chart 2

