



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - July 16, 2009

Weekly Federal Bison Slaughter

	06-Jun	13-Jun	20-Jun	27-Jun	04-Jul	June Total	2009 YTD	09 vs 08 % Change
Total Canada	268	315	444	378	242	1,647	10,376	0%
<i>previous year</i>	333	263	419	308	380	1,703	10,413	

Provincially Inspected Slaughter

	Jan-09	Feb	Mar	Apr	May	May-08	2009 YTD	2008 YTD	% Change
Alberta	186	213	257	228	172	195	1056	1396	-24%
Saskatchewan	40	57	40	14	46	40	197	N/A	
Manitoba/BC	42	63	85	68	89	68	347	384	-10%
Ontario/Quebec	67	36	30	58	55**	58	246	310	-21%
Total	335	369	412	368	307	361	1846	2090	-12%

** Ontario/Quebec Provincial slaughter number is 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
Total Canadian Federal and Provincial Slaughter	12,222	12,503	-2%

US Federal Slaughter*

for week ending:	06-Jun	13-Jun	20-Jun	27-Jun	June Total	2009 YTD	2008 YTD	% Change
	1101	1067	1036	932	4,136	26,064	27,600	-6%
<i>previous year</i>	955	1111	1090	1207	4,363			

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

Canada Live Bison Exports to US

	Mar-09	Apr-09	May-09	June-09	2009 YTD	2008 YTD	% Change
Slaughter Male	555	726	859	917	3,969	4,461	-11%
Slaughter Female	924	692	1,031	481	4,669	4,411	6%
Feeder Male	411	176	125	583	2,020	2,894	-30%
Feeder Female	201	263	63	266	1,688	2,074	-19%
Total	2,091	1,857	2,078	2,247	12,346	13,840	-11%

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

Boneless	January 2009	February	March	April	May	YTD 2009	YTD 2008	% Change
USA	Kg 50,633	24,887	27,160	45,101	34,472	182,253	103,436	76%
	Value (\$Cdn) 392,229	196,672	232,568	422,423	277,021	1,520,913	708,802	115%
France	Kg 37,657	13,964	50,046	28,098	33,559	163,324	236,734	-31%
	Value (\$Cdn) 389,926	222,463	700,574	377,096	466,006	2,156,065	2,326,303	-7%
Germany	Kg 592	831	998	1,283	3,811	7,515	28,335	-73%
	Value (\$Cdn) 7,936	13,893	13,101	21,199	39,625	95,754	417,135	-77%
Switzerland	Kg 2,749	3,026	7,438	4,332	3,144	20,689	44,914	-54%
	Value (\$Cdn) 108,815	111,605	286,191	166,471	102,597	775,679	656,478	18%
Mexico	Kg -	-	-	423	-	423	-	-
	Value (\$Cdn) -	-	-	16,165	-	16,165	-	-
Neth. Antilles	Kg -	-	-	-	-	-	86	-100%
	Value (\$Cdn) -	-	-	-	-	-	893	-100%
Belgium	Kg -	-	-	-	-	-	-	-
	Value (\$Cdn) -	-	-	-	-	-	-	-
Italy	Kg -	-	-	-	-	-	431	-100%
	Value (\$Cdn) -	-	-	-	-	-	6,899	-100%
United Arab Emirates	Kg 647	19	-	-	-	666	47	1317%
	Value (\$Cdn) 18,432	600	-	-	-	19,032	756	2417%
Total	Kg 92,278	42,727	85,642	79,237	74,986	374,870	413,983	-9%
	Value (\$Cdn) 917,338	545,233	1,232,434	1,003,354	885,249	4,583,608	4,117,266	11%

Bone-in

	January 09	February	March	April	May	YTD 2009	YTD 2008	% Change
Total	Kg 7,776	205	-	867	-	8,848	29,642	-70%
	Value (\$Cdn) 29,181	2,155	-	8,253	-	39,589	89,922	-56%

Total Exports, Boneless and Bone-in

	January 09	February	March	April	May	YTD 2009	YTD 2008	% Change
Kg	100,054	42,932	85,642	80,104	74,986	383,718	443,625	-14%
Value (\$Cdn)	946,519	547,388	1,232,434	1,011,607	885,249	4,623,197	4,207,188	10%

*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)
July 2008	228.63	221.07	148.48	138.81
Aug 2008	236.62	228.95	150	142.74
Sep 2008	239.14	230.36	137.5	145.89
Oct 2008	239.99	230.17	147.02	141.71
Nov 2008	241.36	228.87	146.6	144.17
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

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
July 2008	205-230	210-225	100-110	100-110
Aug 2008	220-230	210-230	90-100	90-100
Sep 2008	225-240	210-230	90-100	90-100
Oct 2008	230-260	225-255	100-125	100-120
Nov 2008	230-275	225-265	125-130	120-130
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

**source CBA survey of marketers*

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

	April		May		June		Change Current Month vs. 2 months prior 1 month prior	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg		
Ribeye Lip-On Fresh	875-1450	992.04	825-1225	988.3	825-1195	961.61	-3%	-3%
Chuckroll/Clod Fresh	290-435	333.88	310-350	328.6	310-425	333.46	0%	1%
Striploin Fresh	700-1050	922.23	740-1050	868.04	690-1050	908.27	-2%	5%
Tenderloin Fresh	1250-2050	1530.8	1200-1700	1376.91	1200-1975	1391.53	-9%	1%
Ground 90% Bulk, Fresh	300-375	328	300-375	325.93	300-375	328	0%	1%
Ground 85% Bulk, Frozen	300-506	375.24	300-395	369.49	300-350	318.97	-15%	-14%
Ground 85% Patties, Frozen	285-470	350.47	285-395	356.26	285-470	349.51	0%	-2%

**source USDA*

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

	Mid-April Pricing	Mid-May Pricing	Mid-June Pricing	Mid-July Pricing
Tenderloin - Fresh	\$39.00 - \$43.00	\$36.00 - \$45.00	\$34.95 - \$42.00	\$39.95 - \$45.00
Strip Loin Boneless - Fresh	\$19.95 - \$25.00	\$21.00 - \$28.00	\$19.95 - \$27.00	\$21.50 - \$27.00
Inside Round - Fresh	\$8.95 - \$12.00	\$8.95 - \$11.50	\$7.95 - \$11.50	\$9.99 - \$12.50
Ground 90% Bulk Fresh	\$6.25 - \$8.35	\$7.45 - \$8.30	\$6.95 - \$8.80	\$8.80 - \$9.20
Fresh Bison Trim	\$6.30 - \$7.60	\$6.61 - \$7.40	\$6.25 - \$7.35	\$7.15 - \$7.85

**source CBA survey of marketers*

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

Kramer Auction (SK) (May 13, 2009)				Sekura Auction (AB) (March 7, 2009)					
Birth Year, Sex	lbs	# of Head	Average (\$/lb)	Birth Year, Sex	lbs	Average (cwt)	Birth Year, Sex	lbs	Average (cwt)
2005 Bulls	>1500	1	0.85	2008 Males	0-300	81.73	2007 Females	400-500	60
2007 Bulls	650-700	5	1.28		300-400	114.83		500-600	95.54
	>700	14	1.35		400-500	122.24		600-700	109.5
2007 Heifers	600-650	6	1.22		500-600	125			
	650-700	10	1.26				2006 Bred Heifers	700-800	425-770 per hd
	>700	6	1.26	2007 Males	500-600	97.59		800-900	770-785 per hd
	<550	3	1.05		600-700	116.25			
2008 Bulls	400-450	31	1.31		800-900	117	Feeder Cows		70.41
	450-500	30	1.36				Feeder Heifers		72
	500-550	51	1.41	2006 Males	800-900	104	Mature Bulls		57
	>550	27	1.41		900-999	100			
	<400	31	1.16						
2008 Heifers	400-450	60	1.25	2008 Females	0-300	91.78			
	450-500	32	1.23		300-400	104.91			
	>500	12	1.28		400-500	106.67			
	<400	26	0.98		500-600	105.04			

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 or diane.kelly@agr.gc.ca

Marketers report continued strong demand and strong prices for bison trim. Middle cuts (tenders, strips and ribeyes) continue to be in good supply creating downward pressure on prices. In many parts of the country poor weather conditions for grilling have had a negative impact on the demand for middle cuts. Some of this inventory may be reduced if good weather extends the grilling season well into the fall.

The strong trim prices have resulted in continued strong prices for mature bulls and cows with prime bull and heifer prices holding steady.

Nationally federal slaughter for the first 27 weeks was up slightly (10,827 in 2009 compared to 10,811 for the same period in 2008). Exports of live animals to May 31 were down by 28% (10,269 in 2009 compared to 14,278 in 2008). The decline in live exports is due to the short supply of animals combined with the stronger Canadian dollar.

Total boneless bison meat exports for the first quarter were down to May 31, 2009 when compared to 2008 (374,870 Kg. in 2009 compared to 413,983 Kg. in 2008). There has been an increase in boneless exports to the U.S. with less boneless bison meat being shipped to France.

Chart 1

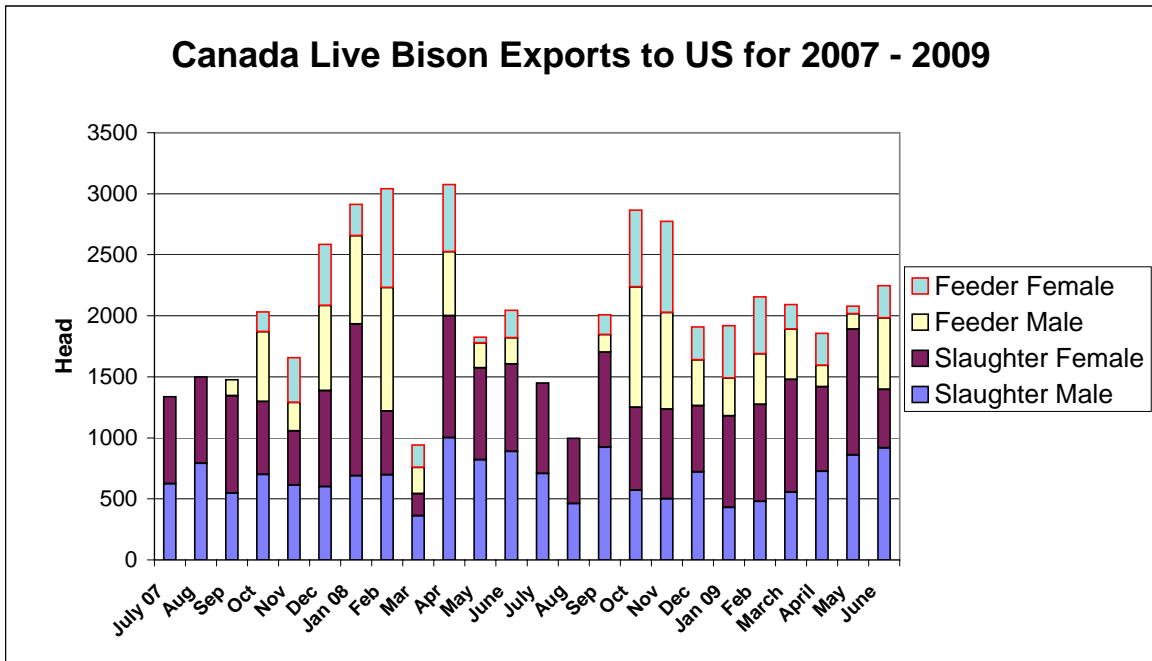


Chart 2

