



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - October 22, 2009

Weekly Federal Bison Slaughter

	05-Sep	12-Sep	19-Sep	26-Sep	03-Oct	Sept Total	2009 YTD	09 vs 08 % Change
Total Canada	277	91	404	331	380	1,483	14,665	-5%
<i>previous year</i>	335	302	431	301	382	1,751	15,442	

Provincially Inspected Slaughter

	Apr	May	June	July	Aug	Aug-08	2009 YTD	2008 YTD	% Change
Alberta	228	172	158	223	150	205	1587	2060	-23%
Saskatchewan	14	32	24	20	15	38	242	N/A	
Manitoba/BC	72	89	91	71	74	67	560	619	-10%
Ontario/Quebec	58	56	56	49	59	37	411	480	-14%
Total	372	349	329	363	298	347	2800	3159	-11%

** Saskatchewan and 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
Total Canadian Federal and Provincial Slaughter	17,465	18,601	-6%

US Federal Slaughter*

for week ending:	05-Sep	12-Sep	19-Sep	26-Sep	03-Oct	Sept Total	2009 YTD	2008 YTD	% Change
	811	1097	1093	895	910	4,806	39,485	42,031	-6%
<i>previous year</i>	1014	906	1133	1077	951	5,081			

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

Canada Live Bison Exports to US

	June-09	July-09	Aug-09	Sept-09	2009 YTD	2008 YTD	% Change
Slaughter Male	917	539	766	488	5,762	6,554	-12%
Slaughter Female	481	559	796	968	6,992	6,468	8%
Feeder Male	583	36	89	423	2,568	3,037	-15%
Feeder Female	266	35	77	205	2,005	2,238	-10%
Total	2,247	1,169	1,728	2,084	17,327	18,297	-5%

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

Boneless		April	May	June	July	August	YTD 2009	YTD 2008	% Change
USA	Kg	45,101	34,472	34,615	19,483	32,484	268,835	198,524	35%
	Value (\$Cdn)	422,423	277,021	277,004	188,399	244,678	2,230,994	1,328,518	68%
France	Kg	28,098	33,559	27,432	21,192	35,613	247,561	360,121	-31%
	Value (\$Cdn)	377,096	466,006	474,091	316,051	468,654	3,414,861	3,614,063	-6%
Germany	Kg	1,283	3,811	3,634	2,883	4,298	18,330	38,372	-52%
	Value (\$Cdn)	21,199	39,625	57,063	45,989	57,497	256,303	540,759	-53%
Switzerland	Kg	4,332	3,144	2,536	5,218	4,242	32,685	80,510	-59%
	Value (\$Cdn)	166,471	102,597	81,030	193,941	157,339	1,207,989	1,123,078	8%
Mexico	Kg	423	-	-	-	-	423	-	100%
	Value (\$Cdn)	16,165	-	-	-	-	16,165	-	100%
China P.Rep.	Kg	-	-	-	-	186	186	-	100%
	Value (\$Cdn)	-	-	-	-	1,030	1,030	-	100%
Saudi Arabia	Kg	-	-	10,073	-	-	10,073	-	100%
	Value (\$Cdn)	-	-	209,682	-	-	209,682	-	100%
Italy	Kg	-	-	-	-	-	-	431	-100%
	Value (\$Cdn)	-	-	-	-	-	-	6,899	-100%
United Arab Emirates	Kg	-	-	-	-	13	679	47	1345%
	Value (\$Cdn)	-	-	-	-	361	19,393	756	2465%
Japan	Kg	-	-	-	-	-	-	10,305	-100%
	Value (\$Cdn)	-	-	-	-	-	-	74,727	-100%
French S. Terr.	Kg	-	-	195	-	-	195	-	100%
	Value (\$Cdn)	-	-	2,971	-	-	2,971	-	100%
Total	Kg	79,237	74,986	78,485	48,776	76,836	578,967	688,310	-16%
	Value (\$Cdn)	1,003,354	885,249	1,101,841	744,380	929,559	7,359,388	6,688,800	10%

Bone-in

	April	May	June	July	August	YTD 2009	YTD 2008	% Change
Total	867	-	-	315	54	9,217	45,356	-73%
Value (\$Cdn)	8,253	-	-	4,354	563	44,506	163,209	-73%

Total Exports, Boneless and Bone-in

	April	May	June	July	August	YTD 2009	YTD 2008	% Change
Kg	80,104	74,986	78,485	49,091	76,890	588,184	733,666	-20%
Value (\$Cdn)	1,011,607	885,249	1,101,841	748,734	930,122	7,403,894	6,852,009	8%

*source Statistics Canada

** Export data for June and July is preliminary

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

wghtd avg

	Bulls (UTM)	Heifers (UTM)	Bulls (OTM)	Cows (OTM)
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
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

*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
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

*source CBA survey of marketers

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

	July		August		September		Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	825-1100	980.36	725-1225	955.56	800-1225	949.75	-3%	-1%
Chuckroll/Clod Fresh	295-425	332.32	305-425	324.59	315-425	336.5	1%	4%
Striploin Fresh	675-1050	914.93	625-1050	904.76	750-1050	868.15	-5%	-4%
Tenderloin Fresh	1000-1600	1202.55	950-1700	1181.28	1100-1650	1249.65	4%	6%
Ground 90% Bulk, Fresh	300-375	329	300-375	329	300-375	328	0%	0%
Ground 85% Bulk, Frozen	300-430	375.4	300-470	362.23	300-440	385.34	3%	6%
Ground 85% Patties, Frozen	285-435	353.6	305-425	355.64	305-440	356.63	1%	0%

*source USDA

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

	Mid-July Pricing	Mid-August Pricing	Mid-September Pricing	Mid-October Pricing
Tenderloin - Fresh	\$39.95 - \$45.00	\$29.00 - \$45.00	\$29.00 - \$37.50	\$31.95 - \$40.00
Strip Loin Boneless - Fresh	\$21.50 - \$27.00	\$18.00 - \$26.00	\$18.00 - \$24.00	\$18.95 - \$24.00
Inside Round - Fresh	\$9.99 - \$12.50	\$7.25 - \$12.25	\$7.25 - \$11.00	\$8.45 - \$15.00
Ground 90% Bulk Fresh	\$8.80 - \$9.20	\$7.25 - \$9.40	\$7.25 - \$9.40	\$7.25 - \$9.45
Fresh Bison Trim	\$7.15 - \$7.85	\$6.45 - \$7.70	\$6.45 - \$7.35	\$6.75 - \$7.35

*source CBA survey of marketers

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

Sekura Auction (AB) (October 3, 2009)						Kramer Auction (SK) (May 13, 2009)			
Birth Year, Sex	lbs	Average (cwt)	Birth Year, Sex	lbs	Average (cwt)	Birth Year, Sex	lbs	# of Head	Average (\$/lb)
2009 Males	300-400	126.00	2008 Females	400-500	71.00	2005 Bulls	>1500	1	0.85
	400-500	101.00		500-600	99.08	2007 Bulls	650-700	5	1.28
2008 Males	400-500	84.00		600-700	102.29		>700	14	1.35
	500-600	112.00	2007 Females	700-800	79.02	2007 Heifers	600-650	6	1.22
	600-700	127.03			650-700	10	1.26		
	700-800	133.06	Feeder Cows		79.86		>700	6	1.26
2007 Males	600-700	87.00	Mature Bulls		91.00	2008 Bulls	<550	3	1.05
	700-800	103.86				2008 Bulls	400-450	31	1.31
2009 Females	0-300	88.71				450-500	30	1.36	
	300-400	110.80				500-550	51	1.41	
	400-500	100.00					>550	27	1.41
						2008 Heifers	<400	31	1.16
						400-450	60	1.25	
						450-500	32	1.23	
						>500	12	1.28	
						<400	26	0.98	

Commentary

By Terry Kremenik, 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

With the strength of the Canadian dollar, there is downward pressure on live bison and bison meat prices. Supplies are steady with many 2007 bison yet to be processed and 2008 animals now coming to the market. These factors have translated into downward pressures on all cuts. The demand for bison trim remains strong. Middle cuts (tenders, strips and rib eyes) continue to be in good supply with no reduction in inventories that have been built up.

Nationally federal slaughter for the first 39 weeks was down 5.0% (14,665 in 2009 compared to 15,442 for the same period in 2008). Exports of live animals to July 31 were down by 6.4% (14,097 in 2009 compared to 17,977 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 for the first quarter were at comparable levels to August 31st 2009 when compared to 2008.

Chart 1

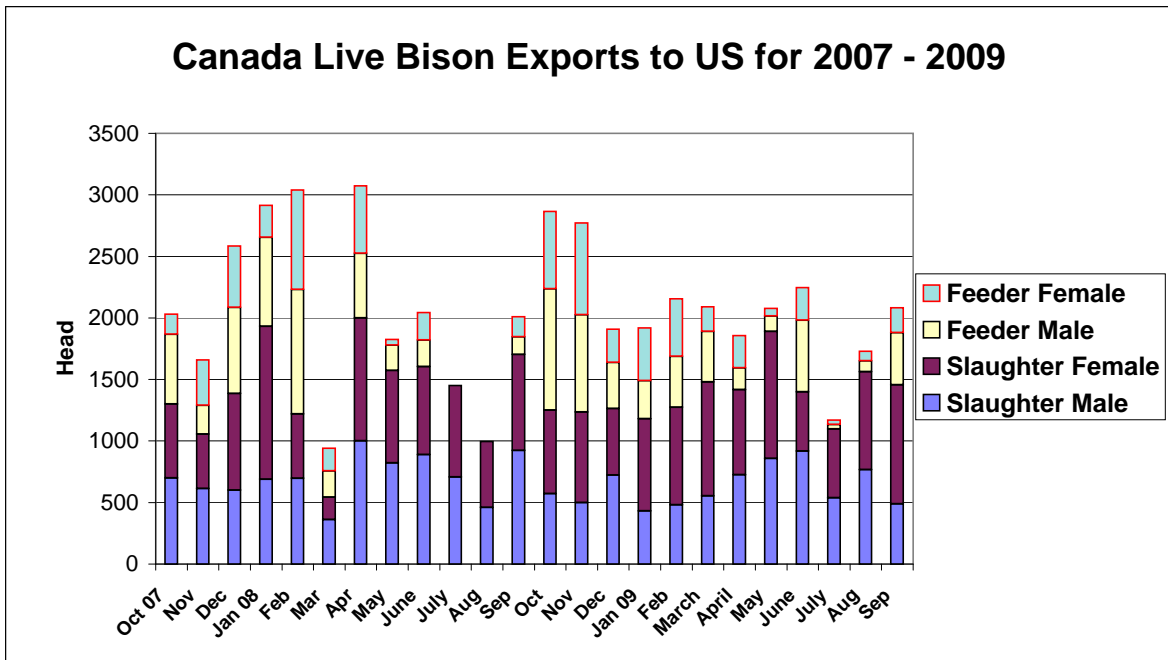


Chart 2

