



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - May 21, 2013

Weekly Federal Bison Slaughter

	06-Apr	13-Apr	20-Apr	27-Apr	Apr Total	2013	2012	% Change
Total Canada	336	138	342	31	847	4,128	3,462	19.2%
<i>previous year</i>	415	131	381	163	1,090			

Provincially Inspected Slaughter

	Nov 2012	Dec 2012	Jan 2013	Feb 2013	Mar 2013	Mar 2012	2013	2012	% Change
Alberta	93	101	147	136	113	102	396	222	78.4%
Saskatchewan	13	10	12	12	49	15	73	34	114.7%
Manitoba/BC	75	40	101	37	63	62	201	163	23.3%
Ontario/Quebec**	33	17	15	18	17	29	50	77	-35.1%
Total	214	168	275	203	242	208	720	496	45.2%

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

Total Canadian Federal and Provincial Slaughter *	YTD 2013	YTD 2012	% Change
	4,848	3,958	22.5%

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

US Federal Slaughter*

	06-Apr	13-Apr	20-Apr	27-Apr	Apr Total	2013	2012	% Change
for week ending:	579	894	818	809	3,100	13,603	13,474	1.0%
<i>previous year</i>	830	726	722	723	3,001			

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

Canada Live Bison Exports to US

	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	2013	2012	% Change
Slaughter Male	320	771	337	373	413	1,894	1,978	-4.2%
Slaughter Female	251	484	707	339	467	1,997	1,322	51.1%
Feeder Male	367	121	340	42	326	829	1,474	-43.8%
Feeder Female	93	100	131	41	164	436	1,080	-59.6%
Total	1,031	1,476	1,515	795	1,370	5,156	5,854	-11.9%

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

Boneless		October 2012	November	December	January 2013	February	March	March YTD		% Change
								2013	2012	
USA	Kg	14,965	11,469	16,976	11,449	14,273	19,822	45,544	44,920	1.4%
	Value (\$Cdn)	146,356	61,549	115,373	152,591	147,399	273,201	573,191	384,176	49.2%
France	Kg	1,285	5,391	18,010	4,720	3,084	11,258	19,062	9,015	111.4%
	Value (\$Cdn)	20,350	92,197	188,588	80,920	81,938	204,718	367,576	146,393	151.1%
Switzerland	Kg	3,433	4,079	6,238	2,291	6,099	11,023	19,413	5,122	279.0%
	Value (\$Cdn)	148,858	138,586	251,424	101,893	249,866	402,653	754,412	226,132	233.6%
Germany	Kg	-	157	290	-	-	-	-	228	N/A
	Value (\$Cdn)	-	3,740	5,854	-	-	-	-	6,257	N/A
Egypt	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
United Arab Emirates	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
China	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Singapore	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Hong Kong	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Italy	Kg	415	192	-	-	605	-	605	1,058	-42.8%
	Value (\$Cdn)	10,770	4,385	-	-	15,709	-	15,709	26,370	-40.4%
Sweden	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Netherlands	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Belgium	Kg	-	-	17,611	-	-	17,353	17,353	-	N/A
	Value (\$Cdn)	-	-	226,435	-	-	224,919	224,919	-	N/A
Total	Kg	20,098	21,288	59,125	18,460	24,061	59,456	101,977	60,343	69.0%
	Value (\$Cdn)	326,334	300,457	787,674	335,404	494,912	1,105,491	1,935,807	789,328	145.2%

Bone-in

	October 2012	November	December	January 2013	February	March	March YTD		% Change
							2013	2012	
Total	737	19,675	-	238	21	-	259	5,374	-95.2%
<i>Value (\$Cdn)</i>	7,734	87,255	-	3,098	317	-	3,415	52,449	-93.5%

Total Exports, Boneless and Bone-in

	October 2012	November	December	January 2013	February	March	March YTD		% Change
							2013	2012	
Kg	20,835	40,963	59,125	18,698	24,082	59,456	102,236	65,717	55.6%
<i>Value (\$Cdn)</i>	334,068	387,712	787,674	338,502	495,229	1,105,491	1,939,222	841,777	130.4%

*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)
Apr 2012	391.85	380.45	305.18	293.24
May 2012	392.57	381.52	308.23	299.28
June 2012	394.12	384.26	308.90	299.01
July 2012	390.28	383.55	308.93	311.93
Aug 2012	391.95	382.88	313.63	300.49
Sept 2012	391.95	380.23	306.09	306.00
Oct 2012	387.49	379.00	305.24	286.23
Nov 2012	388.79	375.65	290.00	278.86
Dec 2012	389.82	373.85	287.23	281.64
Jan 2013	388.29	375.04	281.52	268.40
Feb 2013	389.80	376.15	274.29	272.58
Mar 2013	389.29	374.23	293.14	273.26
Apr 2013	389.47	373.08	288.78	277.77

*source USDA

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

	Bulls	Heifers	Mature Bulls	Mature Cows
May 2012	365-390	355-390	160-250	160-250
June 2012	365-390	355-390	160-250	160-250
July 2012	365-390	355-390	160-250	160-250
Aug 2012	365-390	355-390	160-250	160-250
Sept 2012	365-390	355-380	no prices reported	no prices reported
Oct 2012	350-390	350-380	180	180
Nov 2012	350-385	325-375	150-190	150-180
Dec 2012	350-375	340-365	150-190	150-175
Jan 2013	350-375	340-360	150-180	150-170
Feb 2013	350-375	340-360	150-180	150-170
Mar 2013	350-375	340-360	150-180	150-170
Apr 2013	350-370	340-360	150-180	150-170
May 2013	350-370	340-360	130-150	130-150

*source CBA survey of marketers

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

	February 2013		March 2013		April 2013		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,300-1,650	1,392.14	1,275-1,600	1,399.37	1,275-1,650	1,397.42	0.4%	-0.1%
Chuckroll/Clod Fresh	500-625	570.56	500-630	583.80	500-640	564.94	-1.0%	-3.2%
Striploin Fresh	775-1,650	1,333.48	750-1,650	1,342.06	750-1,650	1,295.27	-2.9%	-3.5%
Tenderloin Fresh	1,850-2,595	2,180.93	1,850-2,595	2,202.25	1,800-2,595	2,118.71	-2.9%	-3.8%
Ground 90% Bulk, Fresh	525-640	579.89	525-640	585.85	475-640	582.01	0.4%	-0.7%
Ground 85% Bulk, Frozen	550-635	560.62	510-635	560.79	510-576	552.66	-1.4%	-1.4%
Ground 85% Patties, Frozen	500-650	564.55	500-650	558.97	500-650	560.69	-0.7%	0.3%

*source USDA

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

	Mid-February 2013 Pricing	Mid-March 2013 Pricing	Mid-April 2013 Pricing	Mid-May 2013 Pricing
Tenderloin - Fresh	\$49.50 - \$57.00	\$49.50 - \$57.00	\$45.95 - \$60.00	\$45.95 - \$57.00
Strip Loin Boneless - Fresh	\$27.95 - \$30.38	\$27.95 - \$30.38	\$26.95 - \$37.00	\$26.95 - \$30.38
Inside Round - Fresh	\$13.00 - \$16.90	\$13.95 - \$16.90	\$13.45 - \$17.00	\$13.45 - \$13.90
Ground 90% Bulk Fresh	\$11.95 - \$13.00	\$11.95 - \$13.00	\$11.95 - \$12.50	\$11.45 - \$12.50
Fresh Bison Trim	\$9.95 - \$11.00	\$9.95 - \$11.00	\$9.45 - \$11.00	\$9.45 - \$11.00

*source CBA survey of marketers

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

Kramer Auctions (SK) (May 8th, 2013)			Kramer Auctions (SK) (March 20th, 2013)			Sekura Livestock Auctions (AB) (March 2, 2013)					
Birth Year, Sex	lbs	# of head	Avg (\$/cwt)	Birth Year, Sex	lbs	# of head	Avg (\$/cwt)	Sex, lbs	# of head	Avg (\$/cwt)	
2012 BULLS	600-650 lbs	39	211	2012 BULLS	550-650 lbs	16	192	2012 Bulls			
	550-599 lbs	53	209		450-549 lbs	52	209	300 - 399	28	229	
	500-549 lbs	73	196		Under 450 lbs	27	204	400 - 499	24	216	
	400-500 lbs	68	187	2011 BULLS	800-900 lbs	34	151	500 - 599	3	212	
	Under 400 lbs	8	124		650-799 lbs	22	150	2011 Bulls			
2011 BULLS	800-950 lbs	17	158	2012 HEIFERS	450-550 lbs	39	203	600 - 699	10	171	
	700-799 lbs	15	143		400-449 lbs	54	153	2012 Heifers			
2010 BULLS					300-399 lbs	22	140	300 - 399	33	170	
	2012 HEIFER CALVES	500-599 lbs	33	145	2011 HEIFERS	600-730 lbs	21	139	400 - 499	4	123
		450-499 lbs	67	141		2011 Heifers					
		400-449 lbs	56	133		500 - 599	1	113			
	Under 400 lbs	17	128					600 - 699	5	148	
2011 HEIFERS	775-900 lbs	27	143	Total Weight		# of head		Price (\$)			
	700-774 lbs	13	130	2010 BULLS	3200	3	1450	Cows	2	133	
	Under 700 lbs	10	127		Breeding Bulls	5	105				
2012 HEIFERS		2	130								
								Bred Cows			
									Low Price (\$)	High Price (\$)	
									950	1,500	

Commentary

By Terry Kremeniuk, 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

Based on available market information, finished bison prices in mid-May reached mid-April levels. Producers received \$3.70 per pound HHW for bison bulls and \$3.60 per pound HHW for heifers with appropriate adjustments for weight and quality. Although there is no inventory of middle and prime cuts, the inventory of frozen bison trim continues to be burdensome. However, fresh bison trim demand has improved. With the summer grilling season on its way, as well as the introduction of new products using bison trim, these burdensome levels of trim should be reduced.

Marketers continue to report that they have access to sufficient animals to meet current market demand as we move into the grilling season.

Nationally, federal slaughter was up 21.5% for the first 18 weeks of 2013 (week ending May 4, 2013) when compared to the same time period in 2012 (4,475 animals in 2013 compared to 3,684 animals in 2012). Live animal exports at 5,156 head for the first four months of 2013 are down by 11.9% when compared to the 5,854 bison exported from January to April 2012.

Quality 2012 bulls sold for around \$2.32/lb live weight while 2011 bulls sold for up to \$1.53/lb live weight on light offerings. 2012 heifers sold for up to \$1.70/lb live weight while 2011 heifers reached \$1.43/lb on light trading.

Chart 1

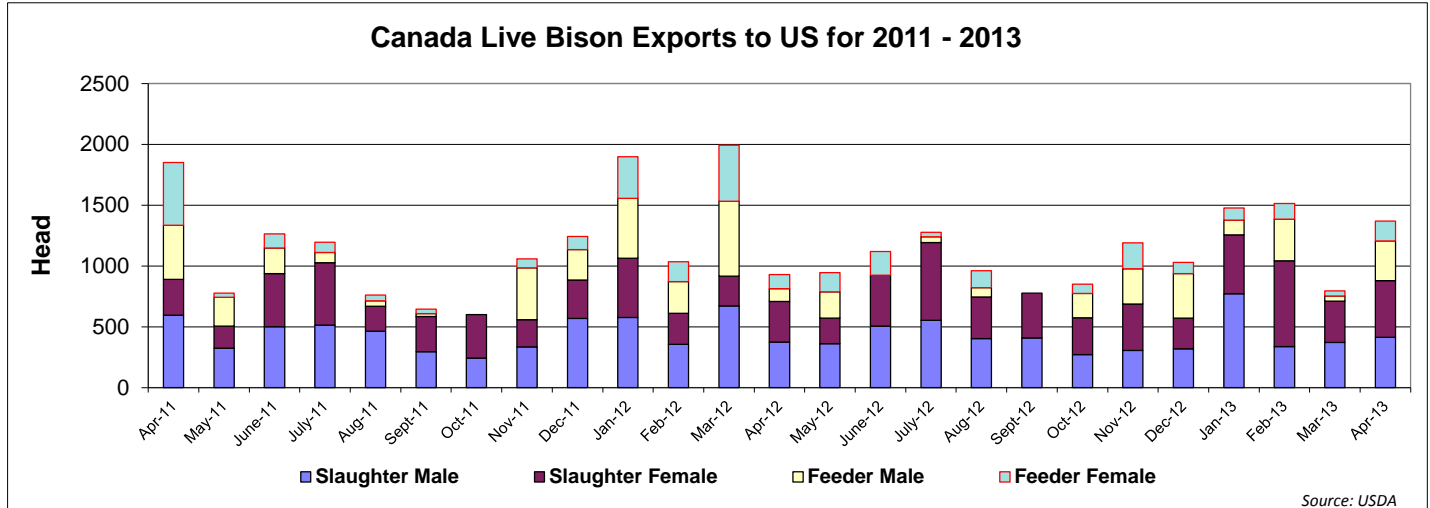
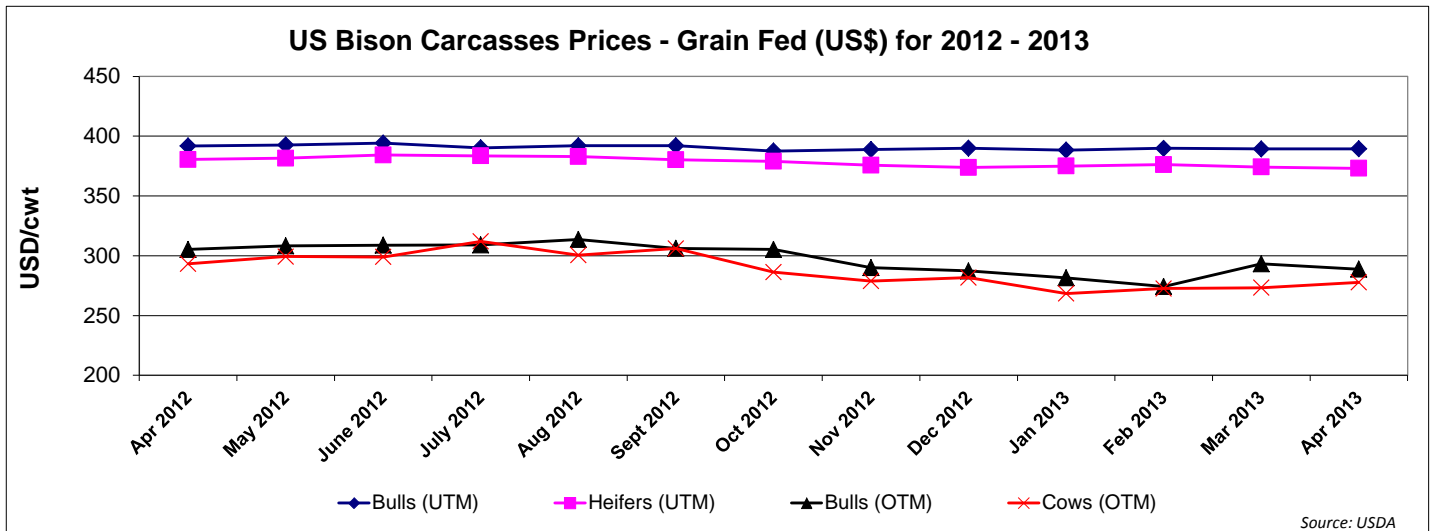


Chart 2



The Canadian Bison Industry by the Numbers.....

On another note, the 2011 Canadian Census of Agriculture was released on May 10, 2011. Nationally, the number of bison farms and ranches reporting bison was at 64% of the 2006 levels. The number of bison reported on farms and ranches in 2011 was also reported to be at about 64% of 2006 levels. According to the data, the average bison herd has remained at 103 head.

Excluding the Atlantic region, there were declines in the number of farms and ranches ranging from 15.5% to 41.3% with the greatest decline in British Columbia and the smallest decline in Ontario.

Again excluding the Atlantic Region, there were declines in the number of bison on farms and ranches in Canada ranging from 27.3% to 44.9% with the greatest decline in QC and the smallest decline in BC.

	FARMS REPORTING BISON			NUMBER OF BISON REPORTED		
	2011	2006	% Change	2011	2006	% Change
Newfoundland and Labrador	-	-	-	-	-	-
Prince Edward Island	0	1	-100.0%	-	-	-
Nova Scotia	2	1	100.0%	-	-	-
New Brunswick	2	3	-33.3%	-	-	-
Quebec	45	69	-34.8%	2,380	4,322	-44.9%
Ontario	60	71	-15.5%	2,320	4,106	-43.5%
Manitoba	108	166	-34.9%	14,116	19,609	-28.0%
Saskatchewan	352	597	-41.0%	39,343	57,395	-31.5%
Alberta	571	869	-34.3%	57,483	97,366	-41.0%
British Columbia	71	121	-41.3%	9,206	12,656	-27.3%
Canada Total	1,211	1,898	-36.2%	125,142	195,728	-36.1%

Note: In Atlantic Provinces number of farms reporting too small for public disclosure.

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