



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - December 30, 2013

Weekly Federal Bison Slaughter

	02-Nov	09-Nov	16-Nov	23-Nov	Nov Total	2013	November YTD	2012	% Change
Total Canada	413	111	246	315	1,085	10,550		10,202	3.4%
<i>previous year</i>	161	70	346	180	757				

Provincially Inspected Slaughter

	June 2013	July 2013	Aug 2013	Sept 2013	Oct 2013	Oct 2012	2013	October YTD	2012	% Change
Alberta	114	119	109	61	111	105	1,162		911	27.6%
Saskatchewan	21	6	2	22	33	26	214		128	67.2%
Manitoba/BC	91	51	69	97	90	62	739		559	32.2%
Ontario/Quebec**	34	44	43	51	27	39	283		279	1.4%
Total	260	220	223	231	261	232	2,398		1,877	27.8%

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

Total Canadian Federal and Provincial Slaughter *	YTD 2013	YTD 2012	% Change
	12,948	12,079	7.2%

*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*

	02-Nov	09-Nov	16-Nov	23-Nov	Nov Total	2013	November YTD	2012	% Change
for week ending:	1051	959	1111	1175	4,296	41,377		37,017	11.8%
<i>previous year</i>	763	882	1005	575	3,225				

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

Canada Live Bison Exports to US

	July-13	Aug-13	Sept-13	Oct-13	Nov-13	2013	November YTD	2012	% Change
Slaughter Male	550	962	685	410	451	6,011		4,787	25.6%
Slaughter Female	495	605	613	389	334	5,739		3,986	44.0%
Feeder Male	0	166	64	303	504	2,528		2,304	9.7%
Feeder Female	0	171	0	22	445	1,416		1,899	-25.4%
Total	1,045	1,904	1,362	1,124	1,734	15,694		12,976	20.9%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

Boneless		May 2013	June	July	August	September	October	October YTD		
		2013	2012	% Change						
USA	Kg	8,778	21,819	16,205	6,148	7,057	22,668	151,698	143,887	5.4%
	Value (\$Cdn)	95,272	309,826	227,297	101,405	106,181	329,904	2,011,444	1,491,025	34.9%
France	Kg	4,624	9,309	6,680	14,601	3,339	13,231	77,726	77,452	0.4%
	Value (\$Cdn)	95,302	172,283	115,035	250,615	60,305	232,889	1,440,795	1,133,503	27.1%
Switzerland	Kg	2,355	6,811	3,489	7,289	3,858	3,822	50,903	29,472	72.7%
	Value (\$Cdn)	106,590	255,753	136,157	270,759	173,081	166,106	2,036,048	1,192,165	70.8%
Germany	Kg	-	-	-	1,598	-	771	2,369	1,171	102.3%
	Value (\$Cdn)	-	-	-	41,549	-	22,082	63,631	29,606	114.9%
Egypt	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
United Arab Emirates	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Mexico	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Saudi Arabia	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Republic of Moldova	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Italy	Kg	353	-	201	-	324	-	1,878	3,402	-44.8%
	Value (\$Cdn)	7,479	-	6,222	-	8,412	-	46,355	88,016	-47.3%
French Southern Terr.	Kg	-	-	-	44	-	-	44	-	-
	Value (\$Cdn)	-	-	-	1,072	-	-	1,072	-	-
Netherlands	Kg	-	-	-	335	-	-	335	-	-
	Value (\$Cdn)	-	-	-	8,702	-	-	8,702	-	-
Belgium	Kg	17,868	7,274	-	-	-	-	62,179	-	-
	Value (\$Cdn)	253,130	97,141	-	-	-	-	822,857	-	-
Total	Kg	33,978	45,213	26,575	30,015	14,578	40,492	347,132	255,384	35.9%
	Value (\$Cdn)	557,773	835,003	484,711	674,102	347,979	750,981	6,430,904	3,934,315	63.5%

Bone-in

	May 2013	June	July	August	September	October	October YTD		
	2013	2012	% Change						
Total	7,216	-	-	48	-	936	8,459	71,068	-88.1%
Value (\$Cdn)	50,767	-	-	741	-	13,373	68,296	618,782	-89.0%

Total Exports, Boneless and Bone-in

	May 2013	June	July	August	September	October	October YTD		
	2013	2012	% Change						
Kg	41,194	45,213	26,575	30,063	14,578	41,428	355,591	326,452	8.9%
Value (\$Cdn)	608,540	835,003	484,711	674,843	347,979	764,354	6,499,200	4,553,097	42.7%

*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)
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
May 2013	388.75	375.62	282.66	267.53
June 2013	388.23	374.56	296.25	285.05
July 2013	388.81	371.23	288.57	269.54
Aug 2013	389.93	372.40	275.39	267.56
Sept 2013	388.46	374.41	282.17	268.85
Oct 2013	389.73	371.10	284.94	272.84
Nov 2013	389.03	371.72	298.97	270.73

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows	\$/cwt live weight			
					2012 Bulls	2012 Heifers	2013 Bulls	2013 Heifers
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				
June 2013	350-370	325-350	125-150	125-150				
July 2013	350-370	325-360	no prices reported	no prices reported				
Aug 2013	360-370	340-355	no prices reported	no prices reported				
Sept 2013	360-370	340-355	no prices reported	no prices reported				
Oct 2013	360-375	340-360	225	200	180	170		
Nov 2013	365-375	345-360	200-230	200-230	180-190	170	200-220	185-200
Dec 2013	365-375	345-365	200-245	200-230	175-210	140-180	200-230	160-205

**source CBA survey of marketers*

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

	September 2013		October 2013		November 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	1,355.10	1,250-1,650	1,331.65	1,227-1,650	1,284.12	-5.2%	-3.6%
Chuckroll/Clod Fresh	500-650	565.94	500-653	552.14	500-646	567.67	0.3%	2.8%
Striploin Fresh	875-1,650	1,278.48	850-1,650	1,243.66	900-1,650	1,203.32	-5.9%	-3.2%
Tenderloin Fresh	1,850-2,595	1,930.99	1,700-2,595	1,912.16	1,800-2,595	1,808.71	-6.3%	-5.4%
Ground 90% Bulk, Fresh	500-637	594.35	525-635	591.99	524-633	564.00	-5.1%	-4.7%
Ground 85% Bulk, Frozen	520-640	561.77	500-620	560.67	500-630	572.13	1.8%	2.0%
Ground 85% Patties, Frozen	530-620	563.08	500-650	567.33	530-620	572.15	1.6%	0.8%

**source USDA*

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

	Mid-September 2013 Pricing	Mid-October 2013 Pricing	Mid-November 2013 Pricing	Mid-December 2013 Pricing
Tenderloin - Fresh	\$53.00 - \$56.85	\$53.00 - \$55.00	\$53.00 - \$55.85	\$51.95 - \$55.85
Strip Loin Boneless - Fresh	\$28.00 - \$30.00	\$28.00 - \$28.75	\$28.00 - \$32.00	\$28.00 - \$30.00
Inside Round - Fresh	\$14.00 - \$18.00	\$14.00 - \$14.50	\$13.95 - \$15.00	\$13.95 - \$14.05
Ground 90% Bulk Fresh	\$12.00 - \$12.00	\$12.00 - \$12.00	\$10.95 - \$12.50	\$10.95 - \$12.50
Fresh Bison Trim	\$10.00 - \$11.00	\$10.60 - \$10.75	\$9.45 - \$11.00	\$9.25 - \$11.00

**source CBA survey of marketers*

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

Vold, Jones & Vold Auctions Co. Ltd. (AB) (December 16th, 2013) 200 Head		Kramer Auctions Ltd. (SK) (Dec 13th, 2013) Highlights - 2013 MGM GRAND Genetics Sale		Kramer Auction Sales Ltd. (SK) (December 4th, 2013)			
				Birth Year, Sex	lbs	# of head	Avg (\$/cwt)
Yearling Bulls	800-950 lbs \$175 - \$180	2011 BRED HEIFERS	Avg Weight	2013 BULLS	400-475 lbs	40	231
	700-800 lbs \$184	Elk Valley Ranches (Frank McAllister & Sons)	Avg Price		300-399 lbs	46	213
	600-700 lbs \$182 - \$184	Wood X 1121 lbs \$2,425		2012 BULLS	900-1025 lbs	39	199
	500-600 lbs \$177	Plains 1089 lbs \$2,192			800-899 lbs	36	209
Yearling Heifers	700-800 lbs \$140 - \$145				700-799 lbs	52	198
	600-700 lbs \$145 - \$152	Silver Creek Bison (Nolan Miller)			Under 700 lbs	12	192
	500-600 lbs \$137 - \$142	Wood 1173 lbs \$3,367		2011 BULLS	12585 (total wt)	13	195
Bull Calves	400-500 lbs \$215	Wood X 1196 lbs \$3,371		MATURE BULLS	6615 (total wt)	6	134
	300-400 lbs \$200			2013 HEIFERS	400-499 lbs	35	204
Heifer Calves	300-400 lbs \$160 - \$162	Bison Spirit Ranch (Trevor & Jody Gompf)			300-399 lbs	51	163
		Wood 1138 lbs \$3,200		2012 HEIFERS	750-875 lbs	5	177
2 Year Old Bulls	\$110	Wood X 1160 lbs \$3,662			600-749 lbs	39	181
Bred Cows	\$650 - \$1050	2011 BREEDING BULLS			500-599 lbs	25	171
Pairs	\$825	Silver Creek Bison (Nolan Miller)		2011 BRED	29155 (total wt)	34	232
Pound Cows	\$56 - \$98	Wood 1582 lbs \$3,125		HEIFERS	10300 (total wt)	10	264
		Wood X 1682 lbs \$4,133			6475 (total wt)	8	178
		2012 BREEDING BULLS					Average
		Bison Spirit Ranch (Trevor & Jody Gompf)		EXPOSED FEMA	763-1025 lbs	23	\$803.26
		Wood X 1196 lbs \$3,083		OPEN FEMALES	850 lbs	4	\$693.75

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

Finished bison prices in mid-December continued to be steady. Producers in Canada continued to receive up to \$3.75 per pound HHW for bison bulls and up to \$3.60 per pound HHW for heifers with appropriate adjustments for weight and quality. Marketers report that there is an adequate supply of finished animals for the next few months as the 2012 bulls begin coming to the market.

Wholesale prices for middle and prime cuts remained strong with continued good movement into the market. European market demand is strong as people prepare for the Christmas season with all high-end cuts in good demand. Hip cuts and trim continue to move but at a pace slower than reflected by middle cuts. US demand is stable. Activity over the next couple of weeks is expected to be slow as everyone begins to break for the Christmas season.

Domestic markets for bison meat are remaining strong with continued softness in demand for hip cuts. Bison trim inventories continue to be burdensome for some marketers. The food service market is stable with increased demand in the retail sector.

Nationally, federal slaughter was slightly above year-ago levels for the first 47 weeks of 2013 (week ending November 23, 2013) when compared to 2012 (10,550 animals in 2013 compared to 10,202 animals in 2012). Live animal exports to the end of November 2013 at 15,694 are up 20.9% when compared to the 12,976 bison exported for the same period in 2012.

Chart 1

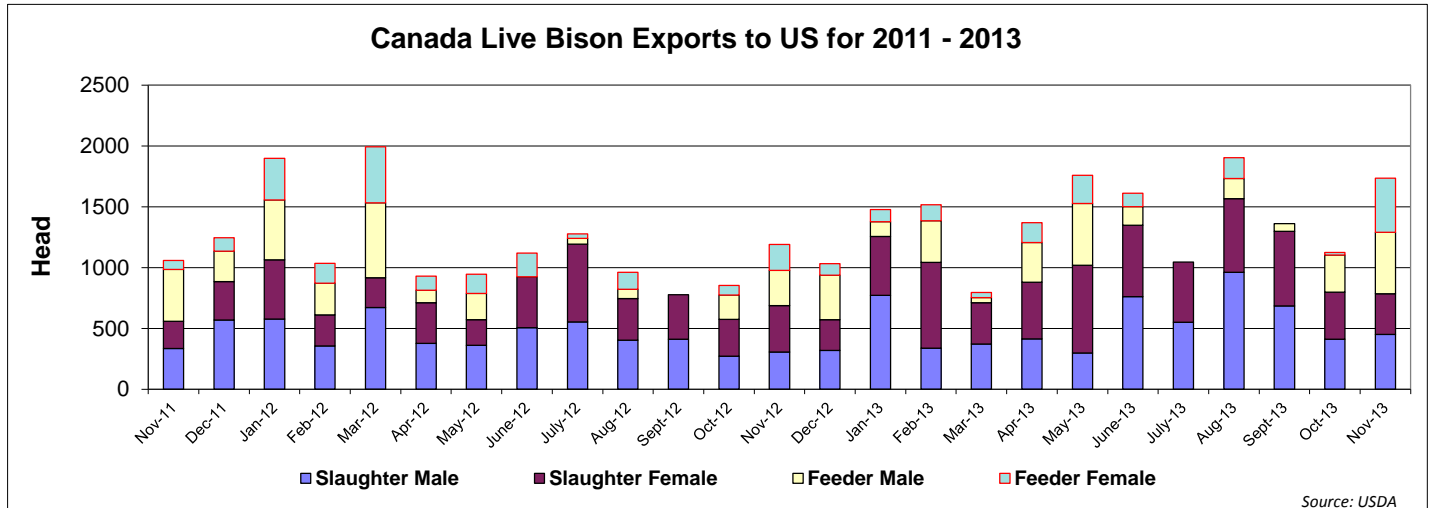
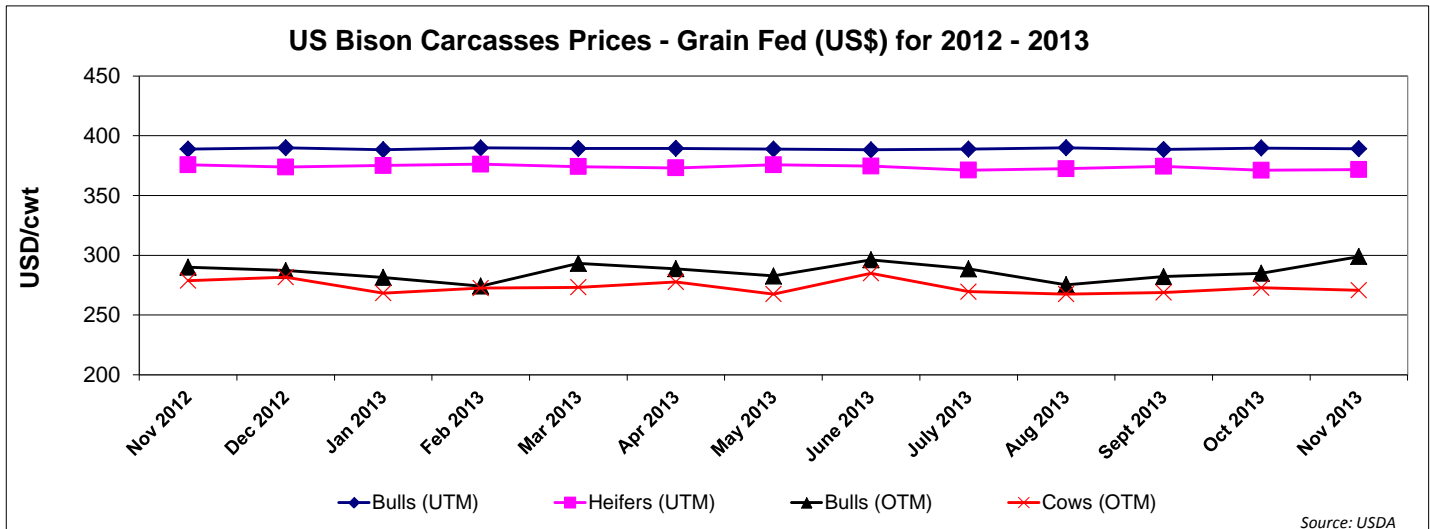


Chart 2



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.

Prepared by: Red Meat Section, Agriculture and Agri-Food Canada

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