



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - September 20, 2012

### Weekly Federal Bison Slaughter

|                      | 04-Aug     | 11-Aug     | 18-Aug     | 25-Aug     | Aug Total  | 2012         | 2011         | % Change     |
|----------------------|------------|------------|------------|------------|------------|--------------|--------------|--------------|
| <b>Total Canada</b>  | <b>152</b> | <b>240</b> | <b>303</b> | <b>270</b> | <b>965</b> | <b>7,924</b> | <b>6,661</b> | <b>19.0%</b> |
| <i>previous year</i> | 170        | 382        | 83         | 153        | 788        |              |              |              |

### Provincially Inspected Slaughter

|                         | Mar 2012   | Apr 2012   | May 2012   | June 2012  | July 2012  | July 2011  | 2012         | 2011         | % Change      |
|-------------------------|------------|------------|------------|------------|------------|------------|--------------|--------------|---------------|
| <b>Alberta</b>          | 102        | 101        | 133        | 87         | 119        | 69         | 662          | 607          | 9.1%          |
| <b>Saskatchewan</b>     | 19         | 4          | 17         | 5          | 0          | 17         | 84           | 94           | -10.6%        |
| <b>Manitoba/BC</b>      | 68         | 51         | 37         | 83         | 36         | 71         | 384          | 514          | -25.3%        |
| <b>Ontario/Quebec**</b> | 29         | 26         | 23         | 14         | 31         | 50         | 171          | 244          | -29.9%        |
| <b>Total</b>            | <b>218</b> | <b>182</b> | <b>210</b> | <b>189</b> | <b>186</b> | <b>207</b> | <b>1,301</b> | <b>1,459</b> | <b>-10.8%</b> |

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

| Total Canadian Federal and Provincial Slaughter * | YTD 2012 | YTD 2011 | % Change |
|---|----------|----------|----------|
|   | 9,225    | 8,120    | 13.6%    |

\*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\*

| for week ending:     | 04-Aug     | 11-Aug     | 18-Aug     | 25-Aug     | Aug Total    | 2012          | 2011          | % Change     |
|----------------------|------------|------------|------------|------------|--------------|---------------|---------------|--------------|
|                      | <b>648</b> | <b>765</b> | <b>714</b> | <b>789</b> | <b>2,916</b> | <b>27,136</b> | <b>29,246</b> | <b>-7.2%</b> |
| <i>previous year</i> | 618        | 783        | 822        | 890        | 3,113        |               |               |              |

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

### Canada Live Bison Exports to US

|                         | Apr-12     | May-12     | June-12      | July-12      | Aug-12     | 2012          | 2011          | % Change     |
|-------------------------|------------|------------|--------------|--------------|------------|---------------|---------------|--------------|
| <b>Slaughter Male</b>   | 376        | 361        | 505          | 553          | 403        | 3,800         | 4,391         | -13.5%       |
| <b>Slaughter Female</b> | 334        | 211        | 420          | 639          | 342        | 2,934         | 2,815         | 4.2%         |
| <b>Feeder Male</b>      | 103        | 215        | 0            | 49           | 77         | 1,815         | 1,944         | -6.6%        |
| <b>Feeder Female</b>    | 117        | 158        | 194          | 37           | 140        | 1,609         | 1,765         | -8.8%        |
| <b>Total</b>            | <b>930</b> | <b>945</b> | <b>1,119</b> | <b>1,278</b> | <b>962</b> | <b>10,158</b> | <b>10,915</b> | <b>-6.9%</b> |

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

| Boneless                    |                      | February 2012  | March          | April          | May            | June           | July           | July YTD         |                  | % Change      |
|-----------------------------|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|------------------|---------------|
|                             |                      |                |                |                |                |                |                | 2012             | 2011             |               |
| <b>USA</b>                  | Kg                   | 11,876         | 12,297         | 21,255         | 4,299          | 19,818         | 7,902          | 98,194           | 195,162          | -49.7%        |
|                             | Value (\$Cdn)        | 136,258        | 95,384         | 265,392        | 89,288         | 215,281        | 109,332        | 1,063,469        | 2,518,675        | -57.8%        |
| <b>France</b>               | Kg                   | 2,496          | 6,519          | 21,401         | 1,970          | 11,042         | 7,919          | 51,347           | 22,659           | 126.6%        |
|                             | Value (\$Cdn)        | 41,724         | 104,669        | 238,623        | 15,207         | 184,769        | 148,164        | 733,156          | 308,348          | 137.8%        |
| <b>Switzerland</b>          | Kg                   | 1,501          | 2,117          | 3,412          | 2,834          | 4,004          | 5,496          | 20,868           | 25,087           | -16.8%        |
|                             | Value (\$Cdn)        | 65,594         | 92,905         | 133,480        | 113,930        | 164,753        | 192,684        | 830,979          | 961,526          | -13.6%        |
| <b>Germany</b>              | Kg                   | 132            | -              | 339            | 157            | 160            | -              | 884              | 3,093            | -71.4%        |
|                             | Value (\$Cdn)        | 3,160          | -              | 8,427          | 4,490          | 3,879          | -              | 23,053           | 88,897           | -74.1%        |
| <b>Egypt</b>                | Kg                   | -              | -              | -              | -              | -              | -              | -                | -                | -             |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | -                | -             |
| <b>United Arab Emirates</b> | Kg                   | -              | -              | -              | -              | -              | -              | -                | 188              | N/A           |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | 3,515            | N/A           |
| <b>Macau</b>                | Kg                   | -              | -              | -              | -              | -              | -              | -                | -                | -             |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | -                | -             |
| <b>Singapore</b>            | Kg                   | -              | -              | -              | -              | -              | -              | -                | -                | -             |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | -                | -             |
| <b>Saudi Arabia</b>         | Kg                   | -              | -              | -              | -              | -              | -              | -                | -                | -             |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | -                | -             |
| <b>Italy</b>                | Kg                   | 170            | 286            | -              | 318            | 368            | 245            | 1,989            | 290              | 585.9%        |
|                             | Value (\$Cdn)        | 4,852          | 8,159          | -              | 9,076          | 9,540          | 6,363          | 51,349           | 7,983            | 543.2%        |
| <b>Sweden</b>               | Kg                   | -              | -              | -              | -              | -              | -              | -                | -                | -             |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | -                | -             |
| <b>Netherlands</b>          | Kg                   | -              | -              | -              | -              | -              | -              | -                | 26,326           | N/A           |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | 133,492          | N/A           |
| <b>Others</b>               | Kg                   | -              | -              | -              | -              | -              | -              | -                | -                | -             |
|                             | Value (\$Cdn)        | -              | -              | -              | -              | -              | -              | -                | -                | -             |
| <b>Total</b>                | <b>Kg</b>            | <b>16,175</b>  | <b>21,219</b>  | <b>46,407</b>  | <b>9,578</b>   | <b>35,392</b>  | <b>21,562</b>  | <b>173,282</b>   | <b>272,805</b>   | <b>-36.5%</b> |
|                             | <b>Value (\$Cdn)</b> | <b>251,588</b> | <b>301,117</b> | <b>645,922</b> | <b>231,991</b> | <b>578,222</b> | <b>456,543</b> | <b>2,702,006</b> | <b>4,022,436</b> | <b>-32.8%</b> |

### Bone-in

|                      | February 2012 | March  | April   | May    | June    | July   | 2012    | 2011    | % Change |
|----------------------|---------------|--------|---------|--------|---------|--------|---------|---------|----------|
| <b>Total</b>         |               |        |         |        |         |        |         |         |          |
| <b>Kg</b>            | -             | 5,374  | 13,341  | 3,995  | 22,069  | 1,906  | 46,685  | 59,865  | -22.0%   |
| <b>Value (\$Cdn)</b> | -             | 52,449 | 127,498 | 41,945 | 176,024 | 20,012 | 417,928 | 335,516 | 24.6%    |

### Total Exports, Boneless and Bone-in

|                      | February 2012 | March   | April   | May     | June    | July    | 2012      | 2011      | % Change |
|----------------------|---------------|---------|---------|---------|---------|---------|-----------|-----------|----------|
| <b>Kg</b>            | 16,175        | 26,593  | 59,748  | 13,573  | 57,461  | 23,468  | 219,967   | 332,670   | -33.9%   |
| <b>Value (\$Cdn)</b> | 251,588       | 353,566 | 773,420 | 273,936 | 754,246 | 476,555 | 3,119,934 | 4,357,952 | -28.4%   |

\*source Statistics Canada



**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](mailto:cba2@sasktel.net) or [diane.kelly@agr.gc.ca](mailto:diane.kelly@agr.gc.ca)

Although bison prices for most cuts remained stable through to the middle of September, there was downward pressure on fresh bison trim and ground bison. Although trim is moving, there are reports of burdensome levels of trim, with the expectation that ground bison and trim will be discounted by marketers rather than having to pay the costs of carrying the inventory. There are also reports of US marketers trying to market trim into the Canadian marketplace. Some of this may be driven by higher than expected mature animal slaughter due to the US drought.

Finished bison prices at \$3.60-\$3.90 per pound hot hanging weight are comparable to last month's prices. Marketers continue to report that they have access to sufficient animals to meet current market demand. As more animals come to market, there is expected to be downward price pressure on live animals if the burdensome level of trim is not reduced. There are reports that the demand for bison in Europe continues to be steady with downward pressures being placed on prices. Soon the European market will be preparing for the Christmas rush.

Soon feeder bison will be coming to the market. With the higher cost of feed, feeder bison prices are expected to be significantly below 2011 levels. Nationally, federal slaughter was up 16.4% for the first 36 weeks of 2012 (week ending September 8, 2012) when compared to the first 36 weeks of 2011 (8,392 animals in 2012 compared to 7,211 animals in 2011). Live bison exports to the U.S. were down for the first six months of 2012 by 14.7% - 8,479 compared to 9,943 bison for the same period in 2011.

Chart 1

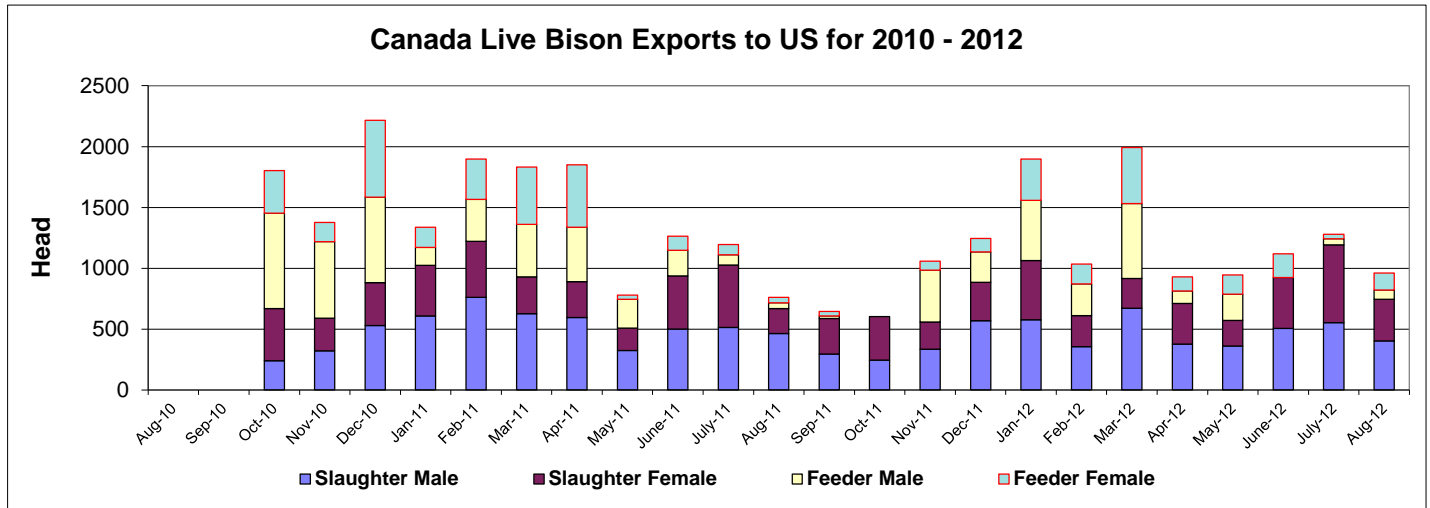
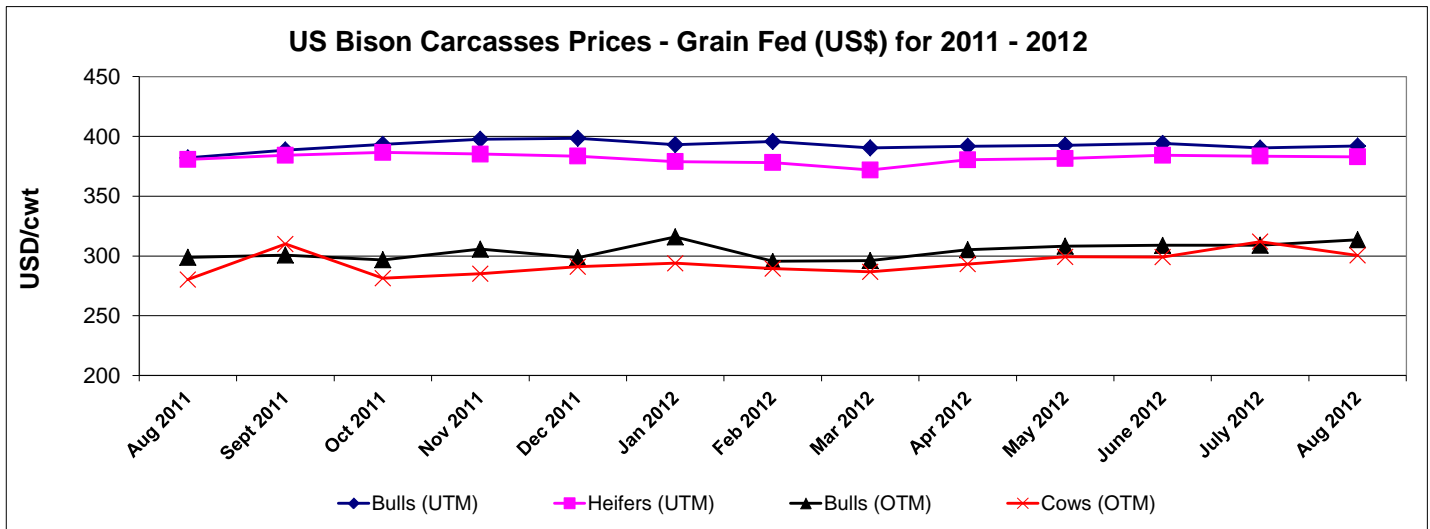


Chart 2



**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%        |
| <b>Canada Total</b>       | <b>1,211</b>          | <b>1,898</b> | <b>-36.2%</b> | <b>125,142</b>           | <b>195,728</b> | <b>-36.1%</b> |

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

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