



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - February 17, 2009

### Weekly Federal Bison Slaughter

	10-Jan	17-Jan	24-Jan	31-Jan	Jan Total	2009 YTD	09 vs 08 % Change
<b>Total Canada</b>	<b>650</b>	<b>448</b>	<b>536</b>	<b>477</b>	<b>2,111</b>	<b>2,111</b>	<b>12%</b>
<i>previous year</i>	259	479	494	650	1,882	1,882	

### Provincially Inspected Slaughter

	Aug	Sept	Oct	Nov	Dec-08	Dec-07	2008 YTD	2007 YTD	% Change
<b>Alberta</b>	205	197	198	197	142	155	2,794	4,385	-36%
<b>Manitoba/BC</b>	67	64	68	80	55	42	879	524	68%
<b>Ontario/Quebec</b>	37	52	33	56	35	39	656	792	-17%
<b>Total</b>	<b>309</b>	<b>313</b>	<b>299</b>	<b>333</b>	<b>232</b>	<b>236</b>	<b>4,329</b>	<b>5,701</b>	<b>-24%</b>

\*source AAFC Red Meat Section

\*Due to varying provincial reporting schedules, total Fed. and Prov. has a one month delay in Prov. Data

	2008	2007	% Change
<b>Total Canadian Federal and Provincial Slaughter</b>	<b>6,440</b>	<b>7,583</b>	<b>-15%</b>

### US Federal Slaughter\*

for week ending:	03-Jan	10-Jan	17-Jan	24-Jan	Jan Total	2009 YTD	2008 YTD	% Change
	<b>794</b>	<b>1,132</b>	<b>1,128</b>	<b>1,099</b>	<b>4,153</b>	<b>4,153</b>	<b>3,965</b>	<b>5%</b>
<i>previous year</i>	720	992	1,215	1,038	3,965			

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

### Canada Live Bison Exports to US

	Oct-08	Nov-08	Dec-08	Jan-09	2009 YTD	2008 YTD	% Change
Slaughter Male	572	500	722	431	431	690	-38%
Slaughter Female	679	735	541	749	749	1,243	-40%
Feeder Male	986	791	376	310	310	723	-57%
Feeder Female	629	747	269	428	428	258	66%
<b>Total</b>	<b>2,866</b>	<b>2,773</b>	<b>1,908</b>	<b>1,918</b>	<b>1,918</b>	<b>2,914</b>	<b>-34%</b>

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

<b>Boneless</b>		August	September	October	November	December	YTD 2008	YTD 2007	% Change
<b>USA</b>	Kg	47,502	18,194	33,760	49,699	22,844	323,021	178,106	81%
	Value (\$Cdn)	253,776	136,815	235,298	390,958	154,426	2,246,015	1,222,478	84%
<b>France</b>	Kg	64,158	45,560	41,867	44,377	43,840	535,765	493,204	9%
	Value (\$Cdn)	586,963	539,152	514,911	591,124	509,241	5,768,491	4,330,914	33%
<b>Germany</b>	Kg	4,858	6,027	4,679	4,616	2,105	55,799	197,437	-72%
	Value (\$Cdn)	51,960	69,473	76,157	60,222	23,885	770,496	2,506,384	-69%
<b>Switzerland</b>	Kg	21,931	3,141	8,254	5,502	2,888	100,295	34,313	192%
	Value (\$Cdn)	271,740	97,703	82,793	198,893	97,146	1,599,613	630,050	154%
<b>Mexico</b>	Kg	1,309	28,681	70,790	-	-	100,780	258,380	-61%
	Value (\$Cdn)	5,180	152,488	371,730	-	-	529,398	963,834	-45%
<b>Japan</b>	Kg	10,305	-	-	-	-	10,305	-	-
	Value (\$Cdn)	74,727	-	-	-	-	74,727	-	-
<b>Neth. Antilles</b>	Kg	36	-	-	-	-	122	1,143	-89%
	Value (\$Cdn)	290	-	-	-	-	1,183	18,414	-94%
<b>Italy</b>	Kg	-	-	-	-	-	431	7,644	-94%
	Value (\$Cdn)	-	-	-	-	-	6,899	135,989	-95%
<b>Other</b>	Kg	-	-	1,414	488	-	1,949	16,126	-88%
	Value (\$Cdn)	-	-	15,876	13,910	-	30,542	181,523	-83%
<b>Total</b>	<b>Kg</b>	<b>150,099</b>	<b>101,603</b>	<b>160,764</b>	<b>104,682</b>	<b>71,677</b>	<b>1,128,467</b>	<b>1,186,353</b>	<b>-5%</b>
	<b>Value (\$Cdn)</b>	<b>1,244,636</b>	<b>995,631</b>	<b>1,296,765</b>	<b>1,255,107</b>	<b>784,698</b>	<b>11,027,364</b>	<b>9,989,586</b>	<b>10%</b>

### Bone-in

	August	September	October	November	December	YTD 2008	YTD 2007	% Change
<b>Total</b>	<b>1,353</b>	<b>8,130</b>	<b>12,044</b>	<b>1,275</b>	<b>749</b>	<b>67,554</b>	<b>117,679</b>	<b>-43%</b>
	<b>13,474</b>	<b>42,120</b>	<b>46,843</b>	<b>12,285</b>	<b>7,839</b>	<b>272,296</b>	<b>530,452</b>	<b>-49%</b>

### Total Exports, Boneless and Bone-in

	August	September	October	November	December	YTD 2008	YTD 2007	% Change
<b>Kg</b>	<b>151,452</b>	<b>109,733</b>	<b>172,808</b>	<b>105,957</b>	<b>72,426</b>	<b>1,196,021</b>	<b>1,304,032</b>	<b>-8%</b>
<b>Value (\$Cdn)</b>	<b>1,258,110</b>	<b>1,037,751</b>	<b>1,343,608</b>	<b>1,267,392</b>	<b>792,537</b>	<b>11,299,660</b>	<b>10,520,038</b>	<b>7%</b>

\*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)
Feb 2008	213.5	199.32	133.39	135
Mar 2008	220.94	207.49	144.83	132.11
Apr 2008	223.96	210.83	140.96	134.97
May 2008	225.63	211.13		141.49
June 2008	227.02	218.03	148.3	131.21
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

\*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Feb 2008	190-205	180-200	65	70
Mar 2008	195-220	185-210	70	70
Apr 2008	215-225	205-215	90	85
May 2008	205-225	200-210	80-100	80-100
June 2008	205-225	195-220	90-100	90-100
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

\*source CBA survey of marketers

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

	November		December		January		Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	740-1,150	981.74	740-1,150	980.64	820-1225	990.73	1%	1%
Chuckroll/Clod Fresh	285-425	329.41	285-425	334.16	290-425	335.27	2%	0%
Striploin Fresh	750-1,050	943.04	750-1,050	945.32	720-1050	943.85	0%	0%
Tenderloin Fresh	1,550-2,255	1,672.02	1,550-2250	1,651.47	1500-2050	1626.43	-3%	-2%
Ground 90% Bulk, Fresh	300-335	330	300-335	326	300-335	326.98	-1%	0%
Ground 85% Bulk, Frozen	295-400	365.36	295-470	345.67	300-470	356.46	-2%	3%
Ground 85% Patties, Frozen	285-470	325.19	285-340	314.55	285-354	343.52	6%	9%

\*source USDA

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

	Mid-November Pricing	Mid-December Pricing	Mid-January Pricing	Mid-February Pricing
Tenderloin - Fresh	\$41.95 - 49.50	\$41.95 - 45.00	\$40.00 - 52.00	\$39.95 - \$49.00
Strip Loin Boneless - Fresh	\$21.95 - 28.50	\$22.00 - 27.95	\$19.00 - 30.00	\$19.00 - \$30.00
Inside Round - Fresh	\$8.75 - 11.75	\$8.79 - 11.80	\$9.00 - 12.50	\$7.95 - \$10.00
Ground 90% Bulk Fresh	\$7.00 - 7.90	\$7.00 - 7.92	\$6.95 - 7.85	\$6.95 - \$7.85
Fresh Bison Trim	\$6.35 - 6.40	\$6.35 - 7.30	\$5.75 - 6.70	\$5.80 - \$6.35

\*source CBA survey of marketers

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

Kramer Auction (SK) (Feb 11, 2009)				Kramer Auction (SK) (Jan 28, 2009)				Sekura Auction (AB) (Jan 10, 2009)		
Birth Year, Sex	lbs	# of Head	Average (\$/lb)	Birth Year, Sex	lbs	# of Head	Average (\$/lb)	Birth Year, Sex	lbs	Average (cwt)
2007 Heifers	600-700	8	1.14	2006 Bulls	>900	6	0.84	2008 Males	300-400	125.27
	>700	2	1.16	2007 Bulls	600-700	11	1.11		400-500	121.08
	<600	4	1.13		700-800	25	1.23			
2008 Bulls	350-400	17	1.38		800-900	13	1.27	2007 Males	600-700	115.5
	400-450	25	1.38		>900	5	1.25			
	450-500	57	1.37	2007 Heifers	600-650	15	1.14	2006 Males	800-900	94.08
	>500	23	1.40		650-700	19	1.14		900-1000	90
	<350	13	0.86		>700	29	1.14			
2008 Heifers	300-350	21	0.92		<600	7	0.7	2008 Females	0-300	89.29
	350-400	12	1.29	2008 Bulls	350-400	32	1.26		300-400	106.72
	400-450	36	1.25		400-450	14	1.34		400-500	122
	>450	19	1.25		450-500	52	1.38			
					>500	11	1.41	2007 Females	500-600	85.99
					<300	7	1.28			
				2008 Heifers	300-400	23	1.11	Mature Bulls		60
					400-450	36	1.29			
					>450	9	1.3	Feeder Cows		56.37

**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 strong, there are reported signs of price weakening for prime slaughter bulls and heifers. The prices offered for mature bulls and cows is strong as the demand for bison trim remains strong. There are continued reports of retail price resistance in some markets, particularly the higher priced cuts. Many marketers believe that the present softness for some cuts will give way to a stronger market as the grilling season begins. The value of the Canadian dollar continues to support present levels.

Nationally federal slaughter for 2008 was up 8% (20,990 in 2008 compared to 19,424 for the same period in 2007). Exports of live animals to the end of December were up 40% (29,670 in 2008 compared to 21,127 in 2007).

Total bison meat exports to the end of December 2008 have remained essentially the same (1,128,467Kg. in 2008 compared to 1,186,353 Kg. in 2007). There has been growth in bison meat exports to the U.S. and France. This data does not reflect the Canadian bison slaughtered in the U.S. where the meat is exported to Europe. Such data is not readily available.

Chart 1

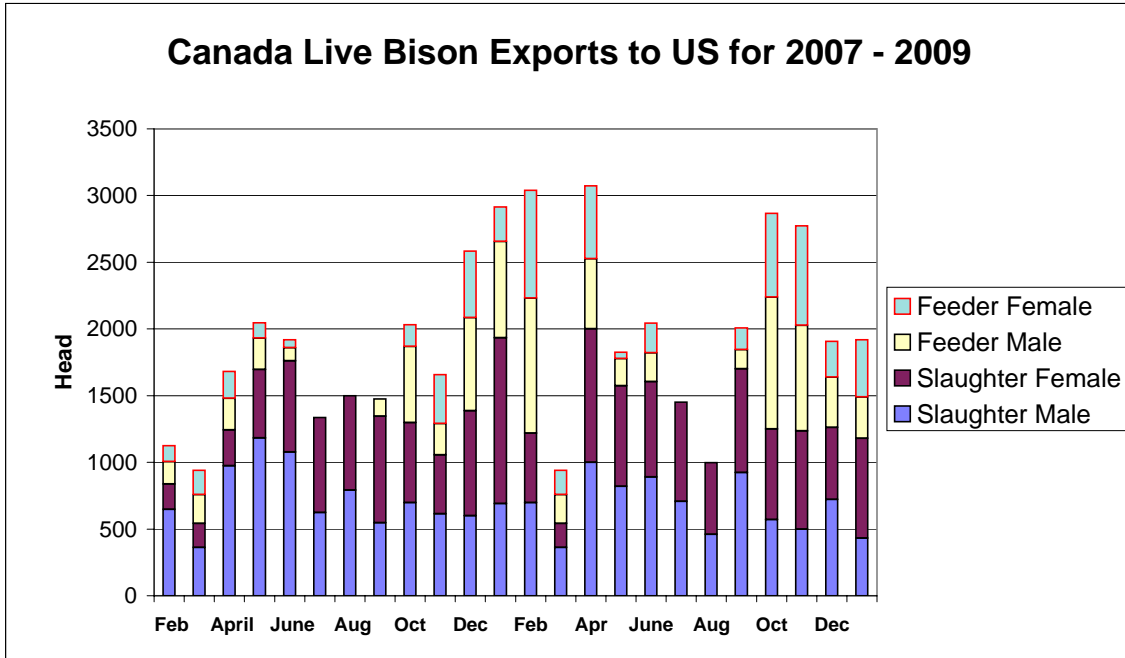


Chart 2

