



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - November 26, 2013

Weekly Federal Bison Slaughter

	05-Oct	12-Oct	19-Oct	26-Oct	Oct Total	2013	2012	% Change
Total Canada	331	120	293	125	869	9,465	9,445	0.2%
previous year	148	96	259	177	680			

Provincially Inspected Slaughter

	May 2013	June 2013	July 2013	Aug 2013	Sept 2013	Sept 2012	2013	2012	% Change
Alberta	151	114	119	109	61	78	1,051	806	30.4%
Saskatchewan	12	21	6	2	22	21	181	102	77.5%
Manitoba/BC	65	91	51	69	97	57	649	497	30.6%
Ontario/Quebec**	31	34	44	43	26	24	231	240	-3.8%
Total	259	260	220	223	206	180	2,112	1,645	28.4%

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

Total Canadian Federal and Provincial Slaughter *	YTD 2013	YTD 2012	% Change
	11,577	11,090	4.4%

*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:	05-Oct	12-Oct	19-Oct	26-Oct	Oct Total	2013	2012	% Change
	890	872	955	908	3,625	37,081	33,792	9.7%
previous year	746	672	829	661	2,908			

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

Canada Live Bison Exports to US

	June-13	July-13	Aug-13	Sept-13	Oct-13	2013	2012	% Change
Slaughter Male	761	550	962	685	410	5,560	4,481	24.1%
Slaughter Female	586	495	605	613	389	5,405	3,605	49.9%
Feeder Male	153	0	166	64	303	2,024	2,015	0.4%
Feeder Female	112	0	171	0	22	971	1,686	-42.4%
Total	1,612	1,045	1,904	1,362	1,124	13,960	11,787	18.4%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

Boneless		April 2013	May	June	July	August	September	September YTD		
								2013	2012	% Change
USA	Kg	22,775	8,778	21,819	16,205	5,417	7,788	129,030	128,922	0.1%
	Value (\$Cdn)	256,215	95,272	309,826	227,297	89,964	117,622	1,681,540	1,344,669	25.1%
France	Kg	6,880	4,624	9,309	6,680	14,601	3,339	64,495	76,167	-15.3%
	Value (\$Cdn)	146,790	95,302	172,283	115,035	250,615	60,305	1,207,906	1,113,153	8.5%
Switzerland	Kg	3,866	2,355	6,811	3,489	7,289	3,858	47,081	26,039	80.8%
	Value (\$Cdn)	173,190	106,590	255,753	136,157	270,759	173,081	1,869,942	1,043,307	79.2%
Germany	Kg	-	-	-	-	1,598	-	1,598	1,171	36.5%
	Value (\$Cdn)	-	-	-	-	41,549	-	41,549	29,606	40.3%
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	395	353	-	201	-	324	1,878	2,987	-37.1%
	Value (\$Cdn)	8,533	7,479	-	6,222	-	8,412	46,355	77,246	-40.0%
French Southern Terr.	Kg	-	-	-	-	44	-	44	-	-
	Value (\$Cdn)	-	-	-	-	1,072	-	1,072	-	-
Netherlands	Kg	-	-	-	-	335	-	335	-	-
	Value (\$Cdn)	-	-	-	-	8,702	-	8,702	-	-
Belgium	Kg	19,684	17,868	7,274	-	-	-	62,179	-	-
	Value (\$Cdn)	247,667	253,130	97,141	-	-	-	822,857	-	-
Total	Kg	53,600	33,978	45,213	26,575	29,284	15,309	306,640	235,286	30.3%
	Value (\$Cdn)	832,395	557,773	835,003	484,711	662,661	359,420	5,679,923	3,607,981	57.4%

Bone-in

	April 2013	May	June	July	August	September	2013	2012	% Change
Total	-	7,216	-	-	48	-	7,523	70,331	-89.3%
Value (\$Cdn)	-	50,767	-	-	741	-	54,923	611,048	-91.0%

Total Exports, Boneless and Bone-in

	April 2013	May	June	July	August	September	2013	2012	% Change
Kg	53,600	41,194	45,213	26,575	29,332	15,309	314,163	305,617	2.8%
Value (\$Cdn)	832,395	608,540	835,003	484,711	663,402	359,420	5,734,846	4,219,029	35.9%

*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)
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
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

**source USDA*

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

wghtd avg

					\$/cwt live weight			
	Bulls	Heifers	Mature Bulls	Mature Cows	2012 Bulls	2012 Heifers	2013 Bulls	203 Heifers
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				
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

**source CBA survey of marketers*

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

	August 2013		September 2013		October 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	1,383.68	1,300-1,650	1,355.10	1,250-1,650	1,331.65	-3.8%	-1.7%
Chuckroll/Clod Fresh	500-1341	558.28	500-650	565.94	500-653	552.14	-1.1%	-2.4%
Striploin Fresh	825-1,650	1,400.19	875-1,650	1,278.48	850-1,650	1,243.66	-11.2%	-2.7%
Tenderloin Fresh	1,850-2,300	2,022.13	1,850-2,595	1,930.99	1,700-2,595	1,912.16	-5.4%	-1.0%
Ground 90% Bulk, Fresh	525-653	648.33	500-637	594.35	525-635	591.99	-8.7%	-0.4%
Ground 85% Bulk, Frozen	528-615	554.13	520-640	561.77	500-620	560.67	1.2%	-0.2%
Ground 85% Patties, Frozen	535-628	569.43	530-620	563.08	500-650	567.33	-0.4%	0.8%

**source USDA*

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

	Mid-August 2013 Pricing	Mid-September 2013 Pricing	Mid-October 2013 Pricing	Mid-November 2013 Pricing
Tenderloin - Fresh	\$53.00 - \$55.00	\$53.00 - \$56.85	\$53.00 - \$55.00	\$53.00 - \$55.85
Strip Loin Boneless - Fresh	\$28.00 - \$31.00	\$28.00 - \$30.00	\$28.00 - \$28.75	\$28.00 - \$32.00
Inside Round - Fresh	\$13.90 - \$15.50	\$14.00 - \$18.00	\$14.00 - \$14.50	\$13.95 - \$15.00
Ground 90% Bulk Fresh	\$10.95 - \$12.50	\$12.00 - \$12.00	\$12.00 - \$12.00	\$10.95 - \$12.50
Fresh Bison Trim	\$10.50 - \$11.00	\$10.00 - \$11.00	\$10.60 - \$10.75	\$9.45 - \$11.00

**source CBA survey of marketers*

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

2013 Canadian National Show & Sale Results (SK) (Nov 12th, 2013)						Vold, Jones & Vold Auction Co. Ltd. (AB) (October 21st, 2013)
Sex, Weight	Price	\$/cwt	Sex	Price	\$/cwt	
2 Year Old Bull			Bull Calf			205 Head
1388	\$3,000	\$216	502	\$1,450	\$289	
1656	\$5,000	\$302	428	\$1,000	\$234	Bulls 1050 - 1350 lbs \$115.00 - \$150.00
1690	\$5,600	\$331	482	\$1,250	\$259	Bulls 1700 - 1850 lbs \$127.50 to \$130.00
1612	\$4,100	\$254	500	\$1,075	\$215	
1474	\$2,600	\$176	Yearling Heifer			Yearling Bulls 400-500 lbs \$148.00
1408	\$3,000	\$213	898	\$1,900	\$212	Yearling Bulls 500-600 lbs \$200.00
Yearling Bull			970	\$4,000	\$412	Yearling Bulls 600-700 lbs \$185.00 to \$198.00
1128	\$2,250	\$199	852	\$1,700	\$200	Yearling Bulls 700-800 lbs \$181.00 to \$201.00
1248	\$8,250	\$661	882	\$1,600	\$181	Yearling Bulls 800-950 lbs \$181.00 to \$190.00
1188	\$6,000	\$505	822	\$1,600	\$195	
1144	\$5,500	\$481	Pen of 2 Yearling Heifers			Yearling Heifers 400-500 lbs \$148.00
1114	\$2,200	\$197	836	\$2,700	\$323	Yearling Heifers 500-600 lbs \$200.00
984	\$1,850	\$188	854	\$2,700	\$316	Yearling Heifers 600-700 lbs \$150.00 to \$174.00
1028	\$1,900	\$185	814	\$1,600	\$197	Yearling Heifers 700-800 lbs \$156.00
2 Year Old Bred Heifer			820	\$1,600	\$195	
1098	\$4,500	\$410	814	\$1,500	\$184	Good Cows \$121.00 to \$127.00
1180	\$4,500	\$381	814	\$1,500	\$184	Older Cows \$60.00
1224	\$7,000	\$572	Pen of 2 Heifer Calves			Pairs \$1850.00
1012	\$3,000	\$296	420	\$925	\$220	
1018	\$3,200	\$314	418	\$925	\$221	
1048	\$3,100	\$296	414	\$1,200	\$290	
1098	\$3,300	\$301	410	\$1,200	\$293	
			444	\$1,125	\$253	
			450	\$1,125	\$250	

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-November 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 with continued interest in grass finished bison.

Domestic markets for bison meat are remaining strong with continued softness in demand for hip cuts. Frozen bison trim inventory levels have been decreasing. Fresh bison trim continues to move well with the extended grilling season. The food service market is stable with increased demand in the retail sector.

Nationally, federal slaughter remained at year-ago levels (up just 0.2%) for the first 43 weeks of 2013 (week ending October 26, 2013) when compared to 2012 (9,465 animals in 2013 compared to 9,445 animals in 2012). Live animal exports to the end of September 2013 at 10,917 are down 6.2% when compared to the 11,643 bison exported for the same period in 2012.

Chart 1

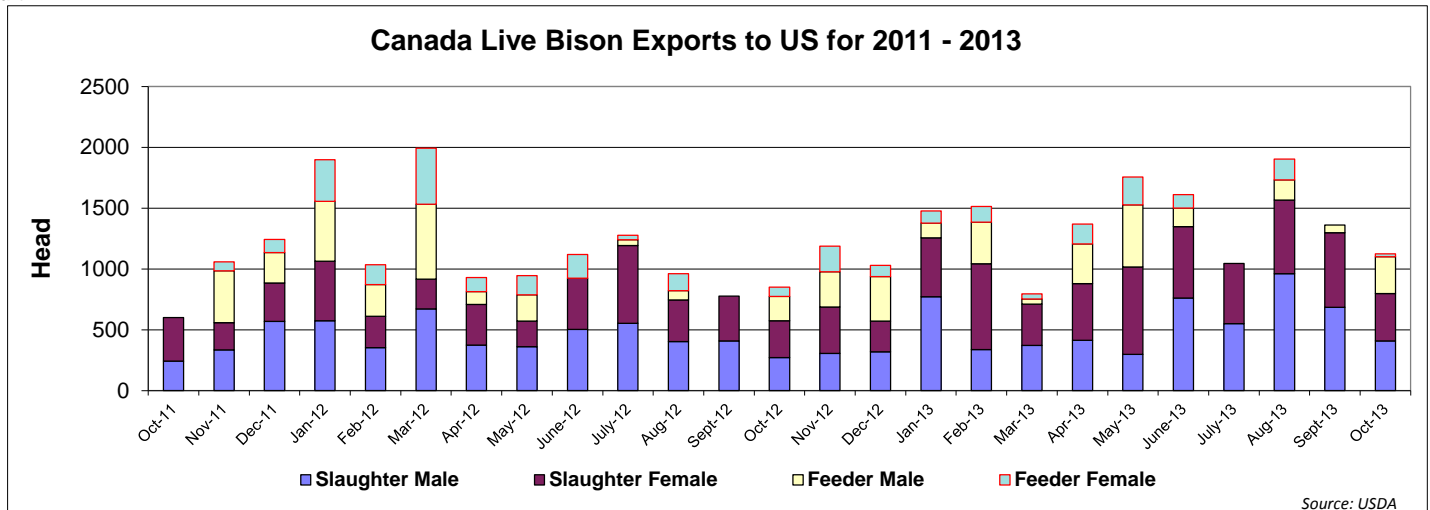
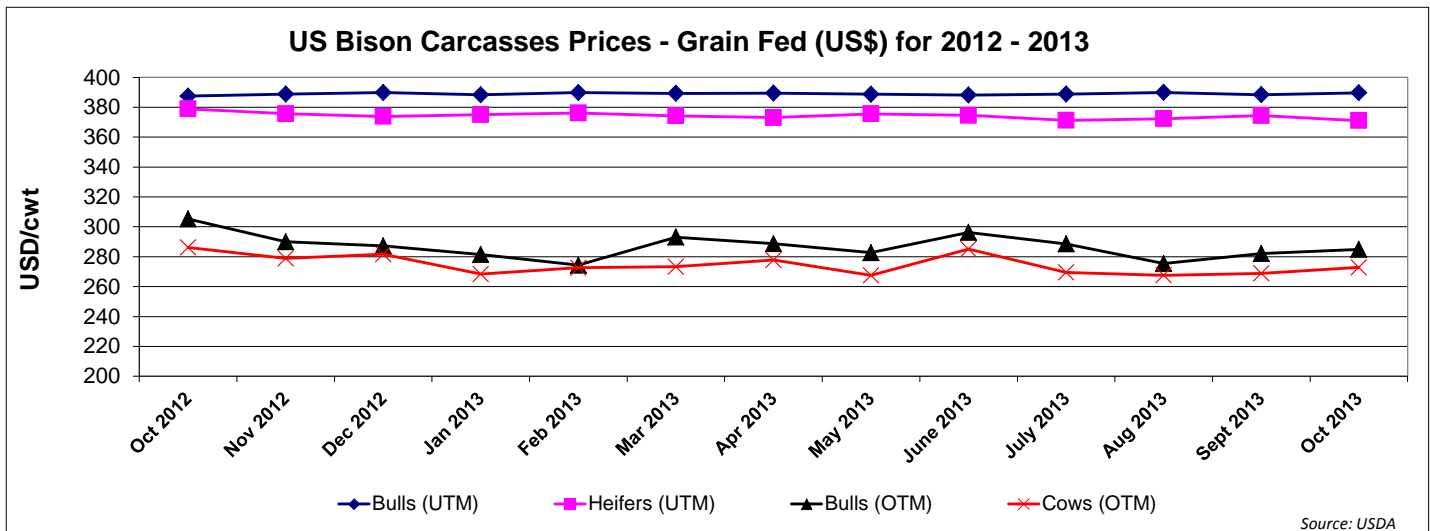


Chart 2



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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