



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - September 19, 2014

### Weekly Federal Bison Slaughter

	02-Aug	09-Aug	16-Aug	23-Aug	Aug Total	January - August YTD		
						2014	2013	% Change
Total Canada	117	269	221	272	879	7,363	7,621	-3.4%
previous year	91	399	9	416	915			

### Provincially Inspected Slaughter

	Mar 2014	Apr 2014	May 2014	June 2014	July 2014	July 2013	January - July YTD		
							2014	2013	% Change
Alberta	109	132	131	118	142	119	852	881	-3.3%
Saskatchewan	9	6	12	9	5	6	100	157	-36.3%
Manitoba/BC	90	43	59	69	70	51	457	483	-5.4%
Ontario/Quebec**	18	13	25	13	42	44	132	162	-18.5%
<b>Total</b>	<b>226</b>	<b>194</b>	<b>227</b>	<b>209</b>	<b>259</b>	<b>220</b>	<b>1,541</b>	<b>1,683</b>	<b>-8.4%</b>

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

Total Canadian Federal and Provincial Slaughter *	YTD 2014	YTD 2013	% Change
	8,904	9,304	-4.3%

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

### Canadian Production

	2008	2009	2010	2011	2012	2013	January - July YTD		
							2014	2013	% Change
Total Slaughter	22,393	23,809	19,149	13,048	13,587	14,388	8,025	8,389	-4.3%
Total Live Exports	25,844	25,118	20,973	14,465	14,007	16,769	10,170	9,570	6.3%
<b>Total Production</b>	<b>48,237</b>	<b>48,927</b>	<b>40,122</b>	<b>27,513</b>	<b>27,594</b>	<b>31,157</b>	<b>18,195</b>	<b>17,959</b>	<b>1.3%</b>

\*source : Canadian Food Inspection Agency, Provincial Governments, and USDA APHIS

### US Federal Slaughter\*

for week ending:	02-Aug	09-Aug	16-Aug	23-Aug	Aug Total	January - August YTD		
						2014	2013	% Change
	908	886	947	1031	3,772	34,435	29,400	17.1%
previous year	1068	829	1021	899	3,817			

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

### Canada Live Bison Exports to US

	Apr-14	May-14	June-14	July-14	Aug-14	January - August YTD		
						2014	2013	% Change
Slaughter Male	406	527	761	824	735	4,902	4,465	9.8%
Slaughter Female	370	513	724	543	565	4,776	4,403	8.5%
Feeder Male	314	130	166	0	32	1,019	1,657	-38.5%
Feeder Female	196	140	154	0	42	847	949	-10.7%
<b>Total</b>	<b>1,286</b>	<b>1,310</b>	<b>1,805</b>	<b>1,367</b>	<b>1,374</b>	<b>11,544</b>	<b>11,474</b>	<b>0.6%</b>

\*source : USDA, APHIS

### Canadian Fresh or Chilled Bison Meat Exports

Boneless		February 2014	March	April	May	June	July 2014	January - July YTD		
								2014	2013	% Change
USA	Kg	10,006	15,571	16,595	17,570	29,146	19,710	120,915	115,825	4.4%
	Value (\$Cdn)	141,870	211,301	219,849	261,047	407,274	235,332	1,678,720	1,473,954	13.9%
France	Kg	17,199	9,319	15,849	3,860	-	4,950	59,980	46,555	28.8%
	Value (\$Cdn)	258,269	167,700	276,161	72,464	-	50,738	972,058	896,986	8.4%
Switzerland	Kg	2,845	4,807	4,017	1,828	2,520	3,560	20,688	35,934	-42.4%
	Value (\$Cdn)	135,148	221,126	173,593	81,627	125,570	171,628	957,232	1,426,102	-32.9%
Mexico	Kg	18,137	-	-	-	-	-	18,137	-	-
	Value (\$Cdn)	98,447	-	-	-	-	-	98,447	-	-
Italy	Kg	370	299	515	501	529	254	2,699	1,554	73.7%
	Value (\$Cdn)	9,331	7,539	14,282	13,771	14,445	6,888	72,243	37,943	90.4%
French Southern Terr.	Kg	-	295	-	-	-	-	513	-	-
	Value (\$Cdn)	-	8,602	-	-	-	-	15,138	-	-
Belgium	Kg	-	-	-	-	-	-	-	62,179	-
	Value (\$Cdn)	-	-	-	-	-	-	-	822,857	-
Other Countries	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Total	Kg	48,557	30,291	36,976	23,759	32,195	28,474	222,932	262,047	-14.9%
	Value (\$Cdn)	643,065	616,268	683,885	428,909	547,289	464,586	3,793,838	4,657,842	-18.5%

### Bone-in

	February 2014	March	April	May	June	July 2014	January - July YTD		
							2014	2013	% Change
Total									
Kg	-	-	-	5,787	-	1,263	15,036	7,475	101.2%
Value (\$Cdn)	-	-	-	60,765	-	17,431	162,053	54,182	199.1%

### Total Exports, Boneless and Bone-in

	February 2014	March	April	May	June	July 2014	January - July YTD		
							2014	2013	% Change
Kg	48,557	30,291	36,976	29,546	32,195	29,737	237,968	269,522	-11.7%
Value (\$Cdn)	643,065	616,268	683,885	489,674	547,289	482,017	3,955,891	4,712,024	-16.0%

\*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)
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
Dec 2013	388.62	370.20	278.85	274.48
Jan 2014	387.22	371.42	297.55	271.73
Feb 2014	388.55	367.87	296.54	275.15
Mar 2014	388.85	373.14	299.63	275.53
Apr 2014	389.40	370.66	301.67	275.49
May 2014	390.49	373.95	324.26	287.48
June 2014	394.17	381.65	325.69	291.62
July 2014	397.58	385.95	328.09	287.96
Aug 2014	402.37	389.93	322.74	290.13

\*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
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
Jan 2014	365-385	345-365	200-245	200-245				
Feb 2014	365-390	355-380	220-250	220-250			180-220	180-220
Mar 2014	375-400	355-385	220-250	220-250			180-265	180-220
Apr 2014	385-400	375-385	220-250	220-250			200-230	200-220
May 2014	385-400	375-385	220-250	220-250			245-260	220-240
June 2014	385-400	375-385	220-250	220-250				
July 2014	400-410	385-395	250-300	250-280				
Aug 2014	400-410	385-395	250-300	250-280				
Sept 2014	400-455	385-435	250-300	275-300				

\*source CBA survey of marketers

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

	June 2014		July 2014		August 2014		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,180-1,650	1,352.16	1,200-1,650	1,381.63	1,150-1,450	1,385.16	2.4%	0.3%
Chuckroll/Clod Fresh	525-642	572.17	525-695	592.95	597-645	600.81	5.0%	1.3%
Striploin Fresh	900-1,650	1,308.67	825-1,650	1,335.20	825-1,375	1,345.60	2.8%	0.8%
Tenderloin Fresh	1,800-2,595	2,166.05	1,700-2,595	2,024.77	1,700-2,100	1,969.30	-9.1%	-2.7%
Ground 90% Bulk, Fresh	525-640	592.21	525-640	558.00	571-608	589.42	-0.5%	5.6%
Ground 85% Bulk, Frozen	500-636	578.98	500-630	571.69	505-606	570.50	-1.5%	-0.2%
Ground 85% Patties, Frozen	500-680	641.69	500-672	606.35	560-612	578.91	-9.8%	-4.5%

\*source USDA

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

	Mid-June 2014 Pricing	Mid-July 2014 Pricing	Mid-August 2014 Pricing	Mid-September 2014 Pricing
Tenderloin - Fresh	\$53.50 - \$61.00	\$50.00 - \$70.00	\$53.50 - \$70.00	\$52.00 - \$57.95
Strip Loin Boneless - Fresh	\$28.50 - \$35.00	\$28.00 - \$35.00	\$28.50 - \$36.00	\$28.95 - \$32.00
Inside Round - Fresh	\$14.00 - \$19.50	\$16.00 - \$19.50	\$14.00 - \$19.50	\$14.00 - \$16.00
Ground 90% Bulk Fresh	\$10.95 - \$12.00	\$11.50 - \$12.50	\$11.50 - \$13.00	\$10.95 - \$13.00
Fresh Bison Trim	\$10.75 - \$11.50	\$10.75 - \$11.50	\$11.30 - \$11.50	\$9.95 - \$11.50

\*source CBA survey of marketers

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

Kramer Auction Sales Ltd. (SK) (May 14th, 2014)			Vold, Jones & Vold Auctions Co. Ltd. (AB) (April 14th, 2014)			Heartland Livestock Services (MB) - Great Spirit Show and Sale (April 5th, 2014)			
Birth Year, Sex, lbs	# of head	Avg (\$/cwt)				Weight	Price		
(323 head)			171 Head			2011 BULLS			
			2013 Bulls	400-500 lbs	\$234 - \$239	Silver Creek Bison Ranch	1615	\$5,750	
				300-400 lbs	\$180 - \$236	Rockwood Bison Ranch	1580	\$3,850	
				300lbs & under	\$180 - \$235	Rockwood Bison Ranch	1620	\$2,700	
<b>2013 BULLS</b>			2012 Bulls	700-800 lbs	\$195	2012 BULLS	Bison Spirit Ranch (GC)	1310	\$8,000
600-725 lbs	58	\$251		600-700 lbs	\$190		Triple B Bison Ranch	1280	\$3,300
500-599 lbs	64	\$248		500-600 lbs	\$222		Taylor Bison	1260	\$3,250
450-499 lbs	39	\$249		400-500 lbs	\$175 - \$180		Fraserwood Bison Ranch (HM)	1025	\$2,500
Under 450	9	\$174					Fraserwood Bison Ranch (HM)	940	\$1,750
<b>2012 BULLS</b>	2	\$160	2013 Heifers	400-500 lbs	\$163	2013 BULLS	Rockwood Bison Ranch (RC)	770	\$5,000
<b>2011 BULLS</b>	2	\$4,600 (avg)		300-400 lbs	\$177.50 - \$200		Torch River Bison	620	1400
<b>2013 HEIFER CALVES</b>				300lbs & under	\$165		Elkola Ranch	615	\$1,300
500-600 lbs	59	\$228	2012 Heifers	600-700 lbs	\$117.50-\$142.50		Torch River Bison (HM)	530	1300
450-499 lbs	46	\$227		400-500 lbs	\$110 - \$155		Sandridge Bison Ranch (HM)	675	\$1,700
400-449 lbs	25	\$205	Exposed Cows		\$875 - \$1250	2012 HEIFERS	Quill Creek Bison Ranch (GC)	1145	\$5,250
Under 400	19	\$186					Beldon Bison Ranch (RC)	915	\$2,650
			OTM Bulls	750-950 lbs	\$160 - \$168		Borderland Ag Bison Ranch	1090	\$3,500
			Mature Bulls	1000-1700 lbs	\$100 - \$120		Borderland Ag Bison Ranch (HM)	1035	\$2,800
			Prices quoted represents good quality animals.			2013 HEIFERS	Triple B Bison Ranch	630	\$1,700
							Elkola Ranch	515	\$1,300
							Triple B Bison Ranch	580	Not sold
							Torch River Bison (HM)	550	\$1,300

**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)

Finished bison prices in mid-September were in transition and showed additional strength. Although most buyers were paying up to \$4.10 per pound HHW for Grade A bulls, one buyer was paying up to \$4.55 per pound HHW to fill orders. Buyers were paying \$4.00 per pound HHW for Grade A heifers with one buyer offering up to \$4.35 per pound HHW. In all instances, appropriate adjustments are made for weight and quality. Live bison continue to be sold into the US with prices in the \$4.50 per pound HHW range for Grade A bulls and about \$4.30 per pound for heifers after adjustments for exchange rates. Appropriate adjustments are required for transportation and preparing animals for export.

Marketers report that there is a strong demand for bison trim in the United States with steady demand for bison meat products in Canada. European demand is steady with reports of distributors placing orders for the Christmas season. Reports indicate that present supplies of finished bison should be adequate for the next three to six months with shortages expected in the future. There is very little bison meat in inventory with some marketers reporting that they are building up inventories as they anticipate a shortage.

Nationally, federal slaughter was 3.4% below year-ago levels for the first 34 weeks of 2014 (week ending August 23, 2014) when compared to the same time period in 2013 (7,363 animals in 2014 compared to 7,621 animals in 2013). Live animal exports for the first eight months of 2014 at 11,544 head are up just 0.6% when compared to the 11,474 bison exported for the same period in 2013.

Chart 1

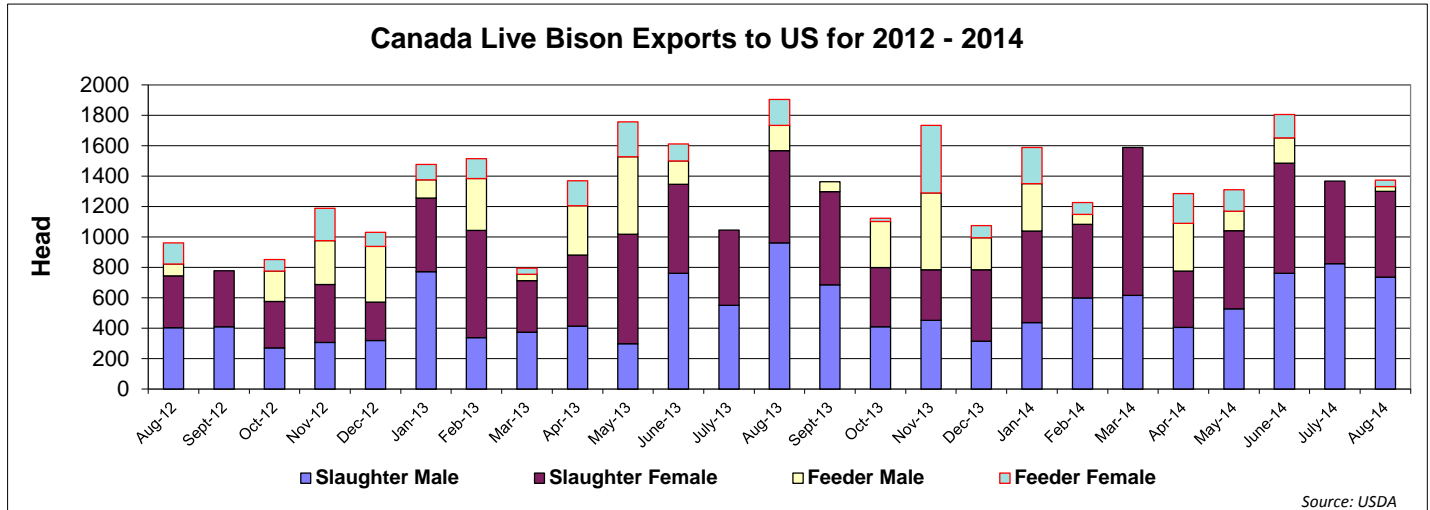
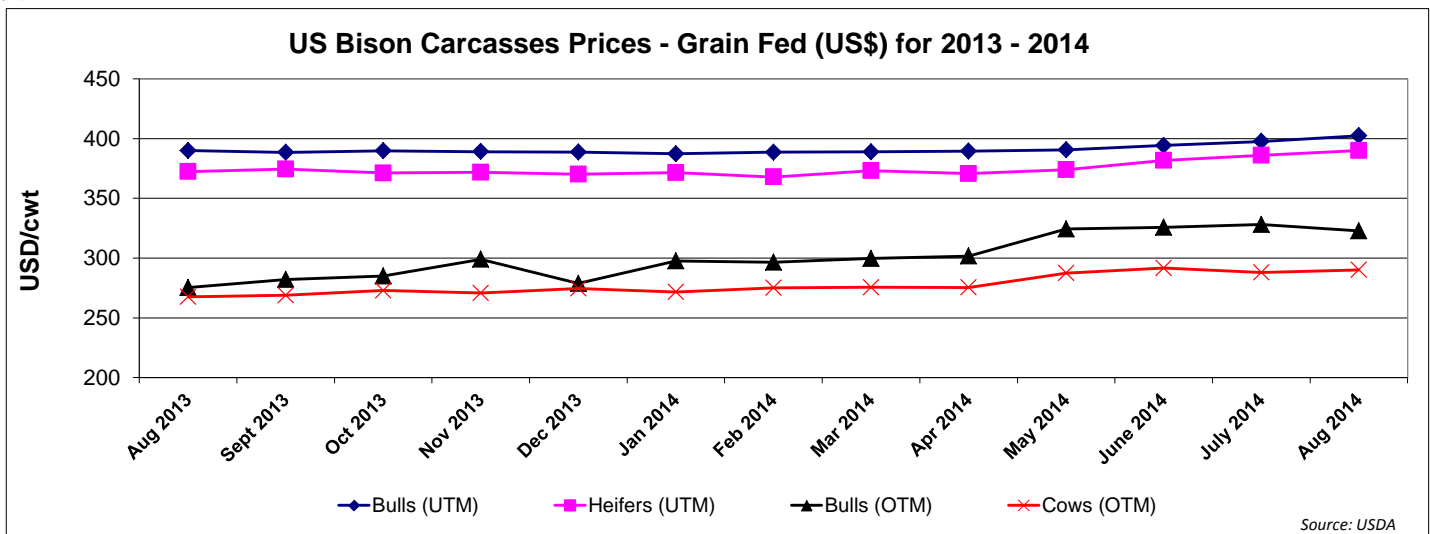


Chart 2



**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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