



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - July 22, 2011

### Weekly Federal Bison Slaughter

	04-Jun	11-Jun	18-Jun	25-Jun	02-Jul	June Total	2011	June YTD 2010	% Change
<b>Total Canada</b>	<b>118</b>	<b>189</b>	<b>237</b>	<b>101</b>	<b>107</b>	<b>752</b>	<b>4,960</b>	<b>9,232</b>	<b>-46.3%</b>
<i>previous year</i>	278	457	322	415	194	1,666			

### Provincially Inspected Slaughter

	Jan 2011	Feb 2011	Mar 2011	Apr 2011	May 2011	May 2010	2011	May YTD 2010	% Change
<b>Alberta</b>	55	77	75	111	134	147	452	832	-45.7%
<b>Saskatchewan</b>	14	28	6	14	8	18	70	166	-57.8%
<b>Manitoba/BC</b>	54	72	139	50	51	86	366	317	15.5%
<b>Ontario/Quebec**</b>	16	18	28	32	44	41	138	184	-25.0%
<b>Total</b>	<b>139</b>	<b>195</b>	<b>248</b>	<b>207</b>	<b>237</b>	<b>292</b>	<b>1026</b>	<b>1499</b>	<b>-31.6%</b>

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

	YTD 2011	YTD 2010	% Change
<b>Total Canadian Federal and Provincial Slaughter *</b>	<b>5,986</b>	<b>10,731</b>	<b>-44.2%</b>

\*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\*

	04-Jun	11-Jun	18-Jun	25-Jun	02-Jul	June Total	2011	June YTD 2010	% Change
<b>Total</b>	<b>712</b>	<b>954</b>	<b>940</b>	<b>949</b>	<b>809</b>	<b>4,364</b>	<b>22,696</b>	<b>28,377</b>	<b>-20.0%</b>
<i>previous year</i>	1049	1094	1219	900	1015	5,277			

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

### Canada Live Bison Exports to US

	Feb-11	Mar-11	Apr-11	May-11	June-11	2011	June YTD 2010	% Change
<b>Slaughter Male</b>	760	627	595	324	501	3,414	3,802	-10.2%
<b>Slaughter Female</b>	462	302	295	183	437	2,097	3,709	-43.5%
<b>Feeder Male</b>	343	431	446	237	209	1,813	3,206	-43.4%
<b>Feeder Female</b>	333	472	514	34	117	1,635	2,354	-30.5%
<b>Total</b>	<b>1,898</b>	<b>1,832</b>	<b>1,850</b>	<b>778</b>	<b>1,264</b>	<b>8,959</b>	<b>13,071</b>	<b>-31.5%</b>

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

Country	Unit	2011						May YTD 2010		% Change
		December 2010	January 2011	February	March	April	May	2011	2010	
<b>Boneless</b>										
<b>USA</b>	Kg	45,712	39,978	32,352	27,835	34,185	19,148	152,934	187,064	-18.2%
	Value (\$Cdn)	531,813	496,613	405,658	372,676	438,761	267,829	1,969,832	1,600,642	23.1%
<b>France</b>	Kg	16,808	1,609	5,557	4,174	2,749	2,614	16,703	102,316	-83.7%
	Value (\$Cdn)	223,326	26,337	76,807	56,721	36,317	32,295	228,477	1,213,574	-81.2%
<b>Switzerland</b>	Kg	5,750	2,641	4,568	3,245	3,155	5,098	18,707	23,705	-21.1%
	Value (\$Cdn)	195,266	95,953	182,343	120,458	118,951	192,887	710,592	847,393	-16.1%
<b>Germany</b>	Kg	397	369	312	365	830	-	1,876	3,305	-43.2%
	Value (\$Cdn)	7,909	7,689	6,858	12,663	24,586	-	51,796	60,508	-14.4%
<b>Egypt</b>	Kg	-	-	-	-	-	-	-	11,682	N/A
	Value (\$Cdn)	-	-	-	-	-	-	-	173,422	N/A
<b>United Arab Emirates</b>	Kg	-	188	-	-	-	-	188	2,188	-91.4%
	Value (\$Cdn)	-	3,515	-	-	-	-	3,515	66,549	-94.7%
<b>Macau</b>	Kg	1,000	-	-	-	-	-	-	1,000	N/A
	Value (\$Cdn)	8,787	-	-	-	-	-	-	8,787	N/A
<b>Singapore</b>	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
<b>Saudi Arabia</b>	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
<b>Mexico</b>	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
<b>French S. Terr.</b>	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
<b>Netherlands</b>	Kg	-	-	-	26,326	-	-	26,326	-	N/A
	Value (\$Cdn)	-	-	-	133,492	-	-	133,492	-	N/A
<b>Others</b>	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
<b>Total</b>	Kg	69,667	44,785	42,789	61,945	40,919	26,860	216,734	331,260	-34.6%
	Value (\$Cdn)	967,101	630,107	671,666	696,010	618,615	493,011	3,097,704	3,970,875	-22.0%

### Bone-in

	December 2010	January 2011	February	March	April	May	2011	May YTD 2010	% Change
<b>Total</b>	17,116	17,567	7,083	3,656	3,356	16,138	47,800	19,084	150.5%
	52,429	54,789	82,497	18,847	16,458	56,265	228,856	60,080	280.9%

### Total Exports, Boneless and Bone-in

	December 2010	January 2011	February	March	April	May	2011	May YTD 2010	% Change
<b>Total</b>	86,783	62,352	49,872	65,601	44,275	42,998	264,534	350,344	-24.5%
	1,019,530	684,896	754,163	714,857	635,073	549,276	3,326,560	4,030,955	-17.5%

\*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)
June 2010	260.77	249.48	186.36	176.32
July 2010	266.74	258.33	208.75	186.43
Aug 2010	272.93	263.38	225.00	224.74
Sept 2010	296.03	276.84	228.75	206.18
Oct 2010	317.57	304.34	234.38	233.46
Nov 2010	325.34	312.02	237.88	228.73
Dec 2010	332.43	324.30	242.19	238.03
Jan 2011	332.33	323.84	259.06	238.78
Feb 2011	354.76	335.85	249.51	254.47
Mar 2011	356.63	350.08	260.52	280.91
Apr 2011	365.73	353.38	277.06	256.92
May 2011	369.99	360.97	275.16	265.24
June 2011	373.99	367.04	295.00	295.95

\*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
July 2010	255-285	235-270	160-200	160-200
Aug 2010	285-290	275-290	180-220	180-220
Sep 2010	280-310	280-310	180-220	180-220
Oct 2010	330-345	310-345	220-240	220-240
Nov 2010	345-350	330-335	220-230	210-220
Dec 2010	325-350	325-340	220-225	200-225
Jan 2011	350-375	340-375	230-270	225-270
Feb 2011	350-383	350-383	250-270	250-270
Mar 2011	350-375	350-365	250-270	250-270
Apr 2011	370-385	365-370	260-290	260-270
May 2011	380-410	380-400	260-275	260-275
June 2011	400-410	400	275-280	275-280
July 2011	400-410	400-410	280-300	275-280

\*source CBA survey of marketers

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

	April 2011		May 2011		June 2011		Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1000-1550	1,320.53	1088-1650	1,343.58	1100-1650	1,358.07	2.8%	1.1%
Chuckroll/Clod Fresh	500-725	545.49	500-625	533.47	500-627	538.35	-1.3%	0.9%
Striploin Fresh	875-1500	1,222.25	900-1600	1,292.36	950-1600	1,349.39	10.4%	4.4%
Tenderloin Fresh	1650-2195	1,913.35	1693-2195	1,944.39	1850-2195	1,961.52	2.5%	0.9%
Ground 90% Bulk, Fresh	450-585	533.96	500-600	535.08	525-561	544.16	1.9%	1.7%
Ground 85% Bulk, Frozen	540-638	575.84	530-650	583.35	450-650	593.59	3.1%	1.8%
Ground 85% Patties, Frozen	500-650	583.58	500-650	585.86	500-675	577.53	-1.0%	-1.4%

\*source USDA

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

	Mid-April 2011 Pricing	Mid-May 2011 Pricing	Mid-June 2011 Pricing	Mid-July 2011 Pricing
Tenderloin - Fresh	\$44.99 - \$60.00	\$49.40 - \$60.00	\$49.25 - \$50.50	\$50.00 - \$60.00
Strip Loin Boneless - Fresh	\$23.99 - \$36.00	\$28.00 - \$34.40	\$28.00 - \$33.05	\$28.00 - \$31.00
Inside Round - Fresh	\$12.75 - \$15.00	\$15.00 - \$18.30	\$14.25 - \$18.70	\$13.67 - \$18.70
Ground 90% Bulk Fresh	\$12.95 - \$13.50	\$12.50 - \$13.00	\$13.00 - \$13.50	\$13.00 - \$14.50
Fresh Bison Trim	\$11.85 - \$12.69	\$11.80 - \$12.00	\$11.80 - \$12.25	\$12.00 - \$13.00

\*source CBA survey of marketers

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

Kramer Auctions (SK) (May 11, 2011)				Sekura Auctions (AB) (April 2, 2011)				Kramer Auctions (SK) (March 16, 2011)		
Birth Year, Sex	lbs	# of head	Average (\$/cwt)	Birth Year, Sex	lbs	low per cwt	high per cwt	Birth Year, Sex	lbs	Average (\$/cwt)
2009 Bulls	750<	6	217	2010 Bulls	300-399	130	267.5	2008 Exposed Females	765-890	162
	<750	2	195		400-499	172.5	261			
2009 Heifers	700<	6	96	2009 Bulls	500-599	140	232	2009 Bulls	565-745	214
	725-850	10	237		600-699	192	192			
	950<	6	164		700-799	157.5	157.5	2009 Heifers	550-649	200
	<725	4	227		800-899	165	165			
2010 Bulls	400-499	23	289	2010 Heifers	0-299	180	192.5	2010 Heifers	550-649	221
	500-599	60	286		300-399	117.5	198			
	600-675	41	283		400-499	211	217.5	2010 Bulls	300-399	265
	<400	21	220		2009 Heifers	400-499	172.5			
2010 Heifers	450-575	19	264	500-599	169	182.5	2010 Heifers	<349	233	
	<450	29	222	600-699	180	180				
	2008 Heifers	600-699	175	175	700-799	192				192
2007 Heifers	800-899	120	120	2008 Heifers	700-799	180	180	350-399	242	
Mature Bulls	800-9999	1550	2400	2007 Heifers	800-899	120	120	400-449	240	
								450-570	241	

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

July live bison and meat prices remain stable at the strong June levels. Demand for all cuts remains strong with certain marketers reporting no inventory. Marketers report that there is some push-back from U.S. customers. Exports to Europe continue but volumes are small.

As mentioned in previous reports, the supply of finished animals for processing continues to be tight with bison numbers being down and heifers being held back for breeding. Domestic consumer demand has shown some resistance at current prices in some markets. Certain meat processors are evaluating their bison program at current prices while others continue to look for steady supplies of product. Never-the-less, the consumer demand remains strong with increased calls on where bison products can be purchased or where live animals can be accessed. European demand continues to be strong.

Nationally, federal slaughter was down 46% in the first 26 weeks of 2011 when compared to 2010 (4,960 animals in 2011 compared to 9,232 animals for 2010). Live bison exports to the U.S. are down by 26% - 8,729 for the first five months of 2011 compared to 11,847 bison for the same period in 2010. The average price for Grade A bulls and heifers continues to be steady at \$4.00 - \$4.10 per pound - comparable to last month. Mature bulls in mid-July ranged from \$2.40 - \$2.80 per pound. Today's price for fresh bison trim is \$12.00 - \$13.00 per kg compared to \$9.15 - \$10.00 per kg in 2010.

Bred heifer prices are being reported at \$2,100 - \$2,200 with bred cows being reported at about \$1,800.

Chart 1

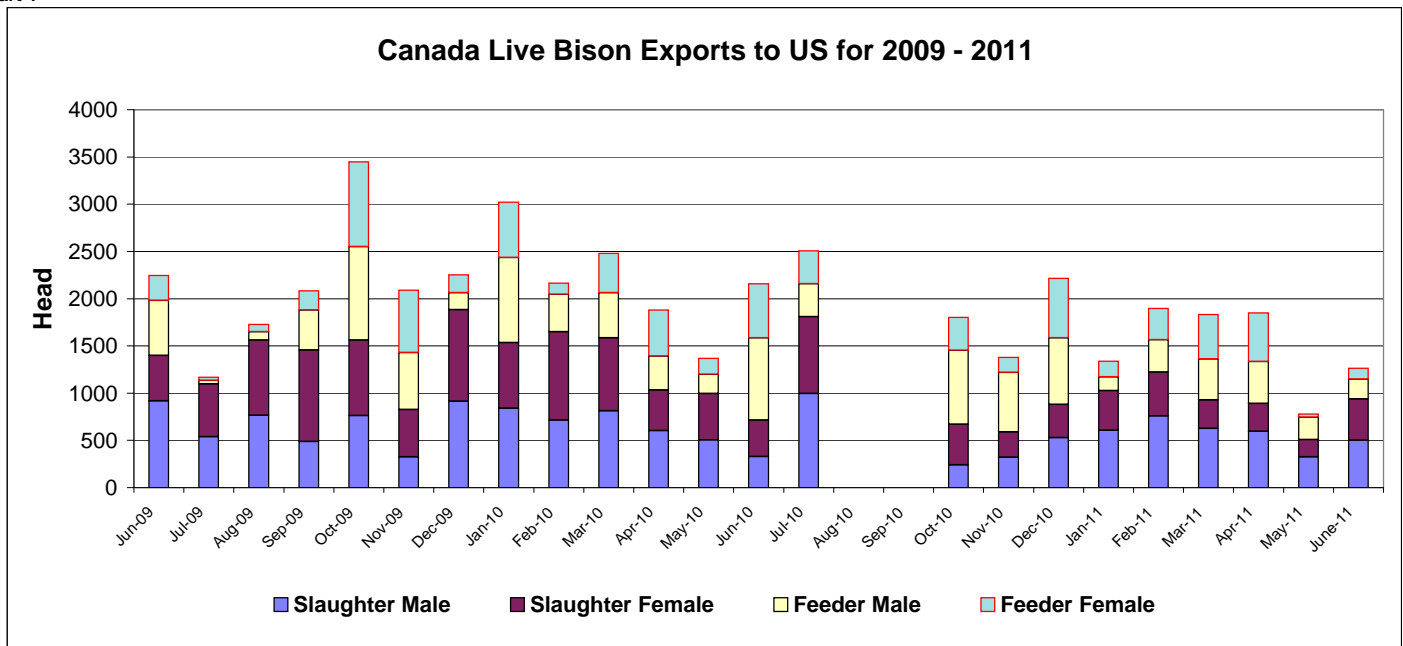


Chart 2

