Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - September 20, 2013

Weekly Federal Bison Slaughter						**August YTD**		
	03-Aug	10-Aug	17-Aug	24-Aug	**August Total**	**2013**	**2012**	**% Change**
Total Canada	**91**	**399**	**9**	**416**	**915**	**7,621**	**7,924**	**-3.8%**
previous year	*152*	*240*	*303*	*270*	***965***			

Provincially Inspected Slaughter							**July YTD**		
	Mar 2013	**Apr 2013**	**May 2013**	**June 2013**	**July 2013**	**July 2012**	**2013**	**2012**	**% Change**
Alberta	113	101	151	114	119	119	881	662	33.1%
Saskatchewan	49	45	12	21	6	5	157	71	121.1%
Manitoba/BC	63	75	65	91	51	36	483	369	30.9%
Ontario/Quebec**	14	6	31	34	28	34	146	174	-16.1%
Total	**239**	**227**	**259**	**260**	**204**	**194**	**1,667**	**1,276**	**30.6%**

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

	YTD 2013	**YTD 2012**	**% Change**
Total Canadian Federal and Provincial Slaughter *	**9,288**	**9,200**	**1.0%**

**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*						**August YTD**		
for week ending:	03-Aug	10-Aug	17-Aug	24-Aug	**August Total**	**2013**	**2012**	**% Change**
	1068	**829**	**1021**	**899**	**3,817**	**29,400**	**27,136**	**8.3%**
previous year	*648*	*765*	*714*	*789*	***2,916***			

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

Canada Live Bison Exports to US							**August YTD**	
	Apr-13	**May-13**	**June-13**	**July-13**	**Aug-13**	**2013**	**2012**	**% Change**
Slaughter Male	413	298	761	550	962	4,465	3,800	**17.5%**
Slaughter Female	467	720	586	495	605	4,403	2,934	**50.1%**
Feeder Male	326	509	153	0	166	1,657	1,815	**-8.7%**
Feeder Female	164	230	112	0	171	949	1,609	**-41.0%**
Total	**1,370**	**1,757**	**1,612**	**1,045**	**1,904**	**11,474**	**10,158**	**13.0%**

**source USDA*

Canadian Fresh or Chilled Bison Meat Exports

Boneless		**February 2013**	**March**	**April**	**May**	**June**	**July**	**July YTD 2013**	**July YTD 2012**	**% Change**
USA	Kg	14,273	20,526	22,775	8,778	20,001	17,061	**114,863**	**98,194**	**17.0%**
	Value ($Cdn)	147,399	285,354	256,215	95,272	277,328	244,097	**1,458,256**	**1,063,469**	**37.1%**
France	Kg	3,084	11,258	6,880	4,624	9,309	6,680	**46,555**	**51,347**	**-9.3%**
	Value ($Cdn)	81,938	204,718	146,790	95,302	172,283	115,035	**896,986**	**733,156**	**22.3%**
Switzerland	Kg	6,099	11,023	3,866	2,355	6,811	3,489	**35,934**	**20,868**	**72.2%**
	Value ($Cdn)	249,866	402,653	173,190	106,590	255,753	136,157	**1,426,102**	**830,979**	**71.6%**
Germany	Kg	-	-	-	-	-	-	**-**	**884**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**23,053**	**-**
Egypt	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
United Arab Emirates	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Mexico	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Saudi Arabia	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Republic of Moldova	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Italy	Kg	605	-	395	353	-	201	**1,554**	**1,989**	**-21.9%**
	Value ($Cdn)	15,709	-	8,533	7,479	-	6,222	**37,943**	**51,349**	**-26.1%**
Sweden	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Netherlands	Kg	-	-	-	-	-	-	**-**	**-**	**-**
	Value ($Cdn)	-	-	-	-	-	-	**-**	**-**	**-**
Belgium	Kg	-	17,353	19,684	17,868	7,274	-	**62,179**	**-**	**-**
	Value ($Cdn)	-	224,919	247,667	253,130	97,141	-	**822,857**	**-**	**-**
Total	**Kg**	**24,061**	**60,160**	**53,600**	**33,978**	**43,395**	**27,431**	**261,085**	**173,282**	**50.7%**
	Value ($Cdn)	**494,912**	**1,117,644**	**832,395**	**557,773**	**802,505**	**501,511**	**4,642,144**	**2,702,006**	**71.8%**

Bone-in		**February 2013**	**March**	**April**	**May**	**June**	**July**	**July YTD 2013**	**July YTD 2012**	**% Change**
Total	**Kg**	**21**	**-**	**-**	**7,216**	**-**	**-**	**7,475**	**46,685**	**-84.0%**
	Value ($Cdn)	**317**	**-**	**-**	**50,767**	**-**	**-**	**54,182**	**417,928**	**-87.0%**

Total Exports, Boneless and Bone-in	**February 2013**	**March**	**April**	**May**	**June**	**July**	**July YTD 2013**	**July YTD 2012**	**% Change**
Kg	**24,082**	**60,160**	**53,600**	**41,194**	**43,395**	**27,431**	**268,560**	**219,967**	**22.1%**
Value ($Cdn)	**495,229**	**1,117,644**	**832,395**	**608,540**	**802,505**	**501,511**	**4,696,326**	**3,119,934**	**50.5%**

**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)
Aug 2012	391.95	382.88	313.63	300.49
Sept 2012	391.95	380.23	306.09	306.00
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

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Sept 2012	365-390	355-380	no prices reported	no prices reported
Oct 2012	350-390	350-380	180	180
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

**source CBA survey of marketers*

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

	June 2013		July 2013		August 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	1,379.34	1,307-1,475	1,355.92	1,300-1,650	1,383.68	0.3%	2.0%
Chuckroll/Clod Fresh	500-625	580.87	561-649	570.93	500-1341	558.28	-3.9%	-2.2%
Striploin Fresh	1,250-1,650	1,386.07	1,010-1,416	1,334.27	825-1,650	1,400.19	1.0%	4.9%
Tenderloin Fresh	1,850-2,595	2,061.85	1,871-2,595	1,988.96	1,850-2,300	2,022.13	-1.9%	1.7%
Ground 90% Bulk, Fresh	525-640	584.90	609-609	609.00	525-653	648.33	10.8%	6.5%
Ground 85% Bulk, Frozen	500-635	549.05	524-615	557.73	528-615	554.13	0.9%	-0.6%
Ground 85% Patties, Frozen	520-635	565.68	524-628	567.22	535-628	569.43	0.7%	0.4%

**source USDA*

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

	Mid-June 2013 Pricing	Mid-July 2013 Pricing	Mid-August 2013 Pricing	Mid-September 2013 Pricing
Tenderloin - Fresh	$45.95 - $57.00	$45.95 - $56.85	$53.00 - $55.00	$53.00 - $56.85
Strip Loin Boneless - Fresh	$25.95 - $30.38	$25.95 - $34.00	$28.00 - $31.00	$28.00 - $30.00
Inside Round - Fresh	$13.45 - $14.05	$13.45 - $15.15	$13.90- $15.50	$14.00- $18.00
Ground 90% Bulk Fresh	$10.95 - $12.50	$10.95 - $12.50	$10.95 - $12.50	$12.00 - $12.00
Fresh Bison Trim	$8.95 - $11.00	$8.95 - $11.00	$10.50 - $11.00	$10.00 - $11.00

**source CBA survey of marketers*

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

Kramer Auctions (SK) (May 8th, 2013)

Birth Year, Sex	lbs	# of head	Avg ($/cwt)
2012 BULLS	600-650 lbs	39	211
	550-599 lbs	53	209
	500-549 lbs	73	196
	400-500 lbs	68	187
	Under 400 lbs	8	124
2011 BULLS	800-950 lbs	17	158
	700-799 lbs	15	143
2010 BULLS		2	132
2012 HEIFER CALVES	500-599 lbs	33	145
	450-499 lbs	67	141
	400-449 lbs	56	133
	Under 400 lbs	17	128
2011 HEIFERS	775-900 lbs	27	143
	700-774 lbs	13	130
	Under 700 lbs	10	127
2012 HEIFERS		2	130

Kramer Auctions (SK) (March 20th, 2013)

Birth Year, Sex	lbs	# of head	Avg ($/cwt)
2012 BULLS	550-650 lbs	16	192
	450-549 lbs	52	209
	Under 450 lbs	27	204
2011 BULLS	800-900 lbs	34	151
	650-799 lbs	22	150
2012 HEIFERS	450-550 lbs	39	203
	400-449 lbs	54	153
	300-399 lbs	22	140
2011 HEIFERS	600-730 lbs	21	139
	Total Weight	**# of head**	**Price ($)**
2010 BULLS	3200	3	1450

Sekura Livestock Auctions (AB) (March 2, 2013)

Sex, lbs	# of head	Avg ($/cwt)
2012 Bulls		
300 - 399	28	229
400 - 499	24	216
500 - 599	3	212
2011 Bulls		
600 - 699	10	171
2012 Heifers		
300 - 399	33	170
400 - 499	4	123
2011 Heifers		
500 - 599	1	113
600 - 699	5	148
Cows	2	133
Breeding Bulls	5	105
	Low Price ($)	**High Price ($)**
Bred Cows	950	1,500

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 or diane.kelly@agr.gc.ca

Finished bison prices in mid-September were steady. Producers received up to $3.70 per pound HHW for bison bulls and up to $3.55 per pound HHW for heifers with appropriate adjustments for weight and quality. Wholesale prices for middle and prime cuts remained stable with continued good movement into the market. Great weather has extended the summer cooking season and helped to reduce the burdensome trim levels which are a continued concern for some marketers. It is expected that over the next year, trim levels will decrease as fewer cows are expected in the market. Fresh bison trim continues to move well with the extended grilling season. European demand has strengthened for prime and middle cuts. Canadian demand for bison meat is steady with some new interest in bison products. Demand in the US appears to be steady as well.

Marketers continue to report that they have access to a good supply of animals to meet current market demand.

Nationally, federal slaughter was down 3.8% for the first 34 weeks of 2013 (week ending August 24, 2013) when compared to 2012 (7,621 animals in 2013 compared to 7,924 animals in 2012). Live animal exports to the end of August 2013 at 11,474 head are up 13.0% when compared to the 10,158 bison exported for the same period in 2012.

Chart 1

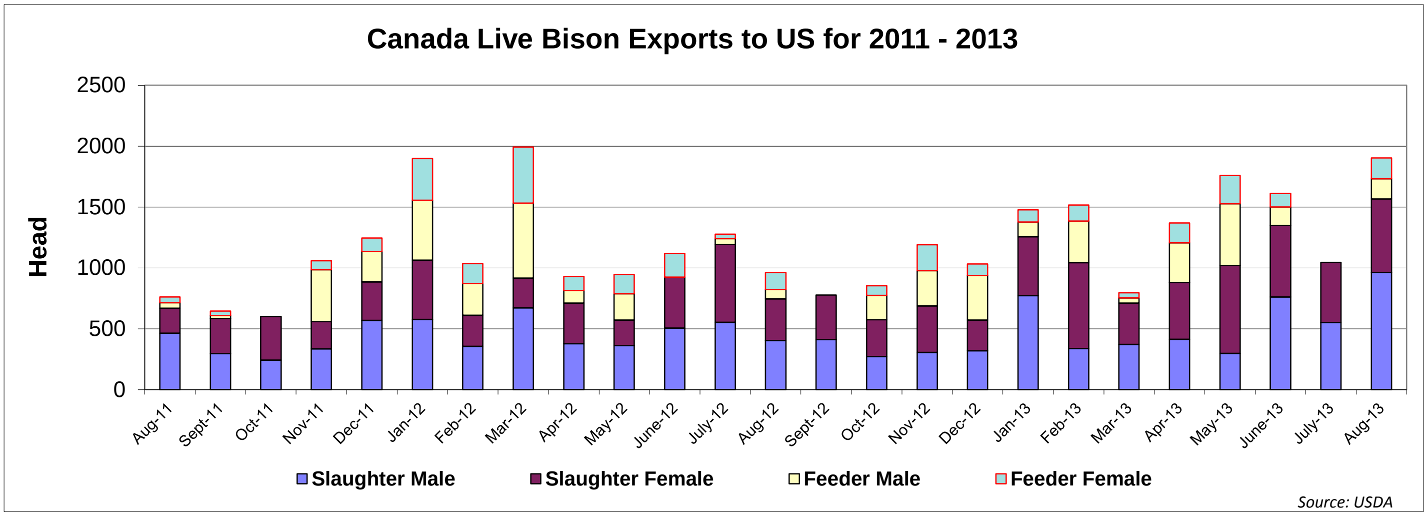
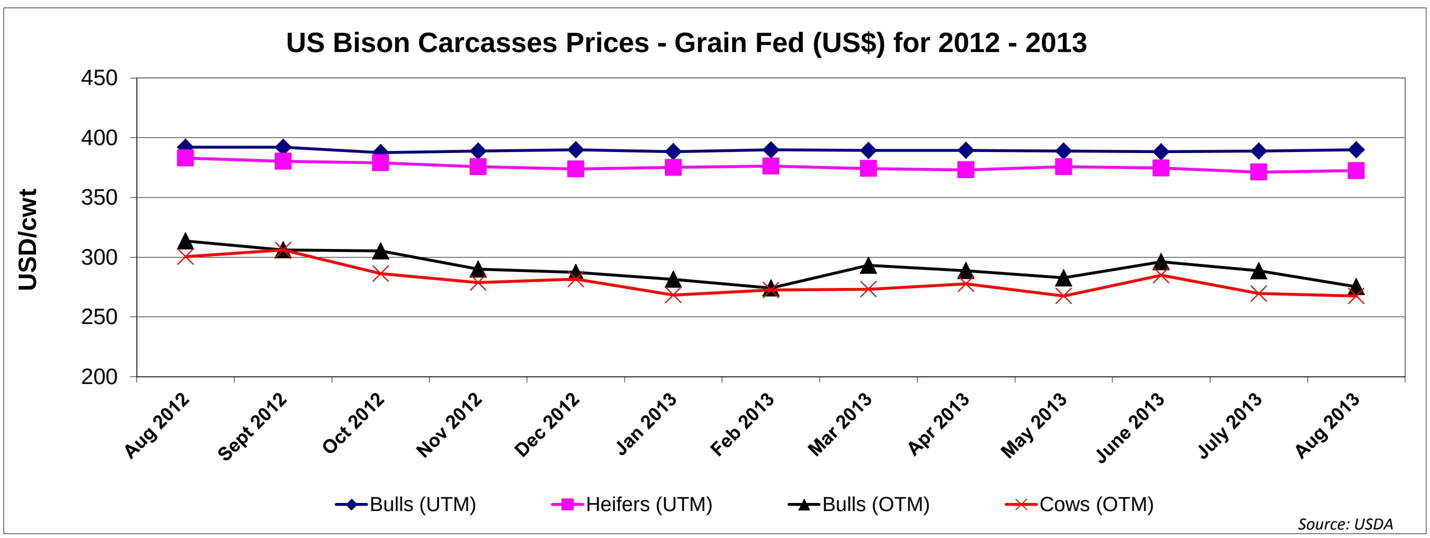


Chart 2



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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