



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - October 25, 2012

### Weekly Federal Bison Slaughter

	01-Sep	08-Sep	15-Sep	22-Sep	29-Sep	Sept Total	2012	Sept YTD 2011	% Change
<b>Total Canada</b>	<b>216</b>	<b>252</b>	<b>106</b>	<b>203</b>	<b>64</b>	<b>841</b>	<b>8,765</b>	<b>7,931</b>	<b>10.5%</b>
<i>previous year</i>	494	56	340	11	369	1,270			

### Provincially Inspected Slaughter

	Apr 2012	May 2012	June 2012	July 2012	Aug 2012	Aug 2011	2012	August YTD 2011	% Change
<b>Alberta</b>	101	133	87	119	66	59	728	666	9.3%
<b>Saskatchewan</b>	4	17	5	5	10	11	99	105	-5.7%
<b>Manitoba/BC</b>	51	37	83	42	62	81	452	595	-24.0%
<b>Ontario/Quebec**</b>	26	23	14	34	42	53	216	297	-27.3%
<b>Total</b>	<b>182</b>	<b>210</b>	<b>189</b>	<b>200</b>	<b>180</b>	<b>204</b>	<b>1,495</b>	<b>1,663</b>	<b>-10.1%</b>

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

Total Canadian Federal and Provincial Slaughter *	YTD 2012	YTD 2011	% Change
	10,260	9,594	6.9%

\*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\*

	01-Sep	08-Sep	15-Sep	22-Sep	29-Sep	Sept Total	2012	Sept YTD 2011	% Change
<b>for week ending:</b>	<b>716</b>	<b>879</b>	<b>755</b>	<b>755</b>	<b>643</b>	<b>3,748</b>	<b>30,884</b>	<b>33,238</b>	<b>-7.1%</b>
<i>previous year</i>	725	787	852	909	719	3,992			

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

### Canada Live Bison Exports to US

	May-12	June-12	July-12	Aug-12	Sept-12	2012	September YTD 2011	% Change
<b>Slaughter Male</b>	361	505	553	403	410	4,210	4,687	-10.2%
<b>Slaughter Female</b>	211	420	639	342	367	3,301	3,105	6.3%
<b>Feeder Male</b>	215	0	49	77	0	1,815	1,967	-7.7%
<b>Feeder Female</b>	158	194	37	140	0	1,609	1,802	-10.7%
<b>Total</b>	<b>945</b>	<b>1,119</b>	<b>1,278</b>	<b>962</b>	<b>777</b>	<b>10,935</b>	<b>11,561</b>	<b>-5.4%</b>

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

Boneless		March 2012	April	May	June	July	August	August YTD		% Change	
								2012	2011		
<b>USA</b>	Kg	12,297	21,255	4,299	19,818	7,902	22,795	120,989	222,269	-45.6%	
	Value (\$Cdn)	95,384	265,392	89,288	215,281	109,332	188,869	1,252,338	2,811,704	-55.5%	
<b>France</b>	Kg	6,519	21,401	1,970	11,042	7,919	8,163	59,510	25,572	132.7%	
	Value (\$Cdn)	104,669	238,623	15,207	184,769	148,164	140,287	873,443	345,630	152.7%	
<b>Switzerland</b>	Kg	2,117	3,412	2,834	4,004	5,496	3,268	24,136	28,680	-15.8%	
	Value (\$Cdn)	92,905	133,480	113,930	164,753	192,684	130,237	961,216	1,098,942	-12.5%	
<b>Germany</b>	Kg	-	339	157	160	-	287	-	1,171	3,093	-62.1%
	Value (\$Cdn)	-	8,427	4,490	3,879	-	6,553	-	29,606	88,897	-66.7%
<b>Egypt</b>	Kg	-	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-	-
<b>United Arab Emirates</b>	Kg	-	-	-	-	-	-	-	188	N/A	N/A
	Value (\$Cdn)	-	-	-	-	-	-	-	3,515	N/A	N/A
<b>Macau</b>	Kg	-	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-	-
<b>Singapore</b>	Kg	-	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-	-
<b>Saudi Arabia</b>	Kg	-	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-	-
<b>Italy</b>	Kg	286	-	318	368	245	486	2,475	380	551.3%	
	Value (\$Cdn)	8,159	-	9,076	9,540	6,363	12,607	63,956	10,546	506.4%	
<b>Sweden</b>	Kg	-	-	-	-	-	-	-	594	N/A	N/A
	Value (\$Cdn)	-	-	-	-	-	-	-	21,352	N/A	N/A
<b>Netherlands</b>	Kg	-	-	-	-	-	-	-	26,326	N/A	N/A
	Value (\$Cdn)	-	-	-	-	-	-	-	133,492	N/A	N/A
<b>Others</b>	Kg	-	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>Kg</b>	<b>21,219</b>	<b>46,407</b>	<b>9,578</b>	<b>35,392</b>	<b>21,562</b>	<b>34,999</b>	<b>208,281</b>	<b>307,102</b>	<b>-32.2%</b>	
	<b>Value (\$Cdn)</b>	<b>301,117</b>	<b>645,922</b>	<b>231,991</b>	<b>578,222</b>	<b>456,543</b>	<b>478,553</b>	<b>3,180,559</b>	<b>4,514,078</b>	<b>-29.5%</b>	

### Bone-in

	March 2012	April	May	June	July	August	2012	August YTD 2011	% Change
<b>Total</b>	<b>5,374</b>	<b>13,341</b>	<b>3,995</b>	<b>22,069</b>	<b>1,906</b>	<b>13,590</b>	<b>60,275</b>	<b>74,437</b>	<b>-19.0%</b>
<b>Value (\$Cdn)</b>	<b>52,449</b>	<b>127,498</b>	<b>41,945</b>	<b>176,024</b>	<b>20,012</b>	<b>118,874</b>	<b>536,802</b>	<b>431,753</b>	<b>24.3%</b>

### Total Exports, Boneless and Bone-in

	March 2012	April	May	June	July	August	2012	August YTD 2011	% Change
<b>Kg</b>	<b>26,593</b>	<b>59,748</b>	<b>13,573</b>	<b>57,461</b>	<b>23,468</b>	<b>48,589</b>	<b>268,556</b>	<b>381,539</b>	<b>-29.6%</b>
<b>Value (\$Cdn)</b>	<b>353,566</b>	<b>773,420</b>	<b>273,936</b>	<b>754,246</b>	<b>476,555</b>	<b>597,427</b>	<b>3,717,361</b>	<b>4,945,831</b>	<b>-24.8%</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)
Sept 2011	388.59	384.18	300.80	310.00
Oct 2011	393.37	386.59	296.80	281.31
Nov 2011	397.68	385.21	305.75	285.11
Dec 2011	398.44	383.57	298.64	290.96
Jan 2012	393.08	378.94	316.03	293.90
Feb 2012	395.80	378.17	295.48	289.46
Mar 2012	390.43	371.89	296.26	286.80
Apr 2012	391.85	380.45	305.18	293.24
May 2012	392.57	381.52	308.23	299.28
June 2012	394.12	384.26	308.90	299.01
July 2012	390.28	383.55	308.93	311.93
Aug 2012	391.95	382.88	313.63	300.49
Sept 2012	391.95	380.23	306.09	306.00

\*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
Oct 2011	375-380	370-375	280-290	260-265
Nov 2011	375-400	370-400	250-280	250-280
Dec 2011	375-400	360-400	250-270	250-270
Jan 2012	380-400	360-400	250-270	250-270
Feb 2012	380-390	360-390	no prices reported	250-270
Mar 2012	365-390	355-390	160-210	160-270
Apr 2012	365-390	355-390	160-210	160-260
May 2012	365-390	355-390	160-250	160-250
June 2012	365-390	355-390	160-250	160-250
July 2012	365-390	355-390	160-250	160-250
Aug 2012	365-390	355-390	160-250	160-250
Sept 2012	365-390	355-380	no prices reported	no prices reported
Oct 2012	350-390	350-380	180	180

\*source CBA survey of marketers

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

	July 2012		August 2012		September 2012		Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,250-1,650	1,398.35	1,250-1,650	1,393.17	1,250-1,650	1,396.23	-0.2%	0.2%
Chuckroll/Clod Fresh	560-653	583.06	500-625	583.06	500-625	574.45	-1.5%	-1.5%
Striploin Fresh	975-1,650	1,354.61	975-1,650	1,345.72	980-1,650	1,332.29	-1.6%	-1.0%
Tenderloin Fresh	1,850-2,595	2,191.64	1,850-2,595	2,189.56	1,850-2,595	2,145.75	-2.1%	-2.0%
Ground 90% Bulk, Fresh	525-640	578.15	525-640	578.15	525-640	589.21	1.9%	1.9%
Ground 85% Bulk, Frozen	560-643	601.84	550-635	581.48	555-615	582.04	-3.3%	0.1%
Ground 85% Patties, Frozen	565-645	580.81	500-650	579.35	532-628	568.81	-2.1%	-1.8%

\*source USDA

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

	Mid-July 2012 Pricing	Mid-August 2012 Pricing	Mid-September 2012 Pricing	Mid-October 2012 Pricing
Tenderloin - Fresh	\$53.00 - \$57.15	\$53.00 - \$57.15	\$53.00 - \$60.00	\$49.95 - \$57.00
Strip Loin Boneless - Fresh	\$28.00 - \$35.00	\$28.00 - \$35.00	\$28.00 - \$34.00	\$27.95 - \$31.00
Inside Round - Fresh	\$14.00 - \$16.90	\$14.00 - \$16.90	\$14.00 - \$16.90	\$13.65 - \$16.90
Ground 90% Bulk Fresh	\$12.00 - \$13.80	\$12.00 - \$13.80	\$12.00 - \$13.80	\$11.95 - \$12.00
Fresh Bison Trim	\$11.00 - \$12.00	\$11.00 - \$12.00	\$10.50 - \$11.60	\$9.95 - \$11.50

\*source CBA survey of marketers

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

Sekura Auctions (AB) (October 13, 2012)				Kramer Auctions (SK) (May 9, 2012)				Sekura Auctions (AB) (April 14, 2012)		
Birth Year, Sex	lbs	# of head	Avg (\$/cwt)	Birth Year, Sex	lbs	# of head	Avg (\$/cwt)	Birth Year, Sex	lbs	Avg (\$/cwt)
2012 Bulls	500 - 599	1	190	2011 BULLS	600-700 lbs	77	237	2011 Bulls	300 - 399	240.15
2011 Bulls	700 - 799	4	187.5		500-599 lbs	89	253		400 - 499	164.78
2010 Bulls	800 - 899	4	180.5		Under 499 lbs	48	267	2010 Bulls	500 - 599	207.5
2011 Heifers	400 - 499	9	185	2010 BULLS	1005 lbs	1	202		600 - 699	194.48
	500 - 599	16	174		650-750 lbs	6	181		700 - 799	220.67
2010 Heifers	700 - 799	9	167.5	2009 BULLS	1050-1080	5	187	2009 Bulls	900 - 999	202.5
	800 - 899	6	158		Under 1000	4	156		0 - 299	175.61
	900 +	2	115	2011 HEIFER CA	450-550 lbs	55	241		300 - 399	217.57
Cows		8	103.6		400-449 lbs	42	243	2010 Heifers	400 - 499	171.96
Cow / Calf Pairs		2	750		350-399 lbs	14	243		500 - 599	175.23
Breeding Bulls		1	101	2010 HEIFERS		1	200		800 - 899	195.39
				<u>2011 Bulls</u>						<u>Average</u>
				High selling pen - \$2.31 /lb with average weight of 697 lbs				Breeding Bulls		3481.58
				<u>2010 Bulls</u>						
				High selling pen - \$2.02/lb with a weight of 1005 lbs						
				<u>2011 Heifer Calves</u>						
				High selling pen - \$2.48/lb with average weight of 519 lbs						

**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)

Bison prices were under pressure over the past month. Although those producers who contracted finished bison earlier in the year continue to receive \$3.90 - \$4.00 per pound, a combination of higher than desirable inventories of trim, and some fallout from the US drought have pushed prices to as low as \$3.50 per pound HHW. Although middle and prime cuts are moving in the market, trim inventories continue to be bothersome.

Finished bison prices offered at \$3.50 - \$3.90 per pound hot hanging weight are below last month's prices. Marketers continue to report that they have access to sufficient animals to meet current market demand. As more animals come to market, there may be further downward price pressure on live animals if the burdensome level of trim is not reduced. There are reports that the demand for bison in Europe continues to be steady with downward price pressure because of consumer resistance.

Soon feeder bison will be coming to the market. With the higher cost of feed, feeder bison prices are expected to be below 2011 levels.

Nationally, federal slaughter was up 8.4% for the first 41 weeks of 2012 (week ending October 13, 2012) when compared to the first 41 weeks of 2011 (9,009 animals in 2012 compared to 8,310 animals in 2011). Live bison exports to the U.S. were down for the first eight months of 2012 by 9.8% - 10,824 compared to 11,996 bison for the same period in 2011.

Chart 1

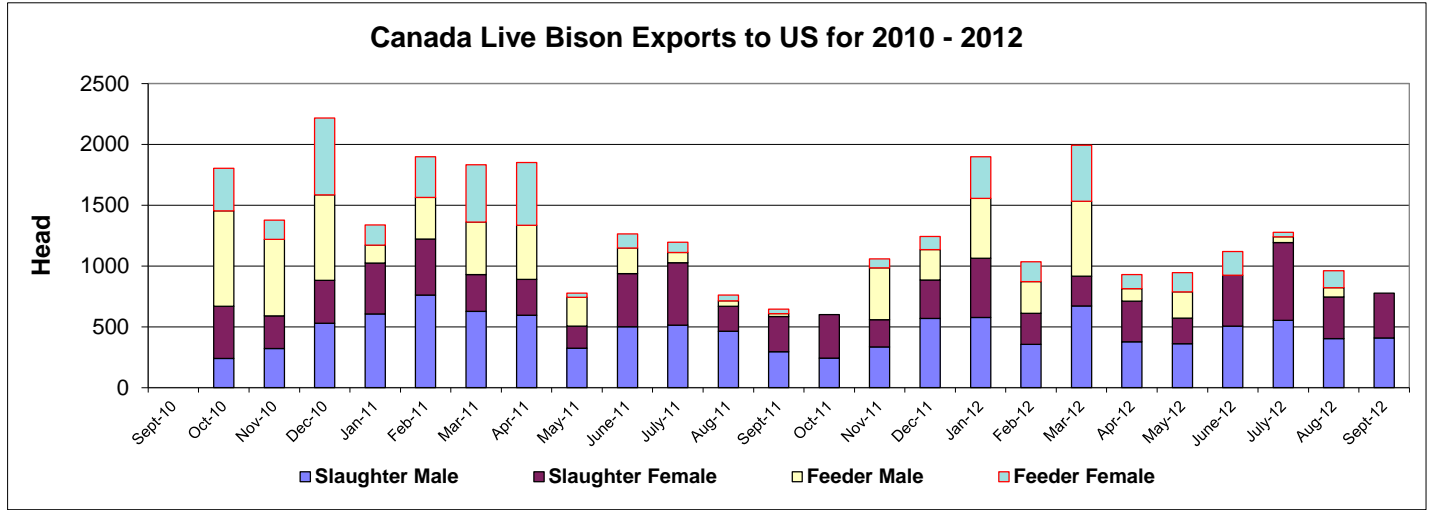
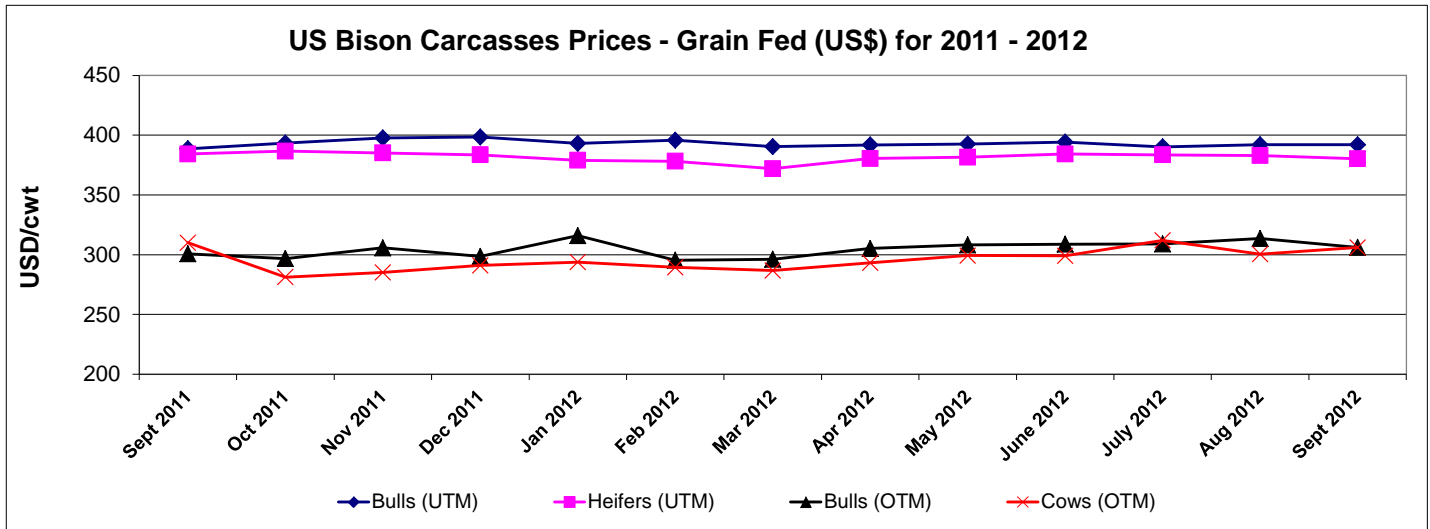


Chart 2



**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.

Prepared by: Red Meat Section, Agriculture and Agri-Food Canada

Contact: Diane Kelly (613) 773-0816 ([diane.kelly@agr.gc.ca](mailto:diane.kelly@agr.gc.ca)) or see us at: <http://www.agr.gc.ca/redmeat>