



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - October 30, 2013

Weekly Federal Bison Slaughter

	31-Aug	07-Sep	14-Sep	21-Sep	28-Sep	Sept Total	2013	September YTD 2012	% Change
Total Canada	115	246	117	299	198	975	8,596	8,765	-1.9%
<i>previous year</i>	216	252	106	203	64	841			

Provincially Inspected Slaughter

	Apr 2013	May 2013	June 2013	July 2013	Aug 2013	Aug 2012	2013	August YTD 2012	% Change
Alberta	101	151	114	119	109	66	990	728	36.0%
Saskatchewan	45	12	21	6	2	10	159	81	96.3%
Manitoba/BC	75	65	91	51	69	71	552	440	25.5%
Ontario/Quebec**	6	31	34	44	43	42	205	216	-5.1%
Total	227	259	260	220	223	189	1,906	1,465	30.1%

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

Total Canadian Federal and Provincial Slaughter *	YTD 2013	YTD 2012	% Change
	10,502	10,230	2.7%

*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*

	31-Aug	07-Sep	14-Sep	21-Sep	28-Sep	Sept Total	2013	September YTD 2012	% Change
for week ending:	913	751	921	726	745	4,056	33,456	30,884	8.3%
<i>previous year</i>	716	879	755	755	643	3,748			

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

Canada Live Bison Exports to US

	May-13	June-13	July-13	Aug-13	Sept-13	2013	September YTD 2012	% Change
Slaughter Male	298	761	550	962	N/A	4,465	4,210	6.1%
Slaughter Female	720	586	495	605	N/A	4,403	3,301	33.4%
Feeder Male	509	153	0	166	N/A	1,657	1,815	-8.7%
Feeder Female	230	112	0	171	N/A	949	1,609	-41.0%
Total	1,757	1,612	1,045	1,904	N/A	11,474	10,935	4.9%

Note: Data for the month of September 2013 is unavailable due to the USDA Government temporary shutdown.

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

Boneless		2013						August YTD		
		March	April	May	June	July	August	2013	2012	% Change
USA	Kg	20,526	22,775	8,778	21,819	15,243	6,379	121,242	120,989	0.2%
	Value (\$Cdn)	285,354	256,215	95,272	309,826	211,599	105,662	1,563,918	1,252,338	24.9%
France	Kg	11,258	6,880	4,624	9,309	6,680	14,601	61,156	59,510	2.8%
	Value (\$Cdn)	204,718	146,790	95,302	172,283	115,035	250,615	1,147,601	873,443	31.4%
Switzerland	Kg	11,023	3,866	2,355	6,811	3,489	7,289	43,223	24,136	79.1%
	Value (\$Cdn)	402,653	173,190	106,590	255,753	136,157	270,759	1,696,861	961,216	76.5%
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	-	1,554	2,475	-37.2%
	Value (\$Cdn)	-	8,533	7,479	-	6,222	-	37,943	63,956	-40.7%
French Southern Terr.	Kg	-	-	-	-	-	44	44	-	-
	Value (\$Cdn)	-	-	-	-	-	1,072	1,072	-	-
Netherlands	Kg	-	-	-	-	-	335	335	-	-
	Value (\$Cdn)	-	-	-	-	-	8,702	8,702	-	-
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	60,160	53,600	33,978	45,213	25,613	30,246	291,331	208,281	39.9%
	Value (\$Cdn)	1,117,644	832,395	557,773	835,003	469,013	678,359	5,320,503	3,180,559	67.3%

Bone-in

	March 2013	April	May	June	July	August	2013	August YTD 2012	% Change	
Total	Kg	-	-	7,216	-	-	48	7,523	60,275	-87.5%
	Value (\$Cdn)	-	-	50,767	-	-	741	54,923	536,802	-89.8%

Total Exports, Boneless and Bone-in

	March 2013	April	May	June	July	August	2013	August YTD 2012	% Change
Kg	60,160	53,600	41,194	45,213	25,613	30,294	298,854	268,556	11.3%
Value (\$Cdn)	1,117,644	832,395	608,540	835,003	469,013	679,100	5,375,426	3,717,361	44.6%

*source Statistics Canada

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-October were steady with some upward pressure. Producers received 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. Most indications are that there is an adequate supply of finished animals for the next few months with the availability of 2011 animals winding down with 2012 bulls expected to be coming to market by the end of the year.

Wholesale prices for middle and prime cuts remained stable with continued good movement into the market. European markets are gearing up for Christmas business with all high-end cuts in good demand. Additional interest in hip cuts has been generated through participation in the Anuga food show in Germany. This combined with the eventual move to a 0% tariff in the EU should maintain good demand. Domestic markets for bison meat are remaining strong with most cuts moving well except for 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. Demand in the US continues to be steady.

Nationally, federal slaughter was down 1.9% for the first 39 weeks of 2013 (week ending September 28, 2013) when compared to 2012 (8,596 animals in 2013 compared to 8,765 animals in 2012). Live animal exports to the end of September 2013 at 12,436 are up 13.7% when compared to the 10,935 bison exported for the same period in 2012.

Chart 1

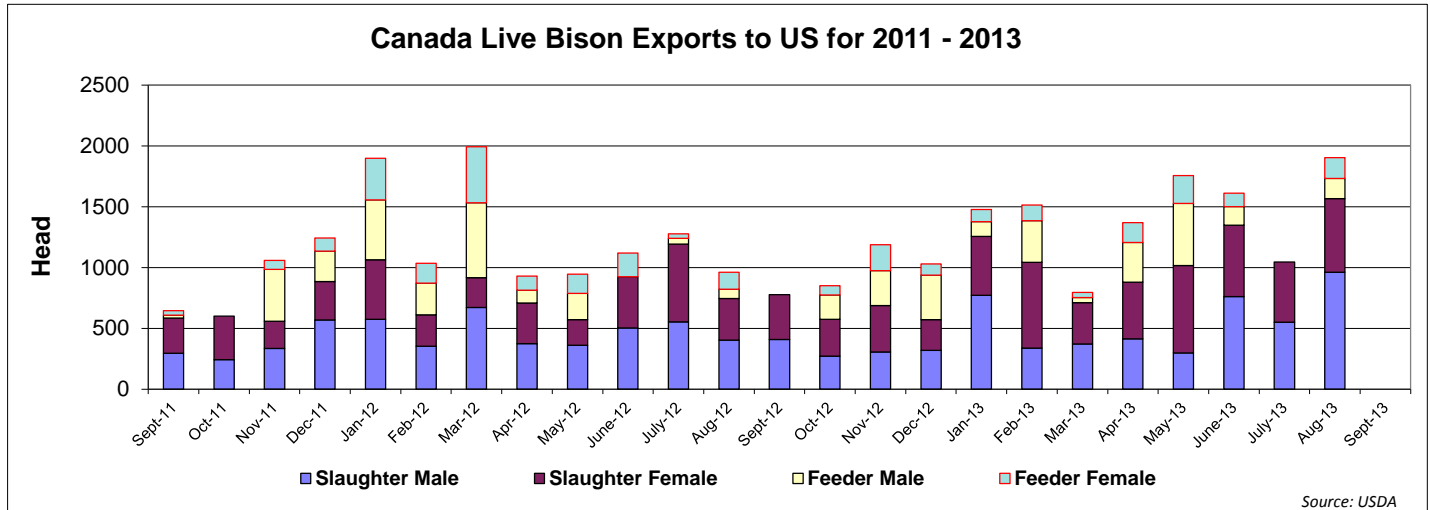
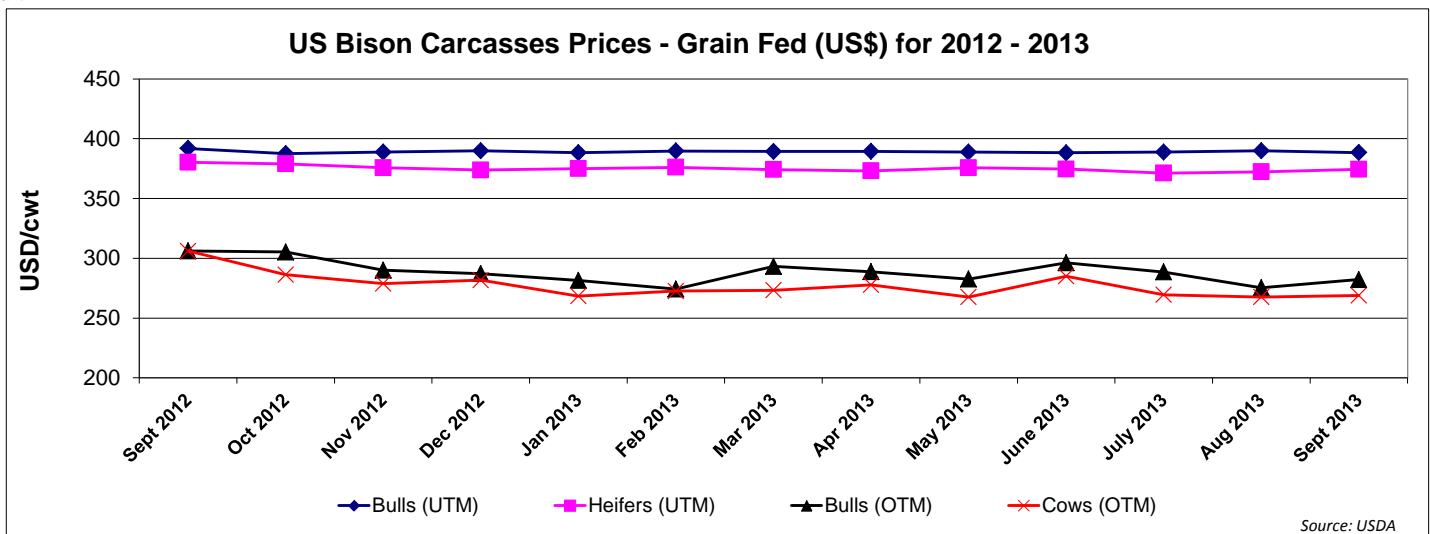


Chart 2



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.

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