



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - April 24, 2014

Weekly Federal Bison Slaughter

	01-Mar	08-Mar	15-Mar	22-Mar	29-Mar	Mar Total	January - March YTD		
Total Canada	126	429	224	301	128	1,208	2,852	3,281	-13.1%
previous year	252	353	195	278	138	1,216			

Provincially Inspected Slaughter

	Oct 2013	Nov 2013	Dec 2013	Jan 2014	Feb 2014	Feb 2013	January - February YTD		
Alberta	111	126	80	111	109	136	220	283	-22.3%
Saskatchewan	33	33	14	36	23	12	59	24	145.8%
Manitoba/BC	90	47	80	56	68	37	124	138	-10.1%
Ontario/Quebec**	27	26	16	11	8	18	19	33	-42.4%
Total	261	232	190	214	208	203	422	478	-11.7%

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

Total Canadian Federal and Provincial Slaughter *	YTD 2014	YTD 2013	% Change
	3,274	3,759	-12.9%

*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-Mar	08-Mar	15-Mar	22-Mar	29-Mar	Mar Total	January - March YTD		
for week ending:	1015	1067	1134	1218	1057	5,491	13,503	10,503	28.6%
previous year	839	936	752	846	939	4,312			

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

Canada Live Bison Exports to US

	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	2014	January - March YTD		
							2013		% Change
Slaughter Male	451	314	436	598	615	1,649	1,481		11.3%
Slaughter Female	334	471	602	486	973	2,061	1,530		34.7%
Feeder Male	504	210	313	64	0	377	503		-25.0%
Feeder Female	445	80	237	78	0	315	272		15.8%
Total	1,734	1,075	1,588	1,226	1,588	4,402	3,786		16.3%

*source : USDA, APHIS

Canadian Fresh or Chilled Bison Meat Exports

								January - February YTD		
Boneless								2014	2013	% Change
Sept 2013										
October										
November										
December										
January 2014										
February										
USA	Kg	7,057	22,668	4,736	7,508	12,317	8,996	21,313	25,722	-17.1%
	Value (\$Cdn)	106,181	329,904	90,476	153,555	202,047	122,755	324,802	299,990	8.3%
France	Kg	3,339	13,231	9,811	19,045	8,803	17,199	26,002	7,804	233.2%
	Value (\$Cdn)	60,305	232,889	166,456	232,143	146,726	258,269	404,995	162,858	148.7%
Switzerland	Kg	3,858	3,822	6,234	3,916	1,111	2,845	3,956	8,390	-52.8%
	Value (\$Cdn)	173,081	166,106	294,630	177,743	48,540	135,148	183,688	351,759	-47.8%
Germany	Kg	-	771	944	820	-	-	-	-	-
	Value (\$Cdn)	-	22,082	25,530	21,417	-	-	-	-	-
Egypt	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
United Arab Emirates	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Mexico	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Saudi Arabia	Kg	-	-	3,104	-	-	-	-	-	-
	Value (\$Cdn)	-	-	55,873	-	-	-	-	-	-
Republic of Moldova	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Italy	Kg	324	-	226	302	231	370	601	605	-0.7%
	Value (\$Cdn)	8,412	-	5,871	7,847	5,987	9,331	15,318	15,709	-2.5%
French Southern Terr.	Kg	-	-	-	-	218	-	218	-	-
	Value (\$Cdn)	-	-	-	-	6,536	-	6,536	-	-
Netherlands	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Belgium	Kg	-	-	15,788	-	-	-	-	-	-
	Value (\$Cdn)	-	-	161,130	-	-	-	-	-	-
Total	Kg	14,578	40,492	40,843	31,591	22,680	29,410	52,090	42,521	22.5%
	Value (\$Cdn)	347,979	750,981	799,966	592,705	409,836	525,503	935,339	830,316	12.6%

Bone-in

								January - February YTD		
Sept 2013								2014	2013	% Change
October										
November										
December										
January 2014										
February										
Total	Kg	-	936	209	-	7,986	-	7,986	259	2983.4%
	Value (\$Cdn)	-	13,373	2,219	-	83,857	-	83,857	3,415	2355.5%

Total Exports, Boneless and Bone-in

								January - February YTD		
Sept 2013								2014	2013	% Change
October										
November										
December										
January 2014										
February										
Total	Kg	14,578	41,428	41,052	31,591	30,666	29,410	60,076	42,780	40.4%
	Value (\$Cdn)	347,979	764,354	802,185	592,705	493,693	525,503	1,019,196	833,731	22.2%

*source Statistics Canada

wghtd avg

	Bulls (UTM)	Heifers (UTM)	Bulls (OTM)	Cows (OTM)
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
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

*source USDA

wghtd avg

Month	Bulls	Heifers	Mature Bulls	Mature Cows	2012 Bulls	2012 Heifers	2013 Bulls	2013 Heifers
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				
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

*source CBA survey of marketers

	January 2014		February 2014		March 2014		2 months prior	1 month prior
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg		
Ribeye Lip-On Fresh	1,200-1,650	1,347.83	1,250-1,650	1,354.65	1,250-1,650	1,393.23	3.4%	2.8%
Chuckroll/Clod Fresh	500-671	569.28	500-625	587.93	500-636	585.24	2.8%	-0.5%
Striploin Fresh	775-1,650	1,257.31	775-1,650	1,254.46	605-1,650	1,298.16	3.2%	3.5%
Tenderloin Fresh	1,700-2,595	2,019.44	1,700-2,595	2,128.78	1,700-2,595	2,154.11	6.7%	1.2%
Ground 90% Bulk, Fresh	525-633	595.05	525-640	572.87	525-640	587.90	-1.2%	2.6%
Ground 85% Bulk, Frozen	500-630	560.37	500-630	557.06	500-630	556.67	-0.7%	-0.1%
Ground 85% Patties, Frozen	500-650	559.21	500-650	569.93	520-650	594.61	6.3%	4.3%

*source USDA

	Mid-January 2014 Pricing	Mid-February 2014 Pricing	Mid-March 2014 Pricing	Mid-April 2014 Pricing
Tenderloin - Fresh	\$51.95 - \$55.00	\$50.00 - \$54.95	\$50.00 - \$53.00	\$51.00 - \$60.00
Strip Loin Boneless - Fresh	\$28.00 - \$30.00	\$28.00 - \$34.00	\$28.00 - \$30.00	\$30.00 - \$32.00
Inside Round - Fresh	\$13.95- \$14.00	\$13.95- \$18.00	\$14.00 - \$14.50	\$15.00 - \$16.00
Ground 90% Bulk Fresh	\$10.95 - \$12.00	\$10.95 - \$12.00	\$10.95 - \$12.00	\$12.00 - \$12.80
Fresh Bison Trim	\$9.25 - \$10.50	\$9.75 - \$11.00	\$9.75 - \$11.00	\$11.00 - \$11.50

*source CBA survey of marketers

Vold, Jones & Vold Auctions Co. Ltd. (AB)	Heartland Livestock Services
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Vold, Jones & Vold Auctions Co. Ltd. (AB) (April 14th, 2014)			Heartland Livestock Services (MB) - Great Spirit Show and Sale (April 5th, 2014)			Vold, Jones & Vold Auctions Co. Ltd. (AB) (March 15th, 2014)		
		171 Head		<u>Weight</u>	<u>Price</u>			326 Head
2013 Bulls	400-500 lbs	\$234 - \$239	2011 BULLS	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		
2012 Bulls	700-800 lbs	\$195	2012 BULLS	Bison Spirit Ranch (GC)	1310	\$8,000		
	600-700 lbs	\$190		Triple B Bison Ranch	1280	\$3,300		
	500-600 lbs	\$222		Taylor Bison	1260	\$3,250		
	400-500 lbs	\$175 - \$180		Fraserwood Bison Ranch (HM)	1025	\$2,500		
				Fraserwood Bison Ranch (HM)	940	\$1,750		
2013 Heifers	400-500 lbs	\$163	2013 BULLS	Rockwood Bison Ranch (RC)	770	\$5,000		
	300-400 lbs	\$177.50 - \$200		Torch River Bison	620	1400		
	300lbs & under	\$165		Elkola Ranch	615	\$1,300		
				Torch River Bison (HM)	530	1300		
2012 Heifers	600-700 lbs	\$117.50-\$142.50		Sandridge Bison Ranch (HM)	675	\$1,700		
	400-500 lbs	\$110 - \$155	2012 HEIFERS	Quill Creek Bison Ranch (GC)	1145	\$5,250		
Exposed Cows		\$875 - \$1250		Beldon Bison Ranch (RC)	915	\$2,650		
				Borderland Ag Bison Ranch	1090	\$3,500		
OTM Bulls	750-950 lbs	\$160 - \$168		Borderland Ag Bison Ranch (HM)	1035	\$2,800		
Mature Bulls	1000-1700 lbs	\$100 - \$120	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		
Prices quoted represents good quality animals.								
						<u>Wild Rose Sale</u>		
						2012 Bulls	\$2800 - \$5500	Avg \$3587
						2012 Heifers	\$1500 - \$2300	Avg \$1785
						2013 Bulls	\$900 - \$5500	Avg \$2128
						2013 Heifers	\$800 - \$1300	Avg \$1080
						<u>Commercial Sale</u>		
						2013 Bulls	500 - 600 lbs	\$230 - \$241
							400 - 500 lbs	\$190 - \$240
							300 - 400 lbs	\$190 - \$220
							300 lbs & under	\$125
						2012 Bulls	800 - 900 lbs	\$187
							700 - 800 lbs	\$185 - \$190
							600 - 700 lbs	\$180 - \$195
							500 - 600 lbs	\$150 - \$180
						2013 Heifers	300 - 400 lbs	\$185 - \$200
							400 - 500 lbs	\$180 - \$182.50
							500 - 600 lbs	\$190
							300 lbs & under	\$100
						2012 Heifers	500 - 600 lbs	\$150 - \$164
						lb Cows		\$53 - \$100
						Bred Cows		\$950 - \$1050
						OTM Bulls	1000 - 1200 lbs	\$130 - \$150
						OTM Bulls	1200 - 1800 lbs	\$120 - \$127

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-April continued to show strength. Producers in Canada received up to \$4.00 per pound HHW for bison bulls and up to \$3.85 per pound HHW for heifers with appropriate adjustments for weight and quality. Marketers report that there is a strong demand for finished bison with many finding their way to the US because of stronger demand created by a stronger US dollar.

Wholesale prices for middle and prime cuts remained strong with continued good movement into the market. European market demand is strong with all high-end cuts in good demand. US demand is strong as retailers begin preparations for the summer season.

Domestic markets for bison meat remains strong. The burdensome trim inventories have been reduced. The food service market is stable with strong demand from the retail sector.

Nationally, federal slaughter was 13.1% below year-ago levels for the first 13 weeks of 2014 (week ending March 29, 2014) when compared to 2013 (2,852 animals in 2014 compared to 3,281 animals in 2013). Live animal exports to the US for the first three months of 2014 at 4,402 head are up 16.3% when compared to the 3,786 bison exported during the same period in 2013.

Chart 1

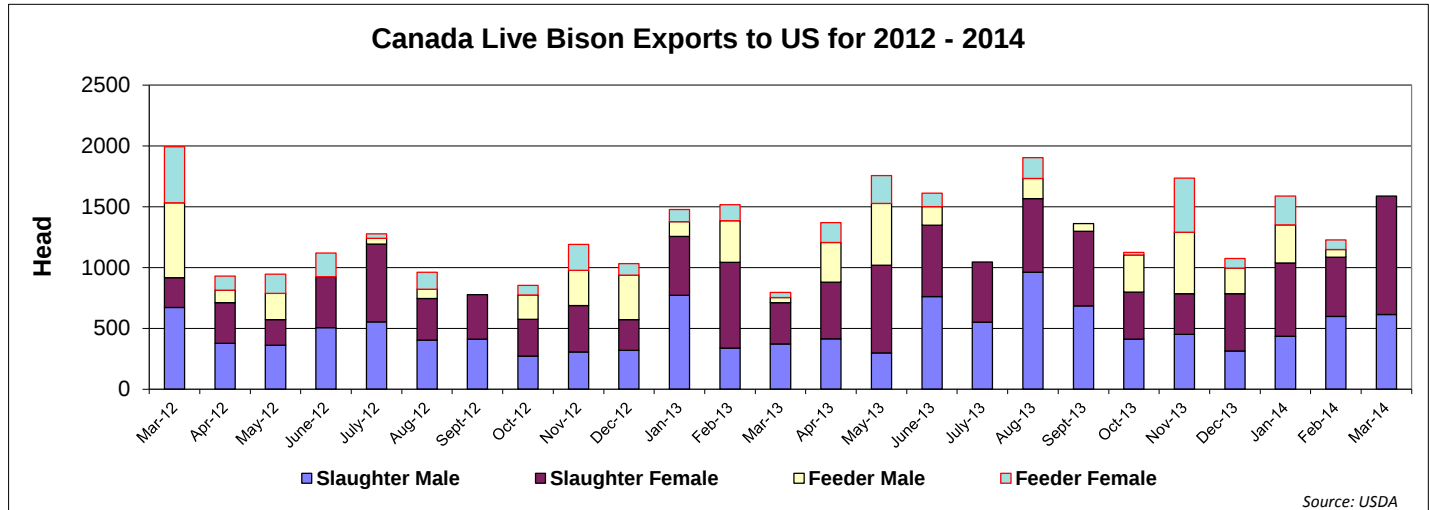
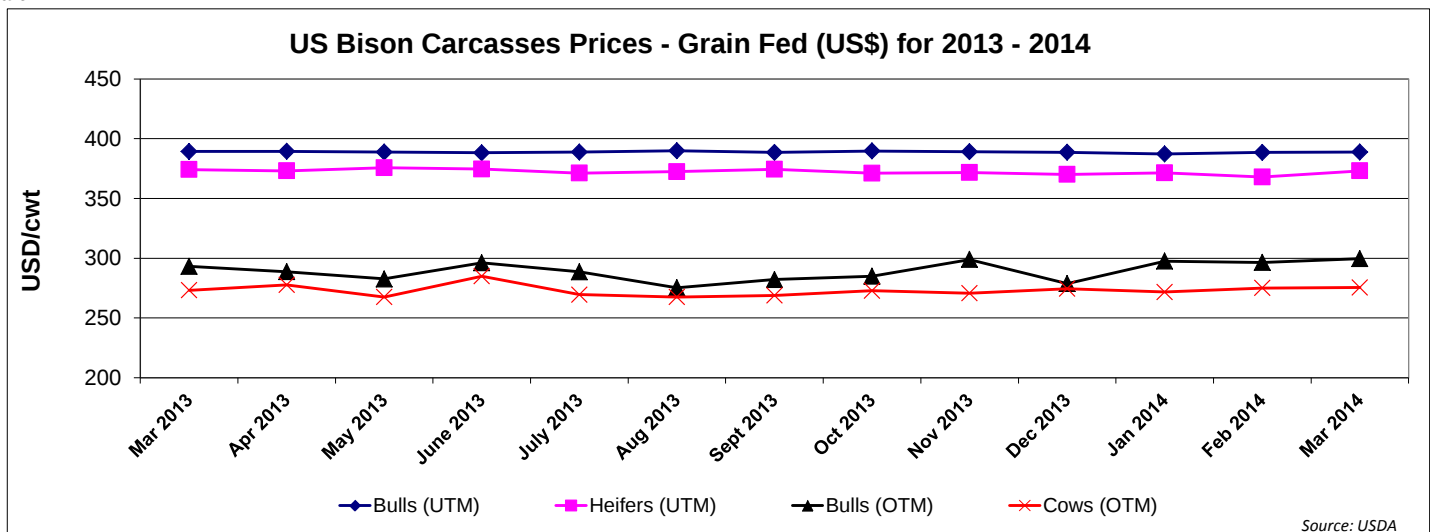


Chart 2



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%
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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