Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

# BISON MARKET AND SUPPLY UPDATE

***Prepared by Red Meat Section/Agriculture and Agri-Food Canada - August 23, 2013***

## Weekly Federal Bison Slaughter

| | 06-Jul | 13-Jul | 20-Jul | 27-Jul | July Total | 2013 | July YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|
| **Total Canada** | **10** | **344** | **77** | **333** | **764** | **6,706** | **6,959** | **-3.6%** |
| ***previous year*** | *213* | *461* | *237* | *270* | ***1,181*** | | | |

## Provincially Inspected Slaughter

| | Feb 2013 | Mar 2013 | Apr 2013 | May 2013 | June 2013 | June 2012 | 2013 | June YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **Alberta** | 136 | 113 | 101 | 151 | 114 | 87 | 762 | 543 | 40.3% |
| **Saskatchewan** | 12 | 49 | 45 | 12 | 21 | 16 | 151 | 66 | 128.8% |
| **Manitoba/BC** | 37 | 63 | 75 | 65 | 72 | 80 | 413 | 333 | 24.0% |
| **Ontario/Quebec**** | 18 | 14 | 6 | 31 | 34 | 14 | 118 | 140 | -15.7% |
| **Total** | **203** | **239** | **227** | **259** | **241** | **197** | **1,444** | **1,082** | **33.5%** |

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

| | YTD 2013 | YTD 2012 | % Change |
|---|---|---|---|
| **Total Canadian Federal and Provincial Slaughter *** | **8,150** | **8,041** | **1.4%** |

**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*

| for week ending: | 06-Jul | 13-Jul | 20-Jul | 27-Jul | July Total | 2013 | July YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|
| | **720** | **955** | **1130** | **946** | **3,751** | **25,583** | **24,220** | **5.6%** |
| ***previous year*** | *665* | *992* | *851* | *802* | ***3,310*** | | | |

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

## Canada Live Bison Exports to US

| | Mar-13 | Apr-13 | May-13 | June-13 | July-13 | 2013 | July YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|
| Slaughter Male | 373 | 413 | 298 | 761 | 550 | 3,503 | 3,397 | **3.1%** |
| Slaughter Female | 339 | 467 | 720 | 586 | 495 | 3,798 | 2,592 | **46.5%** |
| Feeder Male | 42 | 326 | 509 | 153 | 0 | 1,491 | 1,738 | **-14.2%** |
| Feeder Female | 41 | 164 | 230 | 112 | 0 | 778 | 1,469 | **-47.0%** |
| Total | **795** | **1,370** | **1,757** | **1,612** | **1,045** | **9,570** | **9,196** | **4.1%** |

**source USDA*

## Canadian Fresh or Chilled Bison Meat Exports

| ***Boneless*** | | January 2013 | February | March | April | May | June | 2013 | June YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **USA** | Kg | 11,449 | 14,273 | 20,526 | 22,775 | 8,778 | 20,001 | **97,802** | **90,292** | **8.3%** |
| | Value ($Cdn) | 152,591 | 147,399 | 285,354 | 256,215 | 95,272 | 277,328 | **1,214,159** | **954,137** | **27.3%** |
| **France** | Kg | 4,720 | 3,084 | 11,258 | 6,880 | 4,624 | 5,619 | **36,185** | **43,428** | **-16.7%** |
| | Value ($Cdn) | 80,920 | 81,938 | 204,718 | 146,790 | 95,302 | 105,193 | **714,861** | **584,992** | **22.2%** |
| **Switzerland** | Kg | 2,291 | 6,099 | 11,023 | 3,866 | 2,355 | 6,811 | **32,445** | **15,372** | **111.1%** |
| | Value ($Cdn) | 101,893 | 249,866 | 402,653 | 173,190 | 106,590 | 255,753 | **1,289,945** | **638,295** | **102.1%** |
| **Germany** | Kg | - | - | - | - | - | - | **-** | **884** | **-** |
| | Value ($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 ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **Italy** | Kg | - | 605 | - | 395 | 353 | - | **1,353** | **1,744** | **-22.4%** |
| | Value ($Cdn) | - | 15,709 | - | 8,533 | 7,479 | - | **31,721** | **44,986** | **-29.5%** |
| **Sweden** | Kg | - | - | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **Netherlands** | Kg | - | - | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **Belgium** | Kg | - | - | 17,353 | 19,684 | 17,868 | 7,274 | **62,179** | **-** | **-** |
| | Value ($Cdn) | - | - | 224,919 | 247,667 | 253,130 | 97,141 | **822,857** | **-** | **-** |
| **Total** | **Kg** | **18,460** | **24,061** | **60,160** | **53,600** | **33,978** | **39,705** | **229,964** | **151,720** | **51.6%** |
| | **Value ($Cdn)** | **335,404** | **494,912** | **1,117,644** | **832,395** | **557,773** | **735,415** | **4,073,543** | **2,245,463** | **81.4%** |

| ***Bone-in*** | | January 2013 | February | March | April | May | June | 2013 | June YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total** | **Kg** | **238** | **21** | **-** | **-** | **7,216** | **-** | **7,475** | **44,779** | **-83.3%** |
| | **Value ($Cdn)** | **3,098** | **317** | **-** | **-** | **50,767** | **-** | **54,182** | **397,916** | **-86.4%** |

| ***Total Exports, Boneless and Bone-in*** | | January 2013 | February | March | April | May | June | 2013 | June YTD 2012 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| | **Kg** | **18,698** | **24,082** | **60,160** | **53,600** | **41,194** | **39,705** | **237,439** | **196,499** | **20.8%** |
| | **Value ($Cdn)** | **338,502** | **495,229** | **1,117,644** | **832,395** | **608,540** | **735,415** | **4,127,725** | **2,643,379** | **56.2%** |

**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) |
|---|---|---|---|---|
| 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 |
| 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 |

**source USDA*

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

*wghtd avg*

| | Bulls | Heifers | Mature Bulls | Mature Cows |
|---|---|---|---|---|
| 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 |
| 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 |

**source CBA survey of marketers*

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

| | May 2013 | | June 2013 | | July 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 | 1,381.54 | 1,300-1,650 | 1,379.34 | 1,307-1,475 | 1,355.92 | -1.9% | -1.7% |
| Chuckroll/Clod Fresh | 500-645 | 580.91 | 500-625 | 580.87 | 561-649 | 570.93 | -1.7% | -1.7% |
| Striploin Fresh | 750-1,650 | 1,344.12 | 1,250-1,650 | 1,386.07 | 1,010-1,416 | 1,334.27 | -0.7% | -3.7% |
| Tenderloin Fresh | 1,800-2,595 | 2,064.15 | 1,850-2,595 | 2,061.85 | 1,871-2,595 | 1,988.96 | -3.6% | -3.5% |
| Ground 90% Bulk, Fresh | 525-640 | 571.32 | 525-640 | 584.90 | 609-609 | 609.00 | 6.6% | 4.1% |
| Ground 85% Bulk, Frozen | 513- 635 | 566.35 | 500-635 | 549.05 | 524-615 | 557.73 | -1.5% | 1.6% |
| Ground 85% Patties, Frozen | 500-650 | 567.16 | 520-635 | 565.68 | 524-628 | 567.22 | 0.0% | 0.3% |

**source USDA*

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

| | Mid-May 2013 Pricing | Mid-June 2013 Pricing | Mid-July 2013 Pricing | Mid-August 2013 Pricing |
|---|---|---|---|---|
| Tenderloin - Fresh | $45.95 - $57.00 | $45.95 - $57.00 | $45.95 - $56.85 | $53.00 - $55.00 |
| Strip Loin Boneless - Fresh | $26.95 - $30.38 | $25.95 - $30.38 | $25.95 - $34.00 | $28.00 - $31.00 |
| Inside Round - Fresh | $13.45- $13.90 | $13.45 - $14.05 | $13.45 - $15.15 | $13.90- $15.50 |
| Ground 90% Bulk Fresh | $11.45 - $12.50 | $10.95 - $12.50 | $10.95 - $12.50 | $10.95 - $12.50 |
| Fresh Bison Trim | $9.45 - $11.00 | $8.95 - $11.00 | $8.95 - $11.00 | $10.50 - $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-August showed some upward pressure. Producers received up to $3.70 per pound HHW for bison bulls with one report of higher prices. For heifers, producers received up to $3.55 per pound HHW with appropriate adjustments for weight and quality. Wholesale prices for middle and prime cuts remained stable with good movement into the market. The inventory of frozen bison trim has declined but continues to be burdensome. Fresh bison trim continues to move well as the summer grilling season is strong but is expected to slow in September. European demand continues to be slow because of the holiday season in Europe. Canadian demand for bison meat is steady with those marketers shipping product to the US also seeing steady demand.**

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

**Nationally, federal slaughter was down 3.6% for the first 30 weeks of 2013 (week ending July 27, 2013) when compared to 2012 (6,706 animals in 2013 compared to 6,959 animals in 2012). Live animal exports to the end of July 2013 at 9,570 are up 4.1% when compared to the 9,196 bison exported for the same period in 2012.**

**Chart 1**

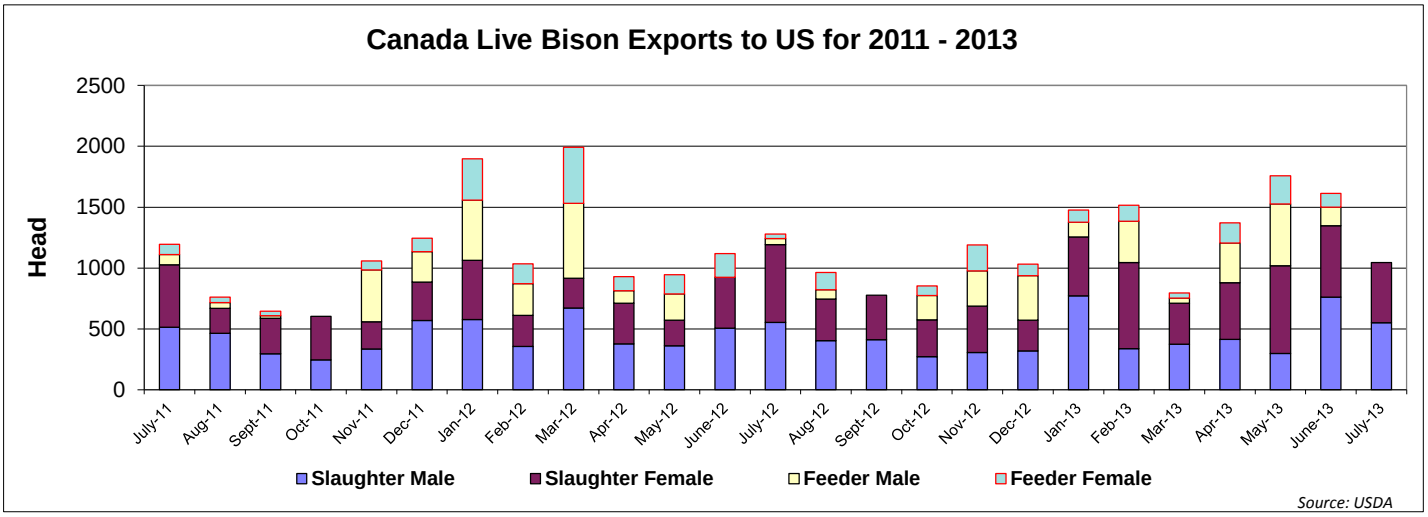
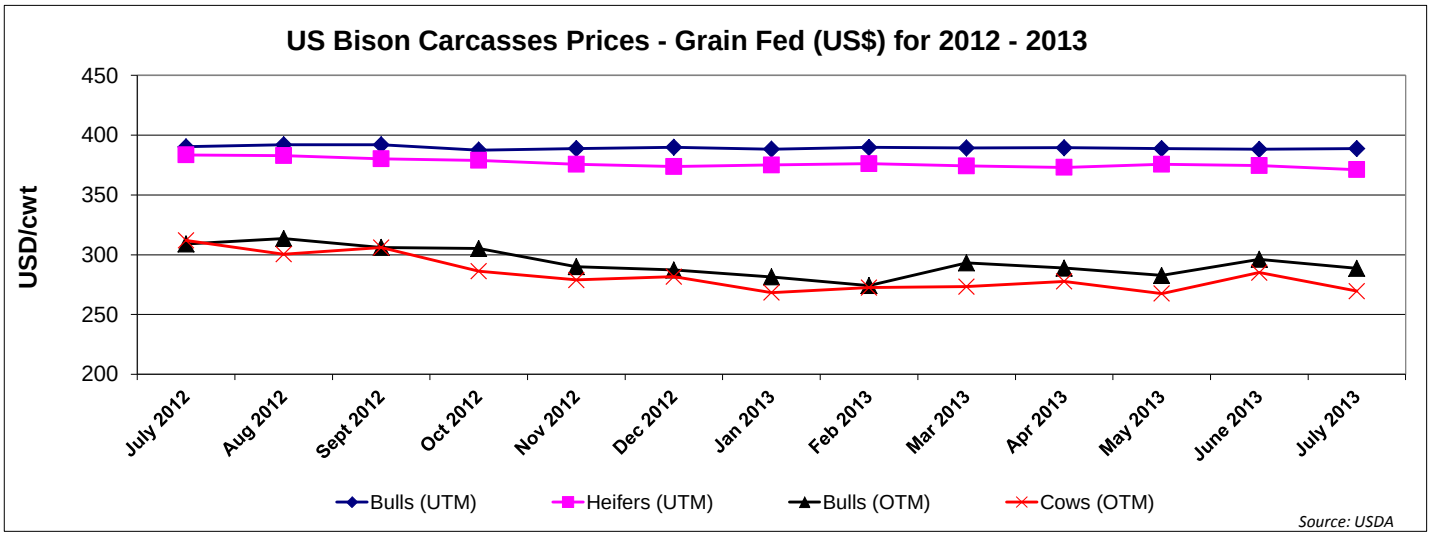



**Chart 2**




**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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