



## BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - February 26, 2012

### Weekly Federal Bison Slaughter

|               | 05-Jan | 12-Jan | 19-Jan | 26-Jan | Jan Total | 2013 | January YTD | 2012 | % Change |
|---------------|--------|--------|--------|--------|-----------|------|-------------|------|----------|
| Total Canada  | 49     | 324    | 279    | 329    | 981       | 981  | 981         | 767  | 27.9%    |
| previous year | 222    | 160    | 179    | 206    | 767       |      |             |      |          |

### Provincially Inspected Slaughter

|                  | Aug 2012 | Sept 2012 | Oct 2012 | Nov 2012 | Dec 2012 | Dec 2011 | 2012  | 2011  | % Change |
|------------------|----------|-----------|----------|----------|----------|----------|-------|-------|----------|
| Alberta          | 66       | 78        | 105      | 93       | 101      | 80       | 1,105 | 1,016 | 8.8%     |
| Saskatchewan     | 10       | 21        | 26       | 13       | 10       | 23       | 151   | 155   | -2.6%    |
| Manitoba/BC      | 71       | 57        | 62       | 75       | 40       | 94       | 674   | 909   | -25.9%   |
| Ontario/Quebec** | 42       | 24        | 39       | 33       | 17       | 32       | 329   | 464   | -29.1%   |
| Total            | 189      | 180       | 232      | 214      | 168      | 229      | 2,259 | 2,544 | -11.2%   |

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

| Total Canadian Federal and Provincial Slaughter * | YTD 2013 | YTD 2012 | % Change |
|---------------------------------------------------|----------|----------|----------|
|                                                   | 981      | 767      | 27.9%    |

\*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\*

|                  | 05-Jan | 12-Jan | 19-Jan | 26-Jan | Jan Total | 2013  | January YTD | 2012  | % Change |
|------------------|--------|--------|--------|--------|-----------|-------|-------------|-------|----------|
| for week ending: | 610    | 848    | 820    | 782    | 3,060     | 3,060 | 3,060       | 3,681 | -16.9%   |
| previous year    | 802    | 804    | 1052   | 1023   | 3,681     |       |             |       |          |

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

### Canada Live Bison Exports to US

|                  | Sept-12 | Oct-12 | Nov-12 | Dec-12 | Jan-13 | 2013  | January YTD | 2012  | % Change |
|------------------|---------|--------|--------|--------|--------|-------|-------------|-------|----------|
| Slaughter Male   | 410     | 271    | 306    | 320    | 771    | 771   | 771         | 576   | 33.9%    |
| Slaughter Female | 367     | 304    | 381    | 251    | 484    | 484   | 484         | 487   | -0.6%    |
| Feeder Male      | 0       | 200    | 289    | 367    | 121    | 121   | 121         | 494   | -75.5%   |
| Feeder Female    | 0       | 77     | 213    | 93     | 100    | 100   | 100         | 341   | -70.7%   |
| Total            | 777     | 852    | 1,189  | 1,031  | 1,476  | 1,476 | 1,476       | 1,898 | -22.2%   |

\*source USDA

### Canadian Fresh or Chilled Bison Meat Exports

| Boneless             |               | July 2012 | August  | September | October | November | December | 2012      | 2011      | % Change |
|----------------------|---------------|-----------|---------|-----------|---------|----------|----------|-----------|-----------|----------|
| USA                  | Kg            | 7,902     | 22,795  | 7,933     | 14,965  | 11,469   | 16,976   | 172,332   | 289,288   | -40.4%   |
|                      | Value (\$Cdn) | 109,332   | 188,869 | 92,331    | 146,356 | 61,549   | 115,373  | 1,667,947 | 3,509,376 | -52.5%   |
| France               | Kg            | 7,919     | 8,163   | 16,657    | 1,285   | 5,391    | 18,010   | 100,853   | 90,176    | 11.8%    |
|                      | Value (\$Cdn) | 148,164   | 140,287 | 239,710   | 20,350  | 92,197   | 188,588  | 1,414,288 | 1,419,907 | -0.4%    |
| Switzerland          | Kg            | 5,496     | 3,268   | 1,903     | 3,433   | 4,079    | 6,238    | 39,789    | 43,620    | -8.8%    |
|                      | Value (\$Cdn) | 192,684   | 130,237 | 82,091    | 148,858 | 138,586  | 251,424  | 1,582,175 | 1,725,037 | -8.3%    |
| Germany              | Kg            | -         | 287     | -         | -       | 157      | 290      | 1,618     | 3,452     | -53.1%   |
|                      | Value (\$Cdn) | -         | 6,553   | -         | -       | 3,740    | 5,854    | 39,200    | 99,397    | -60.6%   |
| Egypt                | Kg            | -         | -       | -         | -       | -        | -        | -         | -         | -        |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | -         | -        |
| United Arab Emirates | Kg            | -         | -       | -         | -       | -        | -        | -         | 188       | N/A      |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | 3,515     | N/A      |
| China                | Kg            | -         | -       | -         | -       | -        | -        | -         | -         | -        |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | -         | -        |
| Singapore            | Kg            | -         | -       | -         | -       | -        | -        | -         | -         | -        |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | -         | -        |
| Hong Kong            | Kg            | -         | -       | -         | -       | -        | -        | -         | -         | -        |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | -         | -        |
| Italy                | Kg            | 245       | 486     | 512       | 415     | 192      | -        | 3,594     | 631       | 469.6%   |
|                      | Value (\$Cdn) | 6,363     | 12,607  | 13,290    | 10,770  | 4,385    | -        | 92,401    | 17,452    | 429.5%   |
| Sweden               | Kg            | -         | -       | -         | -       | -        | -        | -         | 594       | N/A      |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | 21,352    | N/A      |
| Netherlands          | Kg            | -         | -       | -         | -       | -        | -        | -         | 27,190    | N/A      |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | -        | -         | 153,376   | N/A      |
| Belgium              | Kg            | -         | -       | -         | -       | -        | 17,611   | 17,611    | -         | N/A      |
|                      | Value (\$Cdn) | -         | -       | -         | -       | -        | 226,435  | 226,435   | -         | N/A      |
| Total                | Kg            | 21,562    | 34,999  | 27,005    | 20,098  | 21,288   | 59,125   | 335,797   | 455,139   | -26.2%   |
|                      | Value (\$Cdn) | 456,543   | 478,553 | 427,422   | 326,334 | 300,457  | 787,674  | 5,022,446 | 6,949,412 | -27.7%   |

### Bone-in

|       | July 2012     | August | September | October | November | December | 2012 | December YTD | 2011    | % Change |
|-------|---------------|--------|-----------|---------|----------|----------|------|--------------|---------|----------|
| Total | Kg            | 1,906  | 13,590    | 10,196  | 737      | 19,675   | -    | 90,883       | 116,521 | -22.0%   |
|       | Value (\$Cdn) | 20,012 | 118,874   | 77,011  | 7,734    | 87,255   | -    | 708,802      | 641,369 | 10.5%    |

### Total Exports, Boneless and Bone-in

|       | July 2012     | August  | September | October | November | December | 2012    | December YTD | 2011      | % Change |
|-------|---------------|---------|-----------|---------|----------|----------|---------|--------------|-----------|----------|
| Total | Kg            | 23,468  | 48,589    | 37,201  | 20,835   | 40,963   | 59,125  | 426,680      | 571,660   | -25.4%   |
|       | Value (\$Cdn) | 476,555 | 597,427   | 504,433 | 334,068  | 387,712  | 787,674 | 5,731,248    | 7,590,781 | -24.5%   |

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

\*source USDA

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

wghtd avg

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

\*source CBA survey of marketers

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

|                            | November 2012 |          | December 2012 |          | January 2013 |          | Change Current Month vs. |               |
|----------------------------|---------------|----------|---------------|----------|--------------|----------|--------------------------|---------------|
|                            | Range         | Wt. Avg  | Range         | Wt. Avg  | Range        | Wt. Avg  | 2 months prior           | 1 month prior |
| Ribeye Lip-On Fresh        | 1,250-1,475   | 1,382.01 | 1,256-1,650   | 1,375.52 | 1,300-1,650  | 1,404.48 | 1.6%                     | 2.1%          |
| Chuckroll/Clod Fresh       | 577-642       | 584.05   | 500-654       | 579.52   | 500-625      | 579.74   | -0.7%                    | 0.0%          |
| Striploin Fresh            | 1,196-1,375   | 1,282.47 | 750-1,650     | 1,310.98 | 800-1,650    | 1,341.80 | 4.6%                     | 2.4%          |
| Tenderloin Fresh           | 1,955-2,595   | 2,179.50 | 1,850-2,595   | 2,177.71 | 1,850-2,595  | 2,153.74 | -1.2%                    | -1.1%         |
| Ground 90% Bulk, Fresh     | 525-642       | 582.18   | 550-630       | 579.86   | 520-640      | 571.74   | -1.8%                    | -1.4%         |
| Ground 85% Bulk, Frozen    | 510-635       | 569.17   | 510-630       | 564.98   | 550-635      | 566.68   | -0.4%                    | 0.3%          |
| Ground 85% Patties, Frozen | 515-650       | 595.27   | 500-650       | 563.04   | 500-650      | 569.92   | -4.3%                    | 1.2%          |

\*source USDA

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

|                             | Mid-November 2012 Pricing | Mid-December 2012 Pricing | Mid-January 2013 Pricing | Mid-February 2013 Pricing |
|-----------------------------|---------------------------|---------------------------|--------------------------|---------------------------|
| Tenderloin - Fresh          | \$49.95 - \$60.00         | \$45.00 - \$63.00         | \$49.95 - \$58.00        | \$49.50 - \$57.00         |
| Strip Loin Boneless - Fresh | \$22.95 - \$38.00         | \$22.95 - \$33.00         | \$27.95 - \$34.00        | \$27.95 - \$30.38         |
| Inside Round - Fresh        | \$13.25- \$16.90          | \$13.25 - \$16.00         | \$13.00 - \$16.90        | \$13.00 - \$16.90         |
| Ground 90% Bulk Fresh       | \$10.45 - \$12.95         | \$10.45 - \$12.95         | \$11.95 - \$13.00        | \$11.95 - \$13.00         |
| Fresh Bison Trim            | \$8.95 - \$12.00          | \$8.95 - \$11.50          | \$8.95 - \$11.25         | \$9.95 - \$11.00          |

\*source CBA survey of marketers

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

| Kramer Auctions (SK) February 13, 2013                  |                                                   |           |              | Sekura Livestock Auctions (AB) (Feb 2, 2013) |           |              | Kramer Auctions (SK) (January 23, 2013)                |                                                   |             |              |
|---------------------------------------------------------|---------------------------------------------------|-----------|--------------|----------------------------------------------|-----------|--------------|--------------------------------------------------------|---------------------------------------------------|-------------|--------------|
| Birth Year, Sex                                         | lbs                                               | # of head | Avg (\$/cwt) | Sex, lbs                                     | # of head | Avg (\$/cwt) | Birth Year, Sex                                        | lbs                                               | # of head   | Avg (\$/cwt) |
| 2012 BULLS                                              | 500-600 lbs                                       | 29        | 213          | Bulls                                        |           |              | 2012 BULLS                                             | 450-600 lbs                                       | 10          | 208          |
|                                                         | 400-499 lbs                                       | 51        | 220          |                                              |           |              |                                                        | 350-449 lbs                                       | 34          | 200          |
|                                                         | 300-399 lbs                                       | 22        | 223          |                                              |           |              |                                                        | 300-349 lbs                                       | 36          | 127          |
| 2011 BULLS                                              | 800-900 lbs                                       | 17        | 158          | 400 - 499                                    | 20        | 218          | 2011 BULLS                                             | 800-900 lbs                                       | 8           | 188          |
|                                                         | 700-799 lbs                                       | 8         | 164          | 500 - 599                                    | 3         | 217          |                                                        | 700-799 lbs                                       | 2           | 193          |
|                                                         |                                                   |           |              | 600 - 699                                    | 12        | 185          |                                                        | 600-699 lbs                                       | 7           | 152          |
| 2012 HEIFERS                                            | 450-500 lbs                                       | 36        | 184          | 700 - 799                                    | 20        | 185          |                                                        | Under 600 lbs                                     | 6           | 126          |
|                                                         | 400-449 lbs                                       | 37        | 173          | 800 - 899                                    | 6         | 192          |                                                        |                                                   |             |              |
|                                                         | 300-399 lbs                                       | 19        | 154          | Heifers                                      |           |              |                                                        | 2010 BULLS                                        | 800-950 lbs | 1            |
| 2011 HEIFERS                                            | 750-850 lbs                                       | 2         | 146          | 300 - 399                                    | 1         | 166          | 2012 HEIFERS                                           | 450-550 lbs                                       | 9           | 183          |
|                                                         | 600-749 lbs                                       | 5         | 167          | 400 - 499                                    | 12        | 187          |                                                        | 350-449 lbs                                       | 25          | 133          |
|                                                         |                                                   |           |              | 500 - 599                                    | 8         | 169          |                                                        | Under 350 lbs                                     | 36          | 119          |
| 2010 BRED HEIFERS                                       |                                                   |           |              | 600 - 699                                    | 14        | 179          | 2011 HEIFERS                                           | 750-850 lbs                                       | 4           | 172          |
|                                                         |                                                   |           |              | 700 - 799                                    | 2         | 126          |                                                        | 600-749 lbs                                       | 27          | 163          |
|                                                         | Averaged \$1951.42 with weights from 850-995 lbs. | 35        |              | 800 - 899                                    | 3         | 175          |                                                        | 500-599 lbs                                       | 19          | 126          |
| MATURE FEMALES                                          | Various Ages                                      | 9         |              | Cows                                         | 10        | 114          | BRED COWS                                              | Various Ages                                      | 29          |              |
| Averaged \$583.33 with weights from 950 lbs - 1050 lbs. |                                                   |           |              | Breeding Bulls                               | 2         | 123          |                                                        | Averaged \$801.92 with weights from 950-1200 lbs. |             |              |
|                                                         |                                                   |           |              |                                              |           |              |                                                        | MATURE EXPOSED COWS                               | 18          |              |
|                                                         |                                                   |           |              |                                              |           |              | Averaged 732.50 with weights from 1000 lbs - 1200 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)

Based on available market information, finished bison prices in mid-February were under pressure but the same highs of January 2013 were reached. There is still concern about the burdensome level of bison trim, some of which has been created by the liquidation of older animals, as farmers and ranchers balance their animal numbers with available feed and pasture. The drought in parts of the U.S. has forced more mature animals to the market, adding to what is already considered a burdensome trim inventory. There are reports that some frozen trim continues to be discounted. Middle and prime cuts continue to show steady movement. Fresh bison trim sold as high as \$11.25 per kg with frozen trim being discounted by some marketers to \$8.00 per kg. Middle and prime cuts have been moving well in Canada, the U.S., and in Europe.

Finished bison bull prices at a high of \$3.75 per pound HHW and finished heifer prices at \$3.60 per pound HHW were comparable to last month's price highs. Marketers continue to report that they have access to sufficient animals to meet current market demand. With the supply chain beginning to prepare for the grilling season, marketers expect sufficient supply at current prices.

Nationally, federal slaughter was up 7.8% for 2012 when compared to 2011 (11,328 animals in 2012 compared to 10,504 animals in 2011). For the first four weeks in 2013, federal slaughter is up 28% (981 in 2013 compared to 767 animals during the same period in 2012). Live bison exports to the U.S. were down during 2012 by 3.2%: 14,007 compared to 14,465 bison for the same period in 2011.

More young feeder animals are coming to market as producers process their animals. Quality 2012 bulls sold for around \$2.20/lb live weight while 2011 bulls sold for up to \$1.65/lb live weight on light offerings. 2012 heifers sold for up to \$1.85/lb live weight while 2012 heifers reached \$1.70/lb on light offerings.

Chart 1

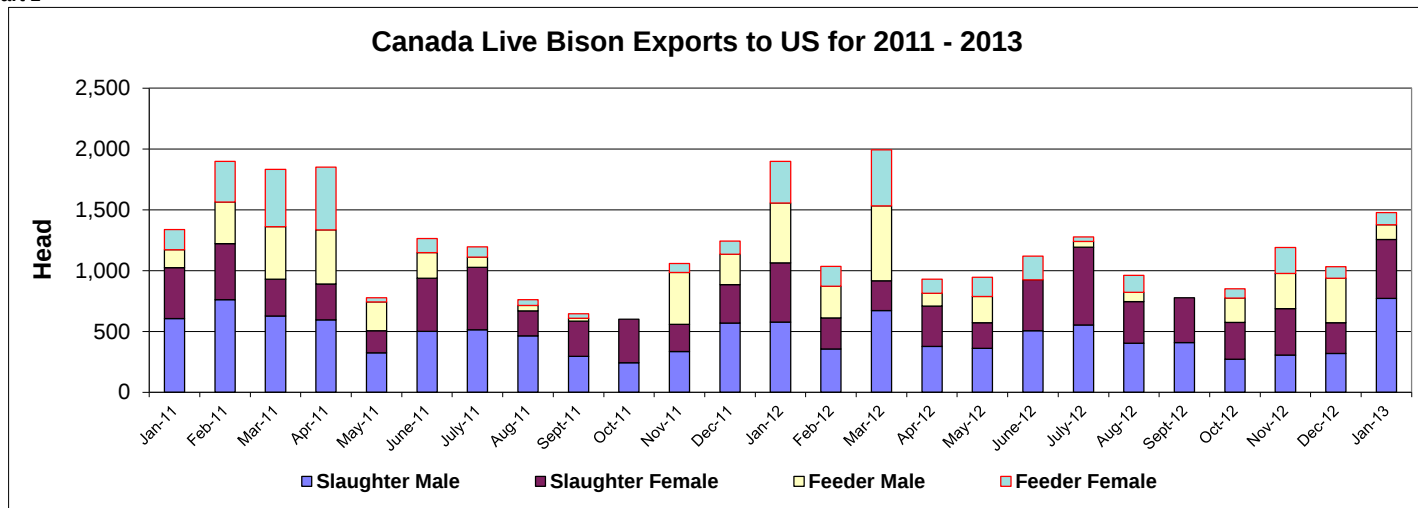
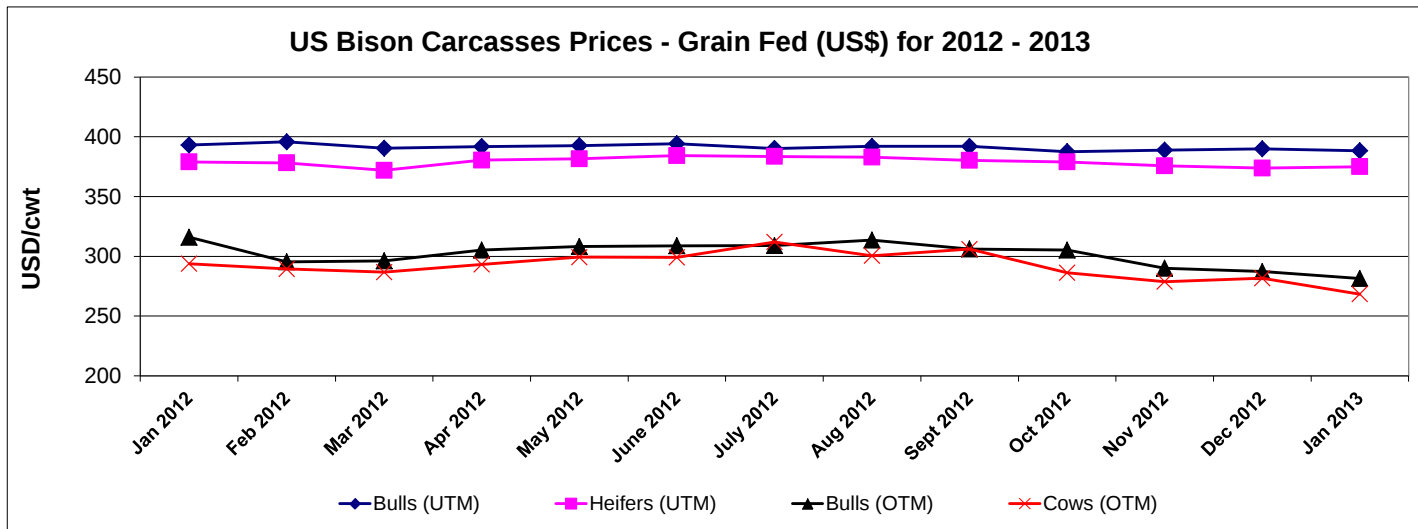


Chart 2



## 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.

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