



BISON MARKET AND SUPPLY UPDATE

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

Weekly Federal Bison Slaughter

	01-Jun	08-Jun	15-Jun	22-Jun	29-Jun	June Total	2013	2012	% Change
Total Canada	329	37	385	123	358	1,232	5,942	5,778	2.8%
<i>previous year</i>	300	260	234	321	293	1,408			

Provincially Inspected Slaughter

	Jan 2013	Feb 2013	Mar 2013	Apr 2013	May 2013	May 2012	2013	2012	% Change
Alberta	147	136	113	101	124	133	621	456	36.2%
Saskatchewan	12	12	49	45	12	12	130	50	160.0%
Manitoba/BC	101	37	63	75	65	39	341	253	34.8%
Ontario/Quebec**	15	18	14	6	19	23	72	126	-42.9%
Total	275	203	239	227	220	207	1,164	885	31.5%

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

	YTD 2013	YTD 2012	% Change
Total Canadian Federal and Provincial Slaughter *	7,106	6,663	6.6%

*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-Jun	08-Jun	15-Jun	22-Jun	29-Jun	June Total	2013	2012	% Change
for week ending:	762	952	911	937	902	4,464	21,832	20,910	4.4%
<i>previous year</i>	771	876	850	791	801	4,089			

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

Canada Live Bison Exports to US

	Feb-13	Mar-13	Apr-13	May-13	June-13	2013	2012	% Change
Slaughter Male	337	373	413	298	761	2,953	2,844	3.8%
Slaughter Female	707	339	467	720	586	3,303	1,953	69.1%
Feeder Male	340	42	326	509	153	1,491	1,689	-11.7%
Feeder Female	131	41	164	230	112	778	1,432	-45.7%
Total	1,515	795	1,370	1,757	1,612	8,525	7,918	7.7%

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

		Dec 2012	January 2013	February	March	April	May	2013	May YTD 2012	% Change
Boneless										
USA	Kg	16,976	11,449	14,273	20,526	22,775	8,778	77,801	70,474	10.4%
	Value (\$Cdn)	115,373	152,591	147,399	285,354	256,215	95,272	936,831	738,856	26.8%
France	Kg	18,010	4,720	3,084	11,258	6,880	4,624	30,566	32,386	-5.6%
	Value (\$Cdn)	188,588	80,920	81,938	204,718	146,790	95,302	609,668	400,223	52.3%
Switzerland	Kg	6,238	2,291	6,099	11,023	3,866	2,355	25,634	11,368	125.5%
	Value (\$Cdn)	251,424	101,893	249,866	402,653	173,190	106,590	1,034,192	473,542	118.4%
Germany	Kg	290	-	-	-	-	-	-	724	-
	Value (\$Cdn)	5,854	-	-	-	-	-	-	19,174	-
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	1,376	-1.7%
	Value (\$Cdn)	-	-	15,709	-	8,533	7,479	31,721	35,446	-10.5%
Sweden	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Netherlands	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Belgium	Kg	17,611	-	-	17,353	19,684	17,868	54,905	-	-
	Value (\$Cdn)	226,435	-	-	224,919	247,667	253,130	725,716	-	-
Total	Kg	59,125	18,460	24,061	60,160	53,600	33,978	190,259	116,328	63.6%
	Value (\$Cdn)	787,674	335,404	494,912	1,117,644	832,395	557,773	3,338,128	1,667,241	100.2%

Bone-in

		Dec 2012	January 2013	February	March	April	May	2013	May YTD 2012	% Change
Total	Kg	-	238	21	-	-	7,216	7,475	22,710	-67.1%
	Value (\$Cdn)	-	3,098	317	-	-	50,767	54,182	221,892	-75.6%

Total Exports, Boneless and Bone-in

		Dec 2012	January 2013	February	March	April	May	2013	May YTD 2012	% Change
	Kg	59,125	18,698	24,082	60,160	53,600	41,194	197,734	139,038	42.2%
	Value (\$Cdn)	787,674	338,502	495,229	1,117,644	832,395	608,540	3,392,310	1,889,133	79.6%

*source Statistics Canada

wghtd avg

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

*source USDA

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
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

*source CBA survey of marketers

	April 2013		May 2013		June 2013		2 months prior	1 month prior
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg		
Ribeye Lip-On Fresh	1,275-1,650	1,397.42	1,300-1,650	1,381.54	1,300-1,650	1,379.34	-1.3%	-0.2%
Chuckroll/Clod Fresh	500-640	564.94	500-645	580.91	500-625	580.87	2.8%	0.0%
Striploin Fresh	750-1,650	1,295.27	750-1,650	1,344.12	1,250-1,650	1,386.07	7.0%	3.1%
Tenderloin Fresh	1,800-2,595	2,118.71	1,800-2,595	2,064.15	1,850-2,595	2,061.85	-2.7%	-0.1%
Ground 90% Bulk, Fresh	475-640	582.01	525-640	571.32	525-640	584.90	0.5%	2.4%
Ground 85% Bulk, Frozen	510-576	552.66	513- 635	566.35	500-635	549.05	-0.7%	-3.1%
Ground 85% Patties, Frozen	500-650	560.69	500-650	567.16	520-635	565.68	0.9%	-0.3%

*source USDA

	Mid-April 2013 Pricing	Mid-May 2013 Pricing	Mid-June 2013 Pricing	Mid-July 2013 Pricing
Tenderloin - Fresh	\$45.95 - \$60.00	\$45.95 - \$57.00	\$45.95 - \$57.00	\$45.95 - \$56.85
Strip Loin Boneless - Fresh	\$26.95 - \$37.00	\$26.95 - \$30.38	\$25.95 - \$30.38	\$25.95 - \$34.00
Inside Round - Fresh	\$13.45 - \$17.00	\$13.45 - \$13.90	\$13.45 - \$14.05	\$13.45 - \$15.15
Ground 90% Bulk Fresh	\$11.95 - \$12.50	\$11.45 - \$12.50	\$10.95 - \$12.50	\$10.95 - \$12.50
Fresh Bison Trim	\$9.45 - \$11.00	\$9.45 - \$11.00	\$8.95 - \$11.00	\$8.95 - \$11.00

*source CBA survey of marketers

Kramer Auctioneers

Kramer Auctions (SK) (May 8th, 2013)				Kramer Auctions (SK) (March 20th, 2013)				Sekura Livestock Auctions (AB) (March 2, 2013)			
<u>Birth Year, Sex</u>	<u>lbs</u>	<u># of head</u>	<u>Avg (\$/cwt)</u>	<u>Birth Year, Sex</u>	<u>lbs</u>	<u># of head</u>	<u>Avg (\$/cwt)</u>	<u>Sex, lbs</u>	<u># of head</u>	<u>Avg (\$/cwt)</u>	
2012 BULLS	600-650 lbs	39	211	2012 BULLS	550-650 lbs	16	192	2012 Bulls			
	550-599 lbs	53	209		300 - 399	28	229				
	500-549 lbs	73	196		400 - 499	24	216				
	400-500 lbs	68	187	500 - 599	3	212					
	Under 400 lbs	8	124	2011 BULLS	800-900 lbs	34	151	2011 Bulls			
2011 BULLS	800-950 lbs	17	158		650-799 lbs	22	150	600 - 699	10	171	
	700-799 lbs	15	143	2012 HEIFERS	450-550 lbs	39	203	2012 Heifers			
2010 BULLS		2	132		400-449 lbs	54	153	300 - 399	33	170	
					300-399 lbs	22	140	400 - 499	4	123	
2012 HEIFER CALVES	500-599 lbs	33	145	2011 HEIFERS	600-730 lbs	21	139	2011 Heifers			
	450-499 lbs	67	141		500 - 599	1	113				
	400-449 lbs	56	133		600 - 699	5	148				
	Under 400 lbs	17	128		<u>Total Weight</u>	<u># of head</u>	<u>Price (\$)</u>				
	2011 HEIFERS	775-900 lbs	27	143	2010 BULLS	3200	3	1450	Cows	2	133
700-774 lbs		13	130	Breeding Bulls		5	105				
Under 700 lbs		10	127						<u>Low Price (\$)</u>	<u>High Price (\$)</u>	
2012 HEIFERS		2	130				Bred Cows	950	1,500		

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-July continue to be under pressure but did reach mid-June levels. Producers received up to \$3.70 per pound HHW for bison bulls and up to \$3.55 per pound HHW for heifers 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 continues to be burdensome but fresh bison trim is moving well as the summer grilling season is in full swing. European demand is slow because of the holiday season in Europe. There are reports that there is more interest in grass-finished bison meat products. 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 up 2.8% for the first 26 weeks of 2013 (week ending June 29, 2013) when compared to the same time period in 2012 (5,942 animals in 2013 compared to 5,778 animals in 2012). Live animal exports to the end of June 2013 at 8,525 are up 7.7% when compared to the 7,918 bison exported for the same period in 2012.

Chart 1

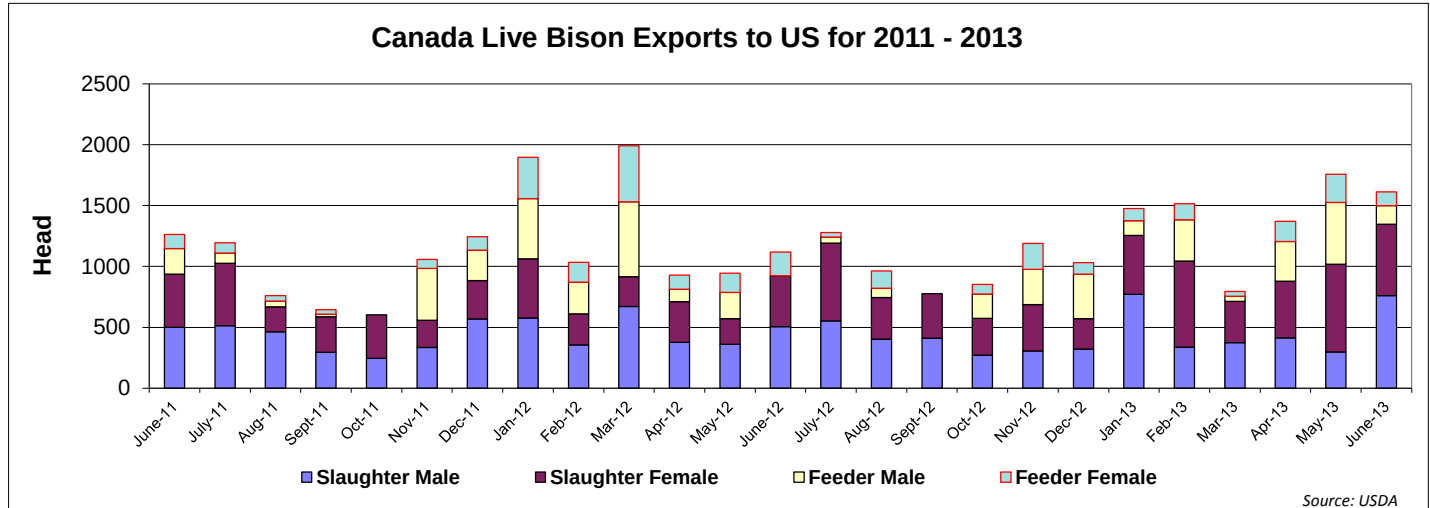
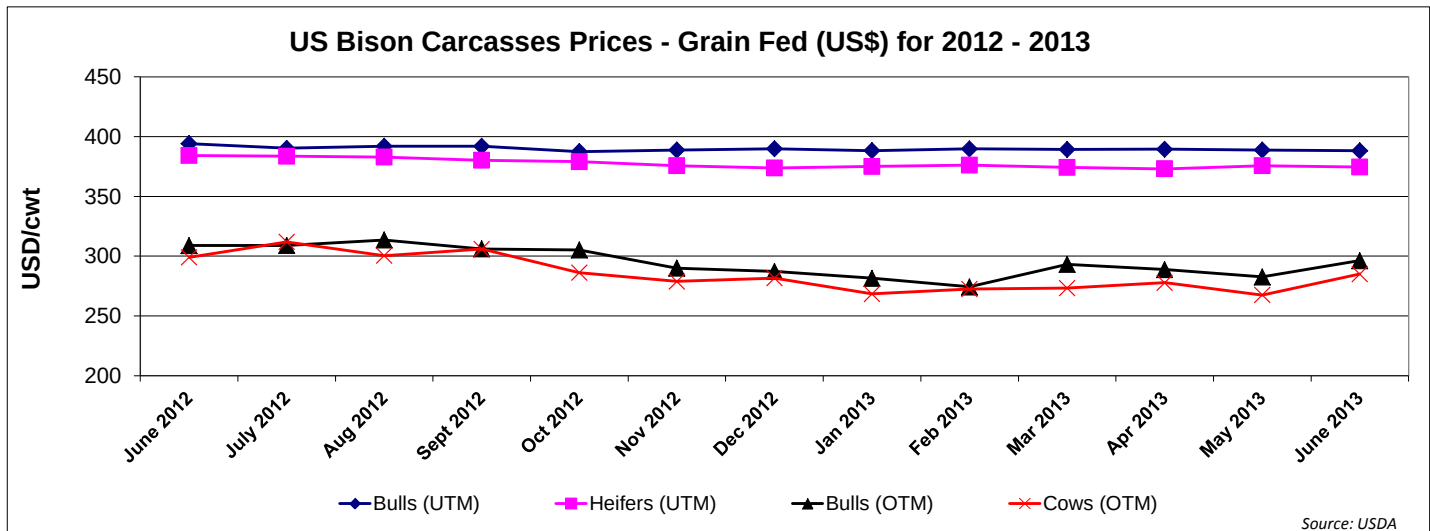


Chart 2



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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