



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - March 26, 2013

Weekly Federal Bison Slaughter

	02-Feb	09-Feb	16-Feb	23-Feb	Feb Total	2013	2012	% Change
Total Canada	247	309	319	209	1,084	2,065	1,484	39.2%
previous year	210	169	54	284	717			

Provincially Inspected Slaughter

	Sept 2012	Oct 2012	Nov 2012	Dec 2012	Jan 2013	Jan 2012	2013	2012	% Change
Alberta	78	105	93	101	147	58	147	58	153.4%
Saskatchewan	21	26	13	10	12	4	12	4	200.0%
Manitoba/BC	57	62	75	40	101	52	101	52	94.2%
Ontario/Quebec**	24	39	33	17	15	33	15	33	-54.5%
Total	180	232	214	168	275	147	275	147	87.1%

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

Total Canadian Federal and Provincial Slaughter *	YTD 2013	YTD 2012	% Change
	2,340	1,631	43.5%

*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:	02-Feb	09-Feb	16-Feb	23-Feb	Feb Total	2013	2012	% Change
	768	810	852	701	3,131	6,191	6,820	-9.2%
previous year	782	891	665	801	3,139			

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

Canada Live Bison Exports to US

	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	2013	2012	% Change
Slaughter Male	271	306	320	771	337	1,108	931	19.0%
Slaughter Female	304	381	251	484	707	1,191	743	60.3%
Feeder Male	200	289	367	121	340	461	755	-38.9%
Feeder Female	77	213	93	100	131	231	503	-54.1%
Total	852	1,189	1,031	1,476	1,515	2,991	2,932	2.0%

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

Boneless		August 2012	September	October	November	December	January 2013	2013	2012	% Change
USA	Kg	22,795	7,933	14,965	11,469	16,976	11,449	11,449	20,747	-44.8%
	Value (\$Cdn)	188,869	92,331	146,356	61,549	115,373	152,591	152,591	152,534	0.0%
France	Kg	8,163	16,657	1,285	5,391	18,010	4,720	4,720	-	N/A
	Value (\$Cdn)	140,287	239,710	20,350	92,197	188,588	80,920	80,920	-	N/A
Switzerland	Kg	3,268	1,903	3,433	4,079	6,238	2,291	2,291	1,504	52.3%
	Value (\$Cdn)	130,237	82,091	148,858	138,586	251,424	101,893	101,893	67,633	50.7%
Germany	Kg	287	-	-	157	290	-	-	96	N/A
	Value (\$Cdn)	6,553	-	-	3,740	5,854	-	-	3,097	N/A
Egypt	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
United Arab Emirates	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
China	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Singapore	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Hong Kong	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Italy	Kg	486	512	415	192	-	-	-	602	N/A
	Value (\$Cdn)	12,607	13,290	10,770	4,385	-	-	-	13,359	N/A
Sweden	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Netherlands	Kg	-	-	-	-	-	-	-	-	-
	Value (\$Cdn)	-	-	-	-	-	-	-	-	-
Belgium	Kg	-	-	-	-	17,611	-	-	-	-
	Value (\$Cdn)	-	-	-	-	226,435	-	-	-	-
Total	Kg	34,999	27,005	20,098	21,288	59,125	18,460	18,460	22,949	-19.6%
	Value (\$Cdn)	478,553	427,422	326,334	300,457	787,674	335,404	335,404	236,623	41.7%

Bone-in

		August 2012	September	October	November	December	January 2013	2013	2012	% Change
Total	Kg	13,590	10,196	737	19,675	-	238	238	-	N/A
	Value (\$Cdn)	118,874	77,011	7,734	87,255	-	3,098	3,098	-	N/A

Total Exports, Boneless and Bone-in

	August 2012	September	October	November	December	January 2013	2013	2012	% Change
Kg	48,589	37,201	20,835	40,963	59,125	18,698	18,698	22,949	-18.5%
Value (\$Cdn)	597,427	504,433	334,068	387,712	787,674	338,502	338,502	236,623	43.1%

*source Statistics Canada

wghtd avg

	Bulls (UTM)	Heifers (UTM)	Bulls (OTM)	Cows (OTM)
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
Feb 2013	389.80	376.15	274.29	272.58

*source USDA

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
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
Mar 2013	350-375	340-360	150-180	150-170

*source CBA survey of marketers

	December 2012		January 2013		February 2013		2 months prior	1 month prior
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg		
Ribeye Lip-On Fresh	1,256-1,650	1,375.52	1,300-1,650	1,404.48	1,300-1,650	1,392.14	1.2%	-0.9%
Chuckroll/Clod Fresh	500-654	579.52	500-625	579.74	500-625	570.56	-1.5%	-1.6%
Striploin Fresh	750-1,650	1,310.98	800-1,650	1,341.80	775-1,650	1,333.48	1.7%	-0.6%
Tenderloin Fresh	1,850-2,595	2,177.71	1,850-2,595	2,153.74	1,850-2,595	2,180.93	0.1%	1.3%
Ground 90% Bulk, Fresh	550-630	579.86	520-640	571.74	525-640	579.89	0.0%	1.4%
Ground 85% Bulk, Frozen	510-630	564.98	550-635	566.68	550-635	560.62	-0.8%	-1.1%
Ground 85% Patties, Frozen	500-650	563.04	500-650	569.92	500-650	564.55	0.3%	-0.9%

*source USDA

	Mid-December 2012 Pricing	Mid-January 2013 Pricing	Mid-February 2013 Pricing	Mid-March 2013 Pricing
Tenderloin - Fresh	\$45.00 - \$63.00	\$49.95 - \$58.00	\$49.50 - \$57.00	\$49.50 - \$57.00
Strip Loin Boneless - Fresh	\$22.95 - \$33.00	\$27.95 - \$34.00	\$27.95 - \$30.38	\$27.95 - \$30.38
Inside Round - Fresh	\$13.25 - \$16.00	\$13.00 - \$16.90	\$13.00 - \$16.90	\$13.95 - \$16.90
Ground 90% Bulk Fresh	\$10.45 - \$12.95	\$11.95 - \$13.00	\$11.95 - \$13.00	\$11.95 - \$13.00
Fresh Bison Trim	\$8.95 - \$11.50	\$8.95 - \$11.25	\$9.95 - \$11.00	\$9.95 - \$11.00

*source CBA survey of marketers

Kramer Aug

Kramer Auctions (SK) (March 20th, 2013)				Kramer Auctions (SK) (March 2nd, 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	550-650 lbs	16	192	2012 BULLS (PENS OF 5)	400-450	15	233	2012 Bulls		
	450-549 lbs	52	209		325-375	8	230	300 - 399	28	229
	Under 450 lbs	27	204					400 - 499	24	216
2011 BULLS	800-900 lbs	34	151	2010 BULLS (PENS OF 3)	1400-1450	6	123	500 - 599	3	212
	650-799 lbs	22	150		1100-1200	8	140	2011 Bulls		
								600 - 699	10	171
2012 HEIFER CALVES	450-550 lbs	39	203	2012 HEIFERS CALVES (PENS OF 5)	400-450	15	172	2012 Heifers		
	400-449 lbs	54	153		300-375	21	173	300 - 399	33	170
	300-399 lbs	22	140					400 - 499	4	123
2011 HEIFERS	600-730 lbs	21	139	2011 YEARLING HEIFERS (PENS OF 5)	700-750	5	177	2011 Heifers		
								500 - 599	1	113
								600 - 699	5	148
	<u>Total Weight</u>	<u># of head</u>	<u>Price (\$)</u>		<u>High Price (\$)</u>	<u>Low Price (\$)</u>	<u>Avg Price (\$)</u>			
2010 BREEDING BULLS	3200	3	1450	2010 BRED HEIFERS (PENS OF 2)						
				Rockwood	6,000	2,400	2215.63			
				Intermountain	3,300	2,000	1312.5	Cows	2	133
								Breeding Bulls	5	105
				2012 BULL CALVES			1444.74			
				2011 YEARLING BULLS			2771.43			
				2012 HEIFERS CALVES (PENS OF 3) - per heifer:			1030.55			
				2011 YEARLING HEIFERS (PENS OF 3) - per heifer:			1341.66			
				2010 BRED HEIFERS (PENS OF 2) - per heifer:			1585.72			
							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

Based on available market information, finished bison prices in mid-March were under pressure but the same highs of February 2013 were reached. Bison trim is burdensome in Canada but less so in the US. Moisture in the central US has resulted in optimism after a severe dry spell and the bison liquidation that resulted. The US liquidation, as a result of the drought, reduced the demand for bison trim from Canada. Reports continue to indicate that some frozen trim continues to be discounted in Canada. 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 US, and in Europe.

Finished bison bull prices at a high of \$3.70 per pound HHW and finished heifer prices at \$3.60 per pound HHW were comparable to last month's prices. 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 36% for the first 10 weeks of 2013 (week ending March 9, 2013) when compared to the same time period in 2012 (2,670 animals in 2013 compared to 1,963 animals in 2012). Live animal exports at 2,991 head during January and February 2013 are up by 2% when compared to the 2,932 bison exported in January and February 2012.

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 \$2.20/lb live weight while 2012 heifers reached \$1.65/lb.

Chart 1

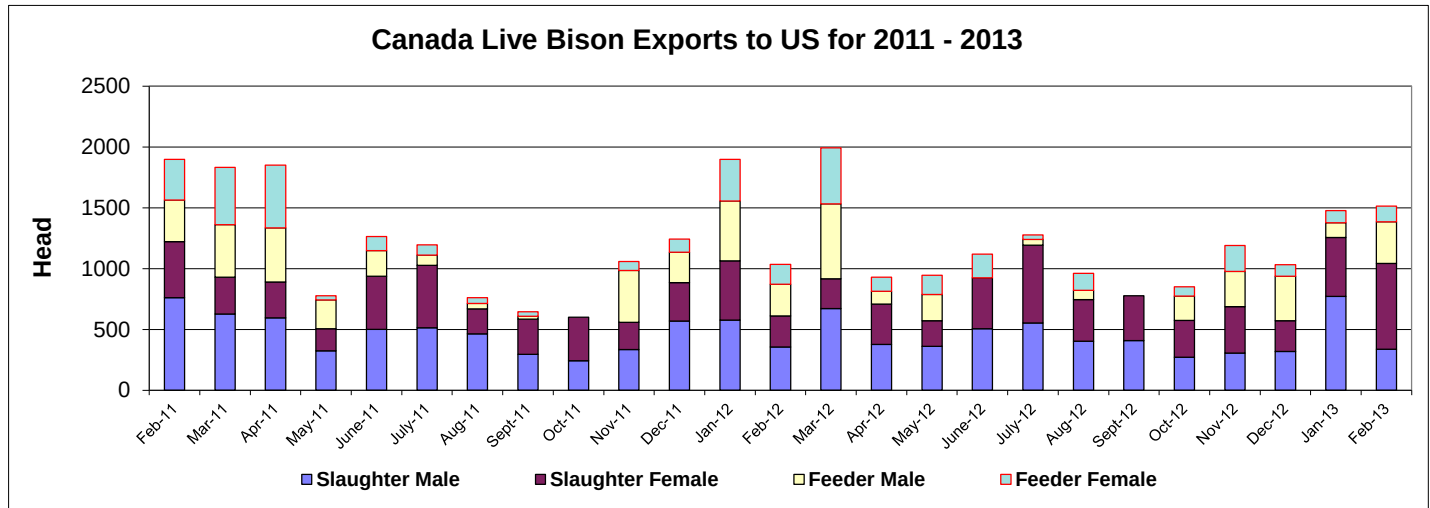
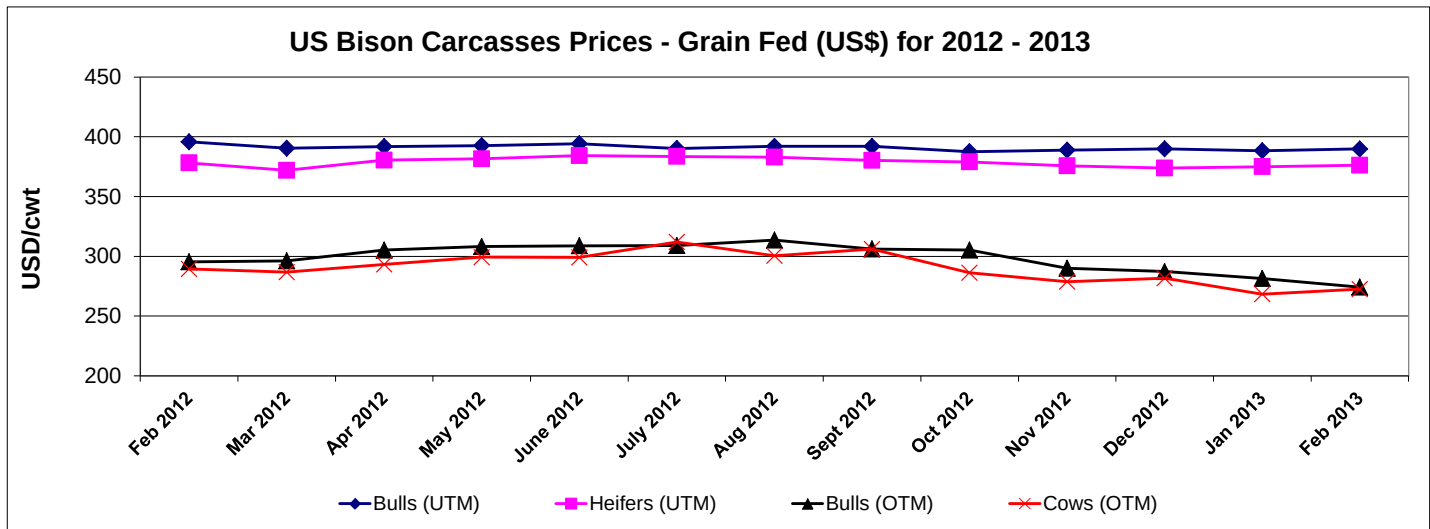


Chart 2



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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