Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

# BISON MARKET AND SUPPLY UPDATE

***Prepared by Red Meat Section/Agriculture and Agri-Food Canada - November 20, 2012***

## Weekly Federal Bison Slaughter

| | 06-Oct | 13-Oct | 20-Oct | 27-Oct | Oct Total | 2012 | October YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|
| **Total Canada** | **148** | **96** | **259** | **177** | **680** | **9,445** | **8,684** | **8.8%** |
| ***previous year*** | *138* | *241* | *138* | *236* | ***753*** | | | |

## Provincially Inspected Slaughter

| | May 2012 | June 2012 | July 2012 | Aug 2012 | Sept 2012 | Sept 2011 | 2012 | September YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **Alberta** | 133 | 87 | 119 | 66 | 78 | 74 | 806 | 740 | 8.9% |
| **Saskatchewan** | 17 | 5 | 5 | 10 | 0 | 5 | 99 | 110 | -10.0% |
| **Manitoba/BC** | 37 | 83 | 42 | 64 | 35 | 82 | 489 | 677 | -27.8% |
| **Ontario/Quebec**** | 23 | 14 | 34 | 42 | 24 | 44 | 240 | 341 | -29.6% |
| **Total** | **210** | **189** | **200** | **182** | **137** | **205** | **1,634** | **1,868** | **-12.5%** |

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

| | YTD 2012 | YTD 2011 | % Change |
|---|---|---|---|
| **Total Canadian Federal and Provincial Slaughter *** | **11,079** | **10,552** | **5.0%** |

**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-Oct | 13-Oct | 20-Oct | 27-Oct | Oct Total | 2012 | October YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|
| | **746** | **672** | **829** | **661** | **2,908** | **33,792** | **36,468** | **-7.3%** |
| ***previous year*** | *914* | *800* | *806* | *710* | ***3,230*** | | | |

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

## Canada Live Bison Exports to US

| | June-12 | July-12 | Aug-12 | Sept-12 | Oct-12 | 2012 | October YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|
| Slaughter Male | 505 | 553 | 403 | 410 | 271 | 4,481 | 4,931 | **-9.1%** |
| Slaughter Female | 420 | 639 | 342 | 367 | 304 | 3,605 | 3,463 | **4.1%** |
| Feeder Male | 0 | 49 | 77 | 0 | 200 | 2,015 | 1,967 | **2.4%** |
| Feeder Female | 194 | 37 | 140 | 0 | 77 | 1,686 | 1,802 | **-6.4%** |
| Total | **1,119** | **1,278** | **962** | **777** | **852** | **11,787** | **12,163** | **-3.1%** |

**source USDA*

## Canadian Fresh or Chilled Bison Meat Exports

***Boneless***

| | | April 2012 | May | June | July | August | September | 2012 | September YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **USA** | Kg | 21,255 | 4,299 | 19,818 | 7,902 | 22,795 | 7,933 | **128,922** | **246,918** | **-47.8%** |
| | Value ($Cdn) | 265,392 | 89,288 | 215,281 | 109,332 | 188,869 | 92,331 | **1,344,669** | **3,002,074** | **-55.2%** |
| **France** | Kg | 21,401 | 1,970 | 11,042 | 7,919 | 8,163 | 16,657 | **76,167** | **33,405** | **128.0%** |
| | Value ($Cdn) | 238,623 | 15,207 | 184,769 | 148,164 | 140,287 | 239,710 | **1,113,153** | **471,530** | **136.1%** |
| **Switzerland** | Kg | 3,412 | 2,834 | 4,004 | 5,496 | 3,268 | 1,903 | **26,039** | **32,447** | **-19.7%** |
| | Value ($Cdn) | 133,480 | 113,930 | 164,753 | 192,684 | 130,237 | 82,091 | **1,043,307** | **1,256,505** | **-17.0%** |
| **Germany** | Kg | 339 | 157 | 160 | - | 287 | - | **1,171** | **3,093** | **-62.1%** |
| | Value ($Cdn) | 8,427 | 4,490 | 3,879 | - | 6,553 | - | **29,606** | **88,897** | **-66.7%** |
| **Egypt** | Kg | - | - | - | - | - | - | **-** | **-** | **-** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **-** | **-** |
| **United Arab Emirates** | Kg | - | - | - | - | - | - | **-** | **188** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **3,515** | **N/A** |
| **China** | Kg | - | - | - | - | - | 2,431 | **2,431** | **-** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | 55,747 | **55,747** | **-** | **N/A** |
| **Singapore** | Kg | - | - | - | - | - | 651 | **651** | **-** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | 12,228 | **12,228** | **-** | **N/A** |
| **Hong Kong** | Kg | - | - | - | - | - | 946 | **946** | **-** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | 19,580 | **19,580** | **-** | **N/A** |
| **Italy** | Kg | - | 318 | 368 | 245 | 486 | 512 | **2,987** | **380** | **686.1%** |
| | Value ($Cdn) | - | 9,076 | 9,540 | 6,363 | 12,607 | 13,290 | **77,246** | **10,546** | **632.5%** |
| **Sweden** | Kg | - | - | - | - | - | - | **-** | **594** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **21,352** | **N/A** |
| **Netherlands** | Kg | - | - | - | - | - | - | **-** | **26,326** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | - | **-** | **133,492** | **N/A** |
| **Thailand** | Kg | - | - | - | - | - | 689 | **689** | **-** | **N/A** |
| | Value ($Cdn) | - | - | - | - | - | 5,209 | **5,209** | **-** | **N/A** |
| **Total** | **Kg** | **46,407** | **9,578** | **35,392** | **21,562** | **34,999** | **31,722** | **240,003** | **343,351** | **-30.1%** |
| | **Value ($Cdn)** | **645,922** | **231,991** | **578,222** | **456,543** | **478,553** | **520,186** | **3,700,745** | **4,987,911** | **-25.8%** |

***Bone-in***

| | | April 2012 | May | June | July | August | September | 2012 | September YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|---|---|
| **Total** | **Kg** | **13,341** | **3,995** | **22,069** | **1,906** | **13,590** | **10,196** | **70,471** | **80,944** | **-12.9%** |
| | **Value ($Cdn)** | **127,498** | **41,945** | **176,024** | **20,012** | **118,874** | **77,011** | **613,813** | **497,957** | **23.3%** |

***Total Exports, Boneless and Bone-in***

| | April 2012 | May | June | July | August | September | 2012 | September YTD 2011 | % Change |
|---|---|---|---|---|---|---|---|---|---|
| **Kg** | **59,748** | **13,573** | **57,461** | **23,468** | **48,589** | **41,918** | **310,474** | **424,295** | **-26.8%** |
| **Value ($Cdn)** | **773,420** | **273,936** | **754,246** | **476,555** | **597,427** | **597,197** | **4,314,558** | **5,485,868** | **-21.4%** |

**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) |
|---|---|---|---|---|
| Oct 2011 | 393.37 | 386.59 | 296.80 | 281.31 |
| Nov 2011 | 397.68 | 385.21 | 305.75 | 285.11 |
| Dec 2011 | 398.44 | 383.57 | 298.64 | 290.96 |
| 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 |

**source USDA*

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

*wghtd avg*

| | Bulls | Heifers | Mature Bulls | Mature Cows |
|---|---|---|---|---|
| Nov 2011 | 375-400 | 370-400 | 250-280 | 250-280 |
| Dec 2011 | 375-400 | 360-400 | 250-270 | 250-270 |
| Jan 2012 | 380-400 | 360-400 | 250-270 | 250-270 |
| 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 |

**source CBA survey of marketers*

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

| | August 2012 | | September 2012 | | October 2012 | | Change Current Month vs. | |
|---|---|---|---|---|---|---|---|---|
| | Range | Wt. Avg | Range | Wt. Avg | Range | Wt. Avg | 2 months prior | 1 month prior |
| Ribeye Lip-On Fresh | 1,250-1,650 | 1,393.17 | 1,250-1,650 | 1,396.23 | 1,275-1,650 | 1,401.99 | 0.6% | 0.4% |
| Chuckroll/Clod Fresh | 500-625 | 583.06 | 500-625 | 574.45 | 500-660 | 577.26 | -1.0% | 0.5% |
| Striploin Fresh | 975-1,650 | 1,345.72 | 980-1,650 | 1,332.29 | 950-1,650 | 1,347.41 | 0.1% | 1.1% |
| Tenderloin Fresh | 1,850-2,595 | 2,189.56 | 1,850-2,595 | 2,145.75 | 1,850-2,595 | 2,147.37 | -1.9% | 0.1% |
| Ground 90% Bulk, Fresh | 525-640 | 578.15 | 525-640 | 589.21 | 525-640 | 589.15 | 1.9% | 0.0% |
| Ground 85% Bulk, Frozen | 550-635 | 581.48 | 555-615 | 582.04 | 530-635 | 576.00 | -0.9% | -1.0% |
| Ground 85% Patties, Frozen | 500-650 | 579.35 | 532-628 | 568.81 | 500-650 | 575.27 | -0.7% | 1.1% |

**source USDA*

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

| | Mid-August 2012 Pricing | Mid-September 2012 Pricing | Mid-October 2012 Pricing | Mid-November 2012 Pricing |
|---|---|---|---|---|
| Tenderloin - Fresh | $53.00 - $57.15 | $53.00 - $60.00 | $49.95 - $57.00 | $49.95 - $60.00 |
| Strip Loin Boneless - Fresh | $28.00 - $35.00 | $28.00 - $34.00 | $27.95 - $31.00 | $22.95 - $38.00 |
| Inside Round - Fresh | $14.00 - $16.90 | $14.00 - $16.90 | $13.65 - $16.90 | $13.25- $16.90 |
| Ground 90% Bulk Fresh | $12.00 - $13.80 | $12.00 - $13.80 | $11.95 - $12.00 | $10.45 - $12.95 |
| Fresh Bison Trim | $11.00 - $12.00 | $10.50 - $11.60 | $9.95 - $11.50 | $8.95 - $12.00 |

**source CBA survey of marketers*

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

**Sekura Auctions (AB) (November 3, 2012)**

| Birth Year, Sex | lbs | # of head | Avg ($/cwt) |
|---|---|---|---|
| 2012 Bulls | 300 - 399 | 11 | 193 |
| 2011 Bulls | 400 - 499 | 1 | 162 |
| | 600 - 699 | 7 | 180 |
| | 700 - 799 | 32 | 193 |
| | 800 - 899 | 10 | 182 |
| | 900 + | 2 | 167 |
| 2012 Heifers | 0 - 299 | 5 | 165 |
| | 300 - 399 | 8 | 181 |
| | 400 - 499 | 2 | 136 |
| | 600 - 699 | 34 | 135 |
| | 700 - 799 | 9 | 134 |
| | | Head Sold | Low |
| Cows | | 5 | 0.81 |

**Sekura Auctions (AB) (October 13, 2012)**

| Birth Year, Sex | lbs | # of head | Avg ($/cwt) |
|---|---|---|---|
| 2012 Bulls | 500 - 599 | 1 | 190 |
| 2011 Bulls | 700 - 799 | 4 | 187.5 |
| 2010 Bulls | 800 - 899 | 4 | 180.5 |
| 2011 Heifers | 400 - 499 | 9 | 185 |
| | 500 - 599 | 16 | 174 |
| 2010 Heifers | 700 - 799 | 9 | 167.5 |
| | 800 - 899 | 6 | 158 |
| | 900 + | 2 | 115 |
| Cows | | 8 | 103.6 |
| Cow / Calf Pairs | | 2 | 750 |
| Breeding Bulls | | 1 | 101 |

**Kramer Auctions (SK) (May 9, 2012)**

| Birth Year, Sex | lbs | Avg ($/cwt) |
|---|---|---|
| 2011 BULLS | 600-700 lbs | 237 |
| | 500-599 lbs | 253 |
| | Under 499 lbs | 267 |
| 2010 BULLS | 1005 lbs | 202 |
| | 650-750 lbs | 181 |
| 2009 BULLS | 1050-1080 | 187 |
| | Under 1000 | 156 |
| 2011 HEIFER CAL | 450-550 lbs | 241 |
| | 400-449 lbs | 243 |
| | 350-399 lbs | 243 |
| 2010 HEIFERS | | 200 |

2011 Bulls
High selling pen - $2.31 /lb with avg weight of 697 lbs

2010 Bulls
High selling pen - $2.02/lb with a weight of 1005 lbs

2011 Heifer Calves
High selling pen - $2.48/lb with avg weight of 519 lbs

**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 were under pressure for the second month in a row. Producers who contracted finished bison earlier in the year continue to receive $3.90 - $4.00 per pound. A combination of higher than desirable inventories of trim, and an adequate supply of animals have pushed prime bulls to the range of $3.45 - $3.85 per pound HHW. Although middle and prime cuts are moving well as retailers prepare for the festive season, trim inventories continue to be burdensome for some marketers.**

**Finished bison prices offered at $3.45 -$3.85 per pound hot hanging weight are below last month's prices. Marketers continue to report that they have access to sufficient animals to meet current market demand. As more animals come to market, there may be further downward price pressure on live animals if the burdensome level of trim is not reduced. There are reports that the demand for bison in Europe continues to be very steady as the Christmas season approaches.**

**Soon the sale season will be in full swing. With the higher cost of feed, feeder bison prices are expected to be below 2011 levels.**

**Nationally, federal slaughter was up 9.4% for the first 44 weeks of 2012 (week ending Nov 3, 2012) when compared to the first 44 weeks of 2011 (9,606 animals in 2012 compared to 8,779 animals in 2011). Live bison exports to the U.S. were down for the first nine months of 2012 by 9.3% - 11,600 compared to 12,796 bison for the same period in 2011.**

**Chart 1**

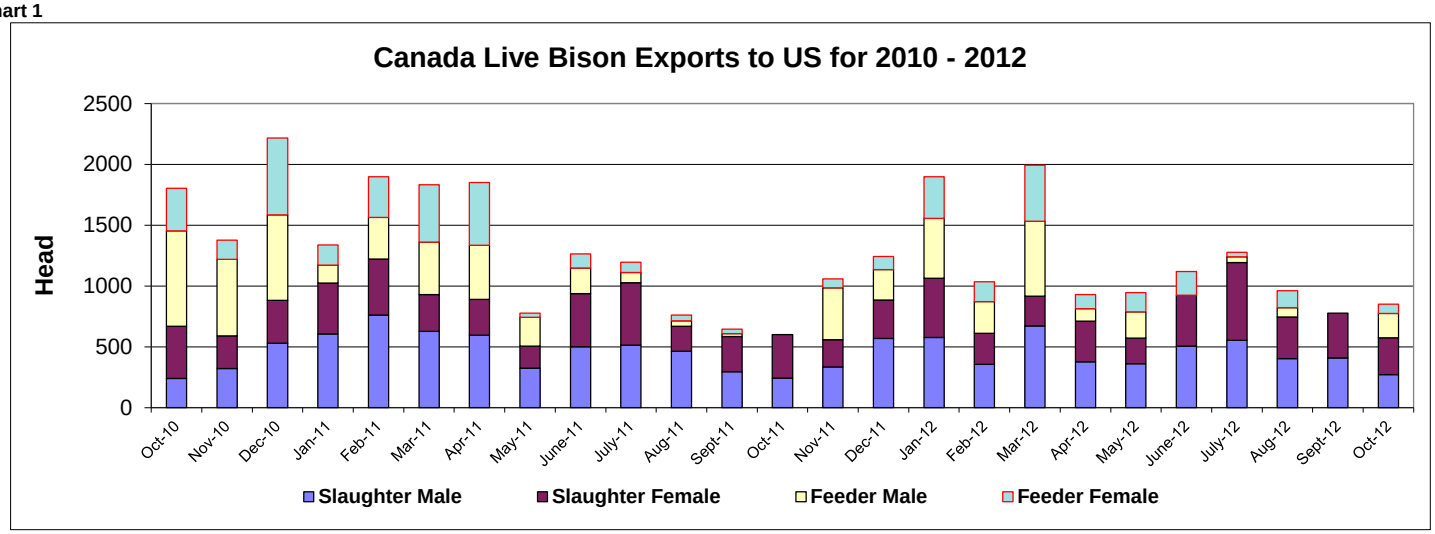
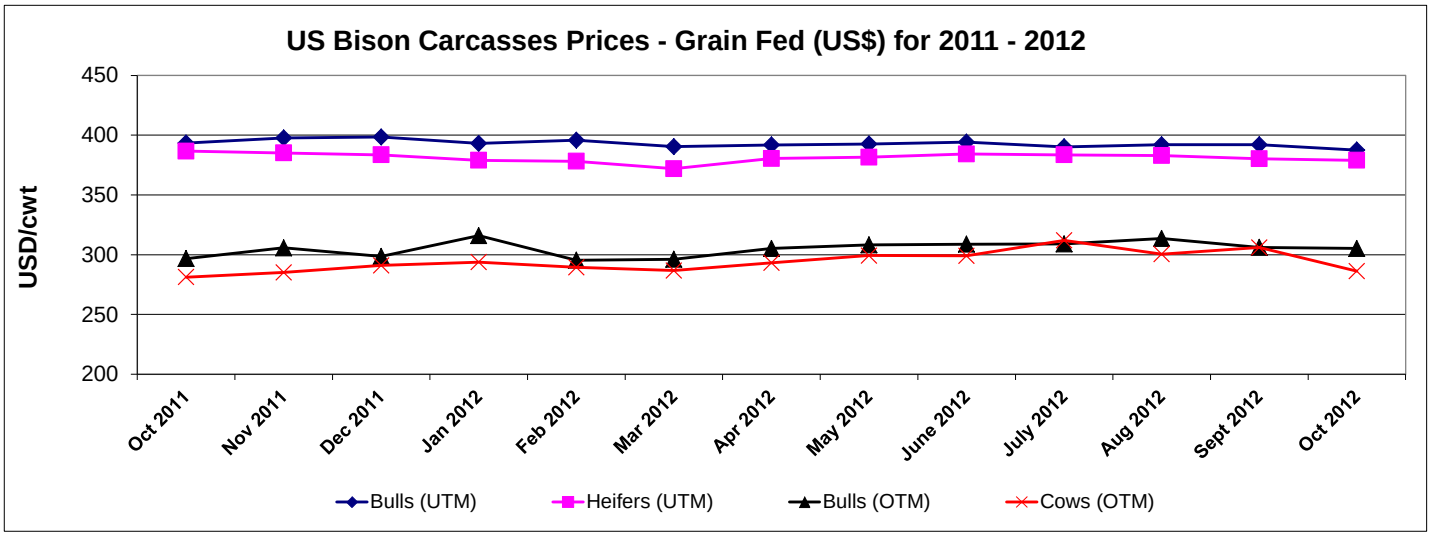



**Chart 2**




**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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