Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - June 18, 2009

Weekly Federal Bison Slaughter

	09-May	16-May	23-May	30-May	May Total	2009 YTD	09 vs 08 % Change
Total Canada	**413**	**323**	**302**	**432**	**1,470**	**8,729**	**0%**
previous year	421	372	289	173	**1,255**	**8,710**	

Provincially Inspected Slaughter

	Dec-08	Jan-09	Feb	Mar	Apr	Apr-08	2009 YTD	2008 YTD	% Change
Alberta	142	186	213	257	228	322	884	1201	-26%
Saskatchewan	26	40	57	40	N/A	78	137	N/A	
Manitoba/BC	55	42	63	85	68	72	258	316	-18%
Ontario/Quebec	35	67	36	30	58	63	191	252	-24%
Total	**258**	**335**	**369**	**412**	**354**	**535**	**1470**	**1769**	**-17%**

**source AAFC Red Meat Section*

**Due to varying provincial reporting schedules, total Fed. and Prov. has a one month delay in Prov. Data*

	2009	2008	% Change
Total Canadian Federal and Provincial Slaughter	**10,199**	**10,479**	**-3%**

US Federal Slaughter*

for week ending:	09-May	16-May	23-May	30-May	May Total	2009 YTD	2008 YTD	% Change
	982	**1166**	**1057**	**910**	4,115	**21,928**	**23,237**	**-6%**
previous year	996	978	1284	1033	4,291			

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

Canada Live Bison Exports to US

	Feb-09	Mar-09	Apr-09	May-09	2009 YTD	2008 YTD	% Change
Slaughter Male	481	555	726	859	3,052	3,572	**-15%**
Slaughter Female	792	924	692	1,031	4,188	3,696	**13%**
Feeder Male	415	411	176	125	1,437	2,678	**-46%**
Feeder Female	467	201	263	63	1,422	1,849	**-23%**
Total	**2,155**	**2,091**	**1,857**	**2,078**	**10,099**	**11,795**	**-14%**

**source USDA*

Canadian Fresh or Chilled Bison Meat Exports

Boneless

		December	January 2009	February	March	April		YTD 2009	YTD 2008	% Change
USA	Kg	18,069	50,633	24,887	27,160	45,101		147,781	**87,645**	**69%**
	Value ($Cdn)	134,560	392,229	196,672	232,568	422,423		1,243,892	**576,156**	**116%**
France	Kg	43,840	37,657	13,964	50,046	28,098		129,765	**159,947**	**-19%**
	Value ($Cdn)	509,241	389,926	222,463	700,574	377,096		1,690,059	**1,723,566**	**-2%**
Germany	Kg	2,105	592	831	998	1,283		3,704	**24,397**	**-85%**
	Value ($Cdn)	23,885	7,936	13,893	13,101	21,199		56,129	**367,299**	**-85%**
Switzerland	Kg	2,888	2,749	3,026	7,438	4,332		17,545	**25,495**	**-31%**
	Value ($Cdn)	97,146	108,815	111,605	286,191	166,471		673,082	**408,444**	**65%**
Mexico	Kg	-	-	-	-	423		423	**-**	
	Value ($Cdn)	-	-	-	-	16,165		16,165	**-**	
Neth. Antilles	Kg	-	-	-	-	-		-	**86**	**-100%**
	Value ($Cdn)	-	-	-	-	-		-	**893**	**-100%**
Belgium	Kg	-	-	-	-	-		-	**-**	
	Value ($Cdn)	-	-	-	-	-		-	**-**	
Italy	Kg	-	-	-	-	-		-	**431**	**-100%**
	Value ($Cdn)	-	-	-	-	-		-	**6,899**	**-100%**
United Arab Emirates	Kg	-	647	19	-	-		666	**47**	**1317%**
	Value ($Cdn)	-	18,432	600	-	-		19,032	**756**	**2417%**
Total	**Kg**	**66,902**	**92,278**	**42,727**	**85,642**	**79,237**		**299,884**	**298,048**	**1%**
	Value ($Cdn)	**764,832**	**917,338**	**545,233**	**1,232,434**	**1,003,354**		**3,698,359**	**3,084,013**	**20%**

Bone-in

		December	January 09	February	March	April		YTD 2009	YTD 2008	% Change
Total	**Kg**	**749**	**7,776**	**205**	**-**	**867**		**8,848**	**17,832**	**-50%**
	Value ($Cdn)	**7,839**	**29,181**	**2,155**	**-**	**8,253**		**39,589**	**54,290**	**-27%**

Total Exports, Boneless and Bone-in

	December	January 09	February	March	April		YTD 2009	YTD 2008	% Change
Kg	**67,651**	**100,054**	**42,932**	**85,642**	**80,104**		**308,732**	**315,880**	**-2%**
Value ($Cdn)	**772,671**	**946,519**	**547,388**	**1,232,434**	**1,011,607**		**3,737,948**	**3,138,303**	**19%**

**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)
June 2008	227.02	218.03	148.3	131.21
July 2008	228.63	221.07	148.48	138.81
Aug 2008	236.62	228.95	150	142.74
Sep 2008	239.14	230.36	137.5	145.89
Oct 2008	239.99	230.17	147.02	141.71
Nov 2008	241.36	228.87	146.6	144.17
Dec 2008	241.11	226.38	150.7	143.66
Jan 2009	238.4	224.73	161.32	142.95
Feb 2009	238.08	221.62	149.43	142.82
Mar 2009	237.3	220.08	146.71	145.8
Apr 2009	238.71	220.44	150	151.9
May 2009	239.33	221.12	159.5	154.78

**source USDA*

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
June 2008	205-225	195-220	90-100	90-100
July 2008	205-230	210-225	100-110	100-110
Aug 2008	220-230	210-230	90-100	90-100
Sep 2008	225-240	210-230	90-100	90-100
Oct 2008	230-260	225-255	100-125	100-120
Nov 2008	230-275	225-265	125-130	120-130
Dec 2008	245-280	235-255	100-135	115-130
Jan 2009	235-280	220-260	100-130	100-130
Feb 2009	240-275	230-260	110-125	110-125
Mar 2009	240-270	230-260	115-145	110-145
Apr 2009	240-250	240-240	130-150	130-150
May 2009	240-270	240-265	120-170	120-170
June 2009	240-265	240-250	130-170	130-165

**source CBA survey of marketers*

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

	March		April		May		Change Current Month vs. 2 months prior	Change Current Month vs. 1 month prior
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg		
Ribeye Lip-On Fresh	876-1225	984.08	875-1450	992.04	825-1225	988.3	0%	0%
Chuckroll/Clod Fresh	285-425	333.69	290-435	333.88	310-350	328.6	-2%	-2%
Striploin Fresh	675-1050	898.42	700-1050	922.23	740-1050	868.04	-3%	-6%
Tenderloin Fresh	1300-2050	1601.66	1250-2050	1530.8	1200-1700	1376.91	-14%	-10%
Ground 90% Bulk, Fresh	280-375	323	300-375	328	300-375	325.93	1%	-1%
Ground 85% Bulk, Frozen	305-470	373.89	300-506	375.24	300-395	369.49	-1%	-2%
Ground 85% Patties, Frozen	310-425	354.08	285-470	350.47	285-395	356.26	1%	2%

**source USDA*

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

	Mid-March Pricing	Mid-April Pricing	Mid-May Pricing	Mid-June Pricing
Tenderloin - Fresh	$39.95 - $51.00	$39.00 - $43.00	$36.00 - $45.00	$34.95 - $42.00
Strip Loin Boneless - Fresh	$24.90 - $29.40	$19.95 - $25.00	$21.00 - $28.00	$19.95 - $27.00
Inside Round - Fresh	$9.15 - $13.00	$8.95 - $12.00	$8.95 - $11.50	$7.95 - $11.50
Ground 90% Bulk Fresh	$6.25 - $8.35	$6.25 - $8.35	$7.45 - $8.30	$6.95 - $8.80
Fresh Bison Trim	$6.20 - $7.35	$6.30 - $7.60	$6.61 - $7.40	$6.25 - $7.35

**source CBA survey of marketers*

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

Kramer Auction (SK) (May 13, 2009)

Birth Year, Sex	lbs	# of Head	Average ($/lb)
2005 Bulls	>1500	1	0.85
2007 Bulls	650-700	5	1.28
	>700	14	1.35
2007 Heifers	600-650	6	1.22
	650-700	10	1.26
	>700	6	1.26
	<550	3	1.05
2008 Bulls	400-450	31	1.31
	450-500	30	1.36
	500-550	51	1.41
	>550	27	1.41
	<400	31	1.16
2008 Heifers	400-450	60	1.25
	450-500	32	1.23
	>500	12	1.28
	<400	26	0.98

Sekura Auction (AB) (March 7, 2009)

Birth Year, Sex	lbs	Average (cwt)	Birth Year, Sex	lbs	Average (cwt)
2008 Males	0-300	81.73	2007 Females	400-500	60
	300-400	114.83		500-600	95.54
	400-500	122.24		600-700	109.5
	500-600	125			
			2006 Bred Heifers	700-800	425-770 per hd
2007 Males	500-600	97.59		800-900	770-785 per hd
	600-700	116.25			
	800-900	117	Feeder Cows		70.41
			Feeder Heifers		72
2006 Males	800-900	104	Mature Bulls		57
	900-999	100			
2008 Females	0-300	91.78			
	300-400	104.91			
	400-500	106.67			
	500-600	105.04			

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

Marketers report continued strong demand and strong prices for bison trim in the US and Canada. Compared to last month, prices for fresh tenderloin and boneless strip loins, although strong have softened. The strengthening of the Canadian dollar has also had an impact on prices. With the warmer weather and the summer grilling season upon us, a strong demand is expected to continue for ground bison and other barbecue cuts. Some marketers are still concerned about the level of frozen middle cuts inventory.

The strong trim prices have resulted in an increase in the prices of mature bulls and cows with prime bull and heifer prices holding steady.

Nationally federal slaughter for the first 22 weeks was down only slightly (8,997 in 2009 compared to 9,043 for the same period in 2008). Exports of live animals to April 30 were down by 30% (8,623 in 2009 compared to 12,366 in 2008). The decline in live exports is due to the short supply of animals combined with the stronger Canadian dollar.

Total boneless bison meat exports for the first quarter were about the same in 2009 when compared to 2008 (299,884 Kg. in 2009 compared to 298,048 Kg. in 2008). There has been an increase in boneless exports to the U.S. with less boneless bison meat being shipped to France. To June 3, 2009, 99,636 Kg of bison meat was shipped into Canada from the U.S. Much of this bison meat is likely from animals of Canadian origin that were slaughtered in the U.S. with cuts not destined for the EU or the U.S. markets being marketed in Canada.

Chart 1

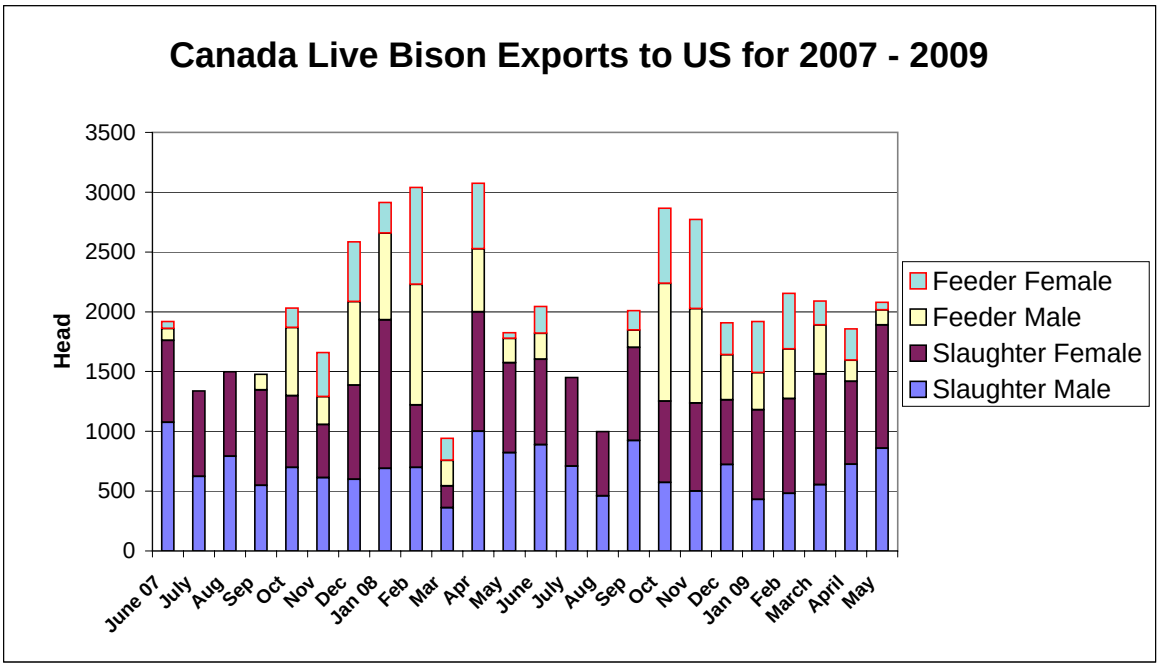


Chart 2

