



BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - May 19, 2009

Weekly Federal Bison Slaughter

	11-Apr	18-Apr	25-Apr	02-May	Apr Total	2009 YTD	09 vs 08 % Change
Total Canada	215	294	296	452	1,257	7,259	-3%
<i>previous year</i>	484	439	350	458	1,731	7,455	

Provincially Inspected Slaughter

	Nov	Dec-08	Jan-09	Feb	Mar	Mar-08	2009 YTD	2008 YTD	% Change
Alberta	197	142	186	213	257	255	656	879	-25%
Saskatchewan	17	26	40	57	40	N/A	137	N/A	
Manitoba/BC	77	55	42	63	85	117	190	244	-22%
Ontario/Quebec	56	35	67	36	30	42	133	189	-30%
Total	347	258	335	369	412	414	1116	1312	-15%

*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	8,375	8,767	-4%

US Federal Slaughter*

for week ending:	04-Apr	11-Apr	18-Apr	25-Apr	Apr Total	2009 YTD	2008 YTD	% Change
	907	1,017	1,023	1,027	3,974	16,785	17,694	-5%
<i>previous year</i>	1,341	1,214	1,123	1,009	4,687			

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

Canada Live Bison Exports to US

	Jan-09	Feb-09	Mar-09	Apr-09	2009 YTD	2008 YTD	% Change
Slaughter Male	431	481	555	726	2,193	2,751	-20%
Slaughter Female	749	792	924	692	3,157	2,944	7%
Feeder Male	310	415	411	176	1,312	2,473	-47%
Feeder Female	428	467	201	263	1,359	1,801	-25%
Total	1,918	2,155	2,091	1,857	8,021	9,969	-20%

*source USDA

Canadian Fresh or Chilled Bison Meat Exports

Boneless		November	December	January 2009	February	March	YTD 2009	YTD 2008	% Change
USA	Kg	54,098	18,069	50,633	24,887	27,160	102,680	79,903	29%
	Value (\$Cdn)	401,246	134,560	392,229	196,672	232,568	821,469	497,946	65%
France	Kg	44,377	43,840	37,657	13,964	48,908	100,529	117,102	-14%
	Value (\$Cdn)	591,124	509,241	389,926	222,463	683,241	1,295,630	1,269,683	2%
Germany	Kg	4,616	2,105	592	831	998	2,421	22,286	-89%
	Value (\$Cdn)	60,222	23,885	7,936	13,893	13,101	34,930	341,180	-90%
Switzerland	Kg	5,502	2,888	2,749	3,026	7,438	13,213	16,552	-20%
	Value (\$Cdn)	198,893	97,146	108,815	111,605	286,191	506,611	288,036	76%
Mexico	Kg	-	-	207,119	-	-	207,119	-	-
	Value (\$Cdn)	-	-	1,039,920	-	-	1,039,920	-	-
Neth. Antilles	Kg	-	-	-	-	-	-	86	-100%
	Value (\$Cdn)	-	-	-	-	-	-	893	-100%
Belgium	Kg	488	-	-	-	-	-	-	-
	Value (\$Cdn)	13,910	-	-	-	-	-	-	-
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	109,081	66,902	299,397	42,727	84,504	426,628	236,407	80%
	Value (\$Cdn)	1,265,395	764,832	1,957,258	545,233	1,215,101	3,717,592	2,405,393	55%

Bone-in

	November	December	January 09	February	March	YTD 2009	YTD 2008	% Change
Total	1,275	749	7,776	205	-	7,981	17,832	-55%
Value (\$Cdn)	12,285	7,839	29,181	2,155	-	31,336	54,290	-42%

Total Exports, Boneless and Bone-in

	November	December	January 09	February	March	YTD 2009	YTD 2008	% Change
Kg	110,356	67,651	307,173	42,932	84,504	434,609	254,239	71%
Value (\$Cdn)	1,277,680	772,671	1,986,439	547,388	1,215,101	3,748,928	2,459,683	52%

*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)
May 2008	225.63	211.13		141.49
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

*source USDA

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

wghtd avg

	Bulls	Heifers	Mature Bulls	Mature Cows
May 2008	205-225	200-210	80-100	80-100
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

*source CBA survey of marketers

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

	February		March		April		Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	825-1225	968.42	876-1225	984.08	875-1450	992.04	2%	1%
Chuckroll/Clod Fresh	295-425	333.87	285-425	333.69	290-435	333.88	0%	0%
Striploin Fresh	725-1050	928.2	675-1050	898.42	700-1050	922.23	-1%	3%
Tenderloin Fresh	1295-2050	1636.82	1300-2050	1601.66	1250-2050	1530.8	-6%	-4%
Ground 90% Bulk, Fresh	250-335	326.45	280-375	323	300-375	328	0%	2%
Ground 85% Bulk, Frozen	300-470	361.26	305-470	373.89	300-506	375.24	4%	0%
Ground 85% Patties, Frozen	285-470	343.64	310-425	354.08	285-470	350.47	2%	-1%

*source USDA

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

	Mid-February Pricing	Mid-March Pricing	Mid-April Pricing	Mid-May Pricing
Tenderloin - Fresh	\$39.95 - \$49.00	\$39.95 - \$51.00	\$39.00 - \$43.00	\$36.00 - \$45.00
Strip Loin Boneless - Fresh	\$19.00 - \$30.00	\$24.90 - \$29.40	\$19.95 - \$25.00	\$21.00 - \$28.00
Inside Round - Fresh	\$7.95 - \$10.00	\$9.15 - \$13.00	\$8.95 - \$12.00	\$8.95 - \$11.50
Ground 90% Bulk Fresh	\$6.95 - \$7.85	\$6.25 - \$8.35	\$6.25 - \$8.35	\$7.45 - \$8.30
Fresh Bison Trim	\$5.80 - \$6.35	\$6.20 - \$7.35	\$6.30 - \$7.60	\$6.61 - \$7.40

*source CBA survey of marketers

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

Kramer Auction (SK) (May 13, 2009)				Sekura Auction (AB) (March 7, 2009)					
Birth Year, Sex	lbs	# of Head	Average (\$/lb)	Birth Year, Sex	lbs	Average (cwt)	Birth Year, Sex	lbs	Average (cwt)
2005 Bulls	>1500	1	0.85	2008 Males	0-300	81.73	2007 Females	400-500	60
2007 Bulls	650-700	5	1.28		300-400	114.83		500-600	95.54
	>700	14	1.35		400-500	122.24		600-700	109.5
2007 Heifers	600-650	6	1.22		500-600	125			
	650-700	10	1.26				2006 Bred Heifers	700-800	425-770 per hd
	>700	6	1.26	2007 Males	500-600	97.59		800-900	770-785 per hd
	<550	3	1.05		600-700	116.25			
2008 Bulls	400-450	31	1.31		800-900	117	Feeder Cows		70.41
	450-500	30	1.36				Feeder Heifers		72
	500-550	51	1.41	2006 Males	800-900	104	Mature Bulls		57
	>550	27	1.41		900-999	100			
	<400	31	1.16						
2008 Heifers	400-450	60	1.25	2008 Females	0-300	91.78			
	450-500	32	1.23		300-400	104.91			
	>500	12	1.28		400-500	106.67			
	<400	26	0.98		500-600	105.04			

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

Marketers report continued strong demand and strong prices for bison trim in the United States and Canada. Marketers are also reporting that middle cuts, although difficult to sell are beginning to move. This has resulted in lower prices for these 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 17 weeks was down 2.6% (7,259 in 2009 compared to 7,455 for the same period in 2008). Exports of live animals to March 31 were down by 30% (6,477 in 2009 compared to 9,301 in 2008).

Total boneless bison meat exports for the first quarter were much stronger in 2009 than in 2008 (426,628 Kg. in 2009 compared to 236,407 Kg. in 2008).

Chart 1

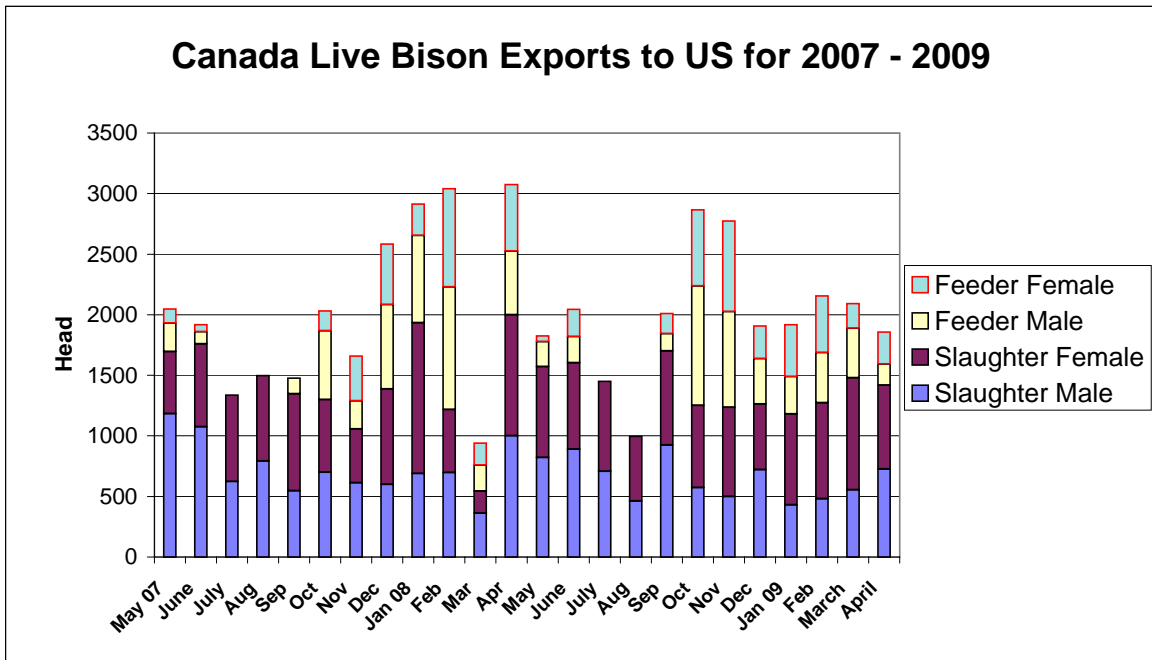


Chart 2

