



# BISON MARKET AND SUPPLY UPDATE

Prepared by Red Meat Section/Agriculture and Agri-Food Canada - September 28, 2016

## Weekly Federal Bison Slaughter

	06-Aug	13-Aug	20-Aug	27-Aug	August Total	January - August YTD		
						2016	2015	% Change
<b>Total Canada</b>	<b>219</b>	<b>120</b>	<b>186</b>	<b>102</b>	<b>627</b>	<b>6,393</b>	<b>7,677</b>	<b>-16.7%</b>
<i>previous year</i>	241	252	201	299	993			

## Provincially Inspected Slaughter

	Mar 2016	Apr 2016	May 2016	June 2016	July 2016	July 2015	January - July YTD		
							2016	2015	% Change
<b>Alberta</b>	105	88	110	54	38	125	537	680	-21.0%
<b>Saskatchewan</b>	13	4	13	12	10	15	71	151	-53.0%
<b>Manitoba/BC</b>	66	25	21	28	35	48	232	337	-31.2%
<b>Ontario/Quebec**</b>	13	6	29	17	19	31	101	163	-38.0%
<b>Total</b>	<b>197</b>	<b>123</b>	<b>173</b>	<b>111</b>	<b>102</b>	<b>219</b>	<b>941</b>	<b>1,331</b>	<b>-29.3%</b>

	YTD 2016	YTD 2015	% Change
<b>Total Canadian Federal and Provincial Slaughter *</b>	<b>7,334</b>	<b>9,008</b>	<b>-18.6%</b>

\*Source AAFC Red Meat Section : Due to varying provincial reporting schedules, total Fed. and Prov. has a one month delay in Prov. Data

## Canadian Production

	2010	2011	2012	2013	2014	2015	January - July YTD		
							2016	2015	% Change
<b>Total Slaughter</b>	19,149	13,048	13,587	14,388	14,371	14,186	6,707	8,015	-16.3%
<b>Total Live Exports</b>	20,973	14,465	14,007	16,769	19,033	26,162	13,446	14,255	-5.7%
<b>Total Production</b>	<b>40,122</b>	<b>27,513</b>	<b>27,594</b>	<b>31,157</b>	<b>33,404</b>	<b>40,348</b>	<b>20,153</b>	<b>22,270</b>	<b>-9.5%</b>

\*source : Canadian Food Inspection Agency, Provincial Governments, and USDA APHIS

## US Federal Slaughter\*

	06-Aug	13-Aug	20-Aug	27-Aug	August Total	January - August YTD		
						2016	2015	% Change
<b>Total</b>	<b>995</b>	<b>979</b>	<b>911</b>	<b>1,022</b>	<b>3,907</b>	<b>35,837</b>	<b>34,386</b>	<b>4.2%</b>
<i>previous year</i>	1,003	906	1,246	810	3,965			

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

## Canada Live Bison Exports to US

	Apr-16	May-16	June-16	July-16	August-16	January - August YTD		
						2016	2015	% Change
<b>Slaughter Male</b>	673	248	875	812	569	5,169	5,599	-7.7%
<b>Slaughter Female</b>	610	214	387	541	247	3,670	5,972	-38.5%
<b>Feeder Male</b>	627	339	157	220	48	3,488	2,447	42.5%
<b>Feeder Female</b>	500	118	162	101	0	1,983	2,046	-3.1%
<b>Total</b>	<b>2,410</b>	<b>919</b>	<b>1,581</b>	<b>1,674</b>	<b>864</b>	<b>14,310</b>	<b>16,064</b>	<b>-10.9%</b>

\*source : USDA, APHIS

## Canadian Fresh or Chilled Bison Meat Exports

Boneless		February 2016	March	April	May	June	July	January - July YTD		
								2016	2015	% Change
<b>USA</b>	Kg	39,591	49,883	51,583	36,149	37,554	60,894	321,608	206,344	55.9%
	Value (\$Cdn)	699,742	809,507	666,051	450,707	475,036	638,755	4,678,637	3,235,277	44.6%
<b>France</b>	Kg	2,887	3,242	2,159	2,051	5,006	4,179	25,325	44,550	-43.2%
	Value (\$Cdn)	51,361	63,670	43,078	45,116	109,470	94,984	500,539	723,952	-30.9%
<b>Switzerland</b>	Kg	5,694	5,400	3,438	3,442	5,794	6,583	31,998	27,724	15.4%
	Value (\$Cdn)	184,388	277,998	131,879	112,668	169,525	209,729	1,143,610	1,027,152	11.3%
<b>Netherlands</b>	Kg	54	-	-	224	-	-	278	-	-
	Value (\$Cdn)	2,198	-	-	8,251	-	-	10,449	-	-
<b>Germany</b>	Kg	-	-	-	-	-	-	-	312	-
	Value (\$Cdn)	-	-	-	-	-	-	-	11,639	-
<b>French Southern Terr.</b>	Kg	-	-	-	-	-	-	-	-	N/A
	Value (\$Cdn)	-	-	-	-	-	-	-	-	N/A
<b>Belgium</b>	Kg	-	-	-	-	-	-	-	-	N/A
	Value (\$Cdn)	-	-	-	-	-	-	-	-	N/A
<b>Other Countries</b>	Kg	92	40	-	-	858	3,226	4,216	10,650	-60.4%
	Value (\$Cdn)	4,170	1,301	-	-	18,198	22,315	45,984	83,955	-45.2%
<b>Total</b>	<b>Kg</b>	<b>48,318</b>	<b>58,565</b>	<b>57,180</b>	<b>41,866</b>	<b>49,212</b>	<b>74,882</b>	<b>383,425</b>	<b>289,580</b>	<b>32.4%</b>
	<b>Value (\$Cdn)</b>	<b>941,859</b>	<b>1,152,476</b>	<b>841,008</b>	<b>616,742</b>	<b>772,229</b>	<b>965,783</b>	<b>6,379,219</b>	<b>5,081,975</b>	<b>25.5%</b>

## Bone-in

	February 2016	March	April	May	June	July	January - July YTD		
							2016	2015	% Change
<b>Total</b>	<b>6,565</b>	<b>1,473</b>	<b>5,763</b>	<b>4,588</b>	<b>4,577</b>	<b>691</b>	<b>26,516</b>	<b>10,818</b>	<b>145.1%</b>
<b>Value (\$Cdn)</b>	<b>30,354</b>	<b>19,242</b>	<b>27,182</b>	<b>82,285</b>	<b>14,042</b>	<b>18,930</b>	<b>222,843</b>	<b>82,484</b>	<b>170.2%</b>

## Total Exports, Boneless and Bone-in

	February 2016	March	April	May	June	July	January - July YTD		
							2016	2015	% Change
<b>Kg</b>	<b>54,883</b>	<b>60,038</b>	<b>62,943</b>	<b>46,454</b>	<b>53,789</b>	<b>75,573</b>	<b>409,941</b>	<b>300,398</b>	<b>36.5%</b>
<b>Value (\$Cdn)</b>	<b>972,213</b>	<b>1,171,718</b>	<b>868,190</b>	<b>699,027</b>	<b>786,271</b>	<b>984,713</b>	<b>6,602,062</b>	<b>5,164,459</b>	<b>27.8%</b>

\*Source: Statistics Canada (HS Code 02013010 - Bison cuts boneless, fresh or chilled and HS Code 02012010 - Bison cuts bone in, fresh or chilled)

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

*wghtd avg*

	Bulls (UTM)	Heifers (UTM)	Bulls (OTM)	Cows (OTM)
Aug 2015	423.71	411.66	350.00	359.07
Sept 2015	425.13	410.79	351.18	353.92
Oct 2015	424.47	410.61	360.90	353.09
Nov 2015	424.44	410.37	364.78	353.10
Dec 2015	424.94	413.08	364.25	369.73
Jan 2016	431.20	415.72	363.40	353.30
Feb 2016	432.26	417.32	372.72	362.10
Mar 2016	441.84	430.47	360.68	370.26
Apr 2016	446.93	429.94	384.32	370.30
May 2016	445.35	429.50	384.97	371.55
June 2016	446.39	431.28	384.95	372.72
July 2016	456.73	443.64	396.95	383.75
Aug 2016	458.44	479.02	398.13	381.79

*\*source USDA*

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

*wghtd avg*

	Bulls	Heifers	Mature Bulls	Mature Cows
Sept 2015	500-530	480-510	400	400
Oct 2015	515-530	495-510	400	400
Nov 2015	530-550	510-530	410	410
Dec 2015	535-550	525-530	420-450	420-450
Jan 2016	535-550	525-530	420-450	420-450
Feb 2016	600-600	575-575	440-450	440-450
Mar 2016	600-600	575-575	475	475
Apr 2016	600-600	575-585	500	500
May 2016	600-600	575-585	500	500
June 2016	600-600	570-575	500	500
July 2016	600-610	565-575	500	500
Aug 2016	600-610	565-575	500	500
Sept 2016	600-625	575-600	500-525	500-525

*\*source CBA survey of marketers*

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

	June 2016		July 2016		August 2016		% Change Current Month vs.	
	Range	Wt. Avg	Range	Wt. Avg	Range	Wt. Avg	2 months prior	1 month prior
Ribeye Lip-On Fresh	1,235-1,453	1,395.17	1,245-1,484	1,433.05	1,245-1,486	1,440.01	3.2%	0.5%
Chuckroll/Clod Fresh	658-803	674.39	677-810	686.12	662-820	672.89	-0.2%	-1.9%
Striploin Fresh	1,000-1,392	1,294.99	1,020-1,361	1,312.47	1,010-1,354	1,299.91	0.4%	-1.0%
Tenderloin Fresh	1,810-2,536	2,160.38	1,908-2,530	2,075.26	1,795-2,547	2,053.28	-5.0%	-1.1%
Ground 90% Bulk, Fresh	575-680	605.00	575-680	626.00	575-680	626.00	3.5%	0.0%
Ground 85% Bulk, Frozen	656-789	716.99	715-840	749.97	650-792	723.28	0.9%	-3.6%
Ground 85% Patties, Frozen	698-777	730.24	698-790	736.68	703-794	737.81	1.0%	0.2%

*\*source USDA*

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

	Mid-June 2016 Pricing	Mid-July 2016 Pricing	Mid-August 2016 Pricing	Mid-September 2016 Pricing
Tenderloin - Fresh	\$44.95 - \$59.50	\$45.00 - \$61.00	\$45.00 - \$61.00	\$51.60 - \$61.00
Strip Loin Boneless - Fresh	\$36.50 - \$38.95	\$33.00 - \$39.00	\$33.00 - \$39.00	\$33.00 - \$39.00
Inside Round - Fresh	\$21.00 - \$23.50	\$21.95 - \$27.60	\$21.95 - \$27.60	\$23.50 - \$24.50
Ground 90% Bulk Fresh	\$22.95 - \$23.50	\$20.50 - \$23.50	\$20.50 - \$23.50	\$22.93 - \$23.50
Fresh Bison Trim	\$19.00 - \$20.95	\$19.00 - \$20.95	\$19.00 - \$20.95	\$19.00 - \$22.93

*\*source CBA survey of marketers*

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

Kramer Auction Sales (SK) (May 11, 2016) <i>506 Head</i>			Vold, Jones & Vold Auction Co. Ltd. (AB) (April 16, 2016)	
CLASS	(# of head)	Avg (\$/lb)	<i>Head Sold: 150</i>	
<b>2015 BULLS CALVES</b>			<b>CALVES</b>	
700 + lbs	6	\$4.43	<b>BULLS</b>	
600-699 lbs	40	\$4.45	500 lbs +	\$445.00 - \$495.00
500-599 lbs	123	\$4.77	400 - 499 lbs	\$470.00 - \$515.00
400-499 lbs	42	\$5.16	300 - 399 lbs	\$485.00 - \$540.00
350-399 lbs	4	\$4.51	Under 300 lbs	\$380.00 - \$530.00
<b>2014 BREEDING BULLS</b>			<b>CALVES</b>	
	7	Averaged between \$4,250 & \$5,900	<b>HEIFERS</b>	
<b>2014 YEARLING BULLS</b>			500 lbs +	
900-1100 lbs	3	\$3.22	400 - 499 lbs	
650-800 lbs	8	\$3.56	300 - 399 lbs	
<b>2013 BULLS</b>			Under 300 lbs	
990-1205 lbs	6	\$2.93	<b>YEARLING BULLS</b>	
<b>2014 HEIFER CALVES</b>			700 - 799 lbs	
550 + lbs	39	\$4.33	600 - 699 lbs	
500-549 lbs	98	\$4.41	500 - 599 lbs	
450-499 lbs	65	\$4.50	300 - 399 lbs	
400-449 lbs	31	\$4.44	Under 300 lbs	
350-399 lbs	12	\$4.44	<b>Mature Bulls</b>	
<b>2014 YEARLING HEIFERS</b>			1250 lbs +	
700-749 lbs	8	\$5.52	950 - 1249 lbs	
650-699 lbs	9	\$5.15		
625-649 lbs	5	\$5.20	<b>Younger Breds</b>	
			— - \$3,350.00	

**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

Prices offered to producers in mid-September were up to \$6.25 per pound HHW for Grade "A" bulls with reports of higher prices for top quality bulls meeting certain specifications. U.S. buyers are offering prices that equate to \$6.25 Canadian with returns dependent on quality, transport incentives, and export costs. Canadian buyers are paying up to \$6.00 per pound HHW for Grade "A" heifers. U.S. buyers are offering prices that equate to Canadian prices with returns dependent on quality, transport incentives, and export costs.

Nationally, federal slaughter in Canada for the first 35 weeks of 2016 (week ending September 3, 2016) was down 15.8% when compared to the same period in 2015 (6,639 animals in 2016 compared to 7,885 animals in 2015). Live animal exports for the first eight months of 2016 were 14,310 head – down 10.9% when compared to the 16,064 head exported during the first eight months of 2015. This decrease was anticipated with higher exports for several months previously.

Marketers report that there continues to be a strong demand for bison trim. Reports are that the inventory of middle cuts has been reduced as some prices have been discounted. Demand in Europe is reported as flat. Canadian demand for bison products has been stable with pockets of interest. Strong US demand continues to drive prices.

The Canadian buyers indicate that present supplies of finished bison continue to be very tight. Bison prices in Canada are expected to continue to be sensitive to Canada - US exchange rates.

Continued exports of feeder animals to the US are expected to create shortages in the Canadian marketplace.

Chart 1

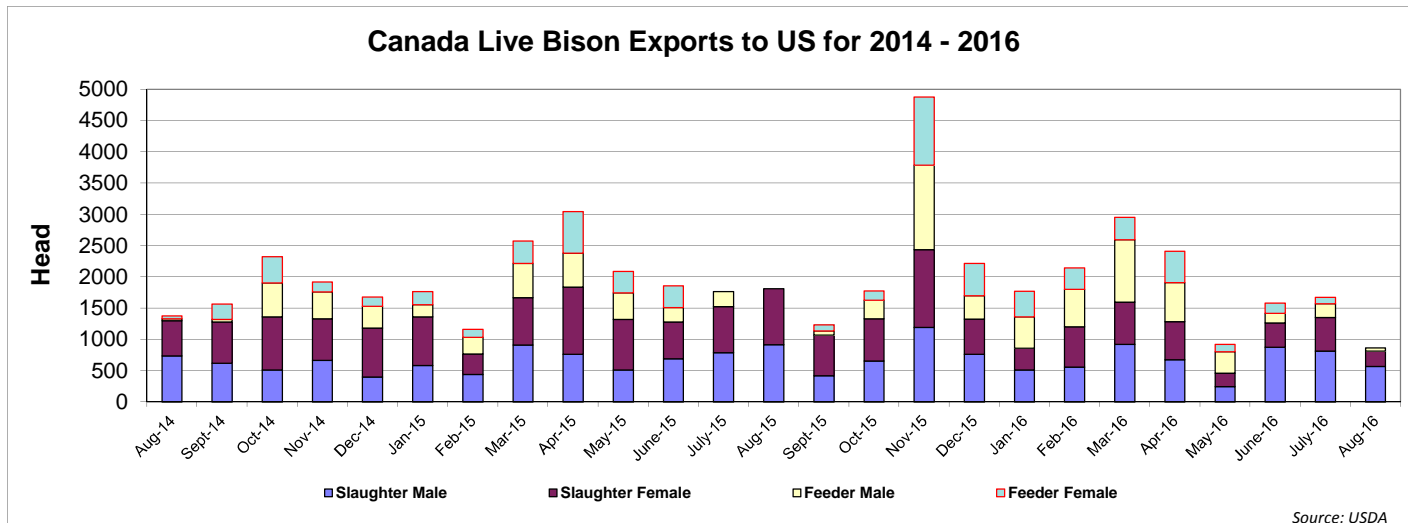
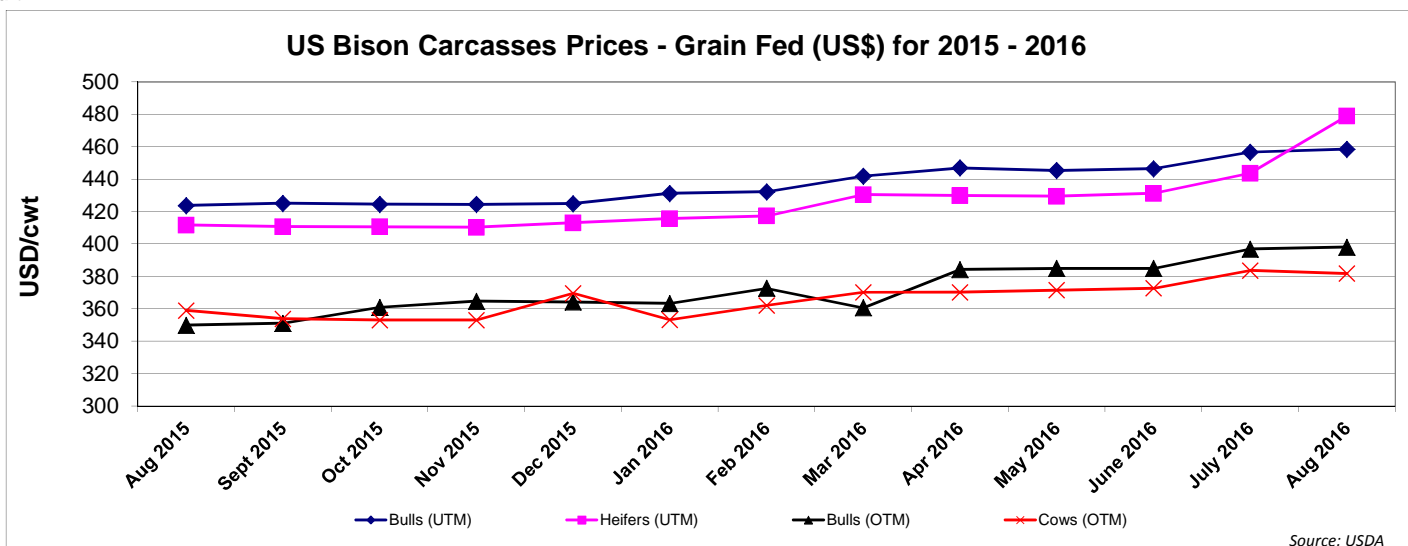


Chart 2



**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%
<b>Canada Total</b>	<b>1,211</b>	<b>1,898</b>	<b>-36.2%</b>	<b>125,142</b>	<b>195,728</b>	<b>-36.1%</b>

Note: In Atlantic Provinces, the number of farms reporting is too small for public disclosure.